

APPENDIX B

RSDI/SSI INCREASES 2015

In January 2016, SSI and RSDI recipients **did not** receive a Cost of Living Adjustment (COLA). The monthly maximum Federal SSI payment levels for 2016 are:

Single - \$733 Couple - \$1,100

In 2016, the standard Part B premium amount will be \$121.80 (or higher depending on income). However, most people who get Social Security benefits will continue to pay the same Part B premium amount as they paid in 2015 because there was not a cost-of-living increase for 2016 Social Security benefits. Generally, a different premium amount is paid if:

- Enrolled in Part B for the first time in 2016
- Not receiving Social Security benefits
- Billed directly for Part B premiums
- Currently receiving Medicare and Medicaid, and Medicaid pays the premiums.
- The modified adjusted gross income as reported on the IRS tax return form 2 years ago is above a certain amount.

A. THE RSDI/SSI COLA UPDATE PROCESS

The annual COLA Mass Change occurs **at** the weeks-end of January **or beginning of** February for most Assistance Groups (AGs) in eRAPIDS that have RSDI and/or SSI entered or Medicare enrollment. Reports which identify individuals affected by the COLA update **become** available on MOBIUS January 31, 2016. Manual updates must be completed by February deadline, effective March 2016. Advance notice requirements apply.

For the automatic update to occur, the Social Security Number (SSN) in RAPIDS must match the SSN in the Social Security Administration file. In addition, the individual's RSDI and/or SSI income must have been entered in eRAPIDS. The automatic update is effective March 2016.

The automatic update does not occur if the income was entered, but end-dated prior to March 2016. It also does not occur if the begin date for RSDI and/or SSI income is later than February 2016.

NOTE: The automatic update does not occur if the case is due for review. If the AG is due for a PR review, the automatic update of income and Medicare information does occur, but eligibility is not run. This prevents closure before the client has an opportunity to complete the PR review. Eligibility must be run to apply the updated income.

The Case Maintenance Process

Two messages on the WRMC192A – Mass Change Exception Listing identify cases skipped when an AG is due for a review by PR and include:

- PR Review Due (Case has a Review Date); and
- PR Review Due (Case Has No Review Date).

For QMB, SLIMB, and QI AG's, functionality prevents the inappropriate closure and denial of these AG's due to the COLA increase. RAPIDS uses the begin MM/YY to determine whether to enter a COLA disregard amount on the AFUI screen for Social Security income (RSDI) using a calculation based on the percentage of the COLA increase, unless a COLA Disregard Amount other than zero is entered manually. For procedures regarding Pickle AG's see item B,9.

Any AG which becomes ineligible for a benefit because of the update will not receive that benefit after February 2016. The appropriate notice is mailed. Workers must evaluate Medicaid AG's that fail for all other coverage groups. These AG's appear on WRMC182A - Assistance Groups Affected by Mass Change, which is described in Item B.

If the current benefit is not confirmed, and there is no previously confirmed passing benefit for the AG, the individual's information is not updated and the case is skipped by Mass Change. These AG's are shown on WRMC182U – Mass Changes Pending AG Listing.

When the SSA file indicates the customer is receiving RSDI or SSI and the amount is zero, the information in RAPIDS is not updated. This amount may not be accurate by the time of the COLA Mass Change and an error message displays this information on the COLA Match Report. The actual SSA benefit amount can be determined on SOLQ.

The WRMC 206A COLA Match Report – Match Result, contains the same information as the WRMC202A - RSDI/SSI/Medicare COLA Match Report – Last Name. On the 206A, the individuals within a Worker's caseload are sorted by match result message. On the 202A, the individuals within a Worker's caseload are sorted by last name. By using the 206A, Workers can identify particular match results which require immediate attention.

Mass Change report, WRMC216A - Post Mass Change Participation Status Report, identifies individuals whose participation status changed as a result of the Mass Change. Workers must determine if the change is valid.

B. REPORTS AND WORKER ACTION

Reports identifying individuals who have been affected by the COLA update became available on MOBIUS January 31, 2016. Manual updates must be completed by February deadline, effective March 2016.

1. Report WRMC202A: RSDI/SSI/Medicare COLA Match Report – Last Name and Report WRMC206A: RSDI/SSI/Medicare COLA Match – Match Result

These reports list all individuals who have RSDI and/or SSI income entered on AFUI and Medicare information on AFMD. The reports describe the result of the match between these individuals in RAPIDS and those on the COLA tape from the Social Security Administration (SSA). Individuals, rather than cases, appear on the reports. Individuals are listed in alphabetical order by caseload. Report WRMC206A is sorted by match result. For each individual, the Worker sees the following: Case Number, SSN, Name of Individual, SSA Amount, Medicare Part B Amount and Match Result. Some of these columns are self-explanatory, but columns that require explanation are listed below:

- SSA Amount

This column is divided into two additional columns. The first column is the income received from SSA as found in RAPIDS (amount prior to the COLA increase). The second column is the income from SSA as found on the tape sent by the Social Security Administration (amount after the COLA increase). It may be either RSDI or SSI. If an individual is receiving both RSDI and SSI, there is a separate entry for each type of unearned income.

- Part B Amount

This is the Medicare Part B premium. This column is divided into two additional columns. The first column is the Medicare premium found in RAPIDS (the amount prior to the premium increase). The second column is the Medicare premium found on the tape sent by the Social Security Administration (amount after premium increase).

- Match Result

This is the result of the match between the information in RAPIDS prior to the COLA updates and the information on the COLA update tape sent by the Social Security Administration.

The Worker may see multiple entries on this printout for the same individual. The Worker must carefully review each entry for the individual. A variety of situations result in multiple entries.

The Case Maintenance Process

Examples of Match Result messages are:

- If the customer receives both RSDI and SSI, and each benefit was updated successfully, the Worker sees the individual name on the printout twice with the match result Record Successfully Updated. This message appears once with the match result for the RSDI update and again with the match result for the SSI update. There are no indicators to identify which entry is for RSDI and which is for SSI.
- If the SSA file indicates the RSDI and/or the SSI amount is zero, the match result indicates that the AFUI screen was not updated. The match result displayed is either Record Not Updated - \$0 RSDI Amount or Record Not Updated - \$0 SSI Amount. This is because the amounts of these benefits are rarely this amount by the time of the COLA Mass Change. Use SOLQ to determine the current amount of the RSDI and/or SSI.
- If the customer receives more than one type of RSDI, the Social Security Administration combines all amounts. The RSDI amount appearing on the COLA tape and the Match Report is the total of all combined updated amounts for that individual. However, RAPIDS identifies each specific type of RSDI separately. Because the amount on the COLA tape is a combined amount and the amount in RAPIDS is specific to each type of RSDI received, it is not possible for an automatic update to occur on these cases. The Worker must manually update each RSDI amount. The Match Result for this situation is Multiple Records For a Type.

If the individual receives SSI, in addition to multiple types of RSDI, the SSI amount is automatically updated even though the RSDI amounts are not.

- If the RSDI is garnished, the amount is not updated. The match result is RSDI Not Updated Due to Garnishment. A Mass Change report provides the new RSDI gross amount and the amount of the garnishment.
- If the automatic update resulted in an update of Medicare information, the Worker sees two entries for an individual. The match result for the premium update is Record