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.

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.

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

Successfully Updated. A separate match result appears for updated information. Only the Medicare Part B premium information is updated by the COLA Mass Change.

- If there is a Medicare premium amount other than zero and no Medicare amount on the COLA tape, one entry for the individual is on the Match Report. The match result is Person is Not Part B Entitled. To prevent possible disruption of Buy-In, the Medicare information is not updated. Workers must determine if a change in the Medicare information is needed.

- If there is a Medicare premium amount of zero and the COLA tape shows the individual is eligible for Medicare, the match result for the first entry is Person is Part B Entitled. The match result for the second entry is Record Successfully Updated.

- If the Medicare Payer is 510 and Self on the COLA tape, to prevent disruption of the Buy-In process, the payer is not updated. The match result displayed is COLA Record Has Payer As Self. Otherwise, the payer is updated and the match result for the payer update is Updated Part B Payer.

- When the RSDI/SSI/Medicare premium amount(s) in RAPIDS reflects the same amount as listed on the COLA tape, and the begin date in RAPIDS is prior to March 2015, the match result is Record Successfully Updated. When this occurs, the same amount(s) listed in both the SSA and RAPIDS columns is seen and no action is necessary.

- The match result NO COLA Found for RSDI and No COLA Found For SSI indicates no benefit information was found for this individual's SSN on the Social Security Administration's tape, even though RSDI and/or SSI was entered by the Worker. If the client's Social Security Number is correct, DXSA must be checked to see if SSA benefits received are based on another person's SSN.

- Other entries in the match results column may require explanation. A guide of commonly found match result notations is found in item C below.

2. Report WRMC192A - Mass Change Exception Listing

   This report lists the AG's with RSDI and/or SSI that were skipped in the eligibility run of mass change. The column titled Exception Description contains information about why the update did not occur. AG's with manual overrides and pending cases appear on the report and require evaluation. Those which did not update due to pending status do not appear on the COLA Match Report and require independent verification of income.

3. Report WRMC182A - Assistance Groups Affected by Mass Change

   This report contains detailed information about AGs on which a mass change COLA update occurred and on which ED/BC was successfully run. This printout contains information by case, rather than by individual. Most of the columns are self-explanatory. The column titled Action Indicator includes one of the following: INC (Increase), DEC (Decrease) and CLO (Closure). If the column is blank, no change in benefits occurred.

   NOTE: A special report is provided to notify the Long Term Care Unit of changes in nursing home contributions due to the COLA Mass Change.

4. Report WRMC 182U - Assistance Groups Pending After Mass Change

   This report contains detailed information about all AGs which were in pending status before the COLA Mass Change and remain pending. Mass Change functionality sends only the previously-confirmed AG through the ED/BC process. When a case contains an AG with no previous confirmations, the case is skipped by Mass Change.

5. Report WRMC 212A - Individuals Changed from State Payer to Self

   This report was discontinued. If eRAPIDS indicates the State is paying the premium, the message, COLA Record has Payer as Self, is displayed on the COLA Match Report.

6. Report WRMC 203 A - RSDI Garnishment Report

   This report lists the individuals who have garnishments applied to RSDI and, as a result, the RSDI has not been updated. It lists the gross RSDI and the amount of the garnishment.

7. Report WRMC 205 A - Income on COLA File with No Corresponding
   This report lists the individuals who have either RSDI or SSI on the COLA file and have no current corresponding screen for that type of income.

8. WRMC 216A - Post Mass Change Participation Status Report

   This report identifies individuals whose participation status changed as a result of the mass change. The report is sorted by case Worker and lists the case number, PIN, caseload, name, current participation status after the mass change and the category. Workers must determine if the change is valid. An example of a valid change is an ABAWD with a new 36-month tracking period.

9. Pickle Assistance Groups (MP W)

   Although the automated determination of the COLA Disregard Amount for RSDI will prevent the inappropriate closure of QMB, SLIMB and QI AG's, it will not prevent the inappropriate closure of Pickle (MP W) AG's. The system will replace the current COLA disregard amount for Pickle AG's with an amount based on the current RSDI COLA percentage increase. These AG's appear on the WRMC182A – Assistance Groups Affected by Mass Change report with the notation CLO to indicate AG closure. These failed AG's require manual correction by the Worker. As an added check, designated Supervisors will receive an email message listing all affected Pickle AG's at a later date. Worker action required for affected Pickle AG's is:

   - Showing RSDI for the affected individual using a future date

   - Note the current COLA disregard amount.

   - eRAPIDS should display the previous COLA disregard amount in the system.

- Add the two COLA disregard amounts together and enter the total on the current screen for RSDI as the COLA disregard amount.

- Run eligibility. Check the benefits for correctness, then confirm.

- Suppress any inappropriate notices.

C. COMMONLY FOUND MATCH RESULTS

The chart below shows the commonly found results of the match between RAPIDS information prior to the COLA updates and the information from the SSA COLA update file.

MATCH RESULT	DEFINITION
RECORD NOT UPDATED – $0 RSDI AMOUNT	This individual exists in RAPIDS with an RSDI amount that is greater than zero, but the same individual exists on the COLA file with a zero RSDI amount. Check SOLQ.
RECORD NOT UPDATED – $0 SSI AMOUNT	This individual exists in RAPIDS with an SSI amount that is greater than zero, but the same individual exists on the COLA file with a zero SSI amount. Check SOLQ.
FUTURE BEGIN DATE – NO UPDATE	This individual's income in RAPIDS has a begin date for RSDI or SSI of later than February. No update occurs in this situation.
MANUAL OVERRIDE	An AG containing an override is open and ongoing. Mass Change will not run on this case. **NOTE:** If an AG was overridden to fail for the ongoing month, the case will still run in a mass change.
MULTIPLE RECORDS FOR A TYPE	This individual is receiving multiple types of RSDI according to RAPIDS, and the COLA file only shows one amount. No update occurs with this match result. Check SOLQ.

NO COLA FOR RSDI	This individual exists in RAPIDS, but was not found on the COLA file. Check SOLQ
PENDING CASE	This case is pending in RAPIDS, and therefore no update occurs.
CASE HAS PENDING AG	There is an unconfirmed AG with no previously open confirmed AG. The case is skipped. No AFUI or AFMD updates occur.
PERSON IS NOT PART B ENTITLED	This individual has a Medicare, Part B, premium amount greater than zero on AFMD, and the COLA file shows that the individual has a zero amount. No update occurs.
UPDATED PART B PAYER	The Payer on AFMD in RAPIDS differed from the Payer found on the COLA tape. The Payer on the COLA file is not Self. An update occurs with this match.
COLA RECORD HAS PAYER AS SELF	The Payer on AFMD in RAPIDS was 510 (Buy In). The Payer found on the COLA tape was Self. An update does not occur with this match.
RECORD SUCCESSFULLY UPDATED	The RAPIDS amount listed was updated with the SSA amount listed.
RSDI NOT UNDATED DUE TO GARNISHMENT	The COLA tape indicates a garnishment is applied to the RSDI. An update does not occur. Check SOLQ.