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**Field Operations Memo 97-04**  
**February 1, 1997**

**TO:** Local Office Staff  
**FROM:** Joyce Sampson, Assistant Commissioner for Field Operations  
**RE:** 1997 RSDI/SSI COLA Update and 1997 COLA Reports for AFDC/TAFC, EAEDC, Food Stamps and SSI

**Introduction**

Effective January 1997, RSDI (Social Security) benefits increased by 2.9 percent; SSI payments increased; the base level Medicare Part B premium increased from \$42.50 to \$43.80 per month; and the patient paid amounts (PPAs) increased by \$14 for SSI rest home cases.

This memo:

- transmits procedures for updating the 1997 RSDI/SSI COLA; and
- provides information concerning the reports used to monitor and track the 1997 RSDI/SSI COLA updates.

**PACES Actions**

PACES updated all appropriate ongoing cases with 1997 RSDI (Type A) and/or SSI (Type 1) income.

The January RSDI (Type A) amounts on PACES were automatically updated using the following method:

If the Type A amount on BENDEX was greater than or equal to the PACES amount, then PACES was updated with the BENDEX income amount and the associated Medicare premium amount and code.

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**PACES Actions  
(cont.)**

If the PACES amount was greater than the BENDEX amount, or the BENDEX amount was not available, the Type A amounts on PACES were increased by 2.9 percent and the associated Medicare premium, if any, was also updated.

SSI amounts for food stamp cases were updated from the SDX files of both the Department and the Massachusetts Commission for the Blind (MCB).

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**PACES Actions  
Category 2, 4**

For all non-Monthly Reporting cases, this update may have resulted in a grant change or case closing effective the first check cycle in February and/or an adjusted February ATP or food stamp closing. Normal pend periods and PACES notices were used.

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**PACES Actions  
MR Cases**

Cases on Monthly Reporting (MR) were not automatically updated. Update these cases when you receive the MR for February. Use the BENDEX inquiry screens to verify the new amounts.

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**PACES Actions  
Client 50**

Cases with client number 50 were not automatically updated. Update these cases at the next eligibility review and enter the appropriate income amounts onto PACES.

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**PACES Actions  
Category 9**

This update may have resulted in an adjusted February ATP. PACES notices were used to notify these cases. Category 9 cases with status code 0 were not adjusted.

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**PACES Actions  
SSI Rest Homes**

PACES calculated new patient paid amounts (PPAs) for SSI rest home cases and automatically updated MMIS with the new amounts. A notice was sent to each recipient (Attachment B).

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**MCB Cases**

The MCB SDX information is not displayed on the SDX Inquiry Screen. Each local office will receive a list of food stamp cases updated from the MCB SDX file.

Use the same procedures if a recipient questions the amount of his or her SSI payment by using the Third Party Query System (TPQY) process which is described on page 4 of this memo.

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**Cases Requiring Worker Action**

Since most cases were automatically updated, the number of cases requiring worker review, correction or reinstatement should be minimal. If a recipient questions the amount of his or her cash grant and/or ATP, or files a timely appeal, check the appropriate report and the BENDEX (RSDI) or SDX (SSI) Inquiry Screens. If the RSDI and/or SSI amount(s) on PACES is different from what is on the BENDEX or SDX Inquiry Screen, or is not available, follow the normal process to request verification and correct the income information on file, if appropriate.

Note: Enter RSDI amounts on the PACES Worksheet as *Type A* income.

Enter SSI amounts on the PACES Worksheet as *Type 1* income.

Enter each recipient's income amount separately, using the appropriate recipient number on the PACES Worksheet.

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**Requesting  
Verification**

If it is necessary to verify a recipient's RSDI/SSI income, there are two ways to obtain verification: use the TPQY process or send the recipient a special verification request letter (Attachment A).

*TPQY Process*

- The TPQY process is the first choice for requesting verification of RSDI and/or SSI income.
- Complete a TPQY card for each recipient requiring verification.
- Send the TPQY card to the appropriate Social Security office.
- A printout from the Social Security office with the requested information should be received at the local office within a week of mailing the card.
- Update PACES, if appropriate.

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*The 1997 RSDI/SSI COLA Letter (Attachment A)*

- If TPQY verification is delayed, use this letter to inform the recipient of the need to provide verification of RSDI and/or SSI benefit amounts.
  - Use this letter for this project *only*.
  - An initial supply of this letter will be sent to each local office. Copies are to be made as needed. Any remaining letters are to be destroyed at the end of this project.
  - If a letter is sent to a recipient, a multilingual card must also be inserted.
  - Updates PACES, if appropriate.
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**Additional ATP  
Use of Code 18  
Timely Appeal  
Filed**

The following specialized procedures are to be followed for the 1997 RSDI/SSI Project only when a timely appeal is filed and food stamps are owed to a recipient. Complete an FSP-14A, the Automated ATP Request Form.

- Write V-18 COLA (under the V-12 Reason).
- Write COLA 1/97 in the top right corner of the form.

Complete a PID.

- Enter Code 18 in block 60.
- Enter the amount of food stamps owed to a recipient in block 61.

Follow all applicable procedures currently in effect for issuing Automated ATPs (see FSPM #XXII).

**Important: Use of Code 18 to issue food stamp benefits owed because a timely appeal was filed will only be allowed for the months of February and March 1997.**

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**Reports  
Categories 2, 4, 9**

Two reports, 1997 RSDI/SSI COLA LISTING FOR CAT 2, 4, 9 CASE/RECIPIENT UPDATES AND 1997 RSDI/SSI COLA LISTING FOR CAT 2, 4, 9 CALCULATED CASE/RECIPIENT UPDATES, are scheduled to be sent to local offices during the first week in February.

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**Reports**

The 1997 RSDI/SSI COLA for AFDC/TAFDC, EAEDC and Food Stamps was completed in January. Five reports were generated:

- 1997 RSDI/SSI COLA LISTING FOR CAT 2, 4, 9 CASE/RECIPIENT UPDATES sorted by local office, CAN and alpha within CAN with page breaks by CAN.
- 1997 RSDI/SSI COLA LISTING FOR CAT 2, 4, 9 CALCULATED CASE/RECIPIENT UPDATES sorted by local office, CAN and alpha within CAN with page breaks by CAN.
- 1997 MCB/SSI UPDATE REPORT FOR CAT 2, 4, 9 sorted by local office, CAN and alpha within CAN with page breaks by CAN.
- 1997 SSI NOT KNOWN FOR CAT 2, 4, 9 sorted by local office, CAN and alpha within CAN with page breaks by CAN.
- CASES WITH MORE THAN SIX AMOUNTS OF RSDI/SSI FOR CATS 2, 4, 9 sorted by local office, CAN and alpha within CAN with page breaks by CAN.

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Local offices will receive two copies of each report.

**Note:**                    **Not all local offices will receive the last three reports because of the small number of cases or recipients involved.**

This memo defines the purpose of each report, the actions to be taken and the report fields.

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**Case/Recipient Updates, CAT. 2, 4, 9**

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**Purpose:** List all cases or recipients updated on PACES, including calculated RSDI amounts and updates from the MCB SDX file.

**Actions:** This report is for reference only.

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Data Element:	Definition
Case Name	Head of Household
Cat	Category of assistance
Case SSN	9-digit social security number of casehead
Dep Num	2-digit recipient updated from BENDEX and/or SDX
Old RSDI	Old amount of RSDI on PACES
New RSDI	New amount of RSDI on PACES
Old SSI	Old amount of SSI on PACES
New SSI	New amount of SSI on PACES

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**Calculated RSDI Updates, CAT. 2, 4, 9**

**Purpose:** List all cases or recipients updated with a calculated RSDI amount on PACES. Reasons for calculation include: no BENDEX record or use of the new RSDI amount before the COLA.

**Actions:** This report is used primarily for reference if a recipient questions the amount of RSDI. Use the BENDEX Inquiry Screen to verify RSDI amounts.

Check the manual list of cases using the new RSDI amounts (see Field Operations Memo 97-05), with the report. Using the new RSDI amount before the COLA may have resulted in a calculation. Complete a PACES Worksheet, if necessary.

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**Calculated RSDI  
Updates, CAT. 2,  
4, 9 (cont.)**

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Data Element:	Definition
Case Name	Head of Household
Cat	Category of assistance
Case SSN	9-digit social security number of casehead
Dep Num	2-digit recipient updated from BENDEX and/or SDX
Old RSDI	Old amount of RSDI on PACES
New RSDI	New amount of RSDI on PACES
Old SSI	Old amount of SSI on PACES
New SSI	New amount of SSI on PACES

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**MCB/SSI  
Updates CAT. 2,  
4, 9**

Purpose:	List all cases or recipients updated on PACES using the MCB SDX file.
Reminder:	Recipients receiving SSI from MCB do not appear on the SDX inquiry screens.
Actions:	This report is for reference only.

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Data Element:	Definition
Case Name	Head of Household
Cat	Category of assistance
Case SSN	9-digit social security number of casehead
Dep Num	2-digit recipient updated from BENDEX and/or SDX
Old RSDI	Old amount of RSDI on PACES
New RSDI	New amount of RSDI on PACES
Old SSI	Old amount of SSI on PACES
New SSI	New amount of SSI on PACES

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**SSI Not Known  
CAT. 2, 4, 9**

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**Purpose:** List all cases or recipients with a type 1 (SSI) amount on PACES for which there is no current SDX record.

**Actions:** Review all cases on the report.

Perform a PACES inquiry of the DEPD and GRT1 Screens to see what income type and to whom RSDI/SSI income is attributed.

Perform an FMCS inquiry (WA) for each case listed by looking at the BENDEX (H) and SDX (D and E) Screens to verify the actual type and amount of RSDI/SSI for each recipient.

Compare the income types and to whom the income is attributed with the results of the PACES inquiry.

Complete a PACES Worksheet to attribute the income to the correct recipient and to remove incorrect income types and amounts.

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<b>Data Element:</b>	<b>Definition</b>
Case Name	Head of Household
Cat	Category of assistance
Case SSN	9-digit social security number of casehead
Dep Num	2-digit recipient updated from BENDEX and/or SDX
Old SSI	Old amount of SSI on PACES

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**Cases With More Than Six Amounts of RSDI/SSI**

**Purpose:** List all cases where there are more than six BENDEX or SDX records. These cases must be manually updated by the worker.

**Actions:** Review all cases on the report.

Perform a PACES inquiry of the DEPD and GRT1 Screens to see what income type and to whom RSDI/SSI income is attributed.

Perform an FMCS inquiry (WA) for each case listed by looking at the BENDEX (H) and SDX (D and E) Screens to verify the actual type and amount of RSDI/SSI for each recipient.

Compare the income types and to whom the income is attributed with the results of the PACES inquiry.

Complete a PACES Worksheet to attribute the income to the correct recipient and to remove incorrect income types and amounts.

**Reminder:** Block 1 of the PACES Worksheet has space for only six entries. RSDI amounts for dependents must be combined to make sure that the total RSDI/SSI case income is contained in block 1.

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Data Element:	Definition
Case Name	Head of Household
Cat	Category of assistance
Case SSN	9-digit social security number of casehead

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**Questions**

Policy questions should be directed by your Hotline designee to the Policy Hotline at (617) 348-8478. Systems questions should be directed to Customer Support Services at (617) 348-5290.

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**¡IMPORTANTE! ESTA NOTICIA AFECTA SUS DERECHOS Y OBLIGACIONES Y DEBE SER TRADUCIDO INMEDIATAMENTE**

Name \_\_\_\_\_ Local Office \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Date \_\_\_\_\_

Dear \_\_\_\_\_ :

Social Security, Railroad Retirement, Veterans' Administration benefits and Supplemental Security Income (SSI) were increased in January 1997. You or a member or your family is listed on the Department's files as receiving one or more of these benefits.

This increase may affect your eligibility and the amount of your cash and /or food stamp benefits since the income from the programs listed above is counted when determining your eligibility.

**To determine your continuing eligibility and the amount of your cash and/or food stamp benefits, you must provide written proof of your current Social Security, Supplemental Security Income (SSI), Railroad Retirement and/or VA benefits to your worker.**

To do this, you must provide one of the following proofs of income:

- a copy of the award letter;
- a written notice from the Social Security Administration stating the gross amount of these benefits; or
- a copy of your VA or SSI check.

This proof must be sent or brought to me by \_\_\_\_\_.

If you cannot send or bring the proof by that date, please contact me at \_\_\_\_\_. Failure to provide the requested proof of income or failure to contact me by the date indicated above is grounds for termination of your cash and/or food stamp benefits.

Worker \_\_\_\_\_

**Commonwealth of Massachusetts • Department of Transitional Assistance  
SSI Recipients Residing in Rest Homes and Community Support Facilities (Level IV)**

As you are an SSI recipient residing in a rest home or community support facility, your monthly income will increase on 1/1/97 due to the effect of the federal cost-of-living adjustment in your SSI benefits. In most instances, this increase will amount to \$14 in your monthly income. By law, whenever your monthly benefit increases, your share of the monthly bill for board and care, the patient paid amount (PPA), must increase by the same amount. See the enclosed card for your old and new PPA. Your personal care allowance of \$60 per month will remain the same.

**(Medical Assistance Policy Manual Citation: 130 CMR 506.440).**

Fair hearings will not be granted if the sole issue you wish to appeal regards the validity of the federal or state law or policy requiring this action. However, if you wish to question the correctness of the computation of your share of your monthly bill, you may obtain a fair hearing before a referee of the Department of Transitional Assistance by filing a request within 30 days of receipt of this notice. A form for this purpose is available at any local office.

SSI Level IV - 12/96