

## SI Individual Discontinued at COLA Instructions

Individuals receiving SI medical coverage who may no longer be receiving SSI will be discontinued when the COLA Batch is run. In order to ensure that the correct coverage is being terminated, these individuals will be excluded from the COLA Batch EDBC. This report will be used to identify the individuals impacted by this issue. Workers will need to research each case to confirm that whether the individuals are still eligible for SSI or not. If not, this coverage will need to be discontinued. For individuals being correctly discontinued, it will be necessary to determine if they can be added to an existing medical program for continued coverage or whether they will need to reapply.

If it is determined that a new application is needed then an application form will need to be sent to the individual and their coverage will be discontinued. If the individual can be added to an existing medical program for coverage then staff will need to follow existing add a person processes to ensure they are added correctly and that appropriate notices are sent to notify the individual of any changes in their benefits.

### Process

#### 1. Determine if the individual is still receiving SSI benefits.

- a. Check EATSS.
  - i. If EATSS shows that the individual is still eligible for SSI, coverage can continue under the SI medical aid code.
  - ii. If EATSS confirms the consumer no longer receives SSI, continue to Step 2.
- b. Update the corresponding data collection pages.
  - i. On the Medical Condition page, ensure that the consumer is listed as SSI (Blind or Disabled).
  - ii. On the Income page, ensure that the consumer's income matches what is shown on EATSS and the amount for SSI is correctly identified with an Income type of Social Security – SSI.
- c. Run EDBC for the come-up month.

*Note: EDBC cannot be run just for one person. If multiple people exist in the medical program block, EDBC will run for ALL individuals currently covered. Special attention needs to be paid to the CE and Review Due dates of all active members. If the review due is in the past, check to see if the review has been returned. If the review was not returned, discontinue all other individuals for failing to return the review. The SSI recipient would remain open, as there is no review requirements for SSI Medicaid. If the review was returned, process the review. For expired CE dates with a future Review Due month, please see the 'Case Skipped at Review' scenario provided with the Review Scenarios attachment to KDHE Policy Memo 2017-02-01: Reviews Processing.*

- d. Review EDBC for an SI aid code and Accept and Save the EDBC.

- e. Create the following journal entry:

Working the Post COLA SI Discontinuance report. It was discovered that SSI is still being received by **(Insert Name)**. Updated data collection pages and ran EDBC for **(Insert Month)**. **(Insert Name)** remains eligible for SI benefits.

**End process.**

**2. Determine if the consumer is PMG or 1619B eligible**

- a. Review the consumer's EDBC results prior to COLA to determine if they were previously a PMG-eligible recipient.
  - i. If the consumer was previously a PMG-eligible recipient, review the Income page and update the Protected Medical Group questions based on the consumer's previous PMG Aid Code. Use the steps below that correspond to the previous Aid Code for the consumer to help complete the questions accurately.
    - 1) Proceed to step 2b.ii. for previous PICKLE (PA, PB, or PD) eligible recipients.
    - 2) Proceed to step 2b.iii. for previous Adult Disabled Child (AA, AB, or AD) recipients.
    - 3) Proceed to step 2b.iv. for previous Qualifying Disabled Widow/Widower (QA, QB, or QD) recipients.
    - 4) Proceed to step 2b.v. for previous Early Widow/Widower (EB or ED) recipients.
  - ii. If the consumer was not previously a PMG-eligible recipient, but is now showing a PMG Aid Code based on the COLA, proceed to step 2b.
- b. Review EATSS to determine why SSI eligibility ended. If the consumer lost SSI and the worker is unable to determine why, the worker will need to review the Journal and all Tasks. It is possible that the consumer lost SSI and still be eligible for SI Medicaid as a 1619B eligible recipient or be eligible for a new program, Medically Needy without a spenddown, if identified as an Eligible Pickle, Adult Disabled Child, Qualifying Disabled Widow/Widower, or Early Widow/Widower. These cases would more than likely have several tasks on them dated prior to COLA and were either missed or have not yet been worked. The worker will need to review EATSS and the case information closely to make an accurate decision.
  - i. If the consumer lost SSI due to wages, they may continue to qualify for SI Medicaid as a 1619B eligible recipient.
    - 1) Review EATSS to see if the 1619B indicator on the BENDEX, SDX, or TPQY has a 'Y' next to it. This indicator will only appear on the first BENDEX, SDX, or TPQY when 1619B was originally determined.
    - 2) If there is a 'Y' then the consumer is a 1619B eligible recipient and the Medical Condition page will need updated.

- a) End date the previous Medical Condition for the last day of the month prior to SSI terminating.
  - b) Add a new Active medical condition of 1619B Blind or 1619B Disabled with a Begin Date of the first day of the month after SSI ended.
- 3) The worker will need to update the Income page to reflect the current types of income received and their current amounts. A 1619B eligible recipient will continue to have SSI listed on the Income page, with a value of \$0.
  - 4) If there is not a 'Y' indicator, the worker will need to call the local Social Security Administration office for that consumer to verify whether they are 1619B eligible or not. If the SSA office confirms that they are 1619B eligible, go back to step 2 b.i.2)
  - 5) If the consumer is not 1619B eligible, proceed to Step 2b.ii.
  - 6) If the consumer is 1619B eligible, and the Medical Condition and Income pages have been updated, run EDBC.
  - 7) The EDBC result should show SSI eligibility with an Aid Code of SSI/SB or SSI/SD depending on whether they are Blind or Disabled.
  - 8) Accept and Save the EDBC result.
  - 9) Create the following journal entry for a consumer who is approved for continuing eligibility:

**Working the Post COLA SI Discontinuance report. EATSS confirms that SSI is no longer being received by (Insert Name). However (Insert Name) is eligible for continued benefits as a 1619B eligible recipient. Updated Medical Condition and Income pages and ran EDBC for (Insert Month). (Insert CE Dates and/or Review Due date).**

#### **End Process**

- ii. If the consumer lost SSI specifically due to the COLA (Cost of Living Adjustment), they may be an Eligible Pickle.
  - 1) Review EATSS to determine if SSI ended 12/17. The SSI amount, prior to termination, could be anywhere from \$1 to \$15 based on the 2% COLA raise for 2018.
  - 2) If SSI ended 12/17, the consumer previously received SSI and OASDI in the same month, and the new OASDI income amount exceeds \$750, the consumer is potentially an eligible Pickle.
  - 3) Whether they are Pickle eligible or not, set an End Date for the SSI with the last day of the month prior to the come-up month and update the OASDI amount and answer the questions in the appropriate section under Protected Medical Groups.

*Note: One of the questions under the Pickle header asks if the person resides in the household of another and pays rent above the minimum threshold amount. The worker does not need to contact the consumer to find out how much rent they pay. The worker can find out if the consumer lives in another household by going back to EATSS and looking at TPQY Page 2 under 'FED LIVING ARRANGEMENT'. If this shows 'IN ANOTHER'S HOUSEHOLD', the answer to this question would be yes. This is important because an individual living in someone else's household would have a different financial standard to meet than an individual living on their own.*

- 4) Proceed to step 3.
- iii. If the consumer lost SSI at any time for Excess Income and they are currently receiving OASDI benefits under a 'C' claim number, they are potentially eligible as an Adult Disabled Child.

*Note: Not every consumer that receives OASDI under a 'C' claim is an Adult Disabled Child per KDHE standards. An individual must be both financially and non-financially eligible in order to receive a designation as Adult Disabled Child. Therefore, care and consideration must be taken when answering the questions under Adult Disabled Child on the Income page.*

- 1) Review EATSS to determine the answers to the following questions:
  - a) Is the consumer receiving benefits on an active 'C' claim number?
  - b) Was the consumer determined to be disabled prior to age 22? (This may be located under Disability Onset Date on TPQY.)
  - c) Did they lose eligibility *solely because* they became eligible for the 'C' claim or an increase in the 'C' claim amount? (Information on SSI termination history and OASDI approval history can be found on TPQY page 3. If the SSI was terminated in one month and the next month a higher 'C' claim amount was given, this may be an indicator that the consumer is eligible as an ADC.)
  - d) Would the consumer be eligible for SSI benefits now if not for the increase in benefits off the 'C' claim?

*Note: If the consumer also became eligible for any other type of unearned income after the death of their parent, they may not be eligible as an ADC. The SSI had to be terminated only because of an increase in the OASDI 'C' claim. Therefore, if there was also a new*

*unearned income amount that began, more research, including a phone call to the local Social Security Administration office, may be necessary.*

- 2) If an answer to *any* of the above questions is 'NO' then the consumer is not an Adult Disabled Child per KDHE standards. Proceed to step 2b.iv.
  - 3) If all of the above questions are answered with a 'YES' then the consumer is potentially eligible as an ADC and the worker needs to determine the amount of the consumer's SSI in the month prior to the month of the increase which resulted in the termination of the SSI benefits. This may be found by looking at either SDX Page 1 or TPQY Page 3.
  - 4) Complete all questions (including the benefit amount and month SSI terminated) on the Income page under the header for Disabled Adult Children for the current OASDI benefit amount.
  - 5) Proceed to step 3.
- iv. If the consumer was previously a Qualifying Disabled Widow/Widower, update the Protected Medical Group questions on the Income page for the current OASDI benefit.

*Note: A consumer would never be determined newly eligible as a Qualifying Disabled Widow/Widower, because this was a process only used prior to 1984. If a consumer switched from non-PMG to a Qualifying Disabled Widow/Widower PMG Aid Code, but they were determined disabled after 1984, proceed to step 3.*

- 1) Review EATSS to determine the answers to the following questions:
  - a) Is the consumer receiving benefits on an active 'D' claim number?
  - b) Was the consumer entitled to OASDI in December 1983? (This may be located under INIT ENT or DISABILITY ONSET DATE on TPQY.)
  - c) Was the consumer entitled to OASDI widow/widower benefit in January 1984 based on their disability? (This SSA history can be located on TPQY page 3.)
  - d) Did they lose SSI eligibility because of an increase in the 'D' claim amount? (Information on SSI termination history and OASDI approval history can be found on TPQY page 3. If the SSI was terminated in one month and the next month a higher 'D' claim amount was given, this may be an indicator that the consumer is eligible as Qualifying Disabled Widow/Widower.)

- e) Would the consumer be eligible for SSI benefits now if not for the increase in benefits off the 'D' claim?

*Note: If the worker is unable to determine answers to these questions and the consumer was previously receiving benefits under this Aid Code, they will need to contact the local Social Security Administration office for more information on this case.*

- 2) If an answer to *any* of the above questions is 'NO' then the consumer is not a Qualifying Disabled Widow/Widower. Proceed to step 3.
  - 3) If all of the above questions are answered with a 'YES' then the consumer is potentially eligible as a Qualifying Disabled Widow/Widower. Complete all questions on the Income page under the header for Qualifying Disabled Widow/Widower for the current OASDI benefit amount.
  - 4) Proceed to step 3.
- v. If the consumer lost SSI at any time for Excess Income and they are currently receiving OASDI benefits under a 'D' claim number, they are potentially eligible as an Early Widow/Widower.

*Note: Not every consumer that receives OASDI under a 'D' claim is an eligible Early Widow/Widower per KDHE standards. An individual must be both financially and non-financially eligible in order to receive a designation as Early Widow/Widower. Therefore, care and consideration must be taken when answering the questions under Early Widow/Widower on the Income page.*

- 1) Review EATSS to determine the answers to the following questions:
  - a) Is the consumer receiving benefits on an active 'D' claim number?
  - b) Is the consumer age 60 or between the ages of 50 and 60 and also disabled? (There should be a Disability Onset Date on TPQY if they are disabled.)
  - c) Did they lose eligibility *because* they became eligible for the 'D' claim? (Information on SSI termination history and OASDI approval history can be found on TPQY page 3. If the SSI was terminated in one month and the next month a 'D' claim was approved, this may be an indicator that the consumer is eligible as an Early Widow/Widower.)
  - d) Would the consumer be eligible for SSI benefits now if not for the benefits off the 'D' claim?

*Note: If the consumer also became eligible for any other type of unearned income after the death of their spouse, they may not be eligible as an Early Widow/Widower. The SSI had to be terminated because of their approval for the OASDI 'D' claim. Therefore, if there was also a new unearned income amount that began, more research, including a phone call to the local Social Security Administration office, may be necessary.*

- e) Is the consumer currently NOT eligible for Medicare part A?  
(This information is located on TPQY page 1.)
- 2) If an answer to *any* of the above questions is 'NO' then the consumer is not an Early Widow/Widower per KDHE standards. Proceed to step 3.
- 3) If all of the above questions are answered with a 'YES' then the consumer is potentially eligible as an Early Widow/Widower.
- 4) Complete all questions on the Income page under the header for Early Widow/Widower for the current OASDI benefit amount.
- 5) Proceed to step 3.

### End Process

### 3. Determine if the consumer is eligible to be added to an open Family Medical program block.

Review the individual's case and coverage history to determine if there is a medical program or case that they may be added to for continued coverage. For all E&D programs, with the exception of ongoing 1619B eligibility, resource information would be required to determine ongoing eligibility. However, consumers may continue to be eligible for Family Medical programs without verification of resources.

**Examples:** Children may be added to another existing MAGI medical program. Parents may also be considered for Caretaker medical if their children have an existing active MAGI medical program. If the individual has a spouse with an open Medically Needy program, they may be able to be added to that program.

- a. If the consumer qualifies for E&D and is NOT 1619B eligible, proceed to Step 4.
- b. If there is an open Family Medical program block, the consumer may be added to this block as a MEM.
  - i. Follow existing processes to add the individual to the Family medical program block.

*Note: If applicable, be sure to discontinue them from one program block if adding them to another existing or new program block for continued coverage.*

- ii. Update the corresponding data collection pages.

- iii. Run EDBC.

*Note: EDBC cannot be run just for one person. If multiple people exist in the medical program block EDBC will run for ALL individuals currently covered. Special attention needs to be paid to the CE and Review Due dates of all active members. If the review due is in the past – check to see if the review has been returned. If not returned –discontinue all other individuals for failing to return the review. If it has been returned, process the review. For expired CE dates with a future review due month, please see the ‘Case Skipped at Review’ scenario provided with the Review Scenarios attachment to KDHE Policy Memo 2017-02-01: Reviews Processing.*

- iv. If coverage results in Medicaid:
  - 1) Do not accept the EDBC Results. Take the appropriate action to send to KDHE staff for approval.
  - 2) Create the following journal entry:
- v. If Coverage results in CHIP:
  - 1) Accept EDBC.
  - 2) Review the system-generated NOA for accuracy. If needed, send V008 using the Standard Text Copy and Paste Spreadsheet to notify individual of the eligibility outcome.
  - 3) Create the following journal entry:

**Working the Post COLA SI Discontinuance report. It was confirmed that SSI is no longer being received by (Insert Name). However (Insert Name) is eligible for continued CHIP benefits (list premium amount if applicable). Updated data collection page and ran EDBC for (Insert Month). (Insert CE Dates and Review due Date).**

#### **End process**

- c. If consumer cannot be added to another program block, continue to Step 4.

#### **4. Discontinue SI medical coverage and Send new application**

If an individual is no longer receiving SSI, does not qualify for 1619B eligibility, and cannot be added to an existing Family medical program block for continued coverage, they should be discontinued and a new application sent.

- a. End date the SSI entry on the Income page with the last day of the month prior to the come-up month.
- b. Run EDBC, taking timely notice into consideration.
  - i. If it is before the Last Day to Close date, run EDBC in the come-up month.



- ii. If after the Last Day to Close, end date the SSI at the end of the following month and set a task to run EDBC prior to the next Last Day to Close date.

*Note: EDBC cannot be run just for one person. If multiple people exist in the medical program block, EDBC will run for ALL individuals currently covered. Special attention needs to be paid to the CE and Review Due dates of all active members. If the review due is in the past, check to see if the review has been returned. If not returned, discontinue all other individuals for failing to return the review. If it has been returned, process the review. For expired CE dates with a future Review Due month, please see the 'Case Skipped at Review' scenario provided with the Review Scenarios attachment to KDHE Policy Memo 2017-02-01: Reviews Processing.*

- c. Accept and Save the EDBC results for any SSI discontinuance that does not include a pending review. Any reviews that are pending and discontinuance will take place need to be sent to the State.
- d. Review the system-generated Discontinuance NOA for accuracy. The system-generated Discontinuance NOA needs to be appended to advise the individual that a new application has been sent if they wish to reapply for medical assistance. If the system-generated Discontinuance NOA is inaccurate or unusable, send a V008 with language from the SSI/MSP Closure form on the Standard Text for Copy and Paste found on the KEES Repository. Delete the MSP language if it does not apply.
- e. Send a new application to the consumer using existing processes.
- f. Create the following journal entry:

Working the Post COLA SI Discontinuance report. It was confirmed that SSI is no longer being received by **(Insert Name)**. **(Insert Name)** is not eligible for continued coverage and will be discontinued effective **(Insert Discontinuance Date)**. New application sent.

End process