

APPENDIX B

RSDI/SSI INCREASES 2005

In January 2005, SSI and RSDI recipients received a cost-of-living increase of 2.7%. The new maximum payment levels for SSI are:

Single - \$579 Couple - \$869

The Medicare premium amount is \$78.20.

A. THE RSDI/SSI COLA UPDATE PROCESS

An automatic Cost of Living (COLA) update will occur on 1/28/05 for most Assistance Groups (AGs) in RAPIDS that have RSDI and/or SSI entered on AFUI. Two basic standards must be met in order for the update to occur. First, the Social Security Number (SSN) in RAPIDS must match the SSN in the Social Security Administration file. Second, the individual's RSDI and/or SSI income must have been entered on AFUI in RAPIDS. The automatic update will not occur if the RSDI and/or SSI income was never entered on AFUI, or if it was entered, but was end-dated prior to March 2005. Also, the automatic update will not occur if the begin date for RSDI and/or SSI income on AFUI is later than February 2005. The automatic update is effective March 2005.

For QMB, SLIMB, and QI AG's, functionality on AFUI will enhance the success of the COLA Mass Change by preventing the inappropriate closure and denial of these AG's during the months of January, February and March. When any form of Social Security income (RSDI) is entered on AFUI with an Effective MMY of January, February, or March, RAPIDS will enter a COLA disregard amount on that version of the screen using a calculation based on the percentage of the COLA increase, unless a "COLA Disregard Amount" other than zero is also being entered. For procedures regarding Pickle AG's see Section B,5.

Food Stamp and WV WORKS AGs which become ineligible because of the update will be closed. The appropriate notice will be mailed. For MA AGs, the income will be updated and the MA AG will pass or fail accordingly. Workers must evaluate cases with MA AGs that fail. These cases appear on report WRMC182A "Assistance Groups Affected by Mass Change" which is described in item B,3.

B. REPORTS AND WORKER ACTION

Reports identifying individuals who have been affected by the COLA update will be available on MOBIUS for each Worker on January 31, 2005. Manual updates must be completed by the February deadline, effective March, 2005.

The Case Maintenance Process

1. Report WRMC202A RSDI/SSI/Medicare COLA Match Report:

This report lists all individuals who have RSDI and/or SSI income entered on AFUI. This report describes the result of the match between these individuals in RAPIDS and those on the COLA tape from the Social Security Administration (SSA). Individuals, rather than cases, appear on this printout. Individuals are listed in alphabetical order by caseload. For each individual the Worker will see the following: Case Number, SSN, Name of Individual, SSA Amount, Part B Amount and Match Result. Some of these columns such as Case Number, SSN and Name of Individual are self explanatory. The column for Black Lung will display the amount passed to us by the SSA file with the COLA income information. It should be used as a lead and not verification of current income. The Railroad Indicator simply indicates if the individual might be a Railroad Retirement Beneficiary. This is intended to be a lead only. The columns that require explanation are listed below:

- SSA Amount

This column is divided into two additional columns. The first column is the income received from SSA as found in RAPIDS (amount prior to the COLA increase). The second column is the income from SSA as found on the tape sent by the Social Security Administration (amount after the COLA increase). It may be either RSDI or SSI. If an individual is receiving both RSDI and SSI, there will be a separate entry for each type of unearned income.

- Part B Amount

This is the Part B Medicare premium. This column is divided into two additional columns. The first column is the Medicare premium found in RAPIDS (the amount prior to the premium increase). The second column is the Medicare premium found on the tape sent by the Social Security Administration (amount after premium increase).

- Black Lung (BLK-Lung)

The Black Lung Code displayed is as follows:

| | | |
|-------|---|---------------------------|
| E | - | Entitled first month paid |
| N | - | Non-payment status |
| P | - | Entitlement Pending |
| T | - | Terminated |
| D | - | Deceased |
| Blank | - | No data received |

The Black Lung amount will be the amount provided by SSA.

The Case Maintenance Process

- Railroad Code (RR)

This will be a Y (yes) or N (no) display only.

- Match Result

This is the result of the match between the information in RAPIDS prior to the COLA updates and the information on the COLA update tape sent by the Social Security Administration.

The Worker may see multiple entries on this printout for the same individual. The Worker must carefully review each entry for the individual. A variety of situations will result in multiple entries.

Examples of Match Result messages are:

- If the customer receives both RSDI and SSI, and each benefit was updated successfully, the Worker will see the individual name on the printout twice with the match result "Record Successfully Updated". It appears once with the match result for the RSDI update and again with the match result for the SSI update. There are no indicators to identify which entry is for RSDI and which is for SSI. The Worker will see the "Record Successfully Updated" Match Result even if the update results in a Zero (\$0.00) amount. For example, the customer receives RSDI and SSI. After the RSDI is updated, he is no longer eligible for SSI. The match result will indicate that the SSI was successfully updated, even though it was updated to zero (\$0.00). This is because RAPIDS is updating the SSI amount previously found on AFUI with the current zero (\$0.00) amount.
- If the customer receives more than one type of RSDI, the Social Security Administration will combine all amounts. The RSDI amount appearing on the COLA tape and the Match Report is the total of all combined updated amounts for that individual. However, RAPIDS identifies each specific type of RSDI separately. Because the amount on the COLA tape is a combined amount and the amount in RAPIDS is specific to each type of RSDI received, it is not possible for an automatic update to occur on these cases. The Worker must manually update each RSDI amount. The Match Result for this situation is "Multiple Records For a Type".

If the individual receives SSI, in addition to multiple types of RSDI, the SSI amount will be automatically updated even though the RSDI amounts are not.

The Case Maintenance Process

- If there is an RSDI and/or SSI amount in RAPIDS, but the COLA shows zero (\$0.00) RSDI/SSI amount, the Worker will see two entries for the individual on the Match Report. The match result for the first entry is "COLA Shows Zero RSDI/SSI Amount". The Worker will see either RSDI amount zero or SSI amount zero, whichever is appropriate. The match result for the second entry is "Record Successfully Updated". These entries mean the RSDI/SSI amount has been updated to zero (\$0.00) in RAPIDS.
- If the RSDI is garnished, the amount will not be updated. The match result is "RSDI Not Updated Due to Garnishment". A Mass Change report will provide the new RSDI gross amount and the amount of the garnishment.
- If the automatic update resulted in an update of Medicare information, the Worker will see two entries for an individual. The match result for the premium update is "Record Successfully Updated". A separate match result will appear for the information which was updated.
- If there is a Medicare premium amount other than zero on AFMD and no Medicare amount on the COLA tape, the Worker will see one entry for the individual on the Match Report. The match result for the entry is "Person is Not Part B Entitled". To prevent possible disruption of Buy-In, the Medicare information on AFMD will not be updated. Workers must determine if a change in the Medicare information is actually needed.
- If there is a Medicare premium amount of zero on AFMD and the COLA tape shows the individual is eligible for Medicare, the match result for the first entry is "Person is Part B Entitled". The match result for the second entry is "Record Successfully Updated".
- If the Medicare **Payer** is 510 on AFMD and Self on the COLA tape, to prevent disruption of the Buy-In process, the **payer** will not be updated on AFMD. The match result displayed "No COLA Record Has **Payer** As Self". **Otherwise, the payer will be updated and the match result for the payer update is "Updated Part B Payer".**

The Case Maintenance Process

- When the RSDI/SSI/Medicare premium amount(s) in RAPIDS reflects the same amount as listed on the COLA tape, and the begin MMY in RAPIDS is prior to March **2005**, the match result will be "Record Successfully Updated". When this occurs, the Worker will see the same amount(s) listed in both the SSA and RAPIDS columns. When this occurs no action is necessary.
- The match result "No COLA Record Found for RSDI" and "No COLA Record Found For SSI" means that benefit information was not found for this individual on the Social Security Administration's tape for this RAPIDS SSN. When trying to resolve this match result, first check to **insure** the **client's** Social Security Number is correct. If the SSN is correct, **the client** may be receiving SSA benefits **based on another person's SSN**. Check DXSA.
- Entries in the match results column other than those shown above may require explanation. A guide that contains explanations of the commonly found match result notations is found in item C below.

2. Report WRMC192A - Mass Change Exception Listing

This report lists the cases on which no COLA update occurred. The column titled "Exception Description" contains information about why the update did not occur. Cases with manual overrides and pending cases appear on the report. If no exception description is included, then the reason ED/BC did not run was not one of the two listed above. This will include the category and sequence code for each AG. **CASES APPEARING ON THIS REPORT REQUIRE A CASE-BY-CASE EVALUATION.** Those which did not update due to pending status will not appear on the COLA Match Report and will require independent verification of income.

3. Report WRMC182A - Assistance Groups Affected by Mass Change

This report contains detailed information about AGs on which a mass change COLA update occurred and on which ED/BC was successfully run. This printout contains information by case, rather than by individual. Most of the columns are self-explanatory. The column titled "Action Indicator" includes one of the following: INC (Increase), DEC (Decrease) and CLO (Closure). If the column is blank, no change in benefits occurred.

NOTE: A special report is provided to the Long Term Care Unit to notify them of changes in nursing home contributions due to the COLA Mass Change. Duplicate notification of these changes to the LTC Unit is not required.

4. Report WRMC 182U - Assistance Groups Pending After Mass Change

This report contains detailed information about all AGs which are in pending status after the COLA Mass Change. Note that these AGs would have been pending some sort of verification before the Mass Change as well. Prior to September, 2000, these AGs appeared only on the AGs Affected By Mass Change (WRMC 182A) Report. Since AGs in Pending status cannot be confirmed, and therefore there is no history, the impression given was that even though the AG was on the 'Affected' list, it was not actually processed by Mass Change. Since Mass Change functionality sends only the previously confirmed SFU through the EDBC process, if there is no previously confirmed SFU, the AG will disappear from AGECEC. Running SFED will bring it back in pending status.

5. Report WRMC 212A - Individuals Changed from State Payor to Self

RAPIDS will not update AFMD from State Payor (510) to Self. The Worker must evaluate each AG to determine if a change is required.

6. Report WRMC 203 A - RSDI Garnishment Report

This report lists the individuals who have garnishments applied to RSDI. It lists the gross RSDI and the amount of the garnishment.

7. Report WRMC 205 A - Income on COLA File with No Corresponding AFUI

This report lists the individuals who have either RSDI or SSI on the COLA file and have no current corresponding AFUI screen for that type of unearned income.

8. Pickle Assistance Groups (MP W)

Although the automated determination of the COLA Disregard Amount will prevent the inappropriate closure of QMB, SLIMB and QI AG's, it will cause the inappropriate closure of Pickle (MP W) AG's. The system will replace the current COLA disregard amount on AFUI for Pickle AG's with an amount based on the current RSDI COLA percentage increase. These require manual intervention by the Worker. Workers will receive a report listing all cases with affected Pickle AG's. This report is not on MOBIUS. Worker action required for affected Pickle AG's is:

The Case Maintenance Process

- Tran to AFUI showing RSDI for the affected individual using a future date parm such as 121212.
- Note the current COLA disregard amount.
- PF8 to the next screen. This should display the COLA disregard amount which previously allowed the AG to pass.
- Add the two COLA disregard amounts together and enter the total on the current AFUI screen for RSDI.
- Run SFED. Check the benefits for correctness, then confirm.
- Suppress any inappropriate notices.

C. COMMONLY FOUND MATCH RESULTS

| MATCH RESULT | DEFINITION |
|-------------------------------|--|
| COLA SHOWS ZERO RSDI AMOUNT | This individual exists in RAPIDS with an RSDI amount that is greater than zero, but the same individual exists on the COLA file with a zero RSDI amount. |
| COLA SHOWS ZERO SSI AMOUNT | This individual exists in RAPIDS with an SSI amount that is greater than zero, but the same individual exists on the COLA file with a zero SSI amount. |
| FUTURE BEGIN DATE - NO UPDATE | This individual's income in RAPIDS has a begin date for RSDI or SSI of later than February 2005 . No update occurs in this situation. |
| MANUAL OVERRIDE | An overridden AG is open and ongoing. Mass Change will not run on this case. NOTE: If an AG was overridden to fail for the ongoing month, the case will still run in a mass change. |

The Case Maintenance Process

| MATCH RESULT | DEFINITION |
|--------------------------------------|--|
| MULTIPLE RECORDS FOR A TYPE | This individual is receiving multiple types of RSDI according to RAPIDS, and the COLA file only shows one amount. No update occurs with this match result. |
| NO COLA RECORD FOR RSDI | This individual exists in RAPIDS, but was not found on the COLA file. |
| PENDING CASE | This case is pending in RAPIDS, and therefore no updates will occur. |
| PERSON IS NOT PART B ENTITLED | This individual has a Medicare, Part B, premium amount greater than zero on AFMD, and the COLA file shows that the individual has a zero amount. No update occurs. |
| UPDATED PART B PAYER | The Payer on AFMD in RAPIDS differed from the Payer found on the COLA tape. The Payer on the COLA file is not Self. An update occurs with this match. |
| COLA RECORD HAS PAYER AS SELF | The Payer on AFMD in RAPIDS was 510 (Buy In). The Payer found on the COLA tape was Self. An update does not occur with this match. |
| RECORD SUCCESSFULLY UPDATED | The RAPIDS amount listed was updated with the SSA amount listed. |
| RSDI NOT UNDATED DUE TO GARNISHMENT | The COLA tape indicates a garnishment is applied to the RSDI. |