



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Operations Memo 2011- 8A
March 21, 2011

To: Department of Transitional Assistance Staff

From: Stephanie Brown, Assistant Commissioner for Policy, Program and External Relations

Re: Prioritizing SNAP Recertifications by Release Date

Overview

Beginning with April's SNAP issuance, the automatic closing for failure to recertify for continuing eligibility will resume for NPA SNAP households and Pure SSI SNAP households. If the household has not been recertified by the appropriate BEACON Release Date for the next SNAP Benefit Issuance Cycle, the household will be closed automatically. Closings will occur on a cyclical basis according to the last digit of the case Social Security Number (SSN).

This memo advises supervisors and case managers of their responsibilities for prioritizing completion of recertifications and provides information about available tools to use to prioritize recertifications by the Release Date in order to process them within BEACON time frames. These tools are:

- Actuate Reports;
- the AU Closing and Reduction Schedule found in Actuate; and
- the Reevaluations in Progress view.

Note: Although periodic eligibility reviews are called *recertifications* in SNAP, in BEACON they are called *reevaluations*. Both terms are used in this memo, as needed.

Release Date

The BEACON Release Date is the date that a transaction, such as a case closing, is authorized by BEACON.

Case Manager Responsibilities

The case manager must:

- review the *Reevaluation Status Detail Report*, daily; and
- ensure that recertifications are completed based on SSN and Release Date once all information is received. In the event that the Release Date has passed, case managers must complete the recertification as soon as possible once all information is received.

Case managers must review the cases on the report paying attention to the Release Date and the type of recertification; e.g., Recert, USR, etc. Those cases with the oldest Release Date and those with the greatest potential for error (USR) should be addressed first.

Supervisor Responsibilities

The supervisor must:

- review the *Reevaluation Status Detail Report* and the *Reevaluation Status Summary Report*, daily; and
 - ensure that case managers are completing the recertification process timely based on the Initiate Date and Release Date.
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Tools Available for Prioritizing Cases

Supervisors and case managers have several reports to assist them in prioritizing recertifications. The most comprehensive is the *Reevaluation Status Detail Report* available in Actuate (see next page). It is important to prioritize cases for completion by monitoring the Release Date.

Actuate Reports

To provide supervisors and case managers more information, there are two Actuate reports which monitor the status of recertifications. These reports are described below.

Reevaluation Status Detail Report

This report is run daily and can be found in Actuate in the *Field Ops Staff TAO Reports* folder. For instructions on accessing Actuate, see Field Operations Memo 2007-7: *TAFDC-Participation Tracking Actuate Report*, page 2 **Accessing Actuate**.

**Actuate Reports
(continued)**

The report is designed to track the status of reevaluations subject to the timely case closing process and identifies all SNAP households who have been sent the *Important Notice of SNAP Benefit Expiration*. The report is sorted by Reevaluation End Date and is run by supervisory unit within the TAO. The report also includes a column that identifies the due date on a VC-1 and a column that identifies the Pending Release Date. The report fields include:

- Household SSN;
- Household Name;
- Reevaluation Type;
- Reevaluation Start Date;
- Reevaluation End Date;
- Supplemental Nutrition Assistance (SNA);
- Initiate Flag;
- Initiate Date;
- Appointment Date;
- VC-1 Due Date;
- Case Manager Wrap-up Date;
- SNAP Result Status;
- Pending Release Date; and
- Release Date.

Daily Reevaluation Status Summary

This report is informational, is run daily and can be found in Actuate in the *Field Ops Staff TAO Reports* folder. It displays the total number of cases by Reevaluation Type, supervisor and case manager. The report fields include:

- Not Initiated;
- Initiated;
- Initiated/VC-1 Due;
- Not Authorized; and
- Pending Release.

**Reevaluation in
Progress View**

The Reevaluation in Progress view is available on BEACON under Daily Priority Actions Views. This view provides the End Date of the case certification period. Supervisors and case managers can prioritize their reviews by clicking on the End Date column and selecting first those cases with the oldest End Date.

AU Closing and Reduction Schedule

The Case Closing and Reduction Schedule can be found in Actuate as “AU Closing Reduction Schedule” in the AU Processing Schedule folder. The schedule lists: Key Date, BEACON Release Date, FMCS Release Date, Benefit Date, and Closing Date by month and SSN.

Processing Rules for Untimely or Incomplete Recertifications

Once a certification period has expired, the household *will not* be required to complete a new application if:

- the client submits the recertification form before the case closing date, and completes the recertification no later than 30 days after the case closing date; or
- the client contacts the case manager about recertification before the case closing date, and completes the recertification no later than 30 days after the case closing date.

Once a certification period has expired, the household *will* be required to complete a new application if:

- the client did not submit the recertification form on or before the case closing date; or
- the client did not contact the case manager about recertification on or before the case closing date.

Note: For recertifications, *contact* means: the client attempts to recertify before the case closing date, i.e., contacts the case manager to schedule an appointment for a recertification interview (face-to-face or telephone) or returns a completed recertification form.

New Report

The Department has developed a new Actuate report to track NPA and Pure SSI SNAP cases that have closed in the past 60 days. In addition to the closing reason “Failure to Recertify,” the report will list cases by a new closing reason: “Initiated but Failed to Recertify.” Beginning April 1, this report can be accessed in Actuate from the FO Staff TAO Report folder under the title “Initiated Cases Closed for Failure to Recertify.”

Job Aid

A Job Aid (Attachment A) entitled SNAP Automated Closing Process is available in DTA Online in the Training folder under Job Aids/Desk Guides.

Obsolete Memos

This Operations Memo obsoletes Field Operations Memo 2009-29 and Operations Memo 2011-8.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline.

SNAP Automated Closing Process

- ☑ Approximately 45 days before the end of the certification period (the exact date depends on the cyclical date of the case based on the last digit of the SSN) BEACON mails a recertification form.
- ☑ If the recipient *fails* to contact his/her case manager to set up an appointment or does not return his/her recertification form by the **release date**, his/her case will close automatically on that **release date** for the Household's next cyclical issuance.
- ☑ If the household submits the reevaluation form, is interviewed and mandatory verifications are received within the "apply by" period, a reevaluation is considered timely and benefits should not be interrupted. The SNAP case must be authorized by both case manager and supervisor prior to the **release date**. The next page depicts the AU Closing Reduction Schedule located in AU Processing in Actuate Reports.
- ☑ If the household submits the appropriate reevaluation and is interviewed and mandatory verifications are not received within the "apply by" period, a reevaluation is considered untimely and benefits may be interrupted.

2 Walnut St
Worcester MA 01608

Your SNAP Semiannual Report

Massachusetts Department of Transitional Assistance

MILLBURY MA 01527-1062

Agency ID:
Worcester TAO - DTA

8/1/20 2011

Recipient Telephone: _____

A good time of day to reach you by phone:
Time(s): _____

Circle all that apply: Days: Monday Tuesday Wednesday Thursday Friday

If your name, address, or telephone number has changed since September 2010, please complete:

New Name: _____

New Address: _____

New Telephone: | | _____

Your Case Manager: **Alaka Toney** Case Manager Telephone Number: (508) 757-3366
Worcester TAO - DTA TAO Fax Number: (508) 750-7259

You must complete this report to continue your food stamp benefits. Sign and return this entire report including all pages to your Transitional Assistance Office at Worcester TAO - DTA on or before 02/26/2011. If this report is not returned on time or if necessary verification is late, your SNAP benefits may stop or be reduced.

This report has been pre-printed with information that you told us about you, the people living with you and your household income and expenses. You need to complete this report if you want your SNAP benefits to continue.

Please to answer ALL of the questions on this report. Your SNAP amount will be based on what you tell us. Your case manager will contact you to follow-up on your answers or ask for necessary verification.

Information on case closing release dates is available to case managers either by referring to the AU Closing and Reduction Schedule or Reevaluation Status Detail Report. Both reports can be accessed through Actuate Report Viewer. Highlighted here is a snapshot of each report and the location of the release date on the reports.

Department of Transitional Assistance AU Closing and Reduction Schedule

SSN	0	1	2	3	4	5	6	7	8	9
MAR 01 2011										
Key Date	02/11	02/14	02/18	02/18	02/18	02/18	02/22	02/25	02/25	02/25
BEACON Release Date	02/23	02/24	02/28	03/01	03/02	03/03	03/04	03/07	03/08	03/09
FMCS Release Date	02/24	02/25	03/01	03/02	03/03	03/04	03/07	03/08	03/09	03/10
Benefit Date	03/01	03/02	03/04	03/05	03/07	03/08	03/10	03/11	03/12	03/14
Closing Date	02/28	03/01	03/03	03/04	03/06	03/07	03/09	03/10	03/12	03/13

Reevaluation Status Detail Report

HH SSN	HH Name	Reeval Type	Reeval Start Date	Reeval End Date	SNA	Initiate Flag	Initiate Date	Appmt Date	VC-1 Due Date	CM Wrap Date	SNAP Result Status	Pending Release Date	Release Date
		RECERT	02/04/2009	02/03/2011		Y	01/28/2011						01/31/2011