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Field Operations Memo 2001-7
February 16, 2001

To: Transitional Assistance Office Staff
From: *js* Joyce Sampson, Assistant Commissioner for Field Operations
Re: BEACON Release 2.0 Pilot Activities - Phase II

Background

Field Operations Memos 2000-31 and 2000-31A explained that AU Managers, TAO Supervisors and Implementation Managers would perform a series of casework activities in BEACON Release 2.0 Pilot. These activities began on November 13, 2000 and AU Managers continue to complete the activities outlined on the BEACON Release 2.0 Pilot Activities Checklists.

This memo explains the next phase of Pilot activities which help AU Managers continue to prepare for BEACON Release 2.0 Production.

Purpose

The purpose of this memo is to provide procedures for the following BEACON Release 2.0 Pilot activities:

- 1) reviewing and resolving benefit discrepancies; and
- 2) processing monthly reports using the special process for Monthly Reporting AUs for any month when conversion occurs, including February and the month of final conversion.

These activities will begin on February 26, 2001 and continue through March 21, 2001. AU Managers should spend four hours per week on these activities.

**Reviewing and
Resolving
Conversion
Benefit
Discrepancies**

Definition

The first BEACON Release 2.0 Pilot activity that the AU Manager will perform is reviewing all benefit discrepancies listed on the BEACON Release 2.0 "Conversion Benefit Discrepancies" View. This activity is necessary to become familiar with the resolution process.

As part of each conversion, BEACON recalculates a benefit payment for all active TAFDC, EAEDC and FS AUs and compares the BEACON Benefit Amount to the PACES/FMCS Benefit Amount.

- If the amounts are the same, this amount becomes the BEACON Authorized Benefit Level and the AU will not be listed on the "Conversion Benefit Discrepancies" View.
- If the PACES/FMCS Benefit Amount and the BEACON Benefit Amount are not equal, the AU will appear on the "Conversion Benefit Discrepancies" View. Both the PACES/FMCS Benefit Amount and the BEACON Benefit Amount appear in the Results tab on the Eligibility Explorer.

In BEACON Release 2.0 Production, the AU will continue to receive the PACES/FMCS Benefit Amount until the first time the user authorizes an EBC Result and the Interview Wrap-up Request is released. Therefore, during BEACON Release 2.0 Pilot it is important for the AU Manager to learn to **correct the data that caused the Conversion Benefit Discrepancy before authorizing an EBC result for an AU appearing on the "Conversion Benefit Discrepancies" View.** If this is not done by the AU Manager, BEACON will assume that the amount is correct and will not compare the BEACON Benefit Amount to the PACES/FMCS Benefit Amount again. The AU will disappear from the "Conversion Benefit Discrepancies" View.

Reviewing

For all AUs listed on the BEACON Release 2.0 "Conversion Benefit Discrepancies" View, the AU Manager must review the discrepancy using the steps below:

- Open Eligibility Explorer and select:
 - ✓ the AU Inquiry tab to review the Eligibility Group(s) created during the conversion process and to view specific client/AU membership information;
 - ✓ the Results tab to view the last (PACES) benefit amount;
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**Reviewing and
Resolving
Conversion
Benefit
Discrepancies
(continued)**

- ✓ the Interview tab to view the Interview Wrap-up window. The Interview Wrap-up window will display a Request with the status of Pending Authorization (this Request was created by the Conversion EBC process when the results between the PACES Benefit Amount and the BEACON Benefit Amount differ);
From this window:
 - ◆ select the Pending Authorization;
 - ◆ click on the EBC Results pushbutton;
 - ◆ select the AU in the EBC Results window to view the BEACON benefit amount calculated by the Conversion EBC process;
 - ◆ click on the Financial tab to view the details of the calculation; and
- Compare all related data on PACES, PRISM, or BEACON Release 1.0 and BEACON Release 2.0 Pilot to find out why the benefit amounts differ (i.e., compare income, shelter costs, SUAs, household size, etc.) and decide which benefit amount is correct.

Resolving

If the discrepancy was caused by incorrect data converted from PACES, PRISM or BEACON Release 1.0, make the appropriate correction. (Additions/changes made on PACES, PRISM or BEACON Release 1.0 will appear in BEACON Release 2.0 Pilot when a new conversion is run.) The following are a few examples of incorrect data that must be corrected on PACES.

Example 1: If the BEACON Benefit Amount and PACES Benefit Amount are different because the Category 9 PACES AU has Type G income (cash grant) entered without an associated active cash AU or does not have Type G income entered and there is an associated active cash AU, the AU Manager must make the correction in Block 5 of the FIW1 Section of the PACES Worksheet.

Example 2: If the BEACON Benefit Amount and PACES Benefit Amount are different because the Category 9 PACES AU has the cash grant entered incorrectly as Type OU income (Other Unearned Income), the AU Manager must zero out the Type OU income and enter it as Type G so that BEACON does not count the cash grant twice.

Example 3: If the BEACON Benefit Amount and PACES Benefit Amount are different because BEACON included a Family Cap child who was incorrectly coded on PACES with a 1C on the DEPD Screen under the MS/R field, the AU Manager must make the correction in Block 97 of the PID.

**Reviewing and
Resolving
Conversion
Benefit
Discrepancies
(continued)**

Example 4: If the BEACON Benefit Amount and PACES Benefit Amount are different because the EAEDC Living Arrangement E (rest home) per diem rate was not entered on BEACON Release 1.0, the Resource Coordinator must enter the information on BEACON Release 1.0. (Until BEACON Release 2.0 is in production, the process to add new Residential Facilities must always begin in Release 1.0.) See *BEACON Today*, Issue 16 for instruction on entering Residential Facilities.

If the discrepancy is found on BEACON Release 2.0 Pilot, the AU Manager must:

- change the information in BEACON Release 2.0 Pilot so that it is correct; and

For Example: If the benefit level is different from PACES because a dependent was not converted correctly, add that dependent to BEACON. See *A User's Guide: Transitional Assistance Programs and BEACON*, Chapter V for instructions.

- keep detailed notes of the steps used to resolve the discrepancy, so that when BEACON Release 2.0 goes into production, these notes can be used as a reference in resolving the discrepancy.

Reminder: Additions/changes made on BEACON Release 2.0 Pilot will be eliminated when a new conversion is run.

TAO Supervisors, Implementation Managers and Central Office must access the Conversion Benefits Discrepancy folder on the Actuate Viewer as a tool to monitor the number of discrepancies remaining for each AU Manager.

After the appropriate level of authorization is completed in BEACON Release 2.0 Pilot for any benefit discrepancy resolution activity, AU Managers must continue to forward unduplicated issues/problems to the BEACON Action Center in accordance with instructions in Field Operations Memo 2000-33.

**Special Process
for BEACON
Release 2.0 Pilot
Monthly Reporting
AUs**

A special process has been developed for BEACON Release 2.0 Pilot Monthly Reporting AUs in a conversion month. **This same process will be used for Monthly Reporting AUs in the first month that BEACON Release 2.0 is in production. For this special process Monthly Reporting AUs will not be penalized for failing to return a Monthly Report or returning an inadequate or incomplete Monthly Report during February and March in the pilot and for the first month of production.**

**Special Process
for BEACON
Release 2.0 Pilot
Monthly Reporting
AUs (continued)**

This special process for Monthly Reporting AUs is used only in BEACON Release 2.0 Pilot and has no impact on the Monthly Reporting process for ongoing TAFDC AUs in PACES. **Therefore, all Monthly Reports will continue to be sent from PACES and followed up on in PACES business as usual.**

To prepare AU Managers for the first month that BEACON is in production, the BEACON Release 2.0 Pilot in February and March will mirror the first month of production. Therefore, in the Release 2.0 Increment 43, the following changes will be in effect:

- BEACON Release 2.0 Pilot has been triggered to look as if BEACON sent the Monthly Report for February.
- Any second February Monthly Reports will not be issued in BEACON Release 2.0 Pilot.
- The "Monthly Report Status" View on BEACON Release 2.0 Pilot will list all AUs subject to monthly reporting for February.
- Monthly Reporting AUs in BEACON Release 2.0 Pilot will not be adversely affected for not complying with the Monthly Reporting requirements for February. This will be accomplished by not running the Monthly Reporting related batch jobs. AU Managers do not need to do any special processing for this to happen.

For the February Report Month on BEACON Release 2.0 Pilot only, AU Managers **must not enter** any monthly reporting information until February 22, 2001. AU Managers should organize the Monthly Reports by SSN to enter on BEACON Release 2.0 Pilot in accordance with the schedule found in the *Case Processing* option of the *Systems Procedures* in Policy Online.

On or after February 22, 2001, AU Managers must process Monthly Reporting AUs on BEACON Release 2.0 Pilot following the instructions below:

- Go to the Monthly Reporting window in the Program Administration workflow and enter the "Return Date" and "Monitor Types."

Note: Monitor Types correspond with the current Monthly Report Action Codes found in Appendix I of the *PACES User's Guide*. Data Entry clerks currently use the codes found in Appendix I of the *PACES User's Guide* to enter the status of returned Monthly Reports. However, on BEACON, the AU Manager is responsible for entering the Monitor Types for Returned Monthly Reports.

**Special Process
for BEACON
Release 2.0 Pilot
Monthly Reporting
AUs (continued)**

Depending on the Monitor Type selected, one of the following four options for the **Monthly Report Return Status** will be prepopulated:

- **Incomplete** (the client has not filled out, in part or full, the Monthly Report);
- **Inadequate** (the client has filled out the Monthly Report, but has not included the necessary verifications or this is the client's Initial Retroactive Report Month [IRRM]);
- **No Change Reported**; or
- **Change Reported** (the client has filled out the Monthly Report and has included the necessary verifications).

In BEACON Release 2.0 Pilot, Monthly Reporting AUs with a Monthly Report Return Status marked "Incomplete" or "Inadequate" will have a correction notice created that will list the needed activity. No action is needed by the AU Manager. If the AU does not return a Monthly Report, no action is needed by the AU Manager.

Remember: For this special BEACON Release 2.0 Pilot Monthly Reporting process and the first month of BEACON Release 2.0 Production, batch jobs will not run to close or divert AUs for missing, incomplete or inadequate monthly reports. Also during BEACON Release 2.0 Pilot, all Monthly Reports will continue to be sent from PACES and followed up on in PACES business as usual.

Refer to BEACON Today, Issue 14 for more details on Monthly Reporting.

*For all recipients with a Monthly Report Return Status of **Change Reported** (which means the client has filled out the Monthly Report and has included the necessary verifications) AU Managers must:*

- enter the client's **actual** income and expenses received during the Budget Month on the appropriate Income and Expenses windows;
 - enter any other changes noted (i.e., address change, AU Members moving in or out of the home) on the monthly report on the appropriate window(s) of the Eligibility Explorer Interview tab;
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**Special Process
for BEACON
Release 2.0 Pilot
Monthly Reporting
AUs (continued)**

- go to Interview Wrap-up Results window and select the "Selection..." button. From the Interview Wrap-up Selection window, select the Monthly Reporting selection, the applicable income and expense sections selections, and any other additional section's selection and click on the "Close" button to return to the Interview Wrap-up Results window;
- click on the "EBC Results..." button, to access the Interview Wrap-up EBC Results. Click on the "Calculate" button to recalculate eligibility. Click on "Close" to return to the Interview Wrap-up Results window; and
- click on the "Authorization" button to authorize the EBC Result. This Authorization will appear on the Supervisor's "Interview Wrap-up Pending Authorizations" View if there is a benefit change. When the Interview Wrap-up Request receives the final Authorization, the status of the request will change to "Pending Release." When the Request is released, the Monthly Report Tracking Status is set to "Worker Completed."

Once these steps are completed, the client's name will be removed from the "Monthly Report Status" View.

**Continuing Pilot
Activities in Field
Operations
Memos 2000-31
and 31A**

The AU Manager who reviews and resolves all benefit discrepancies listed on the BEACON Release 2.0 "Conversion Benefit Discrepancies" View and processes his or her monthly reports must continue completing practice activities listed on the BEACON Pilot Activities checklist as described in Field Operations Memos 2000-31 and 2000-31A. These activities should be completed by role-playing interactive interviews with another AU Manager, if possible.

If the AU Manager has completed all activities listed on the checklists, the TAO Supervisor must select those activities that the AU Manager had the most difficulty completing. The TAO Supervisor will inform the AU Manager to continue working on those activities.

**TAO Supervisors'
Responsibilities**

TAO Supervisors, the primary BEACON coaches to their unit staff, must monitor each AU Manager's pilot activities and review all BEACON Release 2.0 Pilot related activities.

The TAO Supervisor must:

- monitor the AU Manager's activities on BEACON Release 2.0 Pilot and on existing systems;

**TAO Supervisors'
Responsibilities
(continued)**

- review all discrepancies between the BEACON Release 2.0 Pilot Benefit Amount and PACES Benefit Amount, ensuring that the data that caused the conversion discrepancy have been resolved before authorizing an EBC change and, if necessary, help AU Managers resolve them;
- review and authorize (approve or reject) the activities on BEACON Release 2.0 Pilot;

Note: When authorizing an action (adding a dependent, changing an address, etc.) on BEACON Release 2.0 Pilot, TAO Supervisors must look at the Verification tab to view any other outstanding verifications. If any verifications for a specific action are outstanding, those data will not be available to be selected on the Interview Wrap-up window.

- check the Conversion Benefits Discrepancy folder on the Actuate Viewer daily to monitor the number of discrepancies remaining for each AU Manager;
- if an AU Manager completes all pilot activities, assign him or her specific activities to complete from the AU Managers' checklist based on areas with which the AU Manager has the most difficulty;
- continue the current reporting process for activities completed in accordance with Field Operations Memos 2000-31 and 2000-31A, if applicable; and
- continue the current BEACON Action Center reporting process in accordance with Field Operations Memo 2000-33.

**Implementation
Managers'
Responsibilities**

The Implementation Manager must:

- **establish a schedule in the TAO to ensure that every AU Manager is spending at least four hours per week performing the activities outlined in this memo;**
- review and authorize (approve or reject), if applicable, activities on BEACON;
- check the Conversion Benefits Discrepancy folder on the Actuate Viewer daily to monitor the number of discrepancies remaining for each AU Manager;

**Implementation
Managers'
Responsibilities
(continued)**

- continue the current reporting process for activities completed in accordance with Field Operations Memos 2000-31 and 200031A using the new *BEACON Activities Report*, issued by e-mail from Joyce Sampson on January 31, 2001, if applicable; and
 - continue the current BEACON Action Center reporting process in accordance with Field Operations Memo 2000-33. Reporting system defects during the pilot phase is critical to the identification and correction of problems prior to implementing BEACON Release 2.0.
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Questions

If you have any questions, please have your Implementation Manager contact the BEACON Action Center with your question by e-mail.

