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Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2005-2
January 21, 2005

To: Transitional Assistance Office Staff

From:  Cescia Derderian, Assistant Commissioner for Field Operations

Re: 2005 Social Security/SSI COLA Update for TAFDC, EA, EAEDC and the Food Stamp Program

Overview

Effective January 2005, Social Security benefits and SSI payments increased by 2.7 percent. The base level Medicare Part B premium increased from \$66.60 to \$78.20. The Medicare Part B penalty premium also increased, as identified in the 2005 Medicare Part B Surcharge Premiums chart (see Attachment A).

This Field Operations memo:

- explains how BEACON updated APs with the 2005 Social Security/SSI COLA amounts and recalculated eligibility for the active AUs containing the updated APs;
Note: The weekend dates for the COLA update and recalculations given in Field Operations Memo 2004-45 have been changed by MIS. Those dates should be disregarded. The new dates appear in this memo.
 - explains which AUs listed on the “Clients With RSDI and/or SSI” View require AU Manager action;
 - informs TAO staff about a report which may also be used to update AUs with discrepant 2005 Social Security/SSI COLA amounts; and
 - gives procedures for AU Managers to update AUs with discrepant 2005 Social Security/SSI COLA amounts.
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**BEACON
Actions**

The January Social Security amounts and SSI amounts on BEACON were automatically processed using the following methods:

BEACON will *update* Social Security and SSI amounts on all active, pending, ineligible, denied and closed APs in TAFDC, EAEDC, EA, PA and NPA Food Stamp AUs with Social Security or SSI income and Medicare Part B premiums (including the surcharge premium, where applicable) over the weekend of **1/22/05** for all AUs.

AU's whose grantee's SSNs ends in 0 or 1 will have benefits *recalculated* on **1/25/05**.

AU's whose grantee's SSNs ends in 2 - 9 will have benefits *recalculated* over the weekend of **1/29/05**.

The "Verified With" value of "Electronically validated by SSA/SDX or BENDEX" was added for all successful updates. The updated amount is displayed on the Income Tab of the Other Income Status window. BEACON also updated the date of death on the Assessed Person window and disability information on the Disability window in the above categories.

For Discrepant Social Security Amounts: If the Social Security amount displayed on the Income Tab of the Other Income Status window was greater than the BENDEX amount or the BENDEX amount was not available, the batch job multiplied the current Social Security amount on BEACON by 2.7 percent and the "Verified With" value of "Calculated by BEACON COLA" was added.

For Discrepant SSI Amounts: If the SSI amount displayed on the Income Tab of the Other Income Status window was greater than the SDX amount or the SDX amount was not available, the current SSI amount on BEACON was not updated.

BEACON will *recalculate* eligibility for all active and ineligible APs in active TAFDC, EAEDC, EA, PA and NPA Food Stamp AUs with Social Security or SSI income, and Medicare Part B premiums (including the surcharge premium, where applicable) on **1/25/05** for AUs whose grantee's SSN ends in 0 or 1. AU's whose grantee's SSNs ends in 2 - 9 will be recalculated over the weekend of **1/29/05**.

Note: SDX and BENDEX Batch Jobs will resume their normal runs on 2/7/05.

For all active AUs with active or ineligible APs, an EBC Results Request was created with the "Pend Period" waived. These requests were released immediately. This update may have resulted in adjusted February food stamp benefits, a grant change or AU closing effective for the first benefit cycle in February.

Note: Some FS AU benefits were not changed due to TBA or Universal Semiannual Reporting processing.

**BEACON
Actions
(Continued)**

The standard income change notices were sent. These notices can be viewed on the Document History Tab.

Note: SSI and RSDI changes for APs in AUs whose grantee's SSN ends in 2 – 9 will appear on the Interview Wrapup Selection window between **1/31** and **2/08**. Do not select the changed SSI/RSDI amount if the intended effective date of the benefit change is prior to February.

**“Clients With
RSDI and/or SSI”
View**

The “Clients With RSDI and/or SSI” View gives AU Managers information for all active AUs with an inactive or ineligible AP who receives Social Security and/or SSI income. The sorting function of this View enables the user to determine which APs:

- were updated by the COLA;
- have RSDI/SSI amounts that were recalculated by BEACON; and
- have RSDI/SSI amounts that were not updated.

All AUs listed with a date of **2005/01/24** or earlier in the “Entered” field have discrepant SSI data that require AU Manager action as described on page 4 of this memo.

**“SSA
Discrepancy
Summary”
Report**

A report has been developed and will be run the week of **1/17/05**, listing APs for which BEACON has SSI and/or RSDI income whose income was not updated by the COLA files. The report is found on Actuate under the “Matches-Managers Supervisors” document. Once in this document, click on the “COLA” document to access the report

The report will be sorted by AU Manager within the TAO and will list the following:

Program Type, AU Name, AU SSN, AP Name, AP SSN, Old SSI Amount, New SSI Amount, Old RSDI Amount, New RSDI Amount, New RSDI Amount Calculation Indicator, Claim Number and FS Household size.

**AUs Requiring
AU Manager
Actions**

To identify APs with discrepant Social Security and/or SSI data that require AU Manager action, the AU Manager must either use the “Clients with RSDI and/or SSI” View or the “SSA Discrepancy Summary” Report.

If using the “Clients with RSDI and/or SSI” View, AU Managers must:

- sort the APs by “Entered” date on the “Clients with RSDI and/or SSI” View by clicking on “Entered”:
 - all APs whose Type is “RSDI” (Social Security), whose “Verified With” is “Calculated by BEACON COLA” and whose “Entered” date is **2005/01/24** or earlier must be reviewed by the AU Manager;
 - all APs whose Type is “SSI” and whose “Entered” date is **2005/01/24** or earlier must be reviewed by the AU Manager;
- compare the Social Security and/or SSI amount(s) on BEACON with the appropriate BENDEX (Social Security) or SDX (SSI) Inquiry Screens on the FMCS: BA option;
- if the BENDEX amount and the BEACON amount differ, access the SVES on-line individual inquiry system to verify the most updated Social Security/SSI income information available from Social Security which appears on the “S” screen of the BA option of the mainframe. Refer to *Systems User’s Guide, Volume 5: Subsystems*, Chapter VI for more information;
Note: To assist the AU Manager in resolving discrepant Social Security and/or SSI data, an automatic request for verification has been sent to SSA for all APs that were not updated by COLA and will be displayed on the SVES Overnight system on BA.
- the correct information from the BA option of the mainframe must now be entered on the Income Tab of the Other Income Status window on BEACON; and
- complete the Interview Wrap-Up section.

Note: When entering Social Security/SSI income, be sure to select the appropriate recipient from the Member List to safeguard against future discrepancies.

**AUs Requiring
AU Manager
Actions
(continued)**

If using the “SSA Discrepancy Summary” Report, AU Managers must:

- access the SVES on-line individual inquiry system to verify the most updated Social Security/SSI income information available from Social Security which appears on the “S” screen of the BA option of the mainframe. Refer to *Systems User’s Guide, Volume 5: Subsystems*, Chapter VI for more information;

Note: To assist the AU Manager in resolving discrepant Social Security and/or SSI data, an automatic request for verification has been sent to SSA for all APs that were not updated by COLA and will be displayed on the SVES Overnight system on BA.

- the correct information from the BA option of the mainframe must now be entered on the Income Tab of the Other Income Status window on BEACON; and
- complete the Interview Wrap-Up section.

Note: When entering Social Security/SSI income, be sure to select the appropriate recipient from the Member List to safeguard against future discrepancies.

**Medicare Part B
Surcharge
Premium**

The basic Medicare Part B Premium increased from \$66.60 to \$78.20 per month. The Medicare Part B Premium surcharges also increased as shown on Attachment A. The basic premium increase was automatically changed for AUs who pay the basic amount. The premium surcharge amounts were also automatically changed as long as they were included in the BENDEX file.

For those AUs who pay the premium surcharge amounts, the surcharge amount must be checked by the AU Manager at the next reevaluation. This can be checked by accessing the BA option of FMCS and looking on the H screen in BENDEX. If it does not show the increased premium amount, the AU Manager must update the amount on file.

Questions

If you have any questions, have your Hotline designee call the Policy Hotline.

Systems questions should be directed to Customer Support Services.

Attachment A

**2005 Medicare Part B Surcharge Premiums
[Base Premium of \$78.20 Plus Surcharge]**

10 %	\$86.02
20 %	\$93.84
30 %	\$101.66
40 %	\$109.48
50 %	\$117.30
60 %	\$125.12
70 %	\$132.94
80 %	\$140.76
90 %	\$148.58
100 %	\$156.40
110 %	\$164.22
120 %	\$172.04
130 %	\$179.86
140 %	\$187.68
150 %	\$195.50
160 %	\$203.32
170 %	\$211.14
180 %	\$218.96

190 %	\$226.78
200 %	\$234.60
210 %	\$242.42
220 %	\$250.24
230 %	\$258.06
240 %	\$265.88
250 %	\$273.70
260 %	\$281.52
270 %	\$289.34
280 %	\$297.16
290 %	\$304.98
300 %	\$312.80
310 %	\$320.62
320 %	\$328.44
330 %	\$336.26
340 %	\$344.08
350 %	\$351.90