



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2009-64
November 6, 2009

To: Transitional Assistance Office Staff

From:  John Augeri, Assistant Commissioner for Field Operations

Re: **SNAP: Waiver of Interview at Recertification for Certain Elderly/Disabled Households**

Overview

In a continuing effort to improve customer service, increase efficiency and relieve the burden on case managers, the Department has requested and received a waiver from USDA that allows case managers to waive the interview requirement at SNAP recertification for certain elderly or disabled households without earned income. To meet the conditions of the waiver, these households must submit the recertification form and verifications timely and be eligible for continued benefits.

This memo discusses:

- the terms of the waiver;
 - which households can have the interview waived and which households cannot have the interview waived;
 - case manager responsibilities for applying the waiver, and
 - BEACON changes to track the waiver.
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Terms of the Waiver

The terms of the waiver are as follows.

- The interview may be waived at recertification only, and only for households in which all household members are elderly and/or disabled with no earned income.
 - If the household or the household's authorized representative requests to have an interview, an interview must be provided.
 - If it appears that a household is ineligible for continued benefits, an interview must be scheduled. This is to ensure that the client has the opportunity to clarify information that may lead to eligibility.
 - The Department is required to track these households in BEACON to demonstrate that waiving the interview does not negatively impact program access and integrity.
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Households Eligible for the Waiver

Effective November 9, 2009, case managers can waive the interview requirement at SNAP recertification only if **all** of the following conditions are met.

- **All** household members are elderly or disabled and have no earned income.
- The recertification form is returned timely and is complete.
- An interview has not been requested by the household or its authorized representative.
- All mandatory verifications are received timely and are acceptable.
- The household will be eligible to continue receiving benefits.

An interview must be scheduled timely if any one of the above conditions is not met. An interview must also be scheduled if any information is questionable, contradictory or incomplete. Verification of eligibility factors or income deductions that have not changed may not be required. See *Transitions*, "From the Hotline," November 2005, and Field Operations Memo 2007-39, *Food Stamp Program: Negative Errors*.

**BEACON
Tracking and
Reporting**

BEACON Increment 2.1.26, effective November 9, 2009, will add fields needed to track households affected by the waiver, as required by USDA. The following fields have been added to the Update tab on the *Interview Wrap-up EBC Results* window:

- Interview Method; and
- Interview Date.

Interview Method has four new field entries:

- Telephone Interview;
- Face-to Face Interview;
- Interview Waived; and
- Interview Scheduled/Canceled.

When wrapping up a “perform EBC on Pending AUs” or SNAP “Reevaluation” transaction, an Interview Method entry must be made. If the household was interviewed (i.e., Telephone Interview or Face-to-Face Interview is selected), an Interview Date entry is also required.

The Interview Waived and the Interview Scheduled/Canceled entries must be used only for households eligible for the interview waiver.

Note: There are no systems edits to prevent selection for another household type, so great care must be taken to use these selections appropriately.

**Case Manager
Responsibilities**

When a completed SNAP recertification form for an elderly or disabled household is received timely, the case manager **must review** the information on the form to determine if the interview can be waived as follows:

Household Appears Eligible and All Verifications Received

If the household meets all of the criteria listed on page 2 of this memo, appears to be eligible for continued SNAP benefits and has provided all mandatory and optional verifications:

- process the recertification with no interview; and
 - when wrapping up the case in BEACON, select *Waived* on the Update tab of the *Interview Wrap-up EBC Results* window.
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**Case Manager
Responsibilities
(continued)**

Household Appears Eligible, Optional Verifications Missing

If the household appears to be eligible and has provided all mandatory verifications but not all optional verifications:

- send a BEACON generated VC-1 requesting the optional verifications. In addition to sending the VC-1, the case manager can call the client to discuss the benefits of submitting the optional verifications and offer assistance in obtaining them.
- if optional verifications are received timely, process the recertification with no interview;
- if optional verifications are not received timely, process the recertification with no interview, using only the mandatory verifications; and
- when wrapping up the case in BEACON, select *Waived* on the Update tab of the *Interview Wrap-up EBC Results* window.

Mandatory Verifications Missing or Information Provided Is Questionable

If the household has not provided all mandatory verifications or the information on the recertification form is questionable:

- schedule a telephone interview using a BEACON-generated appointment letter; and
- send a BEACON generated VC-1 requesting the missing verifications.

If all mandatory verifications are received or the questionable information is resolved before the scheduled interview:

- call the client and cancel the interview. Process the recertification with no interview; and
- when wrapping up the case in BEACON, select *Scheduled/Canceled* on the Update tab of the *Interview Wrap-up EBC Results* window.

If all mandatory verifications are **not** received or questionable information is **not** resolved before the scheduled interview:

- proceed with the interview and process the recertification according to standard procedures; and
 - when wrapping up the case in BEACON, select the appropriate interview method (telephone or face-to-face) on the Update tab of the *Interview Wrap-up EBC Results* window and enter the date the interview took place.
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**Case Manager
Responsibilities
(continued)**

If the client misses the scheduled interview:

- send the client a BEACON-generated *Notice of Missed Interview* (NOMI) following standard procedures.

If the client does not complete the interview:

- close the case for the following reason: “Failed to keep appointment for interview.”

**Household Appears Ineligible, Reports Earned Income or
Requests an Interview**

If the household appears to be ineligible, or reports earned income, or requests an interview:

- schedule a telephone interview (unless the client has requested a face-to-face interview), using a BEACON-generated appointment letter. The interview cannot be waived.
- if the scheduled interview is missed, send the client a BEACON-generated *Notice of Missed Interview* (NOMI) following standard procedures.
- process the recertification according to standard procedures.
- when wrapping up the case in BEACON, select the interview method (telephone or face-to-face) on the Update tab of the *Interview Wrap-up EBC Results* window and enter the date the interview took place.

The reason for scheduling an interview even though the household appears ineligible is to avoid erroneously denying otherwise eligible households. For example, a household might report a larger amount of income in the month of recertification, but the income is actually a one-time lump sum payment. For this reason, a telephone interview must be scheduled.

**SNAP Interview
Waiver Process
Job Aid**

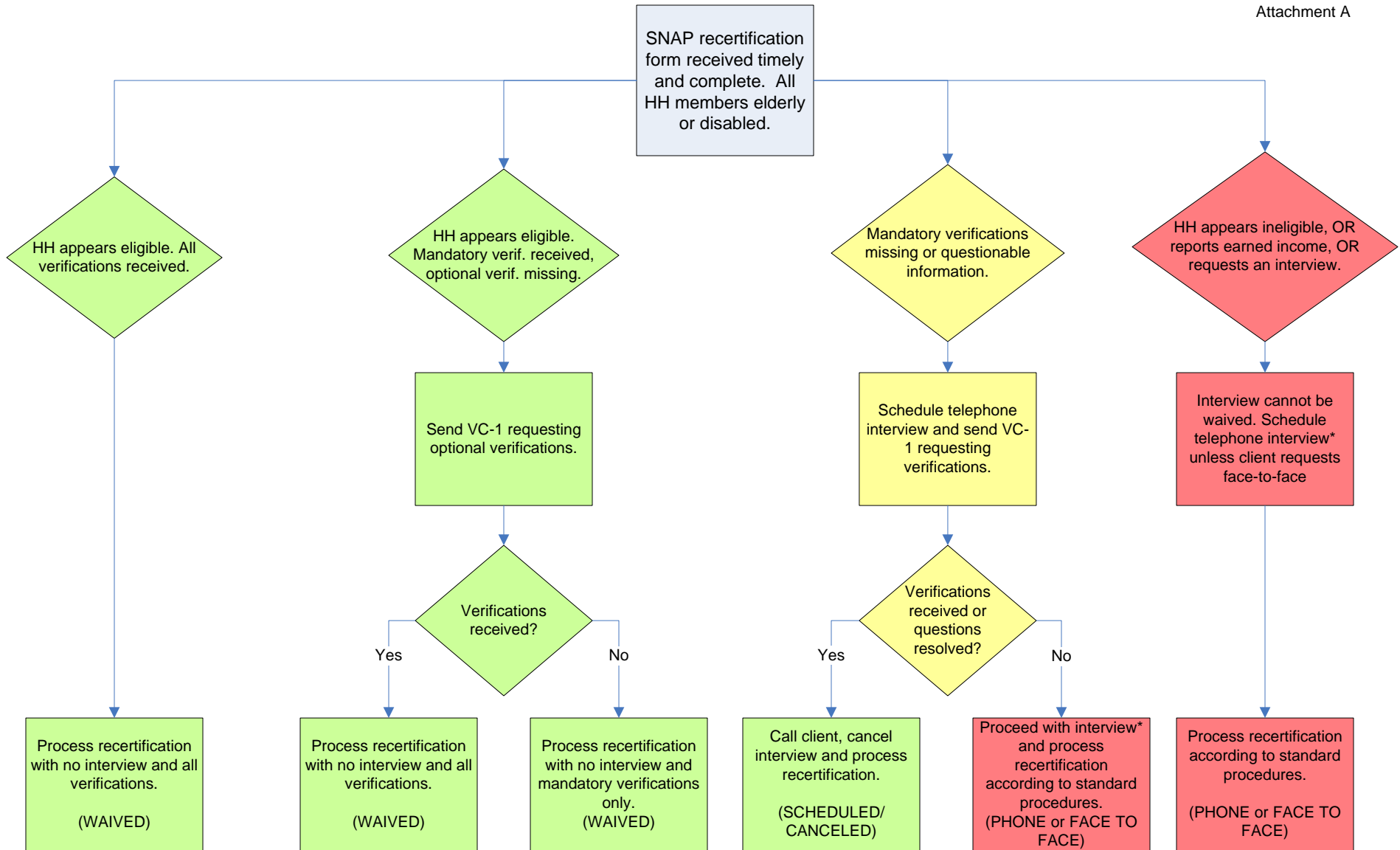
A job aid entitled *SNAP Interview Waiver Process for Certain Elder/Disabled Households* (Attachment A) has been developed to assist the case manager in following and implementing this interview waiver process for elderly or disabled households. This new job aid is posted on Policy Online under the Job Aids heading.

Questions

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

SNAP Interview Waiver Process for Certain Elder/Disabled Households

2009-64
Attachment A



Waiver only applies to HH's at RECERTIFICATION where

1. all HH members are elderly or disabled with no earned income
2. recertification form is received timely and complete
3. all mandatory verifications received
4. HH is eligible for continued benefits
5. HH does not request an interview

* Remember if the scheduled interview is missed a NOMI must be sent before you deny the case for reason "Failed to keep appointment for review."