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Field Operations Memo 2007-2
January 19, 2007

To: **Transitional Assistance Office Staff**

From: **John Augeri, Assistant Commissioner for Field Operations**

Re: **2007 Social Security/SSI COLA for TAFDC, EA, EAEDC and FS**

Overview

Effective January 2007, Social Security Benefits and SSI payments increased by 3.3 percent. The base level Medicare Part B Premium increased from $88.50 to $93.50. The Medicare Part B Penalty Premium also increased, as identified in the 2007 Medicaid Part B Surcharge Premiums chart on page 5 of this memo.

This Field Operations Memo:

- explains how BEACON updated APs with the 2007 Social Security/SSI COLA amounts and recalculated eligibility for the active AUs containing the updated APs;
- explains which AUs listed on the "Clients With RSDI and/or SSI" view require AU Manager action; and
- transmits procedures for AU Managers to update AUs with discrepant 2007 Social Security/SSI COLA amounts.

BEACON Actions

The January Social Security/SSI amounts on BEACON are automatically processed through the following methods:

1. BEACON updated Social Security/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 January 12, 2007.

2. 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) as follows:
   - for AUs whose grantee's SSN ends in 0-5, BEACON will recalculate benefits over the weekend of January 19, 2007; and
   - for AUs whose grantee's SSN ends in 6-9, BEACON will recalculate benefits over the weekend of January 26, 2007.

3. 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 for TAFDC, EAEDC, and FS AUs.

   - *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 3.3 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 amount on BEACON was not updated.

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

BEACON Actions (continued)

Remember: Some FS AU benefits will <u>not</u> change, due to TBA or Universal Semiannual Reporting requirements.

The standard income change notices will be sent. These notices can be viewed on the Document History tab.

Note: Due to the volume of AUs in the Malden Centralized SSI office, an Actuate report will be issued listing all updated AUs.

Note: SSI and RSDI changes for APs in AUs whose grantee's SSN ends in 0-5 will appear on the Interview Wrap-up Selection window between January 16, 2007 and January 19, 2007. Do not select the changed SSI/RSDI amount if the intended effective date of the benefit change is prior to February.

<u>Increase of Bay State CAP Standard Utility Allowance:</u>

To offset the effect of the COLA on Bay State CAP AUs, BEACON will increase the Bay State CAP SUA from $268.00 to $297.00. As a result, AUs living alone will see little or no change in benefit amount. AUs living with others will see an increase of approximately $9.00 in CAP benefits.

<u>Terminated Income from SDX Record:</u>

Due to AU Managers' inability to remove terminated income in Bay State CAP AUs, all terminated income from the SDX record will be automatically removed in all AUs beginning on January 16, 2007. The following is a list of all unearned income types that will be updated:

- Black Lung;
- Railroad Retirement;
- Veterans' Benefits;
- Military Pension;
- Federal Civil Service Pension;
- Employment-related Pension (state, local government, private); and
- Workers Compensation.

(Note: The BENDEX update will remove terminated RSDI.)

After the COLA update these AUs can be viewed in the Daily Priority Actions, "Documents Sent for Past Week."

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 the date of January 12, 2007 or earlier in the "Entered" field have discrepant SSI data that require AU Manager follow-up.

AUs Requiring AU Manager Actions

To identify APs with discrepant Social Security and/or SSI data that require AU Manager follow-up, the AU Manager must use the "Clients with RSDI and/or SSI" view.

AU Managers must:

- sort the APs by "Entered" date on the view by clicking on "Entered";
  - all APs whose Type is "RSDI" (Social Security), and whose "Verified With" is "Calculated by BEACON COLA" must be reviewed by the AU Manager;
  - all APs whose Type is "SSI" and whose "Entered" date is January 12, 2007 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 of the Mainframe;

- if the BENDEX amount and the BEACON amount differ, access the SVES online individual inquiry system to verify the most updated Social Security amount which appears on the "S" screen of the BA option of the Mainframe. Refer to the *Systems User's Guide*, Volume 5: *Subsystems*, Chapter VI for more information;

- enter the correct information from the BA option of the Mainframe on the Income tab of the Other Income Status window on BEACON; and

- complete the Interview Wrap-Up section.

AUs Requiring AU Manager Actions (continued)

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 $88.50 to $93.50 per month. The Medicare Part B Premium surcharges also increased as shown in the table below. 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 done 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.

2007 Medicare Part B Surcharge Premiums
[Base Premium of $93.50 Plus Surcharge]

10%	$102.85	180%	$261.80
20%	$112.20	190%	$271.15
30%	$121.55	200%	$280.50
40%	$130.90	210%	$289.85
50%	$140.25	220%	$299.20
60%	$149.60	230%	$308.55
70%	$158.95	240%	$317.90
80%	$168.30	250%	$327.25
90%	$177.65	260%	$336.60
100%	$187.00	270%	$345.95
110%	$196.35	280%	$355.30
120%	$205.70	290%	$364.65
130%	$215.05	300%	$374.00
140%	$224.40	310%	$383.35
150%	$233.75	320%	$392.70
160%	$243.10	330%	$402.05
170%	$252.45	340%	$411.40

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline at 617-348-8478.

Systems questions should be directed to Customer Support Services at 617-348-5290.