



**Commonwealth of Massachusetts**  
*Executive Office of Health and Human Services*  
**Department of Transitional Assistance**  
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**Field Operations Memo 2001-5**  
**February 27, 2001**

**To:** Transitional Assistance Office Staff

**From:** Joyce Sampson, Assistant Commissioner for Field Operations

**Re:** 2001 Social Security/SSI COLA Update and 2001 COLA Reports for TAFDC, EAEDC, SSI and the Food Stamp Program

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**Overview**

Effective January 2001, Social Security benefits and SSI payments increased by 3.5 percent; the Patient Paid Amounts (PPAs) increased by \$18 for SSI rest home Assistance Units (AUs); the base level Medicare Part B premium increased from \$45.50 to \$50.00.

TAFDC and EAEDC cases with SSNs ending in 0-5 as well as all Food Stamp cases were updated correctly. However, TAFDC and EAEDC cases with SSNs ending in 6-9 were not updated correctly on 1/16/01 and an incorrect PACES notice was generated. The problem that caused these cases to update incorrectly was identified and corrected. The COLA was rerun for TAFDC and EAEDC cases with SSNs ending in 6-9 on 2/8/01. A second PACES notice that resulted from the COLA update was generated to 812 Assistance Units. An informational notice was also mailed to these AUs. This notice informed the AU to disregard the first notice dated 1/16/01 and that the second notice dated 2/8/01 contained the correct information about the action being taken on their case and the correct benefit amount(s).

Transitional Assistance Offices received a report titled: TAFDC/EAEDC CORRECTED COLA REPORT FOR SSN'S ENDING IN 6-9 listing all AUs that received a second notice as well as the informational notice.

This report must be reviewed by the AU Manager to determine if the AU received an overpayment. If the AU received an overpayment, follow the appropriate recoupment procedures.

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**Overview  
(cont.)**

All the remaining COLA Reports addressed in this memo were rerun on 2/13/01 and 2/16/01. Disregard all other COLA Reports issued prior to these dates.

This memo:

- transmits procedures for updating the 2001 Social Security/SSI COLA; and
  - provides information concerning the reports used to monitor and track the 2001 Social Security/SSI COLA updates.
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**PACES Actions**

PACES updated ongoing AUs with 2001 Social Security (Type A) and/or SSI (Type 1) income.

The January Social Security (Type A) amounts on PACES were automatically updated using the following method:

If the Type A amount on BENDEX was greater than or equal to the PACES amount, then PACES was updated with the BENDEX income amount and the associated Medicare premium amount and code.

If the PACES amount was greater than the BENDEX amount, or the BENDEX amount was not available, the Type A amounts on PACES were increased by 3.5 percent and the associated Medicare premium, if any, was updated.

SSI amounts for food stamp AUs were updated from the SDX files of both the Department and the Massachusetts Commission for the Blind (MCB).

NOTE: BEACON was updated with the new amounts with the data conversion that took place on 2/15/01. Converted data was available in Release 2.0 Pilot on 2/23/01 except for transactions for SSNs ending in 6-9 that are pending for PA benefits in the second cycle in February and in March for food stamp benefits.

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**PACES Actions  
Category 2, 4**

For all non-Monthly Reporting AUs, 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 PACES notices were used.

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**PACES Actions  
MR Cases**

AUs on Monthly Reporting (MR) were not automatically updated. Update these AUs when you receive the MR for March. Use the BENDEX inquiry screens to verify the new amounts.

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**PACES Actions  
Client 50** AUs with client number 50 were not automatically updated. Update these AUs at the next eligibility review and enter the appropriate income amounts onto PACES.

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**PACES Actions  
Category 9** This update may have resulted in adjusted February food stamp benefits. PACES notices were used to notify these AUs. Category 9 AUs with status code 0 were not adjusted. Category 9 cases containing both food stamp (FS) members (status code 1 or 2) and State Supplemental Food Stamp Program (SSFSP) members (status code 6 or 7) were not adjusted due to the need to prorate income.

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**PACES Actions  
SSI Rest Homes** PACES calculated new PPAs for SSI rest home AUs and automatically updated MMIS with the new amounts. A notice was sent to each recipient (Attachment A).

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**MCB Cases** The Massachusetts Commission for the Blind (MCB) SDX information is not displayed on the SDX Inquiry Screen. Each Transitional Assistance Office will receive a list of food stamp AUs updated from the MCB SDX file.

If a recipient questions the amount of his or her SSI payment, use the State Verification Eligibility System (SVES) on-line individual Inquiry System which is described on page 4 of this memo.

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**AUs Requiring  
AU Manager  
Action** Since most AUs were automatically updated, the number of AUs requiring AU Manager review, correction or reinstatement should be minimal. If a recipient questions the amount of his or her cash grant and/or food stamp benefits, or files a timely appeal, check the appropriate report and the BENDEX (Social Security) or SDX (SSI) Inquiry Screens. If the Social Security and/or SSI amount(s) on PACES are different from what is on the BENDEX or SDX Inquiry Screen, or are not available, follow the normal process to request verification and correct the income information on file, if appropriate.

NOTE: Enter Social Security amounts on the PACES Worksheet as Type A income.

Enter SSI amounts on the PACES Worksheet as Type 1 income.

Enter each recipient's income amount separately, using the appropriate recipient number on the PACES Worksheet.

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**Requesting  
Verification on  
SVES**

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If the information on PACES does not match with what is on the BENDEX or SDX Inquiry Screen, or is not available, PACES must be updated from information displayed on the SVES online 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.

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**Use of Code 18  
and Code 38  
Timely Appeal  
Filed**

The following specialized procedures are to be followed for the 2001 Social Security/SSI Project only when a timely appeal is filed and either food stamp benefits or State Supplemental Food Stamp benefits are owed to a recipient. Complete an FSP-14A, the Automated Food Stamp Benefit Request Form.

To issue food stamp benefits only:

- Write V-18 COLA (under the V-16 Reason) and write COLA 1/2001 in the top right corner of the form.
- Complete a PID by entering Code 18 in Block 60 and the amount of food stamp benefits owed to a recipient in Block 61.

To issue State Supplemental Food Stamp benefits only:

- Write V-38 COLA (under the V-16 Reason) and write COLA 1/2001 in the top right corner of the form.
- Complete a PID by entering Code 38 in Block 60 and the amount of State Supplemental Food Stamp benefits in Block 61.

Follow all applicable procedures currently in effect for issuing FS benefits and SSFSP benefits. Refer to Field Operations Memo 98-8 for further information concerning automated proration of income.

**Important: Use of Code 18 to issue food stamp benefits or Code 38 to issue State Supplemental Food Stamp benefits because a timely appeal was filed will be allowed only for the months of February and March 2001.**

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**Reports**

The 2001 Social Security/SSI COLA for TAFDC, EAEDC and Food Stamps was completed in February. Six reports were generated.

This section of the memo defines the purpose of each report, the actions to be taken and the report fields.

The first three reports are for informational purposes only. The last three reports require AU Manager action. Since the first three reports contain the same data elements, the data elements and definitions will be displayed once. Since the last three reports contain different data elements, the data elements and definitions will be displayed for each report.

**2001 Social Security/SSI COLA Listing For CAT 2, 4, 9 Case/Recipient Updates (Informational Only)**

**Purpose:** Lists all AUs or recipients updated on PACES, including calculated Social Security amounts and updates from the MCB SDX file.

**Action:** None. This report is for reference only.

**Data Element: Definition:**

Case Name Grantee.  
 Cat Category of assistance.  
 Case SSN 9-digit social security number of grantee.  
 Dep Num 2-digit recipient number updated from BENDEX and/or SDX.  
 Old Soc Sec Old amount of Social Security on PACES.  
 New Soc Sec New amount of Social Security on PACES.  
 Old SSI Old amount of SSI on PACES.  
 New SSI New amount of SSI on PACES.

**2001 Social Security/SSI COLA Listing For CAT 2, 4, 9 Calculated Case/Recipient Updates (Informational Only)**

**Purpose:** Lists all AUs or recipients updated with a calculated Social Security amount on PACES. Reasons for the calculation include: no BENDEX record or use of the new Social Security amount before the COLA.

**Action:** None. This report is used primarily for reference if a recipient questions the amount of Social Security. Use the BENDEX Inquiry Screen to verify Social Security amounts.

Check the manual list of AUs using the new Social Security amounts with the report. Using the new RSDI amount before the COLA may have resulted in a calculation. Complete a PACES Worksheet, if necessary.

**2001 MCB/SSI  
Update For CAT  
2, 4, 9  
(Informational  
Only)**

Purpose: Lists all AUs or recipients updated on PACES using the MCB SDX file.

Reminder: Recipients receiving SSI from MCB do not appear on the SDX inquiry screens.

Action: None. This report is for reference only.

**The following Transitional Assistance Offices will not receive this report: Boston Family Housing, Centralized TAFDC, Oak Bluffs.**

**2001 SSI Not  
Known For CAT  
2, 4, 9 (Action  
Required)**

Purpose: Lists all AUs or recipients with a Type 1 (SSI) amount on PACES without a current SDX record.

Actions: Review all AUs on the report.

Perform a PACES inquiry of the DEPD and GRT1 Screens to see what income type and to whom Social Security/SSI income is attributed.

Perform an FMCS inquiry (WA) for each AU listed by looking at the BENDEX (H) and SDX (D and E) Screens to verify the actual type and amount of Social Security/SSI for each recipient.

Compare the income types and to whom the income is attributed with the result of the PACES inquiry.

Complete a PACES Worksheet to attribute the income to the correct recipient and to remove incorrect income types and amounts.

Data Element: Definition:

Case Name	Grantee.
Cat	Category of assistance.
Case SSN	9-digit social security number of grantee.
Dep Num	2-digit recipient number updated from BENDEX BENDEX and/or SDX.
Old SSI	Old amount of SSI on PACES.

**Cases With  
More Than Six  
Amounts Of  
Social  
Security/SSI For  
CAT 2, 4, 9  
(Action  
Required)**

Purpose: Lists all AUs where there are no more than six BENDEX or SDX records. These AUs must be manually updated by the AU Manager.

Actions: Review all AUs on the report.

Perform a PACES inquiry of the DEPD and GRT1 Screens to see what income type and to whom Social Security/SSI income is attributed.

Perform an FMCS inquiry (WA) for each case listed by looking at the BENDEX (H) and SDX (D and E) screens to verify the actual type and amount of Social Security/SSI for each recipient.

Compare the income types and to whom the income is attributed with the results of the PACES inquiry.

Complete a PACES Worksheet to attribute the income to the correct recipient and to remove incorrect income types and amounts.

Reminder: Block 1 of the PACES Worksheet has space for only six entries. Therefore, Social Security amounts for cases with more than five dependents must be combined to make sure that the total Social Security/SSI case income is contained in Block 1.

Data Element: Definition:

Case Name Grantee.

Cat Category of assistance.

SSN 9-digit social security number of casehead.

**The following Transitional Assistance Offices will not receive this report: Athol, Boston Family Housing, Fall River SSI, Falmouth, Framingham, Greenfield, Haverhill, Northampton, Oak Bluffs, Orleans, Plymouth, Quincy, Revere SSI, Roslindale SSI, Southbridge, Springfield SSI, Taunton, Wareham, Worcester SSI.**

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**Category 9  
Cases  
Containing Both  
FS and SSFSP  
Household  
Members  
(Action  
Required)**

**Purpose:** Lists all category 9 AUs containing AU members receiving FS benefits (dependent status 1 or 2) in combination with AU members receiving SSFSP benefits (dependent status 6 or 7). These AUs must be manually updated by the AU Manager.

**Action:** Review all AUs on the report.

The SSI and/or Social Security income of the SSFSP member(s) must be prorated to determine how much will be countable to the FS AU. Prorate the income of the SSFSP member following current instructions contained in Field Operations Memo 98-8.

**Data Element: Definition:**

Case Name	Grantee.
Cat.	Category of assistance.
Case SSN	9-digit social security number of casehead.
FS Household Size	Number of AU members in food stamp (FS) AU.
SSFS Household Size	Number of AU members in State Supplemental Food Stamp (SSFSP) household.

**The following Transitional Assistance Offices will not receive this report: Centralized TAFDC, Fall River SSI, Falmouth, North Adams, Oak Bluffs, Orleans, Pittsfield, Plymouth, Revere SSI, Roslindale SSI, Springfield SSI, Wareham, Worcester SSI.**

**Questions**

Policy questions should be directed by your Hotline designee to the Policy Hotline at (617) 348-8478. Systems questions should be directed to the Customer Service Center at (617) 348-5290.





**Commonwealth of Massachusetts • Department of Transitional Assistance  
SSI Recipients Residing in Rest Homes or Community Support Facilities (Level IV)**

As you are an SSI recipient residing in a rest home or community support facility, your monthly income will increase on 1/1/2001 due to the effect of the federal cost-of-living adjustment in your SSI benefits. In most instances, this increase will amount to \$18 in your monthly income. By law, whenever your monthly benefit increases, your share of the monthly bill for board and care, the patient paid amount (PPA), must increase by the same amount. See the enclosed card for your old and new PPA. Your personal needs allowance of \$60 per month will remain the same.

**(Medical Assistance Policy Manual Citation: 130 CMR 519.003)**

Fair hearings will not be granted if the sole issue you wish to appeal regards the validity of the federal or state law or policy requiring this action. However, if you wish to question the correctness of the computation of your share of your monthly bill, you may obtain a fair hearing before a referee of the Department of Transitional Assistance by filing a request within 30 days of receipt of this notice. A form for this purpose is available at any Transitional Assistance Office.

