



Department of Transitional Assistance (DTA) / MassHealth Benefit Presumed Income Eligibility

1/22/2021

Please Mute



Please join the meeting muted during the session to keep interruptions to a minimum

Engage During Meeting

1. Chat

Send a message in the **Chat** panel

1. Type in your **question**
2. Hit Enter

2. Questions / Checkpoints

- We will be monitoring the chat for questions throughout the session
- During the designated checkpoints for questions, **please come off mute** to ask your questions once the moderator calls on you

This Call Is Being Recorded





WELCOME

Our Journey Today

I HOUR



Welcome & Overview

5 mins



Presumed Income Eligibility Policy Overview



Requirements for MassHealth/DTA Benefits Verification

15 mins



DTA + MH Income Verification Process



Questions

30 mins



Account Set Up, Sending & Receiving Reports



Next Steps & Q&A

10 mins

Purpose



Clarify for appropriate RAA staff on **new income eligibility** policy and process for applicants enrolled in **DTA** or **MassHealth**

Goal



Create a standardized understanding of new policy guideline for presumed income eligibility to **accelerate the speed** of application reviews towards reaching more families in need



REGULATION

An emergency regulation was authorized

DHCD and its contracted RAAs may **obtain personal information** from other **state agencies** to **expedite the processing** of RAFT applications

DETAILS

RAFT applicants currently enrolled in **MassHealth** or **receive DTA** administered benefits are presumed income eligible for RAFT

Regulation applies only to administering RAFT funds

- If the RAA already has proof that an applicant receives DTA or MassHealth benefits, the RAA can use that verification instead of obtaining verification directly from MassHealth or DTA
-

- RAAs may obtain benefit verification directly from MassHealth and DTA for multiple RAFT applications, without the need for applicant-provided income documentation
-

- RAAs may process the application upon receipt of DTA or MassHealth-verified benefits, plus proof of housing crisis and a valid form of identification (per RAFT Administrative Plan)

REQUIREMENTS FOR VERIFICATION



Signed Authorizations: RAAs must have a signed RAFT Application on file for the applicant household they are seeking to verify

Applicant Approval: RAAs may check for DTA/MassHealth benefits for every RAFT Application, except for any application where the applicant specifically states that income should not be verified via MassHealth and DTA sources. *RAAs must not submit these applications in DTA/MH benefit verification report.*

8. MassHealth/DTA Benefits

To receive RAFT/ERMA, you must meet certain income requirements, and your income must be verified. The RAFT/ERMA Agency may be able to call MassHealth or DTA to verify your income (they will not ask about your health or benefits):

- ☐ I am on MassHealth insurance.
- ☐ I receive DTA benefits (i.e., SNAP, TAFDC, EAEDC).
- ☐ I do not receive MassHealth or DTA benefits, or do not wish that those sources be used to verify my income.

Verification Report: RAAs must use the DTA/MassHealth Benefit Verification Report to verify receipt of benefits for multiple applicants

Secure Data Transfer: RAAs must use the Commonwealth's Interchange File Transfer system to securely send and receive these reports.

REQUIREMENTS FOR VERIFICATION



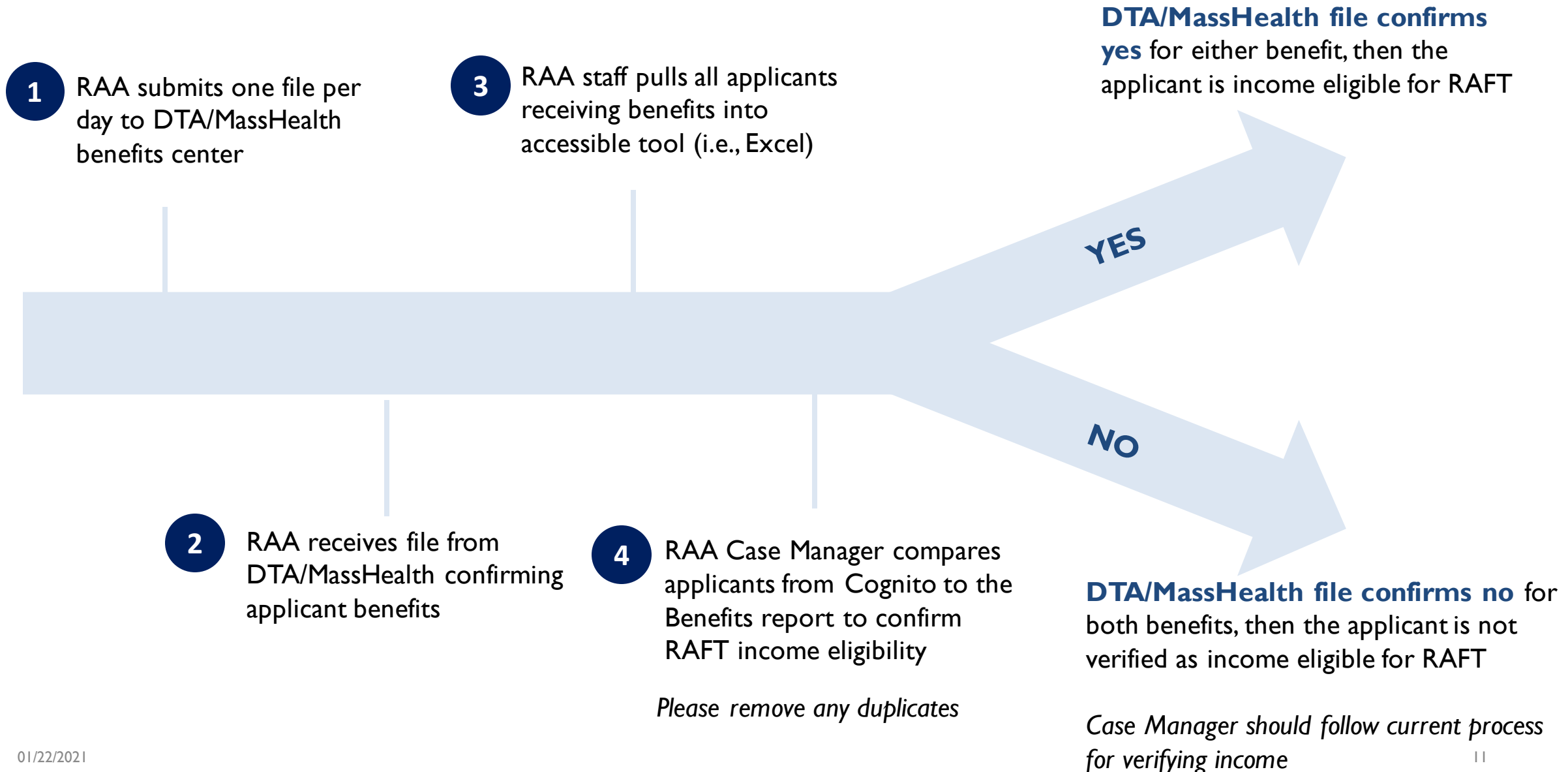
Interchange Users: Each RAA needs to designate one primary and one secondary Interchange User to send and receive reports.

Frequency of Report Submissions:

- Submit up to one verification report each day
- No limit on the number of applications per verification report
- Reports are accepted for processing until 5PM each business day, but RAAs are encouraged to submit by noon for quicker processing time
- Reports will be returned to each Interchange User, generally within 48 hours

Phone Verification: Do not verify multiple RAFT applications by phone. To obtain benefit verification in rare circumstances (*i.e., the applicant is with the RAA to complete an application*) the RAA may contact DTA at (857) 408-0661 or MassHealth at (833) 501-7898

INCOME VERIFICATION PROCESS



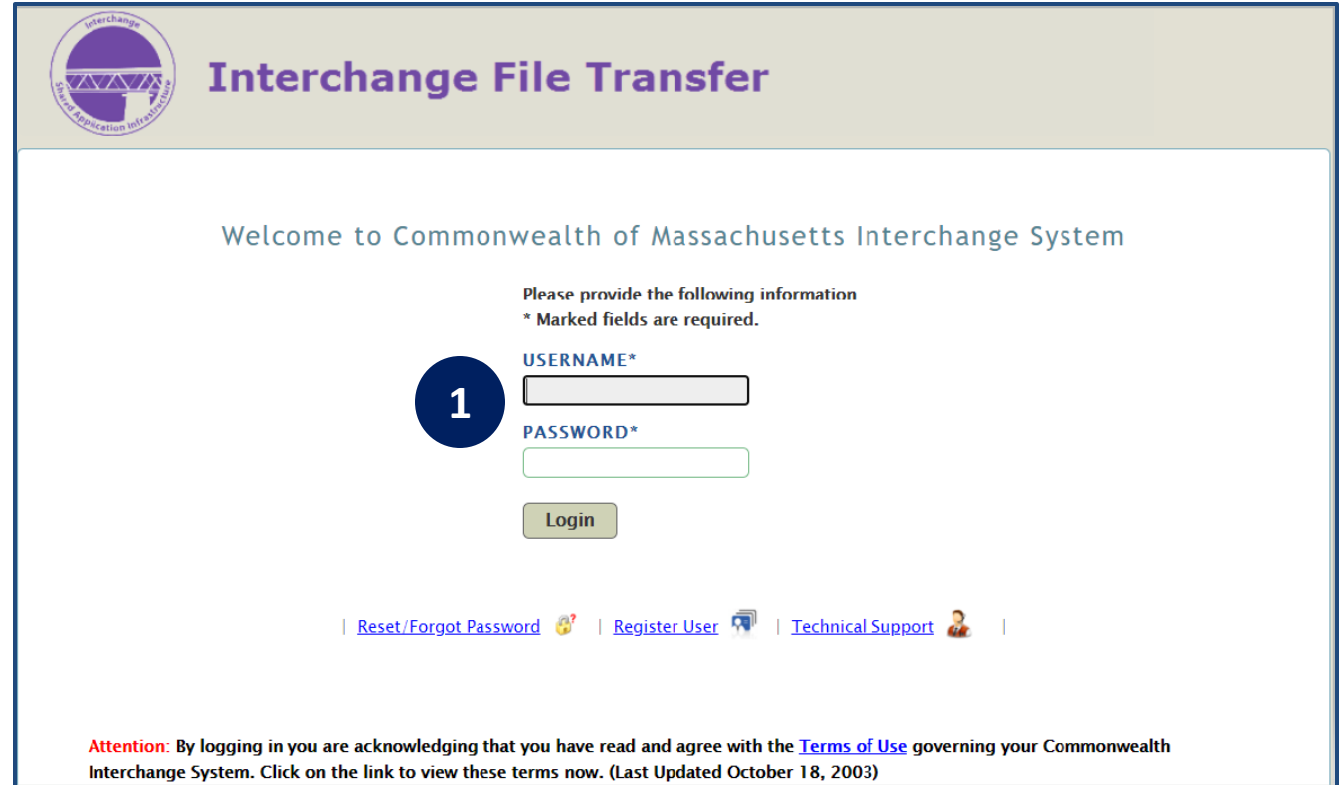


QUESTIONS

SETTING UP AN INTERCHANGE ACCOUNT



- Each RAA user must have one primary Interchange user and one secondary Interchange user to use this report.
 - Submit each user's name and email address to robert.muollo@mass.gov
- Each user will receive two “Welcome to Interchange” emails, each containing a log-in link
 - One with a username
 - One with a temporary password



The screenshot shows the 'Interchange File Transfer' login interface. At the top left is a circular logo with a bridge and the text 'Interchange Shared Application Infrastructure'. The title 'Interchange File Transfer' is in purple. Below the title, it says 'Welcome to Commonwealth of Massachusetts Interchange System'. A prompt asks for 'Please provide the following information' and notes that marked fields are required. There are two input fields: 'USERNAME*' and 'PASSWORD*', both with red asterisks. A large blue circle with the number '1' is next to the username field. Below the password field is a 'Login' button. At the bottom, there are links for 'Reset/Forgot Password' (with a question mark icon), 'Register User' (with a user icon), and 'Technical Support' (with a person icon). A red 'Attention' note at the bottom states: 'By logging in you are acknowledging that you have read and agree with the Terms of Use governing your Commonwealth Interchange System. Click on the link to view these terms now. (Last Updated October 18, 2003)'.

Interchange File Transfer

Welcome to Commonwealth of Massachusetts Interchange System

Please provide the following information
* Marked fields are required.

1 USERNAME*

PASSWORD*

Login

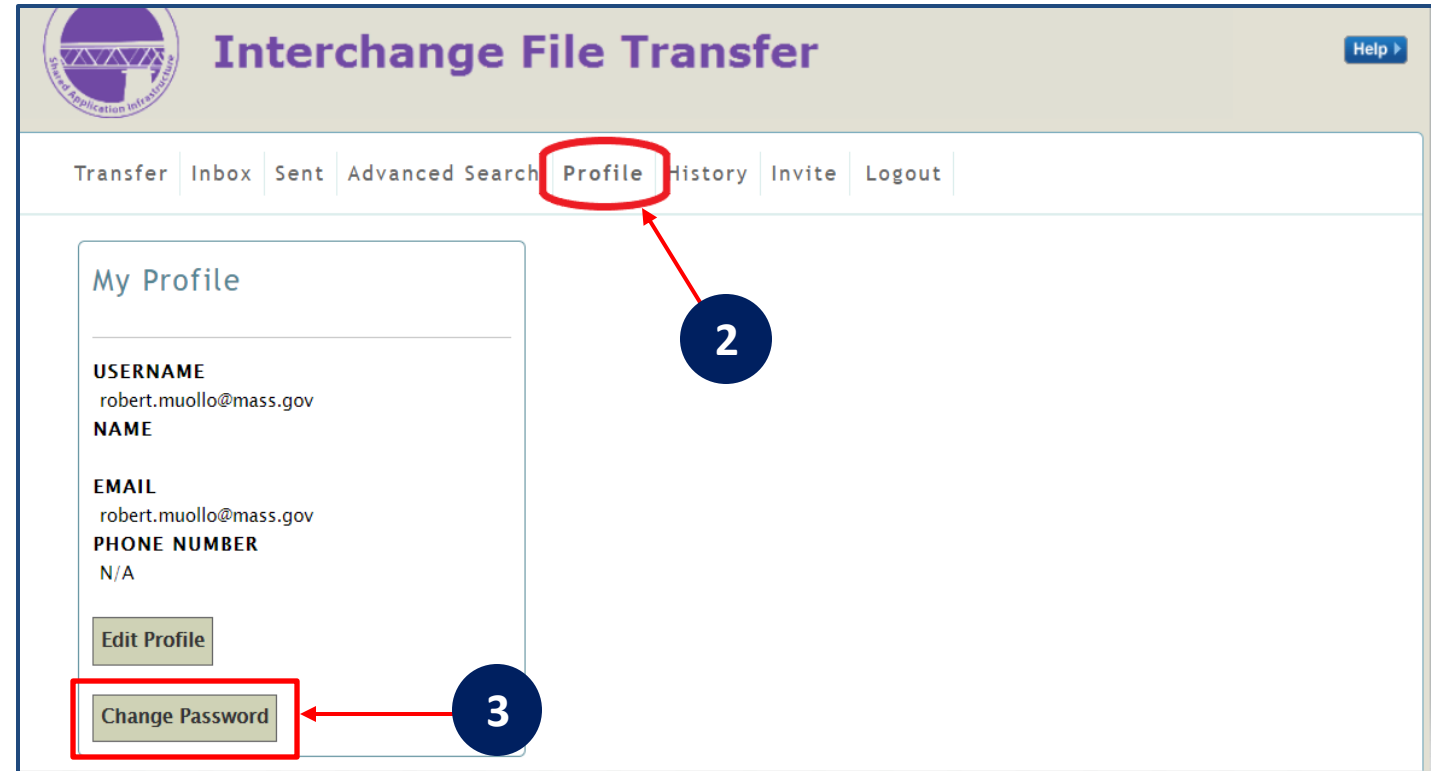
[Reset/Forgot Password](#) ? | [Register User](#) | [Technical Support](#) |

Attention: By logging in you are acknowledging that you have read and agree with the [Terms of Use](#) governing your Commonwealth Interchange System. Click on the link to view these terms now. (Last Updated October 18, 2003)

CHANGING INTERCHANGE TEMPORARY PASSWORD



1. Click the log-in link from one of the emails and enter your username and the temporary password.
2. Once logged in, click on Profile Tab
3. Click on Change Password
4. You will be prompted to change your temporary password to a permanent one.



POPULATING THE VERIFICATION REPORT



- Information needed to complete the verification should be available through each RAA's Cognito/CMS
- Include this information for **only one member of the household** per application. Each row in the report must represent a unique application
- Save each report as: **RAFT_Verification_<Agency Name>_YYYY-MM-DD_File_##.xlsx**
 - Each report you submit will have its own file number. For example, the first report you submit for processing is “File_01”, the second report “File_02”, and so on.
- **Do not add new verification requests** to previously submitted reports. For example, if you submitted 50 records in your first report, your second report should only include new records that you have not yet submitted

DATA REQUIREMENTS



| Column Name | Input | Required Format |
|--------------------------|-------------|----------------------------------|
| Agency Code | Required | Text |
| Date of Report | Required | Date: MM/DD/YYYY |
| Batch File Number | Required | Text: "File_01", "File_02", etc. |
| Benefit Claim Type | Required | Text: "MH", "DTA" or "Dual" |
| Date of RAFT Application | Required | Date: MM/DD/YYYY |
| Last Name | Required | Text |
| First Name | Required | Text |
| Date of Birth | Required | Date: MM/DD/YYYY |
| Address | Required | Text |
| Address2 | Recommended | Text |
| City | Required | Text |
| Zip Code | Required | Text format for leading zero |
| Social Security Number | Required | Text: xx-xxx-xxxx |
| Gender | Recommended | Text: Male/Female |
| Unique Applicant ID | Recommended | Text |

VERIFICATION REPORT TO SUBMIT BEST PRACTICES



All records include same Date of Report

All records include same File Number

Enter "Dual" to verify MH & DTA

Applicant consent to verify

Duplicates screened and removed

Data quality checks (ex. 5-digit zip code)

All records have SSN with hyphens

One record = one unique application

| Agency Code | Date of Report | File Number | Benefit Claim Type | Date of RAFT Application | Last Name | First Name | Date of Birth | Address | Address 2 | City | Zip Code | Social Security Number | Gender | Cognito / Unique ID |
|-------------|----------------|-------------|--------------------|--------------------------|-----------|-----------------|---------------|--------------------|-----------|-----------|----------|------------------------|--------|---------------------|
| CMHA | 1/12/2021 | FILE_01 | DTA | 8/19/2020 | SMITH | JOSEPH EXAMPLE | 1/1/1999 | 123 EXAMPLE STREET | | WORCESTER | 01610 | 000-00-0001 | MALE | T127 |
| CMHA | 1/12/2021 | FILE_01 | MH | 8/21/2020 | SMITH | JOSEPH EXAMPLE | 1/1/1999 | 123 EXAMPLE STREET | | WORCESTER | 01610 | 000-00-0001 | MALE | T127 |
| CMHA | 1/12/2021 | FILE_01 | DUAL | 9/11/2020 | REID | CHARLES EXAMPLE | 1/2/1992 | 456 MAIN LANE | | WORCESTER | 01610 | 000-00-0003 | MALE | T126 |
| CMHA | 1/12/2021 | FILE_01 | DUAL | 9/30/2020 | SANTOS | SARAH EXAMPLE | 1/2/1993 | 999 TEST STREET | | WORCESTER | 01610 | 000-00-0004 | FEMALE | T125 |
| CMHA | 1/12/2021 | FILE_01 | DUAL | 10/21/2020 | CASSIDY | DANTE EXAMPLE | 1/3/1997 | 11 SAMPLE AVE | APT 1 | WORCESTER | 01610 | 000-00-0005 | MALE | T124 |

UPLOADING A DTA/MASSHEALTH BENEFIT VERIFICATION REPORT



Once you have populated and saved the report, log into the [Interchange File Report](#)

1. Select the “Transfer” tab
2. Name transaction with RAA name and date of submission
3. Set “Retention Period” to 7 days
4. In "Recipient Emails" box, enter all three email addresses:
jessica.cunha@mass.gov,
christel.lantin@mass.gov,
robert.muollo@mass.gov

The screenshot shows the 'Interchange File Transfer' web application. At the top, there is a navigation bar with tabs: Transfer, Inbox, Sent, Advanced Search, Profile, History, Invite, and Logout. A 'Help' button is in the top right corner. Below the navigation bar, the 'Transfer' tab is selected. A message states '* Marked fields are required.' Below this, there are four numbered callouts: 1 points to the 'Transfer' tab; 2 points to the 'TRANSACTION NAME (MAX 256 CHARACTERS)*' text input field; 3 points to the 'RETENTION PERIOD (IN DAYS)' dropdown menu, which currently shows '60'; and 4 points to the 'RECIPIENT EMAILS*' text area, which includes a checkbox for 'System Group'.

UPLOADING A DTA/MASSHEALTH BENEFIT VERIFICATION REPORT



5. Optional: In the “Message” box, type any specific notes regarding the data.
6. Select the file you wish to upload. Ensure report is saved as
RAFT_Verification_<Agency
Name>_YYYY-MM-DD_File_###.xlsx
7. Click “Send Files”
8. The “Sent” tab includes a record of your transmitted reports

A screenshot of a web form for uploading documents. The form is titled "MESSAGE (MAX 900 CHARACTERS)" and has a large text area for a message. Below this is a section titled "UPLOAD DOCUMENTS" which contains four "Choose File" buttons, each followed by the text "No file chosen". There is also an "Add More Files" button. At the bottom of the form is a "Send Files" button. The form is overlaid with three numbered blue circles: 5 next to the message box, 6 next to the first "Choose File" button, and 7 next to the "Send Files" button. At the bottom of the form, there is a copyright notice: "© Commonwealth of Massachusetts (2010 – 2012)".

RECEIVING A DTA/MASSHEALTH BENEFIT VERIFICATION REPORT



The primary and secondary Interchange User will receive an email notification that file(s) were received in Interchange

1. Click the link provided in that email to retrieve your file(s)
2. Once logged into Interchange, click on “Inbox” tab
3. All files received will be displayed in your Inbox. You can sort by Transaction, Sender, Number of Files, Size, and Dates.
4. Click on the file link you would like to download to your computer.

The screenshot shows the 'Interchange File Transfer' web application. The 'Inbox' tab is selected and highlighted with a red circle (labeled 3). Below the tab, there is a table of received files. The table has columns for Transaction, Sender, Files, Size, Created Date, and Updated Date. A file named 'RAA Name, DTA Verification, 12-17-20.xlsx (26.15 KB)' is listed and highlighted with a red rectangle (labeled 5). The file is associated with the transaction 'RAA Name, 12-17-20' and the description 'Applicants for DTA verification'.

| Transaction | Sender | Files | Size | Created Date | Updated Date |
|---------------------------------|--------|-------|----------|--------------|--------------|
| ▼ RAA Name, 12-17-20 | | 1 | 26.15 KB | 12/17/2020 | 12/17/2020 |
| Applicants for DTA verification | | | | | |



INTERPRET RESULTS – DTA/MASSHEALTH DAILY REPORT

The report received will include new columns that display whether an individual is verified as receiving DTA and/or MassHealth benefit along with the benefit start date

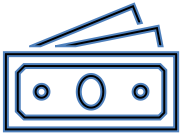
- **Receiving Benefit | Yes:** The household is presumed income eligible for RAFT
- **Receiving Benefit | No:** Benefits cannot be verified
- **Receiving Benefit | Error:** Required data field(s) are missing or formatting is incorrect. This record must be resubmitted.
- **Note:** *some records may not appear in the return file due to a secondary, manual review. After the manual review is complete, these records are sent in a separate report to each designated Interchange User.*

| DTA | | MassHealth | | | |
|---|--|--|--|---|--|
| Receiving Benefit | Start of Benefits | Receiving Benefit | Aid Cat Effective Date | Aid Category | Program Type |
| Result will display “YES”, “NO”, or “ERROR” If “YES”, household is income eligible for RAFT. | Result will include date benefits were effective, if applicable. | Result will display “YES”, “NO” or “ERROR” If “YES”, household is income eligible for RAFT. | Result will include date benefits were effective, if applicable. | MassHealth Category (for reference only) | MassHealth Plan Type (for reference only) |



To document the verification, include a **reference to the report** in the applicant's file.

Note: Do not include the report in the applicant's file without first removing information not pertaining to that individual



RAAs may use the **applicant's stated household income** for RAFT reporting purposes



Next Steps/Reminders

1. If you haven't already, submit **designated Interchange users**
2. Continue to submit reports as needed
3. Be sure to check report for duplicates and formatting/data field requirements before submitting
4. Let us know how it is going, feedback you have? Anything we can change?
5. Working on functionality improvements (i.e., the ability to sort and filter)



Questions

- Reach out to Robert Muollo (robert.muollo@mass.gov)



QUESTIONS



THANK YOU!