



*Commonwealth of Massachusetts*  
*Executive Office of Health and Human Services*  
*Department of Transitional Assistance*


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**Operations Memo 2014-23**  
**March 13, 2014**

**To:** Department of Transitional Assistance Staff

**From:**  Lydia Conley, Acting Assistant Commissioner for Policy, Program and External Relations

**Re:** Program Integrity Checklist Overview

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**Overview**

As a part of the Department's ongoing efforts to strengthen program integrity, enhancements continue to be made to the BEACON system. Effective with BEACON Build 46.2, scheduled for March 17, 2014, the Department will begin implementing the first phase of the Program Integrity (PI) Checklist.

A main focus of the PI Checklist project is to reengineer how matches are processed in BEACON. Current processes and procedures require staff to manually review, evaluate, and verify any external data before dispositioning a match.

The PI Checklist will integrate and automate many of these steps, reducing the time necessary to process matches. In addition to providing a single location summarizing the statuses of external data sources, the PI Checklist will ensure that external data sources have been reviewed and appropriate action taken when authorizing benefits or determining ongoing eligibility.

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**Purpose of  
Memo**

The purpose of this memo is to:

- introduce the Program Integrity Checklist project;
  - advise staff of changes to the Client Search page; and
  - inform staff of upcoming enhancements.
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**Program Integrity  
Checklist  
Overview**

A main focus of the Program Integrity (PI) Checklist project is to ensure that matches received from external data sources are addressed in a timely manner. This will include many automations and BEACON changes to assist case managers, such as:

- grouping all outstanding matches in a centralized location;
- alerting case managers of outstanding matches at key points in various BEACON workflows;
- importing select match data into BEACON and performing recalculation of benefits;
- automating notices requesting verification of certain matches; and
- automating closings and/or recalculation of benefits when verification is requested and not returned for these automated matches.

Outstanding matches will prevent the authorization of benefits, greatly reducing potential overpayments and enhancing program integrity. Future Operations Memos will detail the incorporation of external matches into the PI Checklist.

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**BEACON  
Changes**

Effective with BEACON Build 46.2, a new PI Checklist icon will appear on the Client Search page. This icon opens the PI Checklist page and will display any outstanding matches from DOR New Hire and The Work Number, if applicable. The DOR New Hire match can continue to be accessed through the Match History tab and The Work Number through the ECF points outlined in Operations Memo 2013-33. These matches must be processed in accordance with existing procedures.

Operations Memo 2014-24 will introduce match automations in support of the PI Checklist project.

This integration is the first step in the full implementation of the PI Checklist, currently scheduled for summer 2014. The PI Checklist will direct staff to any outstanding matches, as well as confirm that appropriate reviews were performed and that no outstanding data remains.

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**Questions**

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

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