

☒ CalSAWS M&E      ☐ CalWIN Migration

<b>Distribution Date:</b>	December 5, 2023
<b>To:</b>	Consortium.RegionalManagers.All, PPOC.All, Committee.MediCal_CMSP.All, Committee.CalWORKs_CalFresh.All, Committee.FosterCare.All; Committee.GA.All, Committee.CAPI.All
<b>CIT Name:</b>	<b>CA-242762 Posted Lists for 2024 SSA COLA Data Changes</b>
<b>From:</b>	CalSAWS Project

**PPOCs, please forward to the appropriate impacted staff in your county:**

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|---|---|
| <input type="checkbox"/> General<br><input checked="" type="checkbox"/> Policy<br><input checked="" type="checkbox"/> CW<br><input checked="" type="checkbox"/> CF<br><input checked="" type="checkbox"/> MC<br><input type="checkbox"/> CMSP<br><input checked="" type="checkbox"/> FC/KG/AAP<br><input type="checkbox"/> Child Care<br><input type="checkbox"/> WtW<br><input checked="" type="checkbox"/> Other Program(s) <u>GA/GR, CAPI, RCA, ARC</u><br><input type="checkbox"/> BenefitsCal <input type="checkbox"/> MyBCW<br><input type="checkbox"/> Customer Correspondence<br><input type="checkbox"/> Other _____ | <input type="checkbox"/> Reports<br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> Caseload Movement<br><input type="checkbox"/> Management<br><input type="checkbox"/> Fiscal<br><input type="checkbox"/> Security<br><input type="checkbox"/> Batch and Interfaces<br><input type="checkbox"/> Imaging<br><input type="checkbox"/> Migration<br><input type="checkbox"/> Conversion<br><input type="checkbox"/> Technical<br><input checked="" type="checkbox"/> Training<br><input checked="" type="checkbox"/> Help Desk |
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Description:	<p><b>Purpose</b> The purpose of this CIT is to notify Counties that the lists for CA-242762 2024 Social Security Title II and Title XVI Cost of Living Adjustments (SSA COLA) have been posted to the CalSAWS Web Portal.</p> <p><b>Background</b> Per <a href="#">ACIN I-64-23</a> and <a href="#">ACWDL 23-26</a>, Social Security Administration (SSA) income will increase by 3.2 percent for 2024.</p> <p>Per <a href="#">ACWDL 23-25</a>, the monthly Medicare Part B Supplemental Medical Insurance Base premium increases to \$174.70 for 2024. The SSI/SSP Cash Grant Levels for Determining Pickle Eligibility from January 1 through December 31, 2024, and the 2024 Pickle Disregard Computation Chart were provided in <a href="#">ACWDL 23-27</a>.</p> <p><b>Additional Information</b></p>
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CA-242762 2024 Social Security Title II and Title XVI Cost of Living Adjustments (SSA COLA) was implemented on December 3, 2023, to:

1. Apply a data change to add the new SSA income amount effective 01/01/2024 for a person receiving SSA in continuing EDBC-based programs.
2. The 2024 SSA COLA published SSA income increase rate is 3.2%. Update the value of the 'Backout Multiplier' to match the rate increase.
3. Update CalSAWS Pickle values to match the 'Pickle Disregard Computation Chart' effective 01/01/2024.
4. Update CalSAWS to match the new SSI/SSP payment standards.
5. Income would increase for the customer who is currently receiving SSA.
6. Update Medicare Part B Premium amounts stored in CalSAWS for the customers to \$174.70 effective 01/01/2024 to address the increase.
7. Create a Journal entry to document the data changes for SSA Income and Medicare Part B Premium amounts.
8. Generate lists for the counties after the data change is applied.

### County Action

The following one-time lists related to CA-242762 have been posted to the CalSAWS Web portal for County follow-up:

1. Individuals whose SSA Income was not updated
2. GA/GR Managed and Non-Managed with updates
3. Individuals whose Medicare was not updated
4. Individuals who did not receive RSDI COLA

The lists contain all the standard columns plus any additional columns listed below and are available to counties at the following location:



Counties must review the lists and follow the County Action as appropriate:

1. **List Name:** Individuals whose SSA Income was not updated  
**List Criteria:** List includes an individual that meets the following criteria:
  - a. Program and Program Person Status is Active, Pending, or Ineligible for at least one of the identified EDBC-based programs\* on or after 01/01/2024.  
\* EDBC-based programs: AAP, CAPI, CF, CW, Diversion, FC, IN, KG, MC, RCA, GA/GR, ARC, TCF
  - b. Is a non-hidden and non-duplicate person  
**Note:** If an individual is hidden on one case but non-hidden on another case, they will be considered on the list criteria as well.
  - c. Does not have a "UP" Role
  - d. Has an SSA income detail record that was not changed by the 2024 SSA COLA data change.
    - i. The income category is Social Security.
    - ii. The income amount detail has a begin date before 01/01/2024.
    - iii. The income amount detail has no end date (high-dated) or is end dated on or after 01/01/2024.
    - iv. The "Reported Amount" is not \$0, or "Income Adjustment" and "Unreported Amount" amount have non-zero values.

- v. The income amount detail is not updated by staff\_id = '92' (System).

**Note:** This list will not bring back records where the "Reported Amount" is \$0, and "Income Adjustment" or "Unreported Amount" is blank.

**Additional Column(s):**

- Begin Date
- SSA End Dated
- Adjusted Amount >\$0
- Unreported Amount >\$0
- Reported Amount
- Household Status

Note: A Blank "Household Status" means there is no existing high-dated household record associated with the individual

- SSI/SSP Individual

Note: This column will consist of values (Y/N)

- Program Type
- CIN #
- Person Name

Note: Person Name Format is: <First Name Last Name>

- DOB

**County Action:** Counties can use this list to verify that SSA income amounts are correct and take action if needed.

2. **List Name:** GA/GR Managed and Non-Managed with Updates

**List Criteria:** Cases where all the following conditions are true:

- a. The data change has been applied by Recommendation 2.1.
- b. Case contains at least one program, that is not run by batch:  
GA/GR Managed and GA/GR Non-Managed
- c. The data change in recommendation 2.1 was applied to a person that is "Pending", "Active", or "Ineligible" effective 01/01/2024 on the GA/GR Managed and GA/GR Non-Managed Programs.

**Additional Column:**

- Program Type
- Reported Amount
- Inheritance
- Person Name

Note: Person Name Format is <First Name Last Name>

**County Action:** Counties can review cases and run EDBC to apply updated SSA income amounts.

3. **List Name:** Individual whose Medicare was not updated

**List Criteria:** List includes an individual that meets the following criteria:

- a. Program and Program Person Status is Active, Pending, or Ineligible on at least one of the identified EDBC-based programs\* on or after 01/01/2024.  
\* EDBC-based programs: MC, CF, TCF
- b. Is a non-hidden and non-duplicate person  
**Note:** If an individual is hidden on one case but non-hidden on another case, they need to be considered on the list.
- c. Does not have a "UP" Role
- d. has Medicare Part B Premium record that was not changed by the 2024 SSA COLA data change.
  - ii. The Medicare Part B Premium record has no end date (high-dated) or is end dated on or after 01/01/2024.
  - iii. The Medicare Part B Premium record has a begin date before 01/01/2024.
  - iv. The individual had more than one high-dated Medicare part B premium record.
  - v. The Medicare Part B Premium record is not updated by staff\_id = '92' (System).

**Additional Columns:**

- Part B Payment Amount
- Part B Payment Method
- Begin Date
- Medicare End Date
- Duplicate Medicare
- Household Status

Note: A blank "Household Status" means there is no existing high-dated household record associated with the individual

- SSI/SSP Individual  
Note: This column will consist of values (Y/N)
- Program Type
- CIN #
- Person Name  
Note: Person Name Format is <First Name Last Name>
- DOB

**County Action:** Counties can use this list to verify that Medicare Premium Amounts are correct and take action if needed.

4. **List Name:** Individuals who did not receive RSDI COLA

**List Criteria:** List includes an active non-hidden and non-duplicate individual on an active Medi-Cal program in January 2024 or later where there is an SSA income record and where the questions answered are as below:

- a. Since April 1977, has this person received or has been entitled to receive both RSDI and SSI/SSP in the same month? is "Yes".
- b. Has this person been discontinued from SSI/SSP? is "Yes".
- c. Has this person been discontinued from SSI/SSP? is "Yes".
- d. Has this person received a RSDI COLA increase in any month since SSI/SSP was discontinued? is "No".

**Additional Columns:**

	<ul style="list-style-type: none"> <li>• CIN #</li> <li>• Person Name Note: Person Name Format is &lt;First Name Last Name&gt;</li> <li>• DOB</li> <li>• Receiving SSI/SSP Note: This column will consist of values (Y/N)</li> </ul> <p><b>County Action:</b> Counties can review this list to ensure that the answer to the question “Has this person received a RSDI COLA increase in any month since SSI/SSP was discontinued?” is correct and make any necessary updates. Worker may need to evaluate Pickle eligibility for prior months.</p> <p>If you have questions on this CIT, please reach out to the Primary Contact and cc your Regional Managers.</p>
Primary Project Contact:	<p>For Medi-Cal: Maggie Orozco-Vega <a href="mailto:Orozco-VegaM@CalSAWS.org">Orozco-VegaM@CalSAWS.org</a></p> <p>For CalFresh/Nutrition Benefit: Caroline Bui <a href="mailto:BuiC@CalSAWS.org">BuiC@CalSAWS.org</a></p> <p>For CalWORKs/RCA/ARC: Sarah Rich <a href="mailto:RichS@CalSAWS.org">RichS@CalSAWS.org</a></p> <p>For Foster Care/Kin-GAP/AAP: Ignacio Lázaro <a href="mailto:lazaroi@CalSAWS.org">lazaroi@CalSAWS.org</a></p> <p>For GAGR/CAP: I: Adelaide Mendoza <a href="mailto:MendozaAD@CalSAWS.org">MendozaAD@CalSAWS.org</a></p>
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Attachments:	CA-242762 2024 Social Security Title II and Tile XVI Cost of Living Adjustments (COLA) Design Document.docx
Web Portal Link:	<div></div> <p>OR</p> <p>You may also retrieve the CIT document and attachments by following these steps:</p> <ol style="list-style-type: none"><li>1. Click on the CRFIs &amp; CITs link at the top of the page.</li><li>2. Click on the "CalSAWS Information Transmittal (CIT)" folder.</li><li>3. Click on the "2023" folder.</li><li>4. Click on the appropriate CIT # folder.</li></ol>