<table>
<tr><td rowspan="2">

Department of Human Services
311 West Saratoga Street
Baltimore MD 21201

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FIA Action Transmittal

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Department of Human Services **311 West Saratoga Street** **Baltimore MD 21201**	**FIA Action Transmittal**
Control Number: # 22-25	**Effective Date: June 1, 2022**
	Issuance Date: June 29, 2022

TO: **DIRECTORS, LOCAL DEPARTMENTS OF SOCIAL SERVICES**
                            DEPUTY/ASSISTANT DIRECTORS FOR FAMILY INVESTMENT,
                            FAMILY INVESTMENT SUPERVISORS

FROM: **LA SHERRA AYALA, EXECUTIVE DIRECTOR**

RE: **MARYLAND BENEFIT REVIEW FORM PROCESS**

PROGRAM IMPACTED: **SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM**

ORIGINATING OFFICE: **OFFICE OF PROGRAMS**

SUMMARY

In Maryland, Supplemental Nutrition Assistance Program (SNAP) households that are certified for 12 months or more are required to complete a mid-point case eligibility review with their Local Department of Social Service (LDSS) halfway through their certification period. The Maryland Benefit Review Form (MBR) is used for this purpose, which is to confirm that a SNAP household remains eligible for benefits for the remainder of the certification period. The process is also known as Periodic Reporting (PR).

The MBR notice will be generated and mailed to the household at least 60 days ahead of the due date. Once generated, the MBR form is accessible on the myMDTHINK Consumer Portal for electronic submission. Customers do not have to wait to receive the mailed form to initiate the MBR submission process.

MBR Timeline

Example: SNAP household certification period 1/03/2022- 01/31/2023.

- In this example, the semi-annual review (MBR) due date is 7/31/2022.
- MBR correspondence dated 6/1/2022 will be mailed to the customer.
- MBR will be visible in the Consumer Portal on 6/1/2022.
- MBR form is due to LDSS on or before 6/30/2022. This allows LDSS the time to review and process the form before the 7/31/2022 deadline.
- MBR late notice will be generated and mailed to the customer by 7/10/2022 if the customer did not return their form by 6/30/22.
- If MBR is completed by 7/31/2022, the case will not close.
- If MBR is not completed by 7/31/2022, the SNAP case will close.

REQUIRED ACTION:

Processing an MBR

The MBR should be completed and returned to the local office on or before the last day of the fifth month of SNAP eligibility.

Electronic MBR Submissions

- When the customer submits the MBR through the Consumer Portal an E&E Worker Portal worker alert will be generated displaying "MBR form Received."
- The MBR will automatically be uploaded into Case Documents.
- When an MBR is submitted through the Customer Portal, the system interface between the Customer Portal and the Worker Portal will automatically populate the updated information from the returned MBR onto the customers case in the E&E System.

Paper MBR Submissions

- If the MBR paper form is submitted to the LDSS, the case manager will need to update E&E with new case information, if reported, and request verification, only if required.
- The MBR must be processed using the Interim Change Functionality in E&E.
- The case manager must add the MBR to Case Documents via scanning/uploading

MBR Submissions with Reported Changes

- If a customer reports changes on the MBR form, verification may be required. Customers may submit required verifications along with the MBR form.
- The Case manager must review the MBR to identify any missing information and generate a 1052 if necessary.
- When verifications are outstanding, the MBR Tracking Page should be updated to reflect that the MBR has been "Submitted but incomplete".

- When the customer returns the verification, the case manager must update all items on the MBR Tracking Page as verified, update the MBR tracking page to reflect that the MBR process has been "Completed" and run eligibility to complete the process.

MBR Submissions with No Reported Changes

- If a customer submits the MBR and does not report any changes, no verifications are required. The Case Manager will process the MBR and mark the MBR tracking page as complete to finalize the process.
- If the MBR tracking page has not been updated by the 10th day of the sixth month of eligibility, the second MBR notice will be mailed to the customer informing them that the completed MBR and required verifications must be received prior to the end of the sixth month, or their case will close.
- If the MBR process is not completed by the last day of the sixth month of eligibility, the E&E System will automatically close the SNAP case.

Late MBR Submissions

- If a household submits the MBR after the case has closed but during the next issuance month (within 30 days following the closure), reinstate the SNAP case. **Benefits should be prorated** but the household should keep the same redetermination date. Case managers must update the system with the date that the MBR was received. The E&E System will prorate the benefits based on the date the documentation was received.

- The MBR form **should not** be accepted after the subsequent month of the SNAP closure (i.e., case closed effective August 1, 2022 and the form is received on or after September 1, 2022). The household must reapply for benefits.

- If the household has requested a fair hearing on the basis that a completed MBR was filed, but the LDSS does not have it, reinstate the household if a completed periodic report is filed before the end of the issuance month.

Case managers should use the E&E MBR How to Guide to assist them with following the steps required to complete the MBR process. Access E&E How to Guides by clicking the Help button on the menu bar next to Settings and select the guide titled "Process Benefit Review Form."

REPORTS:

Qlik report: "E&E SNAP MD Benefit Review Cases"

This is a 2-tier report that will provide the forecasting information showing how many MBRs are anticipated in each month for the next 12 months as well as the case details. This report is being modified to provide the same information as the Redet Report.

NOTE:

Households in which all adult members are elderly or have a disability with no earned income and are certified for periods up to 36 months, must file a Benefit Review Form once a year.

Prior to closing an ESAP and MSNAP case, the case manager must complete an interview to confirm that the correct information is being captured on the case. Be sure to narrate that the appropriate steps have been completed.

ATTACHMENTS:

SNAP Manual Section, 410
SNAP Manual Section, 420

INQUIRIES

Please direct policy questions to the Office of Statewide Policy Compliance and Customer Service Performance by completing the FIA Policy Information Request Form found on Knowledge Base.
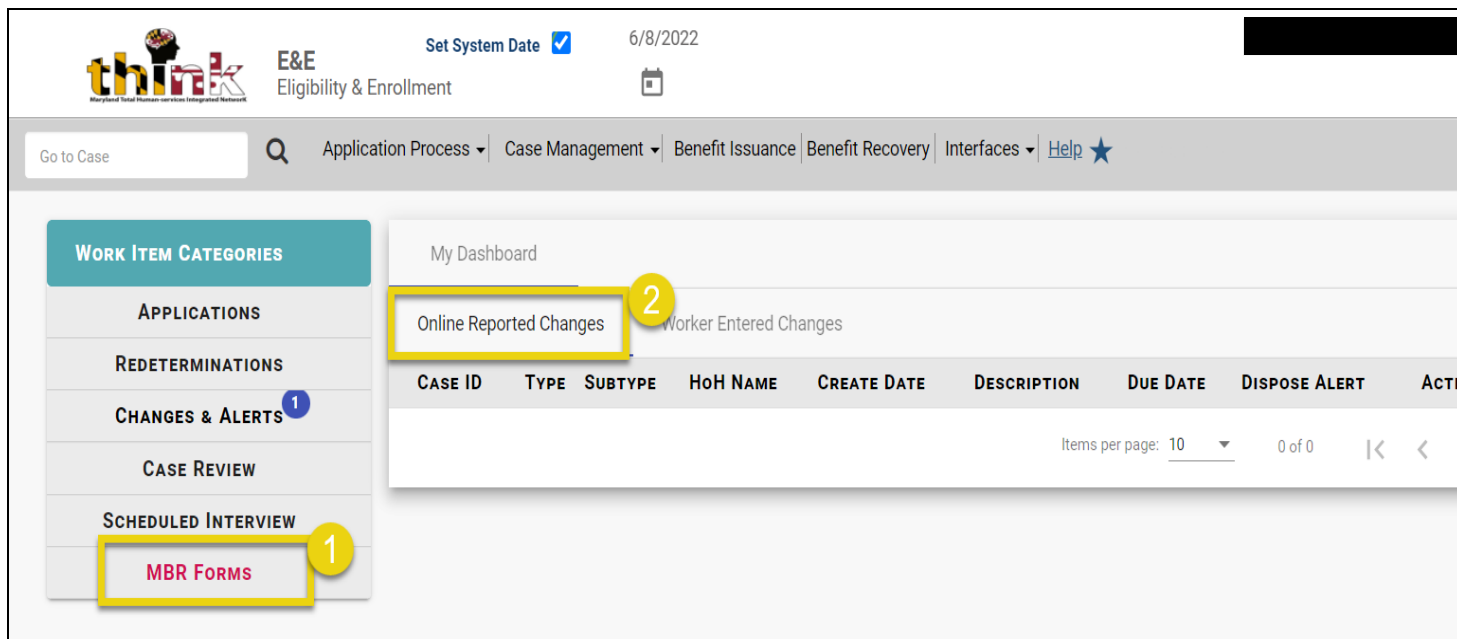
 For systems questions, please email fia.bsdm@maryland.gov.

c: DHS Executive Staff
     Constituent Services
     DHS Help Desk
     FIA Management Staff
     Office of Administrative Hearings

Note: A customer may submit a **Maryland Benefits Review** (MBR) form electronically using the myMDTHINK Consumer Portal or deliver a paper MBR form to their local Department of Social Services office. Once the Maryland Benefits Review form is uploaded to a case, you can begin the Maryland Benefit Review process. This guide explains both methods to access and update customer information reported on the Maryland Benefits Review form.
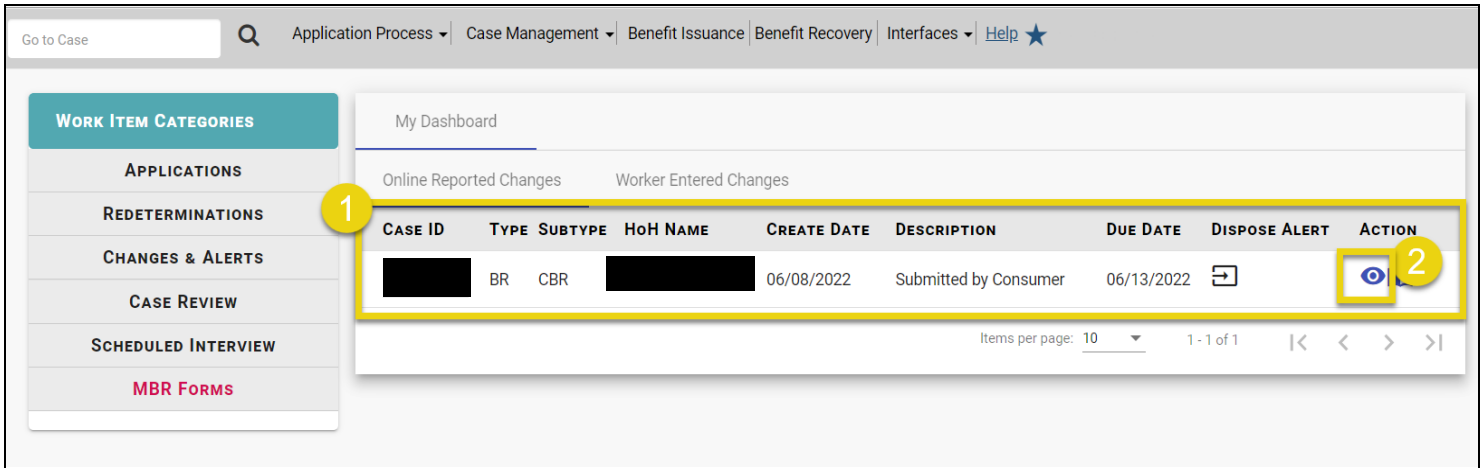
Method 1: Process the Maryland Benefits Review (MBR) form submitted by a customer through the myMDTHINK Consumer Portal

1. On the **Eligibility & Enrollment** dashboard, *click* the **MBR Forms (1)** tab on the **Left-Hand Navigation Menu** then *click* the **Online Reported Changes (2)** tab.

2. The **MBR Online Reported Changes (1)** section will display MBR forms submitted through **myMDTHINK Consumer Portal**. *Click* the **Eye (2)** icon to open the case.
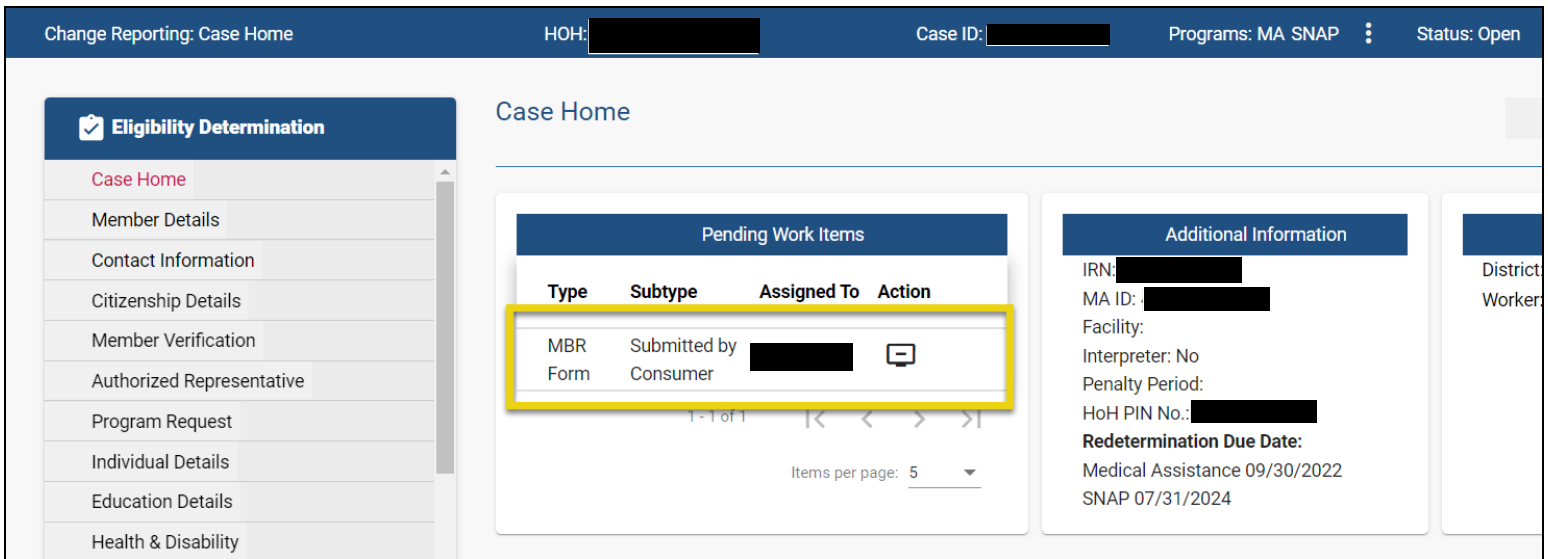
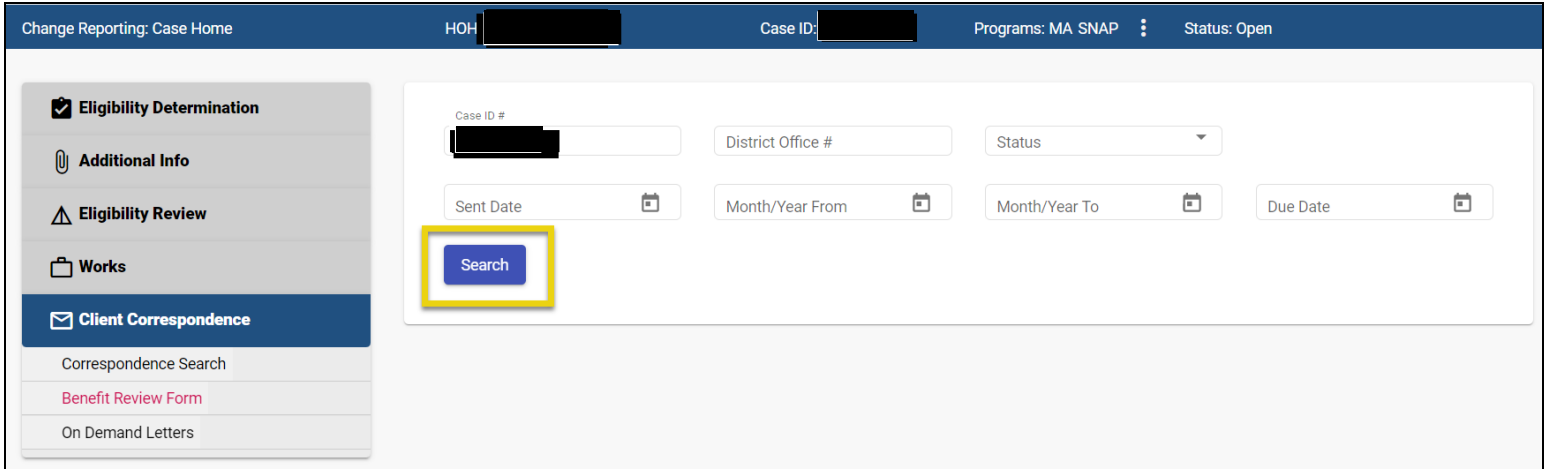3. The **Case Home** screen will display. Note that the **Pending Work Items Section** shows the **MBR Form Submitted by Consumer** work item.

4. *Click* the **Case Management (1)** tab on the taskbar, then *select* the **Benefit Review Form (2)** option.
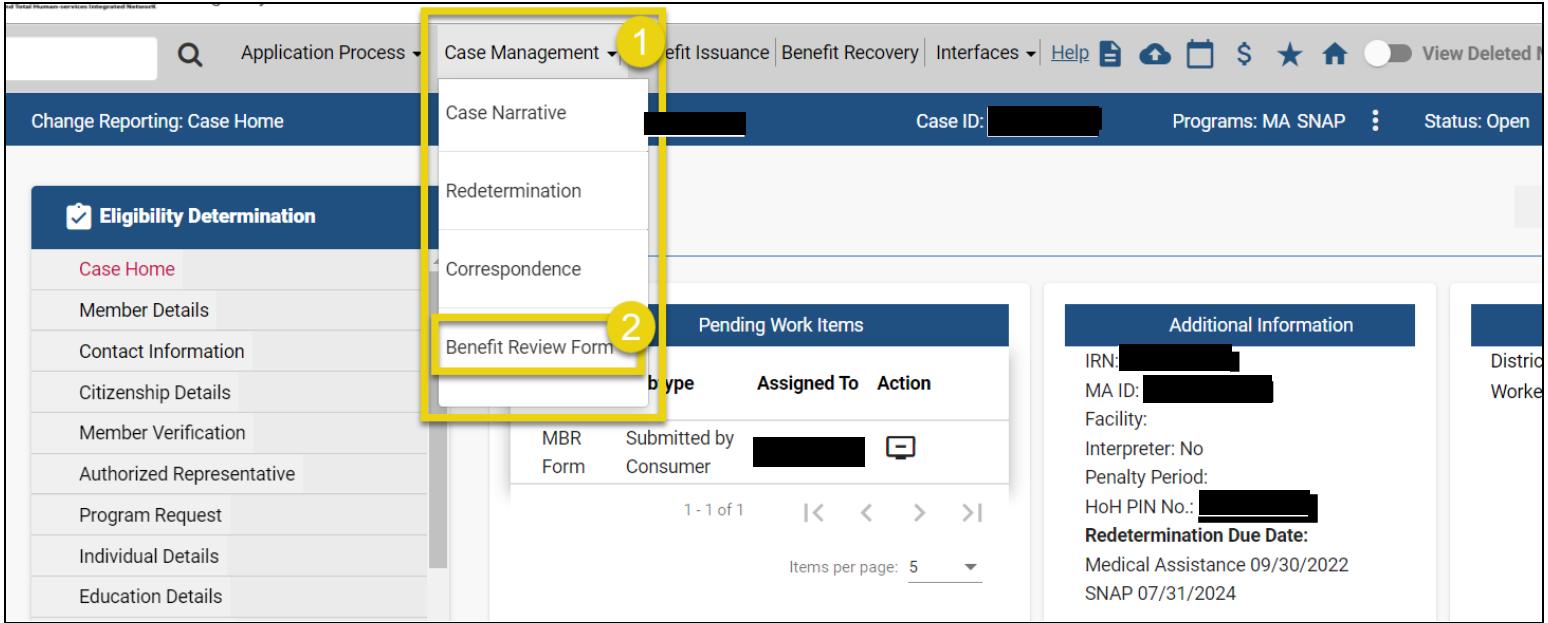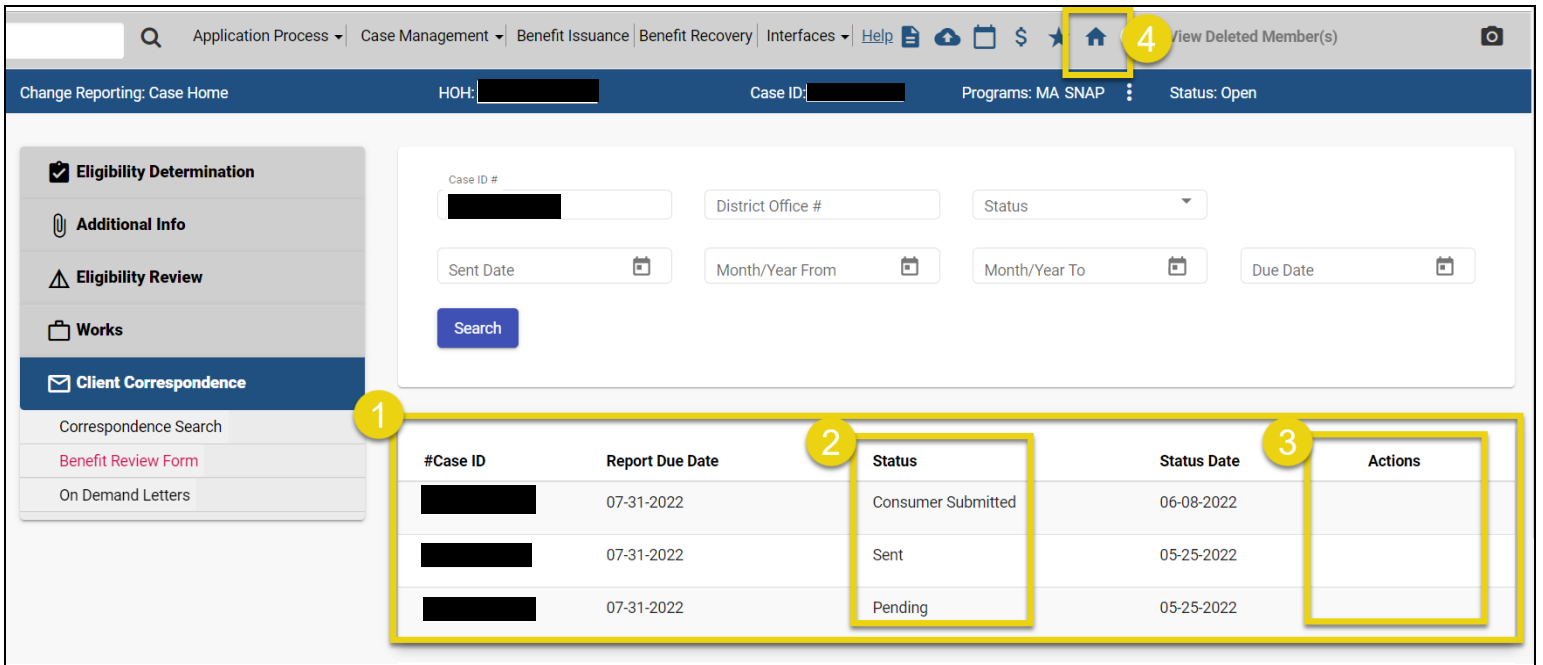
5. The **Benefit Review Form** screen will display. *Click* the **Search** button.
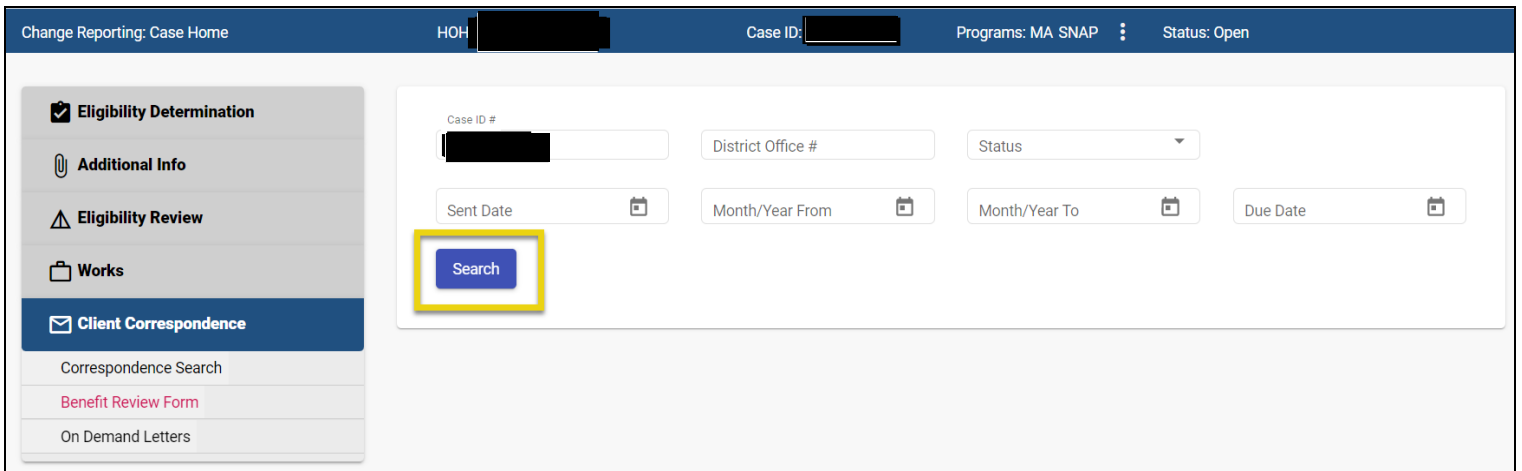
6. The **Benefit Review Search** window will refresh and display the **Search Result (1)** section. *Note* the **Status (2)** of the MBR. Also, note that the **Actions (3)** column shows that you can not take any action.

Click the **Home (4)** icon to return to the **Case Home** screen.

7. The **Case Home** screen will display. *Click* the **Actions (1)** button then *select* the **Change Reporting (2)** option from the dropdown menu.

8. The **Report Changes** window will display. *Click* the **Initiate Benefit Review Form (1)** checkbox, *enter* the **Date of Change (2)**, then *click* the **Save & Close (3)** button.

9. You will be redirected to the **Case Home** screen. *Click* the **Case Management (1)** button on the taskbar then *select* the **Benefit Review Form (2)** option from the dropdown menu.

10. The **Benefit Review Form** screen will display. *Click* the **Search** button.

| Change Reporting: Case Home | HOH | Case ID: | Programs: MA SNAP | Status: Open |
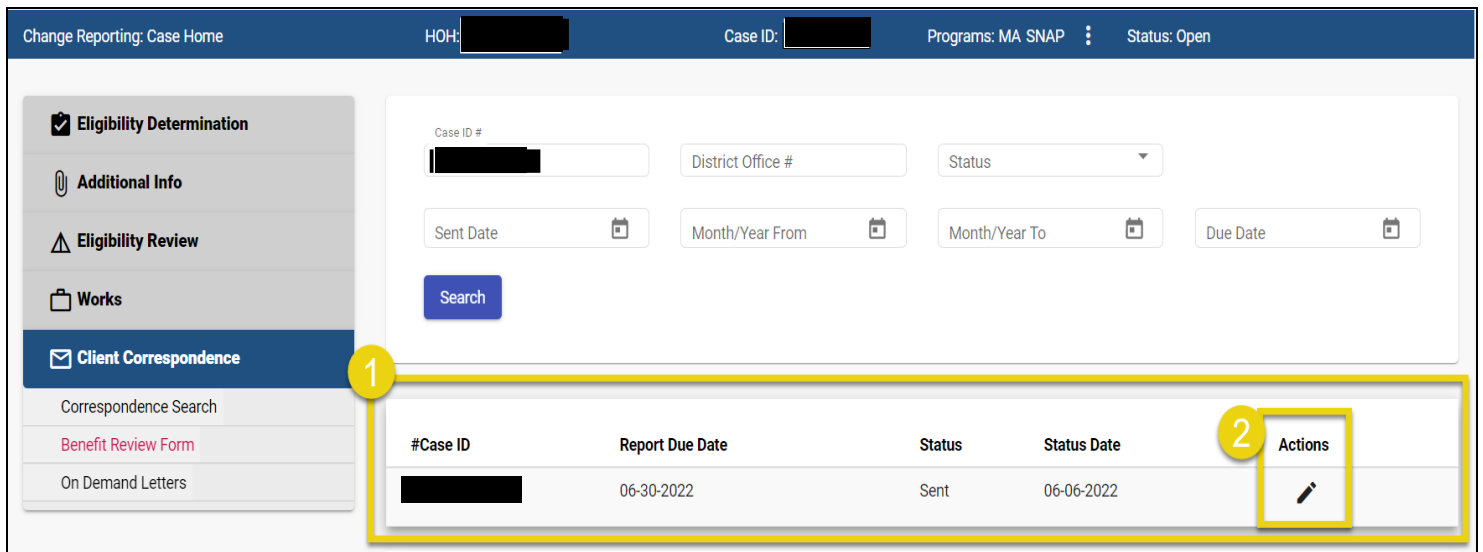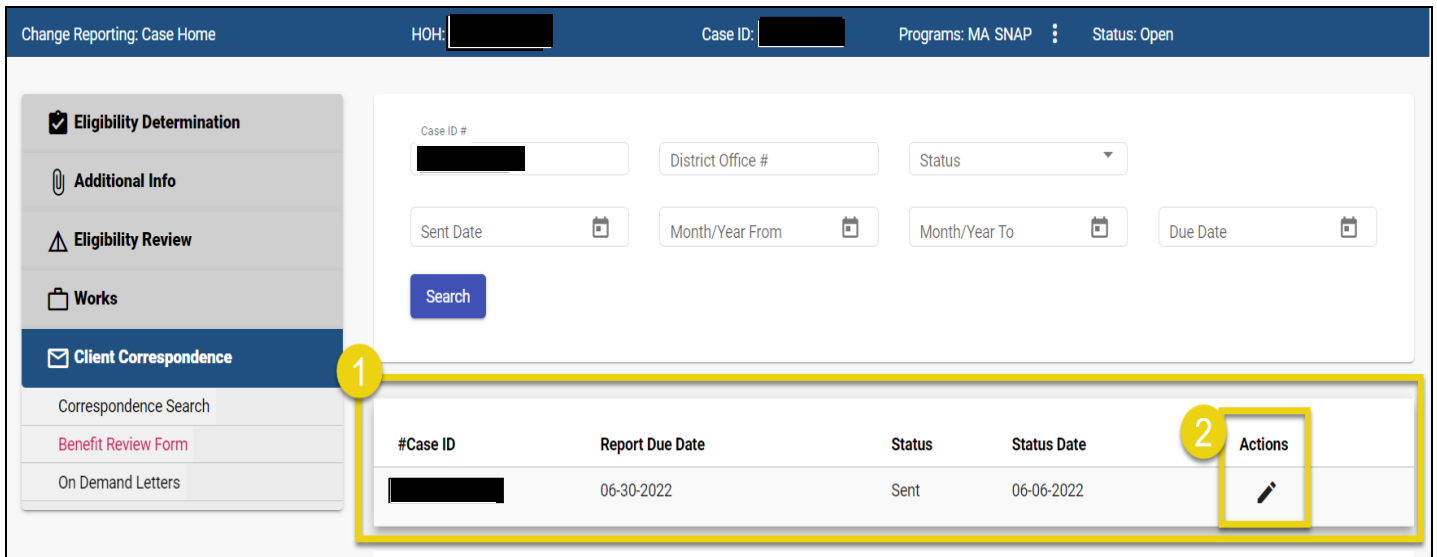
Eligibility Determination
Additional Info
Eligibility Review
Works
Client Correspondence
Correspondence Search
Benefit Review Form
On Demand Letters

Case ID #

District Office #

Status

Sent Date

Month/Year From

Month/Year To

Due Date

Search

11. The **Benefit Review Search** window will refresh showing the **Search Result (1)** section. Note that the **Actions (2)** column now shows the **Pen (2)** icon, which means that you can begin processing the MBR.

#Case ID	Report Due Date	Status	Status Date	Actions
	07-31-2022	Consumer Submitted	06-08-2022	✏️
	07-31-2022	Sent	05-25-2022	
	07-31-2022	Pending	05-25-2022	

Method 2: Process the Maryland Benefits Review form submitted by a customer to a Case Manager at the district office.

1. Enter the **Case ID (1)** then click the **Magnifying Glass (2)** icon.

2. *Click* the **Case Management (1)** tab on the taskbar, then *select* the **Benefit Review Form (2)** option.

3. The **Benefit Review Form** screen will display. *Click* the **Search** button.

4. The **Benefit Review Search** window will refresh and show the **Search Result (1)** section. Note the **Status (2)** of the MBR. Also note that the **Actions (3)** column shows that you can not take any action.

   Click the **Home (4)** icon to return to the **Case Home** screen.

5. The **Case Home** screen will display. *Upload* the MBR form by *clicking* the **Additional Info (1)** tab on the **Left-Hand Navigation Menu**, then *selecting* the **Case Documents (2)** option.

6. The **Case Document** screen will display. *Select* **Document Type MBR (1)**, **Document Name MBR (2)**, and the **Household Member (3)** from the respective dropdown menus. *Click* the **Choose Files (4)** button to initiate file upload.

7. Your local folder will display. *Select* the **MBR FIle (1)** you want to upload, then *click* the **Open (2)** button.
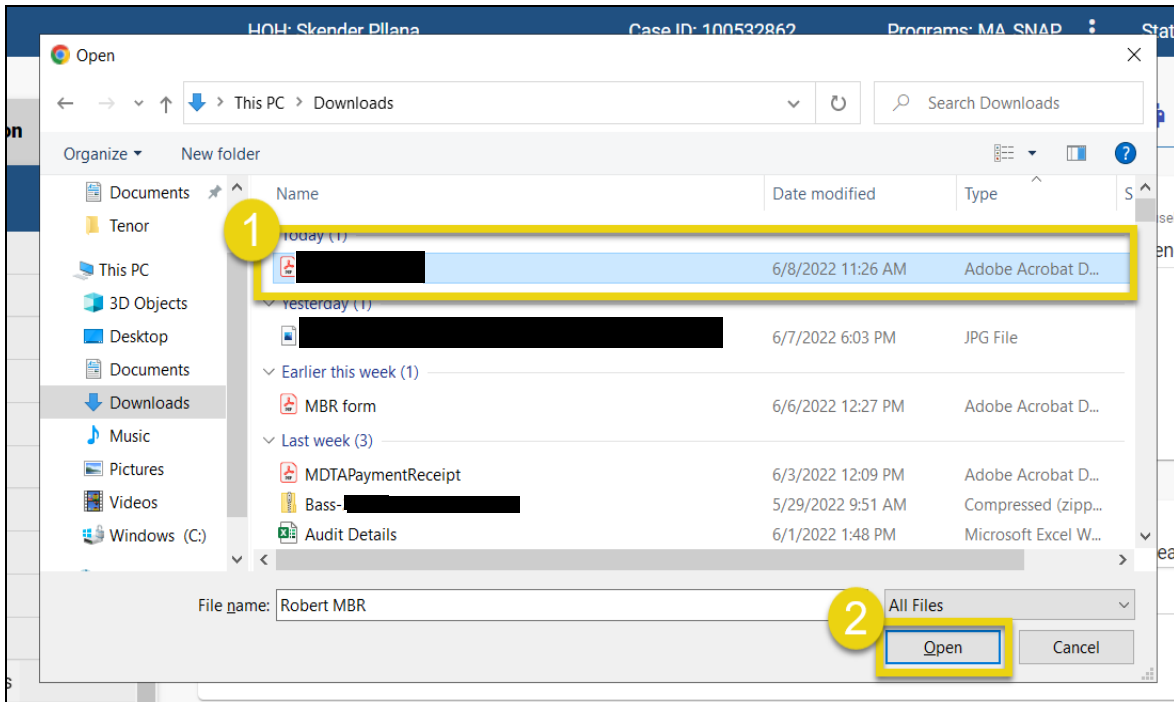
8. An **Upload Confirmation** popup window will display. *Click* the **Close** button.
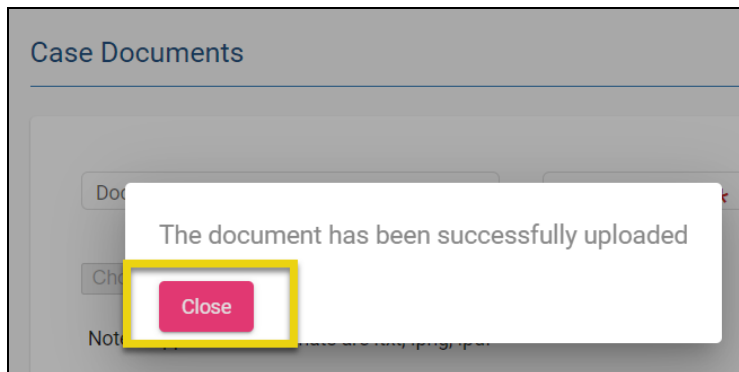
9. You will be redirected to the **Case Home** screen. *Click* the **Actions (1)** button then *select* the **Change Reporting (2)** option from the dropdown menu.
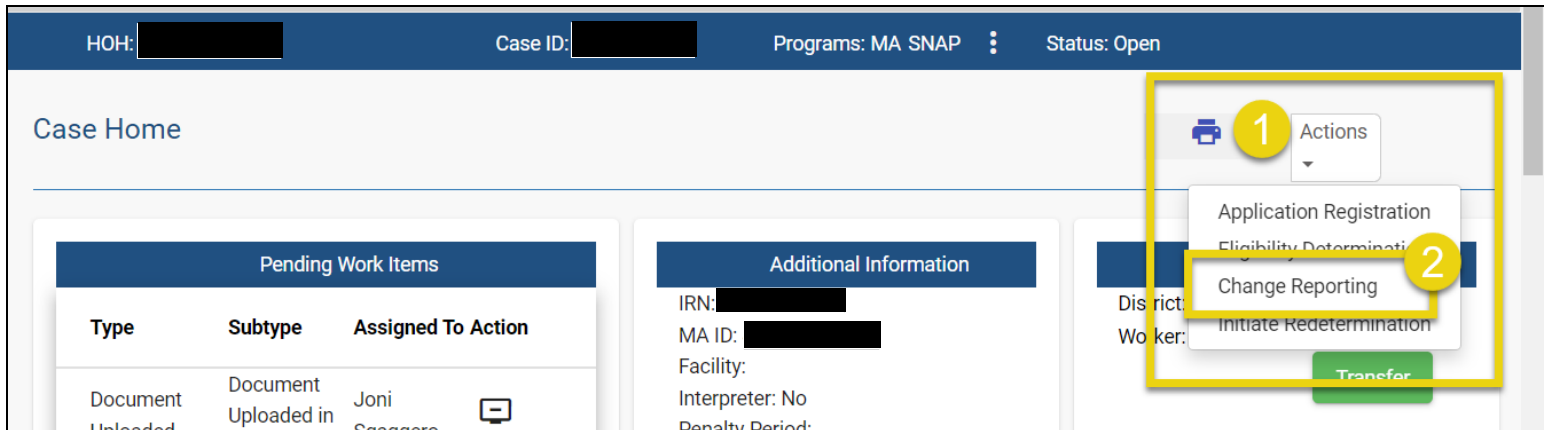
10. The **Report Changes** window will display. *Click* the **Initiate Benefit Review Form (1)** checkbox, *enter* the **Date of Change (2)**, then *click* the **Save & Close (3)** button.

12. You will be redirected to the **Case Home** screen. *Click* the **Case Management (1)** button on the taskbar then *select* the **Benefit Review Form (2)** option from the dropdown menu.

13. The **Benefit Review Form** screen will display. *Click* the **Search** button.

14. The **Benefit Review Search** window will refresh showing the **Search Result (1)** section. *Note* the **Actions (2)** column now shows the **Pen (2)** icon, which means that you can begin processing the MBR.
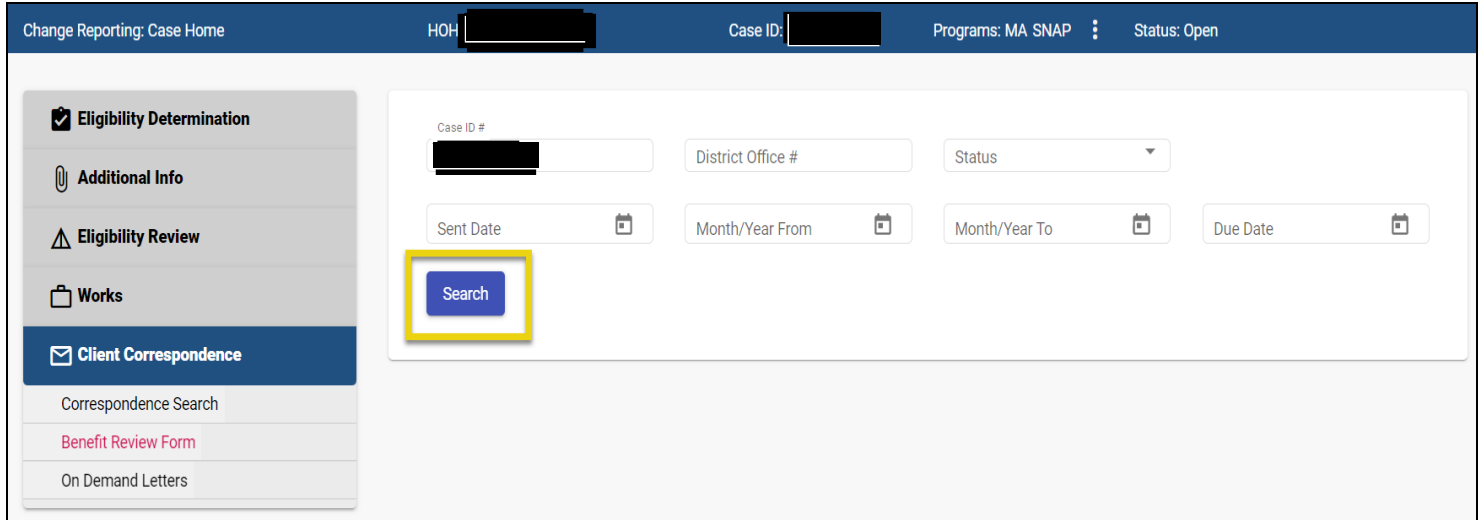
Complete the Maryland Benefits Review Form Process

<u>**Note**</u>: The MBR processing workflow from this stage to its completion is the same whether the form was electronically submitted by the customer using the myMDTHINK Consumer Portal (Method 1) or entered by a case manager at a Department of Social Services office (Method 2).

1. On the **Case Home** screen. *Click* the **Case Management (1)** button on the taskbar then *select* the **Benefit Review Form (2)** option from the dropdown menu.

2. The **Benefit Review Form** screen will display. *Click* the **Search** button.

3. The **Benefit Review Search** window will refresh showing the **Search Result (1)** section.

   Click the **Pen (2)** icon to process the Maryland Benefit Review form.

4.   The **Maryland Benefits** window will appear. *Select* the **Method (1)** in which the form was submitted and enter the **Received Date (2)**. *Check* the **Check all that Apply (3)** boxes to process the Maryland Benefits Review form. If a household's information is incomplete, additional fields will be displayed for you to *select* the **Reason (4)** and *enter* comments in the **Details (5)** field. Once complete, *click* on **Save & Close (6)**

5. You will be redirected to the **Maryland Benefits Review** screen, which now displays the refreshed **Search Result (1)** section showing the updated **Status (2)**.

    Click the **Home (3)** icon on the taskbar to return to the **Case Home** screen and continue processing the case.

6. After you've updated all customer information and required verification, *click* the **Dollar ($)** icon to run eligibility.
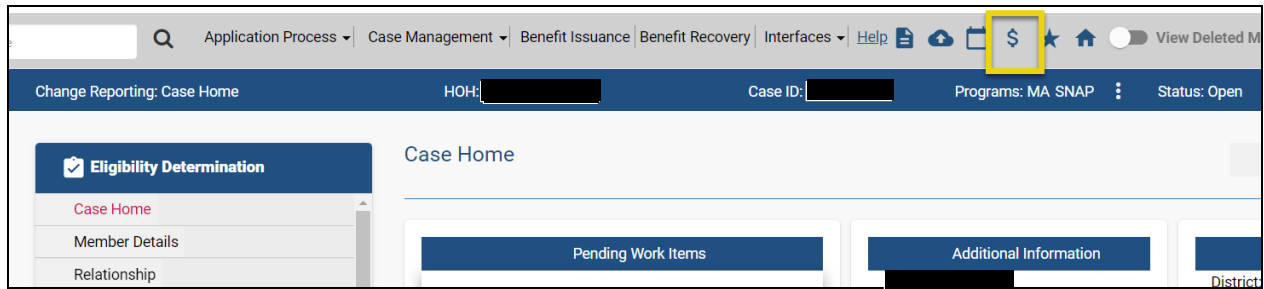
7. The **Eligibility Details** screen will display. *Click* the **Eligibility Period** button.
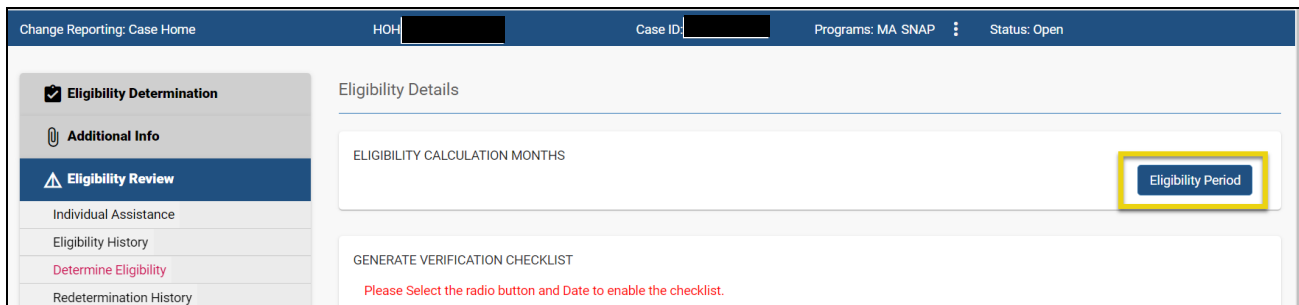
8. The **Eligibility Details** screen will refresh and display eligibility summary information if eligibility was run previously. If not, then *click* the **Run Eligibility** button.

9. The **Eligibility Summary (1)** section will display the eligibility details. *Click* the **Next (2)** button to continue.

HOH: ████	Case ID: ████	Programs: MA SNAP ⋮	Status: Open

Eligibility Details

ELIGIBILITY CALCULATION MONTHS

Start: 6/1/2022   To: 8/31/2022   ☐ Waive Adverse Action   **Run Eligibility**

ELIGIBILITY SUMMARY

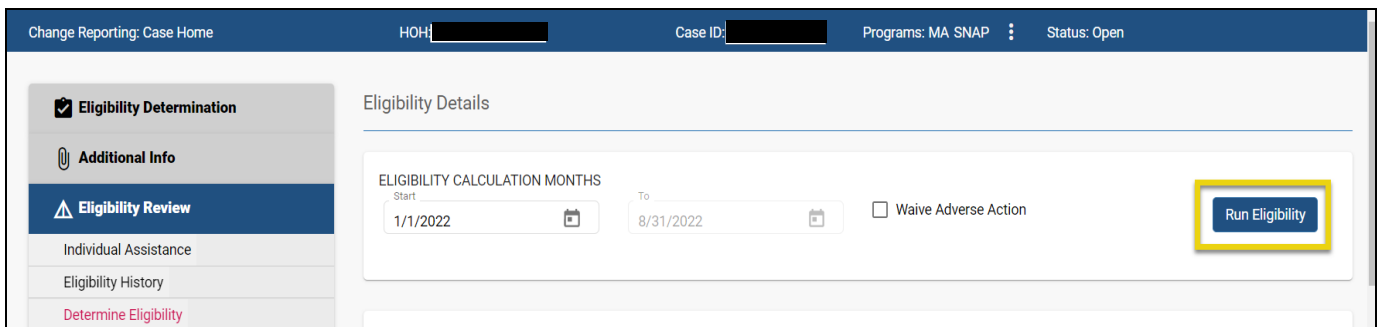| Program Name	AG Head	Benefits Coverage	Pay Month	Eligibility Status	Actions
SNAP	████	SNAP	06/2022	Pass	👁
Medical Assistance	████	S02	06/2022	Pass	👁
Medical Assistance	████	S98	06/2022	Denied	👁
SNAP	████	SNAP	07/2022	Pass	👁
Medical Assistance	████	S02	07/2022	Pass	👁
Medical Assistance	████	S98	07/2022	Denied	👁
SNAP	████	SNAP	08/2022	Pass	👁
Medical Assistance	████	S02	08/2022	Pass	👁
Medical Assistance	████	S98	08/2022	Denied	👁

Next

Back to Top

10. The **Monthly Eligibility Details Information** section will display. *Click* the **Program Eligibility (1)**, **Financial Eligibility (2)**, **Individual Financial (3)**, and **Recoupment Details (4)** tabs to review the respective information. *Click* the **Next (5)** button to continue.

Programs	Name	Eligibility Date
SNAP ▾	▾	06/2022 ▾

BENEFIT MONTH: 06/2022   Pass

① Program Eligibility	② Financial Eligibility	③ Individual Financial	④ Recoupment Details
Program Details	**Program Type**	**Benefit Group**	**RMP Indicator**
	NPA-FS (FS)	SNAP	No
Status	**Eligibility Status**	**Status Date**	**Application Date**

11. The **Issuance Method** screen will display. *Click* the **Save & Next** button to continue.

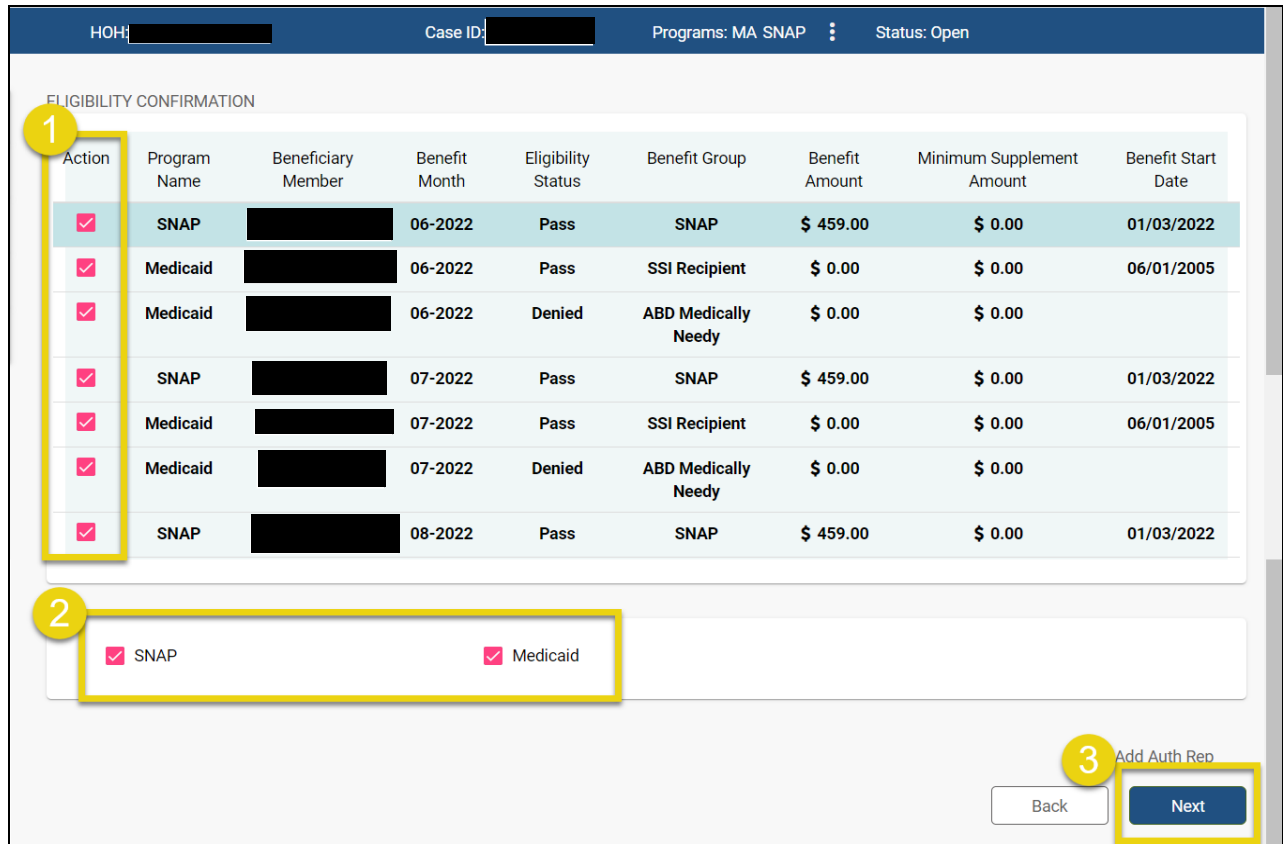| HOH: ▮▮▮	Case ID: ▮▮▮	Programs: MA SNAP ⋮	Status: Open

ISSUANCE METHOD

Program	AID Code	Issuance Method	Beneficiary
SNAP	SNAP	Batch EBT	▮▮▮

‹ Back   Save & Next ›
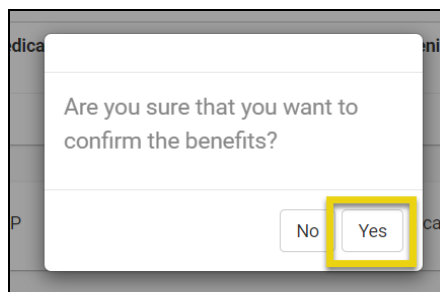
12. The **Eligibility Confirmation** screen will display. *Click* the **Action (1)** checkboxes to confirm the monthly eligibility and *click* the **Program (2)** checkbox to confirm the benefit program. *Click* the **Next (3)** button to continue.
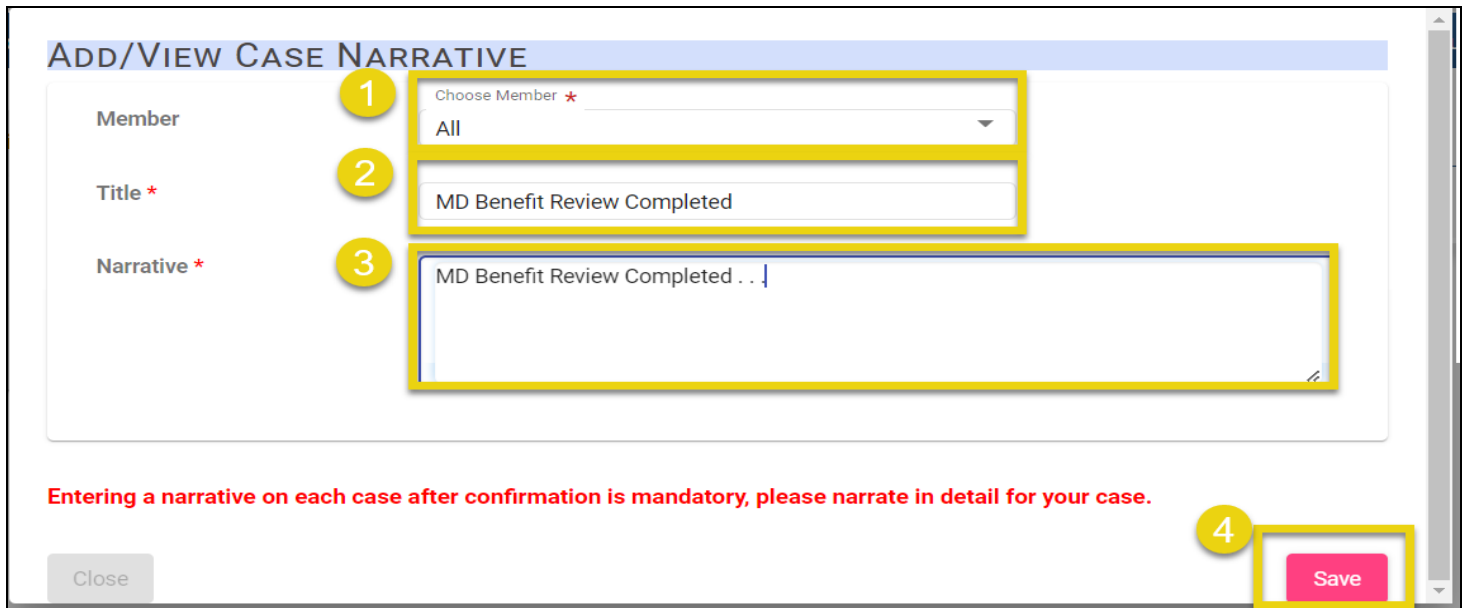
	Action	Program Name	Beneficiary Member	Benefit Month	Eligibility Status	Benefit Group	Benefit Amount	Minimum Supplement Amount	Benefit Start Date
	✓	SNAP		06-2022	Pass	SNAP	$ 459.00	$ 0.00	01/03/2022
	✓	Medicaid		06-2022	Pass	SSI Recipient	$ 0.00	$ 0.00	06/01/2005
	✓	Medicaid		06-2022	Denied	ABD Medically Needy	$ 0.00	$ 0.00	
	✓	SNAP		07-2022	Pass	SNAP	$ 459.00	$ 0.00	01/03/2022
	✓	Medicaid		07-2022	Pass	SSI Recipient	$ 0.00	$ 0.00	06/01/2005
	✓	Medicaid		07-2022	Denied	ABD Medically Needy	$ 0.00	$ 0.00	
	✓	SNAP		08-2022	Pass	SNAP	$ 459.00	$ 0.00	01/03/2022

ELIGIBILITY CONFIRMATION

HOH: Case ID: Programs: MA SNAP   Status: Open

☑ SNAP   ☑ Medicaid

Add Auth Rep

Back   Next

13. The **Confirmation** popup window will display. *Click* the **Yes** button to continue.

Are you sure that you want to confirm the benefits?

No   Yes

14. The **Add/View Case Narrative** screen will display. *Select* **Member (1)** from the dropdown menu. *Enter* the **Title (2)** and **Narrative (3)**, then *click* the **Save (4)** button.

ADD/VIEW CASE NARRATIVE

Member — (1) Choose Member *
All

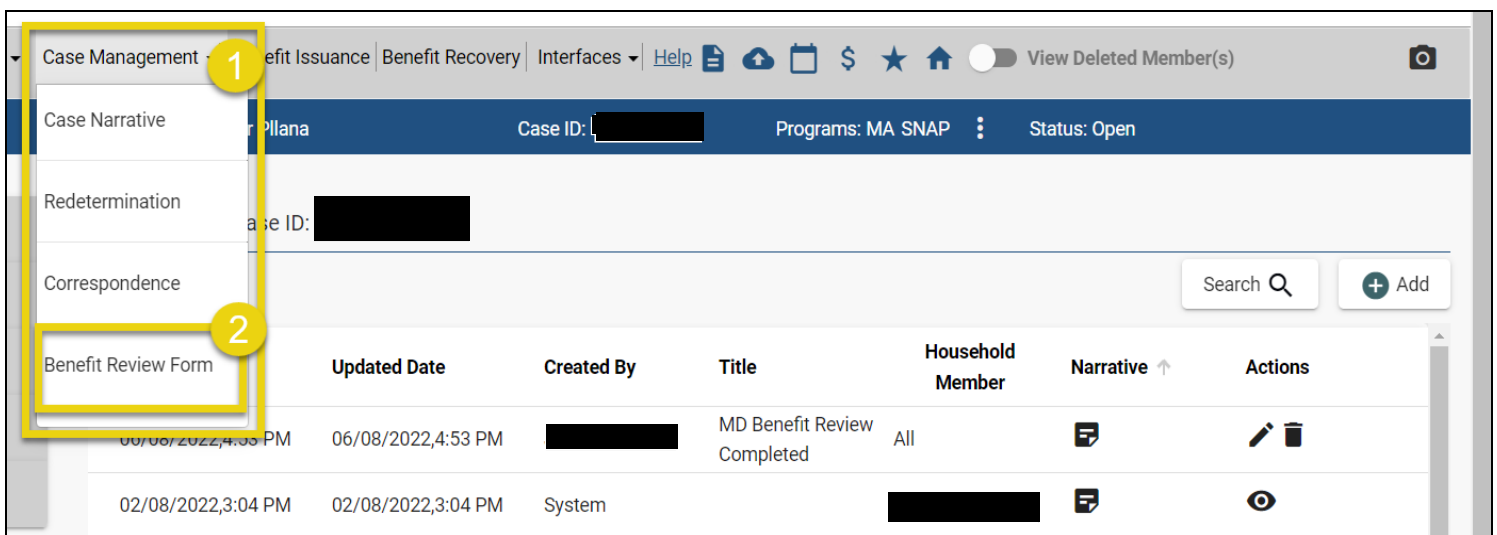**Title *** — (2) MD Benefit Review Completed

Narrative * — (3) MD Benefit Review Completed . . .

Entering a narrative on each case after confirmation is mandatory, please narrate in detail for your case.
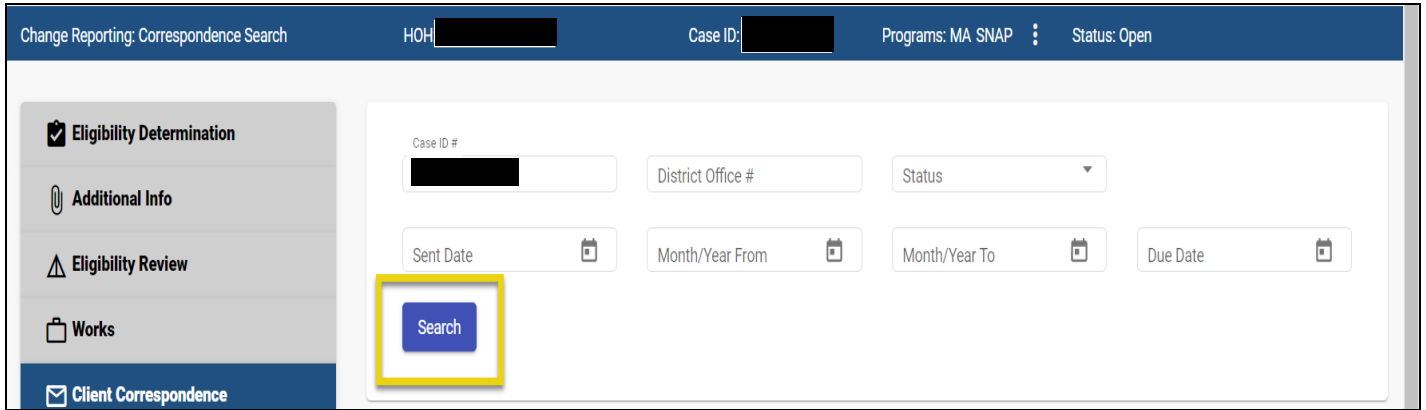
(4) Save

Close

15. The **Case Narrative List** screen will display. *Click* the **Case Management (1)** tab on the taskbar then *select* the **Benefit Review Form (2)** option.
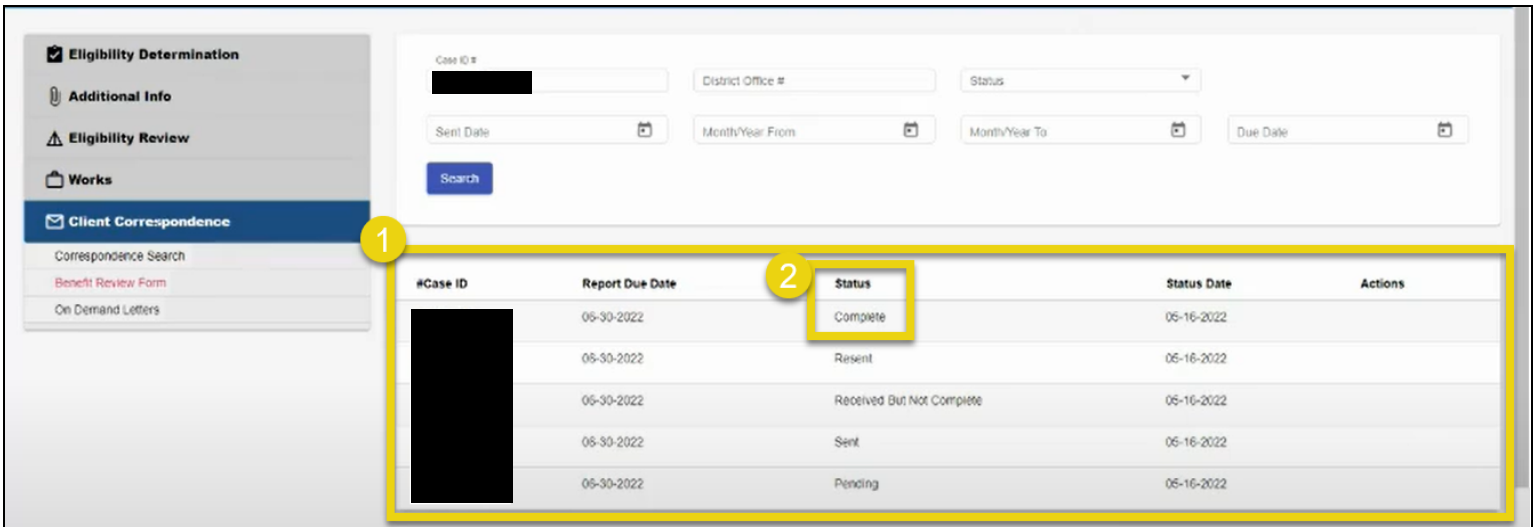

Case Management (1) | efit Issuance | Benefit Recovery | Interfaces ▾ | Help 📄 ☁ 🗓 $ ★ 🏠 ⬤ View Deleted Member(s) 📷

Case Narrative

Redetermination

Correspondence

(2) Benefit Review Form

Pllana Case ID: ▮ Programs: MA SNAP ⋮ Status: Open

ase ID: ▮

Search 🔍   ⊕ Add

Updated Date	Created By	Title	Household Member	Narrative ↑	Actions
06/08/2022,4:53 PM	06/08/2022,4:53 PM ▮	MD Benefit Review Completed	All	📝	✏ 🗑
02/08/2022,3:04 PM	02/08/2022,3:04 PM System	▮		📝	👁

16. The **Benefit Review** screen will display. *Click* the **Search** button

17. The **Benefit Review Form** will refresh displaying the **Search Results (1)** section. Note the **Status Complete (2)** for this MBR.

You have now completed the Maryland Benefits Review process.