

COLA – SSI Cases in a NF with an Obligation

Overview

Some SSI cases in a NF have been identified as having large changes in their liability amount due to the case being updated for COLA. These cases will need to be reviewed to ensure the correct patient liability is being given. SSI recipients between the ages of 21-64 do not lose their SSI upon entering a NF/MH. Because there is no Federal Financial Participation (FFP) for individuals in that age range, their SSI is counted toward their patient liability.

These instructions will highlight the most important screens to review when resolving an increase in liability for SSI individuals in a Nursing Facility. However, the worker will need to review and evaluate all applicable Data Collection Pages for accuracy.

Process

1. Navigate to the case in KEES.
2. Review the Journal and Tasks:
 - a. If there are any tasks on the case not currently being processed, these will need to be worked as well.
 - b. If the case is currently being worked, no further action is needed. Skip to the next case on the report.
3. Case Summary – Review this page for current coverage by clicking the black caret next to the beneficiary's name in the program block.
4. Ensure all Post-Conversion Cleanup has been completed on the case. Refer to the KEES User Manual for instructions.
5. EATSS – Review EATSS to determine the current amount of the consumer's Social Security benefits. Make note of the amount(s) found. If the consumer is no longer receiving SSI, refer to the instructions for *SSI Recipients Discontinued at COLA*.
6. Income Page – Confirm that the Social Security income amounts listed on the Income page correspond with information found in EATSS. End date any duplicate or incorrect records and create correct records as needed.

Note: If there is only a change in the income amount, simply adding the new amount on the Income Detail page with a Begin Date of 1/1/18 will automatically end date the previous amount detail record.

7. Expense Page – Review all expenses and verify that duplicate records do not exist. If any expenses are listed on the Expense page, staff should refer to the medical expense Job Aid for appropriate action [**Job Aid 8.2 – Applying Medical Expense Changes to Reduce Share of Cost (LTC)**].
8. Medicare Expense Page – COLA is updating the Medicare expense records for cases that have one of the two standard Part B premiums. These records are set with a payer of 'State'. This means the Medicare premium will not be allowed as an expense in the medical budget. If the worker is expecting the Medicare premium to be allowed, the payer must be adjusted.
9. After all appropriate updates have been made, Run EDBC in the come-up month and review the EDBC results.
 - a. If EDBC is as expected, Accept and Save EDBC. Proceed to step 10.

- b. If EDBC is not displaying as expected, staff should review all data collection pages to identify and update incorrect data.
10. EDBC will generate a new NOA when it has been Saved. Review this for accuracy and append the *COLA Mass Change* snippet from the Standard Text for Copy and Paste on the KEES Repository.
11. Go to Distributed Documents and delete the COLA NOA that was previously produced. It should be listed with a status of 'On Hold'.
12. Add a Case Journal:
Case appears on the COLA SSI Cases in NF with an Obligation Report. (Journal actions taken)

End of Process