

# BEC Reporting Updates

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# Agenda

1. Welcome

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2. NCOA Updates

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3. Reporting Changes

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4. Questions

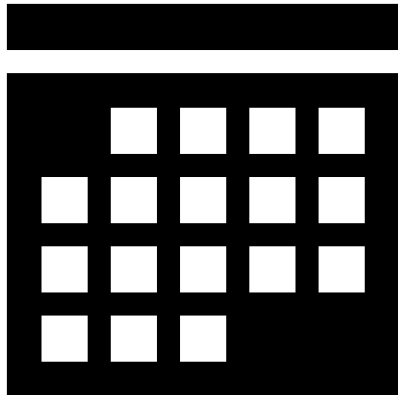
# NCOA Announcements



## Name and Email Change

- Center for Benefits Access (CBA) is changing its name to **Center for Economic Well-Being (CEW)**.
- As part of our recent name change, we are transitioning to a new email address. Please update your records and direct all future communications to [Center4EWB@ncoa.org](mailto:Center4EWB@ncoa.org).
- We'll continue monitoring the old address (centerforbenefits@ncoa.org) for the next 6 months to facilitate a seamless transition and to ensure you are still able to reach us without any interruption during this period. However, all future communications from the CEW team will come from our new address.

# NCOA Announcements



## Upcoming Deadlines

- **July 15:** For those who report performance data monthly, the June reports are due. For those who report performance data quarterly, the Q2 reports are due.
  - Any past-due reports are also due by this date.
  - Delayed reporting will impact the ability to implement changes to the reporting form.
- **July 31:** First interim financial reports are due.
  - Report expenditures from January 1 through June 30.
  - Budgets information has been populated. If you need to add a line item or reallocate between budget lines an amount greater than ten percent of the total sub-grant award, please contact us in advance.

# Reporting Changes

## January through June / Q1 through Q2

- Demographics:
  - Gender categories included Transgender.
  - *Household* income
- Objectives/Measures:
  - On 4/29, we announced you no longer needed to report on the objectives / measures you created as part of your application.

## July Onwards / Q3 Onwards

- Demographics:
  - New gender category: "Non-binary". There will be separate categories for Transgender (Yes/No).
  - *Individual* income
- Objectives/Measures:
  - All BECs report on one common measure: *# of clients with whom or on whose behalf you submit new enrollment or renewal applications in a minimum of one of the five core benefits.*

# Reporting Changes – Demographic Questions

## Changes to Gender and Transgender Categories

January through June / Q1 & Q2 Reports	July / Q3 Reports to End of Grant
Gender (Female) Gender (Male) Gender (Transgender) Gender (Other)	Gender (Female) Gender (Male) Gender (Non-binary) Gender (Other)  Transgender (Yes) Transgender (No)

- The change to the gender and transgender categories aligns with ACL's recent changes to the questions for MIPPA grantees in the STARS reporting system. These changes were informed by stakeholder feedback.

# Reporting Changes – Demographic Questions

## Changes to Income Categories

January through June / Q1 & Q2 Reports	July / Q3 Reports to End of Grant
Annual Household Income (<\$10,000)	Annual Individual Income (<\$10,000)
Annual Household Income (\$10,000-\$14,999)	Annual Individual Income (\$10,000-\$14,999)
Annual Household Income (\$15,000-\$19,999)	Annual Individual Income (\$15,000-\$19,999)
Annual Household Income (\$20,000-\$24,999)	Annual Individual Income (\$20,000-\$24,999)
Annual Household Income (\$25,000-\$29,999)	Annual Individual Income (\$25,000-\$29,999)
Annual Household Income (\$30,000 or more)	Annual Individual Income (\$30,000 or more)

- Note the dollar amounts of the categories remain the same.
- The change to asking about clients' *individual* income aligns with existing questions for MIPPA grantees in the STARS reporting system. This also allows us to have a better view of the financial situations of clients the program is serving.

# Reporting Changes – Objectives/Measures

## 1 Common Objectives for All BECs

- On 4/29, we announced BECs no longer needed to report the measures from their applications.
- Instead, we will ask all BECs to report on one common measure:
  - *# of clients with whom or on whose behalf you submit new enrollment or renewal applications in a minimum of one of the five core benefits.*
- How does this differ from “Number of Clients Assisted” in the report?
  - Per previous guidance, for this grant cycle, NCOA said BECs could count clients assisted with any benefit application (subject to exceptions outlined in the guidance) even if they were not assisted with a core benefit. That is not changing.
  - The common measure is a separate question about the *subset* of clients assisted with at least one core benefit. It does not impact other questions and guidance (e.g., clients must still be Medicare-eligible beneficiaries).



# Reporting Changes – Objectives/Measures

## Example:

Client ID	App ID	Benefit	Core? (T/F)	Submitted?
1	101	CSFP	F	T
2	102	Medicaid	T	T
2	103	LIHEAP	T	T
3	104	TANF	F	T
3	105	MSP	T	T
3	106	Section 8	F	F

Assume the table was already filtered for eligible clients (e.g., Medicare-eligible beneficiaries) and benefits.

- Number of clients assisted with submitting applications?
- Number of applications submitted?
- Number of core applications submitted?
- Number of clients with whom or on whose behalf you submit new enrollment or renewal applications in a minimum of one of the five core benefits?

# Reporting Changes – Objectives/Measures

## Example:

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2	103	LIHEAP	T	T
3	104	TANF	F	T
3	105	MSP	T	T
3	106	Section 8	F	F

Assume the table was already filtered for eligible clients (e.g., Medicare-eligible beneficiaries) and benefits.

- Number of clients assisted with submitting applications? **n=3 (1, 2, 3)**
- Number of applications submitted? **n=5 (101, 102, 103, 104, 105)**
- Number of core applications submitted? **n=3 (102, 103, 105)**
- Number of clients with whom or on whose behalf you submit new enrollment or renewal applications in a minimum of one of the five core benefits? **n=2 (2, 3)**

# Reporting Changes – Objectives/Measures

## Implementation

- In the July / Q3 reports (due August 15), there will be two questions:
  - What is the value for this period for # of clients with whom or on whose behalf you submit new enrollment or renewal applications in a minimum of one of the five core benefits?
  - What was the total value for the prior 6 months (January 1 through June 30) for # of clients with whom or on whose behalf you submit new enrollment or renewal applications in a minimum of one of the five core benefits?
- For future reports, we only need an update on the value for that reporting month/quarter.
- In the WizeHive portal, there will be a location to view the total reported value for the grant cycle.

# Questions

