



Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance
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Field Operations Memo 2004- 3
January 23, 2004

To: Transitional Assistance Office Staff

From:  Cescia Derderian, Assistant Commissioner for Field Operations

Re: 2004 Social Security/SSI COLA Update for TAFDC, EA, EAEDC and the Food Stamp Program

Overview

Effective January 2004, Social Security benefits and SSI payments increased by 2.1 percent. The base level Medicare Part B premium increased from \$58.70 to \$66.60. The Medicare Part B penalty premium also increased, as identified in the 2004 Medicare Part B Surcharge Premiums chart (see Attachment A).

This memo:

- explains how BEACON updated Assessed Persons (APs) with the 2004 Social Security/SSI COLA amounts and recalculated eligibility for the active AUs containing the updated APs;
 - explains which AUs listed on the "Clients With RSDI and/or SSI" View require AU Manager action; and
 - gives procedures for AU Managers to update AUs with discrepant 2004 Social Security/SSI COLA amounts.
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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 APs in TAFDC, EAEDC, EA, PA and NPA Food Stamp AUs with Social Security or SSI income and Medicare Part B premiums (including the surcharge premium, where applicable) over the 1/17/04 weekend . The “Verified With” value of “Electronically validated by SSA/SSI 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 in the above categories.

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 2.1 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 SSI amount on BEACON was not updated.

BEACON recalculated eligibility for active and ineligible APs in active TAFDC, EAEDC, EA, PA and NPA Food Stamp AUs with Social Security or SSI income, and Medicare Part B premiums (including the surcharge premium, where applicable) over the 1/17/04 weekend for AUs whose grantee’s SSN ended in 0 - 5. AU’s whose grantee’s SSNs ended in 6 - 9 were recalculated over the 1/24/04 weekend.

For all active AUs with active or ineligible APs, an EBC Results Request was created with the Pend Period waived. These requests were released immediately. This update may have resulted in adjusted February food stamp benefits, a grant change or AU closing effective for the first benefit cycle in February.

Note: Some FS AU benefits were not changed due to TBA or Universal Semiannual Reporting processing.

BEACON Actions (Continued) Normal income change notices were sent. These notices can be viewed on the Document History Tab.

Note: SSI and RSDI changes for Assessed Persons in AUs whose grantee's SSN ends in 6 – 9 will appear on the Interview Wrapup Selection window between 1/17 and 1/24. Do not select the changed SSI/RSDI amount if the intended effective date of the benefit change is prior to February.

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

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

All AUs listed with a date of **2004/01/16** or earlier in the “Entered” field have discrepant SSI data that require AU Manager action as described below.

AUs Requiring AU Manager Actions Since most APs were automatically updated, the number of APs requiring AU Manager review, correction or reinstatement should be minimal.

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

- sort the APs by “Entered” date on the “Clients with RSDI and/or SSI” View by clicking on “Entered”:
 - all APs whose Type is “RSDI” (Social Security), whose “Verified With” is “Calculated by BEACON COLA” and whose “Entered” date is 2004/01/16 or earlier must be reviewed by the AU Manager;
 - all APs whose Type is “SSI” and whose “Entered” date is 2004/01/16 or earlier must be reviewed by the AU Manager;

**AUs Requiring
AU Manager
Action
(continued)**

- 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;
- if the BENDEX amount and the BEACON amount differ, access the SVES on-line individual inquiry system to verify the most updated Social Security/SSI income information available from Social Security. Refer to *Systems User's Guide, Volume 5: Subsystems*, Chapter VI for more information;
- correct the income information on the Income Tab of the Other Income Status window; 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.

**Medicare Part B
Surcharge
Premium**

The basic Medicare Part B Premium increased from \$58.70 to \$66.60 per month. The Medicare Part B Premium surcharges also increased as shown on Attachment A. The basic premium increase was automatically changed for AUs 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 AUs who pay the premium surcharge amounts, the surcharge amount must be checked by the AU Manager at the next reevaluation. This can be checked 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.

Questions

If you have any questions, have your Hotline designee call the Policy Hotline at 617-348-8478.

Systems questions should be directed to the Customer Support Services at 617-348-5290.

**2004 Medicare Part B Surcharge Premiums
[Base Premium of \$66.60 Plus Surcharge]**

10 %	\$73.26
20 %	\$79.92
30 %	\$86.58
40 %	\$93.24
50 %	\$99.90
60 %	\$106.56
70 %	\$113.22
80 %	\$119.88
90 %	\$126.54
100 %	\$133.20
110 %	\$139.86
120 %	\$146.52
130 %	\$153.18
140 %	\$159.84
150 %	\$166.50
160 %	\$173.16
170 %	\$179.82
180 %	\$186.48

190 %	\$193.14
200 %	\$199.80
210 %	\$206.46
220 %	\$213.12
230 %	\$219.78
240 %	\$226.44
250 %	\$233.10
260 %	\$239.76
270 %	\$246.42
280 %	\$253.08
290 %	\$259.74
300 %	\$266.40
310 %	\$273.06
320 %	\$279.72
330 %	\$286.38
340 %	\$293.04
350 %	\$299.70