

APPENDIX B

RSDI/SSI INCREASES 2007

In January 2007, SSI and RSDI recipients received a cost-of-living increase of 3.3%. The new maximum payment levels for SSI are:

Single - \$623 Couple - \$934

The Medicare premium amount is \$93.50.

A. THE RSDI/SSI COLA UPDATE PROCESS

The annual Cost of Living (COLA) Mass Change will occur on 1/26/07 for most Assistance Groups (AGs) in RAPIDS that have RSDI and/or SSI entered on AFUI or Medicare enrollment listed on AFMD. Reports which identify individuals affected by the COLA update will be available on MOBIUS for each Worker on January 29, 2007. Manual updates must be completed by the February deadline, effective March 2007. Advance notice requirements apply.

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 not entered on AFUI, or if it was entered, but was end-dated prior to March 2007. Also, the automatic update will not occur if the begin date for RSDI and/or SSI income on AFUI is later than February 2007. The automatic update is effective March 2007.

NOTE: The automatic update will not occur if the case is due for review. If the case is not due for review, but an AG is due for a PR review, the automatic update of income and Medicare information will occur, but eligibility will not be run. This will avoid closure before the client has the opportunity to complete the PR review. Eligibility must be run to apply the updated income. Two new messages on the WRMC192A – Mass Change Exception Listing identify cases skipped when an AG is due for a review by PR:

- PR Review Due (Case has a Review Date); and
- PR Review Due (Case Has No Review Date):

For QMB, SLIMB, and QI AG's, functionality on AFUI prevents the inappropriate closure and denial of these AG's **due to the COLA increase**. RAPIDS will enter a COLA disregard amount on the AFUI screen **for Social Security income (RSDI)** using a calculation based on the percentage of the COLA increase, unless a "COLA Disregard Amount" other than zero is entered manually. For procedures regarding Pickle AG's see **item B,9**.

Any benefit AG's which become ineligible because of the update will be closed **effective March 2007**. The appropriate notice will be mailed. Workers must evaluate Medicaid **AG's** that fail **for all other coverage groups**. These AG's appear on report WRMC182A "Assistance Groups Affected by Mass Change" which is described in item B,3.

If the current benefit is not confirmed, and there is no previously confirmed passing benefit for the AG, the individual's information will not be updated and the case will be skipped by Mass Change. **These AG's are shown on the WRMC182U report**.

When the SSA file indicates the customer is receiving RSDI or SSI and the amount is zero, the information in RAPIDS will not be updated. **A zero amount may not** be accurate by the time of the COLA Mass Change. **An** error message will display this information on the COLA Match Report. Use SOLQ to determine the actual SSA benefit amount.

COLA Mass Change Report, the WRMC 206A COLA Match Report – Match Result, will be produced. This report contains the same information as the WRMC202A RSDI/SSI/Medicare COLA Match Report – Last Name. On the 206A, the individuals within a Worker's caseload are sorted by match result message. On the 202A, the individuals within a Worker's caseload are sorted by last name. **By using the 206A, Workers can identify particular match results which require immediate attention**.

Another new Mass Change report, WRMC216A - Post Mass Change Participation Status Report, identifies individuals whose participation status changed as a result of the Mass Change. Workers must determine if the change is valid. **An example of a valid change is an ABAWD with a new 36-month tracking period**.

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 29, 2007**. Manual updates must be completed by the February deadline, effective March, **2007**.

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1. Report WRMC202A: RSDI/SSI/Medicare COLA Match Report – Last Name and Report WRMC206A: RSDI/SSI/Medicare COLA Match – Match Result

These reports list all individuals who have RSDI and/or SSI income entered on AFUI and Medicare information on AFMD. The reports describe 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 the reports. Individuals are listed in alphabetical order by caseload. **Report WRMC206A is sorted by match result.** For each individual, the Worker will see the following: Case Number, SSN, Name of Individual, SSA Amount, Medicare Part B Amount and Match Result. Some of these columns are self-explanatory, but 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 Medicare Part B 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).

- 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.

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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". This message 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.
- If the SSA file indicates the RSDI and/or the SSI amount is zero, the match result will indicate that the AFUI screen was not updated. The match result displayed will be either "Record Not Updated - \$0 RSDI Amount" or "Record Not Updated - \$0 SSI Amount". This is because the amounts of these benefits are rarely this amount by the time of the COLA Mass Change. Use SOLQ to determine the current amount of the RSDI and/or SSI.
- 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.

- 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

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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".
- When the RSDI/SSI/Medicare premium amount(s) in RAPIDS reflects the same amount as listed on the COLA tape, and the begin date in RAPIDS is prior to March **2007**, 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 SSN, even though RSDI and/or SSI was entered by the Worker on AFUI. 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

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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 AG's with RSDI and/or SSI on AFUI, but for which no COLA update occurred. The column titled "Exception Description" contains information about why the update did not occur. AG's with manual overrides and pending cases appear on the report. If no exception description is included, the reason ED/BC did not run was not one of the two listed above. This includes the category and sequence code for each AG. AG's appearing on this report require a case-by-case evaluation. Those which did not update due to pending status do not appear on the COLA Match Report and 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 AG's would have been in pending status before the Mass Change as well. Mass Change functionality sends only the previously-confirmed AG through the ED/BC process. **When a case contains an AG with no previous confirmations, the case is skipped by Mass Change.**

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.

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6. Report WRMC 203 A - RSDI Garnishment Report

This report lists the individuals who have garnishments applied to RSDI and, as a result, the RSDI has not been updated. 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 income.

8. WRMC 216A - Post Mass Change Participation Status Report

This report identifies individuals whose participation status changed as a result of the mass change. The report is sorted by case Worker and lists the case number, PIN, caseload, name, current participation status after the mass change and the category. Workers must determine if the change is valid. **An example of a valid change is an ABAWD with a new 36-month tracking period.**

9. Pickle Assistance Groups (MP W)

Although the automated determination of the COLA Disregard Amount for RSDI on AFUI will prevent the inappropriate closure of QMB, SLIMB and QI AG's, it will not prevent 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 AG's appear on the WRMC182A – Assistance Groups Affected by Mass Change report with the notation CLO to indicate AG closure.** These failed AG's require manual correction by the Worker. **As an added check, designated Supervisors will receive a GroupWise message listing all affected Pickle AG's at a later date.** Worker action required for affected Pickle AG's is:

- 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 previous COLA disregard amount.

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- Add the two COLA disregard amounts together and enter the total on the current AFUI screen for RSDI as the COLA disregard amount.
- Run SFED. Check the benefits for correctness, then confirm.
- Suppress any inappropriate notices.

C. COMMONLY FOUND MATCH RESULTS

The chart below shows the commonly found results of the match between RAPIDS information prior to the COLA updates and the information from the SSA COLA update file.

MATCH RESULT	DEFINITION
RECORD NOT UPDATED – \$0 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. Check SOLQ.
RECORD NOT UPDATED – \$0 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. Check SOLQ.
FUTURE BEGIN DATE – NO UPDATE	This individual's income in RAPIDS has a begin date for RSDI or SSI of later than February. No update occurs in this situation.
MANUAL OVERRIDE	An AG containing an override 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.
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. Check SOLQ.

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NO COLA RECORD FOR RSDI	This individual exists in RAPIDS, but was not found on the COLA file. Check SOLQ
PENDING CASE	This case is pending in RAPIDS, and therefore no update occurs .
CASE HAS PENDING AG	There is an unconfirmed AG with no previously open confirmed AG. The case is skipped. No AFUI or AFMD updates 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. An update does not occur. Check SOLQ.