

# Information Memorandum Transmittal Aging and People with Disabilities



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**Number:** APD-IM-21-114

**Issue date:** 12/17/2021

**Topic:** Systems Issues

**Due date:**

**Subject:** APD End of Year (2021) Processing Schedule and Updates

**Applies to (check all that apply):**

- |   |  |
|---|--|
| <input type="checkbox"/> All DHS employees                                | <input type="checkbox"/> County Mental Health Directors                                  |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Types A and B | <input type="checkbox"/> Health Services   |
| <input checked="" type="checkbox"/> Aging and People with Disabilities    | <input checked="" type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs                        | <input type="checkbox"/> ODDS Children's Intensive In Home Services                      |
| <input type="checkbox"/> County DD program managers                       | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)                            |
| <input type="checkbox"/> Support Service Brokerage Directors              | <input type="checkbox"/> Other ( <i>please specify</i> ):                                |
| <input type="checkbox"/> ODDS Children's Residential Services             |  |
| <input type="checkbox"/> Child Welfare Programs                           |  |

**Message:**

See the attached document covering topics for End of Year (2021)

- APD End of Year (2021) Processing Schedule
- Client Maintenance System (CMS) and Community Based Care System (CBC/512) Suspended Records
- Oregon Eligibility (ONE) End of Year Updates
- Oregon ACCESS End of Year Updates

*If you have any questions about this information, contact:*

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## APD End of Year (2021) Processing Schedule

Following is the end of year and holiday schedule. It includes systems availability and payment processing information for the dates listed:

### Thursday December 17<sup>th</sup>

#### *Local Office Actions*

- All payroll batch entries for the HCW pay-period ending 12/04/21 must be entered into mainframe for payment processing by 5:00PM on 12/17/21. Please remember to add your office's cost center when pulling a payroll batch from OR PTC DCI.
- Check in all cases on the laptops and log out of Oregon ACCESS by 5pm

#### *System Actions*

- State processing deadline for last December HCW pay processing cycle

### Monday December 20<sup>th</sup>

#### *Local Office Actions*

- Review CBC suspended records on SCFP for any suspended service periods to prepare for the last 2021 check run; *SJD9055R-B Suspense Report by Branch* is a CA View report of all the suspended records

#### *Systems Actions*

- Final HCW service payment checks mailed
- Final HCW Overtime (OT) payment run

### Thursday December 23<sup>rd</sup>

#### *Local Office Actions*

- LAST day to fix CMS records for clients whose medical eligibility is in the CM system if needed to get CBC/512 out of suspense prior to CMS end of month run with COLA update.

Remember: When updating CMS with changes effective in November, use a SUPL incoming code. When updating CMS with changes effective in December, use the COMP incoming code

Note: Because changes in ONE do not require overnight batch processing before becoming available to the 512, ONE changes can be completed up to Monday, December 27<sup>th</sup>.

### Friday December 24<sup>th</sup>

- State Holiday – No payment processing

## **Saturday December 25<sup>th</sup>**

- State Holiday – No payment processing
- USPS Closed – No mail delivery

## **Monday December 27<sup>th</sup>**

### ***Local Office Action***

- Last day to clear any CBC suspend records
  - “Touch” the 512 to update with CM changes made on, or before, December 27<sup>th</sup>
  - “Touch” the 512 to update with changes made in ONE.
- Check in all cases on the laptops and log out of Oregon ACCESS by 5pm
- See CMS/CBC change AFTER the CMS end of month Run on 12/27/2021 for further instructions to correct suspended records related to CM

### ***Systems Actions***

- This is the CMS end of month deadline
- Mainframe closed at 8pm
- CMS records updated with the SSI/SSB COLA and the new OSIPM standards
- New 512 authorizations generated dated 01/01/2022 using the new amounts from CMS or ONE with narrative
- Oregon ACCESS CMS related cases updated with the SSI/SSB COLA. This is the gross SSI/SSB amount
- Oregon ACCESS OSIPM standards and Community Spouse Allowance updated to reflect 2022 amounts

## **Wednesday December 29<sup>th</sup>**

### ***Systems Actions***

- Last CBC weekly checks run for December
- Last CEP daily check run for non-HCW payments and all CEP provider adjustments
- Mainframe closed at 8pm

## **Friday December 31<sup>st</sup>**

### ***Systems Actions***

- CBC 512 documents for 2022 mailed during this week reflecting new COLA amounts in CMS or ONE, depending upon where the client's medical is housed.
- CEP FICA Refund processed (checks dated 01/01/2022)
  - In this yearly run, all providers paid via check
- Mainframe closed at 7pm

## **Saturday January 1<sup>st</sup>**

### ***Systems Actions***

- First CBC monthly check run for 2022
- State Holiday

## **Monday January 3<sup>rd</sup>**

### ***Systems Actions***

- First CEP daily check run and all CEP provider adjustments
- CBC checks mailed
- CEP FICA refund checks mailed

## **Tuesday January 4<sup>th</sup>**

### ***Local Office Action***

- Last day for local office to enter HCW timesheets for first 2022 pay processing run.

### ***Systems Actions***

- State processing deadline for first January 2022 HCW pay processing cycle

## **Wednesday January 5<sup>th</sup>**

### ***Systems Actions***

- First 2022 HCW OT payment run
- First 2022 HCW service payment checks mailed

## **Thursday January 6<sup>th</sup>**

### ***Systems Actions***

- First 2022 HCW OT mailed

## **Monday January 31<sup>st</sup>**

### ***Systems Action***

- W-2s and 1099s will be mailed by January 31, 2022

# **Client Maintenance System (CMS) and Community Based Care System (CBC/512) Suspended Records**

## **About CMS**

The Client Maintenance System (CMS) stores information about a consumer's income and liability. This information is used by the Community Based Care System (CBC/512). CMS only holds one record, it does not store history. Changes entered into CMS must process in overnight batch processing before they become "available" to other systems. This essentially results in a one-day delay. For information on the dates to fix CMS/512 records for suspended payments, please see the APD End of Year (2021) Processing Schedule.

The CMS is scheduled to automatically update SSI and SSB amounts on the night of December 27, 2021. The new amounts will reflect the 2022 COLA adjustment.

## **About CBC/512**

The CBC/512 system uses service eligibility, income, and liability information from CMS in generating the 512. As stated above, CMS only holds one record. So, whatever information is on the CMS record is used "as is" by the CBC system. Remember changes made to CMS must process overnight. Once overnight batch processing has taken place, you must "touch" the CBC/512 record to draw in the CMS changes. If you need assistance with clearing your suspense records, please contact the Service Desk.

### *How the COLA affects the way CMS and CBC work together*

The interaction between CMS and CBC/512 is especially important to remember at the end of each year. Automated Cost of Living (COLA) changes in the CMS system impact the CBC/512. The timing of the automatic updates must be considered when correcting suspended CBC/512 records with service periods in late 2021. Note that a liability cannot be increased as a result of a COLA increase.

### **CMS/CBC change BEFORE the CMS COLA Run on 12/27/2021**

As stated, the CMS system is scheduled to automatically update SSI and SSB amounts on the night of December 27, 2021. This means any changes you need to make to CMS in order to correct suspended November/December CBC/512 payments must be made by **December 23<sup>rd</sup>**. This will allow the CMS changes to process the night of December 23<sup>rd</sup>. You will then need to "touch" the CBC/512

record on the next business day of **December 27<sup>th</sup>** to draw in the CMS changes and fix the suspension.

**CMS/CBC change AFTER the CMS end of month Run on 12/27/2021**

If you need to correct a November/December CBC/512 record that is *CM related* after the night of December 27, 2021, it is recommended that you submit the applicable adjustment form found on the Forms Server. **Central office can correct these records for you.**

If you do not have any suspended November or December CBC/512 records, you do not need to do anything. The automatic adjustment will not affect your CBC/512 payments for November and December.

*Client/Provider 512*

We will generate the annual copy of the 512 document for consumers and providers that are generated each time there is a COLA. We will add a narrative to the 512s, as well.

## Oregon Eligibility (ONE) System End of Year Updates

The Oregon Eligibility system (ONE) updates the applicable program standards to reflect 2022 COLA adjusted amounts. ONE also uses data files provided by SSA to update client income, Medicare information, and client expense data. ONE will automatically evaluate eligibility for January 2022 using updated standards and income. Please see [APD-PT-21-041](#) for additional information.

**Wednesday, October 2, 2021** – 2022 Annual Income segments created. 2022 projected income amount copied from 2021 record.

**Wednesday, November 10, 2021** – 2022 COLA adjusted program standards added to ONE. This update added COLA adjusted standards that become effective on 1/1/2022. Standards updated include the following:

- OSIPM Adjusted Income Standards
- Long-Term Care Countable Income Standard (300% of SSI)
- Home Equity Exclusion Limit
- Allocating and Deeming related figures
- Resource Assessment related figures
- Pickle Multiplier
- MRP 2022 amounts for the following:
  - Nursing Facility PIF (NF/PIF)
  - Children's Room and Board (CRB)
  - Title IV-E Children's Room and Board Allowance (4ER/4ES)
  - APD Adult Room and Board
  - MAGI Room and Board

**Wednesday, November 24, 2021** – Phase 1 of automatic Medical Related Payment update implemented. ONE will automatically update recurring MRPs that are indexed to the SSA COLA. This means that if an MRP exists for one of the listed items, that MRP is currently authorized for the 2021 maximum amount, and the end date of the MRP falls in 2022, ONE will end date the 2021 MRP and create a new one for 2022. The 2022 MRP will reflect the COLA adjusted maximum amount for the item. Further, the 2022 MRP will copy all other data – Issue To, Payment Mode, Address, etc... from the 2021 MRP record. The following Pay Types were considered for automatic update:

- MRP-002/B8 – MAGI Room and Board
- MRP-006/H1 – IV-E R&B/Incidentals
- MRP-007/H2 –IV-E R&B/Incidentals Supplement
- MRP-018/13 – CBC Facility R&B

**Wednesday, November 24, 2021** (*continued*)

- MRP-033/H7 – Children’s Room and Board  
Phase 1 of this change did the following:
- End date the existing MRP effective 12/31/2021
- Create a pending MRP effective 1/1/2022

**Weekend of December 3, 2021** – Protected Eligibility provisions added to ONE. This logic ensures that individuals eligible for programs with standards indexed to the Federal Poverty level do not lose eligibility when the SSA income COLA is applied. Instead, eligibility for these programs is protected until the FPL standards are changed in March.

- Affected programs include: QMBP, SLMB, QSMF, EPD

SDX SSI Income updates applied to ONE. This process automatically updates SSI income entries on the ONE data collection screens. The update is based on data provided by SSA. Eligibility is evaluated for updated cases and automatically ‘Authorized’ unless it results in a benefit decrease. The Notice of Eligibility was produced for ‘Authorized’ cases if the eligibility evaluation resulted in a change to eligibility or liability. Please note the following:

- Eligibility was not automatically evaluated after the income update if the ONE case was not in an Active/Approved status. For “In Progress” case modes (e.g. Change, Renewal, etc...) SSI income was updated but no automated eligibility evaluation was performed.
- Benefit Decrease tasks were only created if no other RFI or task was present on the case. This modification was made to reduce the number of tasks created.
- Benefits were placed in pending status on cases with overdue renewals, however December benefits will remain in place.
- RFIs were generated and mailed for the following categories:
  - Interviews (e.g. when the individual is being evaluated for NMAGISERV or QMBP)
  - AVS consent when there’s no record in the case file and AVS is required



**Weekend of December 10, 2021** – BENDEX SSB/SSDI Income updates applied to ONE. This process automatically updated the following in the ONE data collection screens, using data provided by SSA:

- SSB and SSDI income
- Medicare Part A and B eligibility data
- Medical/SNAP expense data related to client-paid Medicare Premiums. Once the data listed above was updated in ONE, eligibility was automatically evaluated. The eligibility determination results were automatically ‘Authorized’ unless there was a benefit decrease. The Notice of Eligibility was produced for ‘Authorized’ cases if the eligibility evaluation resulted in a change in eligibility or patient liability. Please note the following:
- Eligibility was not automatically evaluated after the BENDEX update if the ONE case was not in an Active/Approved status. For “In Progress” case modes (e.g. Change, Renewal, etc...) SSB/SSDI income, Medicare data, and expense information was updated but no automated eligibility evaluation was performed.
- As with the daily BENDEX processing, SSB/SSDI updates are not processed if there is more than one SSB/SSDI record on file in ONE for an individual
- As with the daily BENDEX processing, SSB/SSDI updates are not processed if there is more than one SSB/SSDI segment on the BENDEX files for an individual.
- Under federal guidelines, patient liability was updated, as applicable, using the new income, expense, and standards information. The patient liability was not protected from update as it was during the 2020 COLA processes.
- Benefit Decrease tasks were only created if no other RFI or task was present on the case. This modification was made to reduce the number of tasks created.

The following actions were also taken as a result of the BENDEX update:

- Benefits were placed in pending status on cases with overdue renewals, however December benefits will remain in place.
- RFIs were generated and mailed for the following categories:
  - Missing Information
  - Interviews (e.g. when the BENDEX updates resulted in potential non-MAGI eligibility)
  - Income Cap Trusts (e.g. when the COLA put someone over the 300% SSI limit)
  - AVS consent when there’s no record in the case file and AVS is required
  - Citizenship/Non-Citizen Status
  - Resource Assessments

**Monday, December 13, 2021** – Phase 2 of automatic MRP update completed. Phase 2 of the automatic MRP update process will do the following:

- Pending 2022 MRP requests will be evaluated
- If the client is eligible for the payment, the MRP will be “Submitted” (aka Authorized) for payment
- Once the payment has been evaluated, staff may review and make any necessary updates to the 2022 MRP authorizations.

### **ONE and the Community Based Care (CBC/512) system**

As stated above, the CBC system is scheduled to run on January 1, 2022. During this processing cycle, CBC will be producing payment for prior service periods, including payments for December 2021 services. The ONE system communicates with CBC in real time. This means that staff can make changes to ONE data, run eligibility, authorize the ONE eligibility results, and touch the CBC/512 to draw in the updated data all in the same day.

If staff need to modify ONE and update the CBC/512 record for 2021 dates of service, these changes should be made prior to the January 1, 2022 check run.

# Oregon ACCESS End of Year Updates

## **COLA Overview**

Annually our systems are updated with various Cost of Living Adjustments that may affect income and standards. Any person with an income type administered by Social Security Administration should receive the 2022 COLA (Cost of Living Adjustment) increase of 5.9%.

### **Please Note**

The SSA amounts are rounded down in our systems. For example, if the SSA amount is \$1,180.90, our systems will show the amount as \$1,180.

### **Please do not take action to add the cents back to the SSA amount.**

Also, ODHS has always rounded down when the SSA income is updated in the systems, so this is not something which should be reported. Both the targeted and QA reviewers should be familiar with the rounding method used.

The Client Maintenance System (CMS) has a special job that updates its records. If a CMS record has an SSI/SSB entry, the amount is increased by the COLA percentage of 5.9%.

A mass file update will synchronize the Social Security benefit information in CMS with Oregon ACCESS:

- On 12/27/2021, a mass file update will run using the CM end-of-month (EOM) records. This process will take the COLA updated Social Security benefit information from CMS and update the Oregon ACCESS gross income fields for the appropriate social security benefit.

If a person in Oregon ACCESS did not have an active record in CMS, no update will occur related to the Social Security Administration COLA.

## **OSIPM Standard Update**

The OSIPM Standards and Community Spouse Allowance will change effective 01/01/2022. Oregon ACCESS will update these amounts the night of 12/27/2021.