

APPENDIX B

RSDI/SSI INCREASES 2008

In January 2008, SSI and RSDI recipients received a cost-of-living increase of 2.3%. The new maximum payment levels for SSI are:

Single - \$637 Couple - \$956

The Medicare premium amount is \$96.40.

A. THE RSDI/SSI COLA UPDATE PROCESS

The annual Cost of Living (COLA) Mass Change occurred January 25, 2008 for most Assistance Groups (AGs) in RAPIDS that have RSDI and/or SSI entered on AFUI or Medicare enrollment on AFMD. Reports which identify individuals affected by the COLA update became available on MOBIUS January 28, 2008. Manual updates must be completed by February deadline, effective March 2008. Advance notice requirements apply.

For the automatic update to occur, the Social Security Number (SSN) in RAPIDS must match the SSN in the Social Security Administration file. In addition, the individual's RSDI and/or SSI income must have been entered on AFUI in RAPIDS. The automatic update is effective March 2008.

The automatic update does not occur if the income was entered, but end-dated prior to March 2008. It also does not occur if the begin date for RSDI and/or SSI income on AFUI is later than February 2008.

NOTE: The automatic update does not occur if the case is due for review. If the AG is due for a PR review, the automatic update of income and Medicare information does occur, but eligibility is not run. This prevents closure before the client has an opportunity to complete the PR review. Eligibility must be run to apply the updated income.

Two messages on the WRMC192A – Mass Change Exception Listing identify cases skipped when an AG is due for a review by PR and include:

- 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 **uses the begin MM/YY of AFUI to determine whether to 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 AG which **becomes** ineligible **for a benefit** because of the update will **not receive that benefit after February 2008**. The appropriate notice **is** mailed. Workers must evaluate Medicaid AG's that fail for all other coverage groups. These AG's appear on 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 **is** not updated and the case **is** skipped by Mass Change. These AG's are shown on WRMC182U – **Mass Changes Pending AG Listing**.

When the SSA file indicates the customer is receiving RSDI or SSI and the amount is zero, the information in RAPIDS **is** not updated. **This** amount may not be accurate by the time of the COLA Mass Change **and an** error message **displays** this information on the COLA Match Report. **The** actual SSA benefit amount **can be determined on SOLQ**.

The WRMC 206A COLA Match Report – Match Result, 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.

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 **who enters** a new 36-month tracking period **and is added to an ongoing Food Stamp AG**.

B. REPORTS AND WORKER ACTION

Reports identifying individuals who have been affected by the COLA update **became** available on MOBIUS **January 28, 2008**. Manual updates must be completed by February deadline, effective March **2008**.

The Case Maintenance Process

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 **sees** 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 **is** 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 **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 **sees** 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 **indicates** that the AFUI screen was not updated. The match result displayed **is** 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 **combines** 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 **is** automatically updated even though the RSDI amounts are not.

- If the RSDI is garnished, the amount **is** not updated. The match result is RSDI Not Updated Due to Garnishment. A Mass Change report **provides** the new RSDI gross amount and the amount of the garnishment.
- If the automatic update resulted in an update of Medicare information, the Worker **sees** two entries for an individual. The match result for the premium update is Record

The Case Maintenance Process

Successfully Updated. A separate match result **appears** for **updated** information. **Only the Medicare Part B premium information is updated by the COLA Mass Change.**

- If there is a Medicare premium amount other than zero on AFMD and no Medicare amount on the COLA tape, one entry for the individual **is** on the Match Report. The match result is Person is Not Part B Entitled. To prevent possible disruption of Buy-In, the Medicare information on AFMD **is** not updated. Workers must determine if a change in the Medicare information is 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 **is** not updated on AFMD. The match result displayed **is** COLA Record Has Payer As Self. Otherwise, the payer **is** 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 **2008**, the match result **is** Record Successfully Updated. When this occurs, the same amount(s) listed in both the SSA and RAPIDS columns **is seen** and no action is necessary.
- The match result NO COLA Found for RSDI and No COLA Found For SSI **indicates no** benefit information was found for this **individual's SSN** on the Social Security Administration's tape, even though RSDI and/or SSI was entered by the Worker on AFUI. **If the client's Social Security Number is correct, DXSA must be checked to see if SSA benefits received are based on another person's SSN.**

- **Other entries** in the match results column may require explanation. A guide of 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, **that were skipped in the eligibility run of mass change.** 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 **and** require 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 **notify** the Long Term Care Unit of changes in nursing home contributions due to the COLA Mass Change.

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

This report contains detailed information about all AGs which **were** in pending status **before** the COLA Mass Change **and remain pending.** 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 **Payer** to Self

This report was discontinued. If AFMD indicates the State is paying the premium, the message, COLA Record has Payer as Self, is displayed on the COLA Match Report.

The Case Maintenance Process

NO COLA 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.