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Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2002-2
January 28, 2002

To: Transitional Assistance Office Staff

From: Cescia Derderian, Acting Assistant Commissioner for Field Operations

Re: 2002 Social Security/SSI COLA Update for TAFDC, EA, EAEDC and the Food Stamp Program

Introduction

Effective January 2002, Social Security benefits and SSI payments increased by 2.6 percent, and the base level Medicare Part B premium increased from \$50.00 to \$54.00. The Medicare Part B penalty premium also increased, as identified in the 2002 Medicare Part B Surcharge Premiums chart (see Attachment A).

This memo:

- Explains how BEACON updated Assessed Persons with the 2002 Social Security/SSI COLA amounts and recalculated eligibility for the active AUs containing the updated Assessed Persons;
- provides a description of the "Clients With RSDI and/or SSI" View and explains which AUs listed on the View require AU Manager action; and
- gives procedures for AU Managers to update AUs with discrepant 2002 Social Security/SSI COLA amounts.

**BEACON
Actions**

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

- BEACON updated Social Security and SSI amounts on all active, pending, ineligible, denied and closed Assessed Persons in TAFDC, EAEDC, EA, PA and NPA Food Stamp AUs with Social Security or SSI income and Medicare Part B premiums. The updated amount is displayed on the Income Tab of the Other Income Status window. BEACON also updated the dates of death and disability information in the above categories.
- BEACON recalculated eligibility for active and ineligible Assessed Persons in active TAFDC, EAEDC, EA, PA and NPA Food Stamp AUs with Social Security or SSI income, and Medicare Part B premiums. BEACON also recalculated disability information changes and dates of death in the above categories.
 - *For Discrepant Social Security Amounts:* If the Social Security amount displayed in the Income Tab on 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 2.6 percent and the “Verified With” value of “Calculated by BEACON COLA” was added.
 - *For Discrepant SSI Amounts:* If the SSI amount displayed in the Income Tab on 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.

For all active AUs with active or ineligible Assessed Persons, this update may have resulted in a grant change or AU closing effective the first benefit cycle in February and/or adjusted February food stamp benefits. Normal pend periods and income change notices were used. These notices can be viewed on the Document History Tab.

**COLA Run and
Release Dates**

On the “Clients With RSDI and/or SSI” View, the date 2002/01/11 or 2002/01/12 will be displayed in the Entered field for Assessed Persons whose Social Security amount was updated. The date 2002/01/17 will be displayed in the Entered field for Assessed Persons whose SSI amount was updated. These are the dates that the COLA file ran and the Assessed Person’s Other Income information was updated. The actual date that EBC Results were run in batch is displayed on the Interview Wrap-Up window.

**COLA Run and
Release Dates
(cont.)**

EBC calculations were run on 01/12/02 for AUs whose grantee's SSN ends in 0 through 2 if an Assessed Person in the AU had a Social Security or SSI change as a result of the COLA.

Since not all SSI recipients were updated on 01/11/02, all 01/11/02 SSI updates were removed and rerun on 01/17/02. The pending EBC Requests for a grantee's SSN ending in 0 through 2 were also removed. These AUs have been re-calculated and re-noticed.

The pending EBC Requests for a grantee's SSN ending in 0 through 2, if an Assessed Person in the AU had a Social Security change, were not removed.

EBC calculations were run to the following schedule.

SSN	Assessed Persons with changes in:	Night of COLA EBC Calculation	BEACON Release Date
0	Social Security	Fri, Jan 11, 2002	Mon, Jan 28, 2002
1,2	Social Security	Fri, Jan 11, 2002	Tue, Jan 29, 2002
0	SSI	Thurs, Jan 17, 2002	Mon, Jan 28, 2002
1	SSI	Thurs, Jan 17, 2002	Tue, Jan 29, 2002
2	SSI	Fri, Jan 18, 2002	Tue, Jan 29, 2002
3	SSI and Social Security	Fri, Jan 18, 2002	Wed, Jan 30, 2002
4	SSI and Social Security	Fri, Jan 18, 2002	Fri, Feb 1, 2002
5	SSI and Social Security	Fri, Jan 18, 2002	Mon, Feb 4, 2002
6,7	SSI and Social Security	Fri, Jan 18, 2002	Tue, Feb 5, 2002
8	SSI and Social Security	Fri, Jan 18, 2002	Thurs, Feb 7, 2002
9	SSI and Social Security	Fri, Jan 18, 2002	Fri, Feb 8, 2002

“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 Assessed Persons who receives Social Security and/or SSI income. The sorting function of this View enables the user to determine which Assessed Persons:

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

The information provided in this View will include:

<u>Data Field</u>	<u>Information Provided</u>
Client	AP name
SSN	AP SSN
Grantee	Yes or No
Type	RSDI or SSI
Old Amount	Old Income Amount
New Amount	New Income Amount
Entered	Date of Most Recent Update
Verified With	Value displayed on the Verification tab that indicates how the income was verified. <ul style="list-style-type: none"> • “Electronically validated by SSA/BENDEX or SSA/SSI” indicates the amount was updated by the BENDEX or SDX batch. • "Calculated by BEACON COLA" indicates that the Social Security amount was recalculated in BEACON by multiplying the existing amount by 2.6 percent. • All other “Verified With” descriptions indicate that the amount was entered by the AU Manager.

**“Clients With
Social
Security/RSDI
and/or SSI” View
(cont.)**

Note: On this View, AU Managers will see as one of the entries in the “Verified With” column, the entry “7830%.” This entry is the internal BEACON code for the “Verified With” value of “Calculated by BEACON COLA.” The English text for this code will be displayed when the next increment is deployed. All of the other valid entries as to how benefits were updated are displayed correctly.

All AUs listed with a date of 01/17/2002 or earlier in the “Entered” field means that the AU has discrepant SSI data that require AU Manager action as described below.

**AUs Requiring
AU Manager
Action**

Since most Assessed Persons were automatically updated, the number of Assessed Persons requiring AU Manager review, correction or reinstatement should be minimal.

To identify Assessed Persons with discrepant Social Security and/or SSI data that require AU Manager action, the AU Managers must:

- identify which Assessed Persons *in the Social Security/RSDI category* must be reviewed by sorting the “Clients With RSDI and/or SSI” View by “Verified With.” All Assessed Persons whose Type is “RSDI” (Social Security) and whose “Verified With” is “Calculated by BEACON COLA” will need to be reviewed by the AU Manager.
 - identify which Assessed Persons *in the SSI category* must be reviewed by sorting the “Clients With RSDI and/or SSI” View by “Entered Date.” All Assessed Persons whose Type is SSI and whose Entered Date is earlier than 01/17/2002 will need to 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 in BA.
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**AUs Requiring
AU Manager
Action (cont.)**

- correct the income information on the Income Tab of the Other Income Status window; and

Note: BEACON must be updated from information displayed on the SVES on-line individual Inquiry System which enables TAO staff to verify the most updated information available from Social Security on RSDI/SSI income. Refer to *Systems User's Guide*, Volume 5: *Subsystems*, Chapter VI for more information.

- complete the Interview Wrap-Up section.

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

**Medicare Part B
Penalty
Premium**

The basic Medicare Part B Premium increased from \$50.00 to \$54.00 per month. The Medicare Part B Premium surcharges also increased as shown on Attachment A. The basic premium increase was automatically changed for Assistance Units who pay the basic amount. The premium surcharge amounts were not automatically changed. Assistance Units who pay the premium surcharge amounts must have the surcharge amount entered by the AU Manager at the next reevaluation.

Questions

Policy questions should be directed by your Hotline designee to the Policy Hotline at (617) 348-8478 **between the hours of 9:00-12:00**. Systems questions should be directed to the Customer Service Center at (617) 348-5290.

2002 Medicare Part B Surcharge Premiums
[Base Premium of \$54.00 Plus Surcharge]

10%	\$59.40
20%	\$64.80
30%	\$70.20
40%	\$75.60
50%	\$81.00
60%	\$86.40
70%	\$91.80
80%	\$97.20
90%	\$102.60
100%	\$108.00
110%	\$113.40
120%	\$118.80
130%	\$124.20
140%	\$129.60
150%	\$135.00
160%	\$140.40
170%	\$145.80
180%	\$151.20

190%	\$156.60
200%	\$162.00
210%	\$167.40
220%	\$172.80
230%	\$178.20
240%	\$183.60
250%	\$189.00
260%	\$194.40
270%	\$199.80
280%	\$205.20
290%	\$210.60
300%	\$216.00
310%	\$221.40
320%	\$226.80
330%	\$232.20
340%	\$237.60
350%	\$243.00