



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2008-5
January 24, 2008

To: Transitional Assistance Office Staff
From:  John Augeri, Assistant Commissioner for Field Operations
Re: 2008 Social Security/SSI COLA for TAFDC, EA, EAEDC and FS

Overview

Effective January 2008, Social Security Benefits and SSI payments increased by 2.3 percent. The base level Medicare Part B Premium increased from \$93.50 to \$96.40. The Medicare Part B Penalty Premium also increased, as identified in the 2008 Medicaid Part B Surcharge Premiums chart on page 5 of this memo.

This Field Operations Memo:

- explains how BEACON updated clients with the 2008 Social Security/SSI COLA amounts and recalculated eligibility for the active cases containing the updated clients;
 - explains which cases listed on the “Clients With RSDI and/or SSI” view require AU Manager action; and
 - transmits procedures for AU Managers to update cases with discrepant 2008 Social Security/SSI COLA amounts.
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**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 clients in TAFDC, EAEDC, EA, PA and NPA food stamp cases with Social Security or SSI income and Medicare Part B premiums (including the surcharge premium, where applicable) over the weekend of January 18, 2008.
2. BEACON recalculates eligibility for all active and ineligible clients in active TAFDC, EAEDC, EA, PA and NPA food stamp cases with Social Security or SSI income, and Medicare Part B Premiums (including the Surcharge Premium, where applicable) as follows:
 - for cases whose grantee's SSN ends in 0-5, BEACON recalculated benefits over the weekend of January 18, 2008; and
 - for cases whose grantee's SSN ends in 6-9, BEACON will recalculate benefits over the weekend of January 25, 2008.
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 cases.
 - *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 2.3 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 cases with active or ineligible clients, 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 case closing effective for the first benefit cycle in February.

**BEACON
Actions
(continued)**

Remember: Some FS case benefits will not 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.

Notes:

- SSI and RSDI changes for clients in cases whose grantee's SSN ends in 0-5 will appear on the Interview Wrap-up Selection window between January 14, 2008 and January 18, 2008. Do not select the changed SSI/RSDI amount if the intended effective date of the benefit change is prior to February
- Due to the volume of cases in the Malden Centralized SSI office, an Actuate report will be issued listing all updated cases.

To offset the effect of the COLA on Bay State CAP cases, BEACON will increase the Bay State CAP SUA from \$297.00 to \$320.00.

After the COLA update these cases 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 cases with an inactive or ineligible client who receives Social Security and/or SSI income. The sorting function of this view enables the user to determine which clients:

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

All cases listed with the date of January 18, 2008 or earlier in the "Entered" field have discrepant SSI data that require AU Manager follow-up.

**Cases Requiring
AU Manager
Actions**

To identify clients 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 clients by “Entered” date on the view by clicking on “Entered”;
 - all clients whose Type is “RSDI” (Social Security), and whose “Verified With” is “Calculated by BEACON COLA” must be reviewed by the AU Manager;
 - all clients whose Type is “SSI” and whose “Entered” date is January 18, 2008 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.

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 \$93.50 to \$96.40 per month. The Medicare Part B Premium surcharges also increased as shown in the table below. The basic premium increase was automatically changed for cases 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 cases 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.

**2008 Medicare Part B Surcharge Premiums
[Base Premium of \$96.40 Plus Surcharge]**

10%	\$106.04	180%	\$269.92
20%	\$115.68	190%	\$279.56
30%	\$125.32	200%	\$289.20
40%	\$134.96	210%	\$298.84
50%	\$144.60	220%	\$308.48
60%	\$154.24	230%	\$318.12
70%	\$163.88	240%	\$327.76
80%	\$173.52	250%	\$337.40
90%	\$183.16	260%	\$347.04
100%	\$192.80	270%	\$356.68
110%	\$202.44	280%	\$366.32
120%	\$212.08	290%	\$375.96
130%	\$221.72	300%	\$385.60
140%	\$231.36	310%	\$395.24
150%	\$241.00	320%	\$404.88
160%	\$250.64	330%	\$414.52
170%	\$260.28	340%	\$424.16

**Medicare Part D
Deductible**

Medicare Part D has three levels of participation: Standard, Partial Extra Help or Full Extra Help. The overwhelming majority of FS-eligible participants qualify for either Full Extra Help or Partial Extra Help due to low income and assets. Therefore, some FS-eligible participants will continue to pay no premium or deductible, while others will pay a low premium and a low deductible. As of January 1, 2008, the Standard Deductible for Medicare Part D was increased from \$265 to \$275 and the Partial Extra Help was increased from \$53 to \$56; these figures must be entered manually by the AU Manager. The Premium portion of Medicare Part D must be entered on the Health Insurance window under 'Premium'. The AU Manager will then be prompted to go to the 'Medical Expense' window to enter co-pays and/or deductible, if applicable.

Note: The Full Extra Help deductible remains at \$0.

The Medical Expenses window has been programmed to accept the new deductible amounts. The Health Insurance window did not require any reprogramming; it will continue to accept the varying Medicare Part D premium amounts.

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 EOHHS Customer Service Center at 617-348-5290.
