Massachusetts Eligibility Data Platforms:
Integrating State and Federal Data Sets to Maximize Benefits and Savings

Center for Health Care Financing
Medicare Eligibility Enhancement Programs
Presenters: Yuping Su and Jenifer Hartman

UMASS MEDICAL SCHOOL

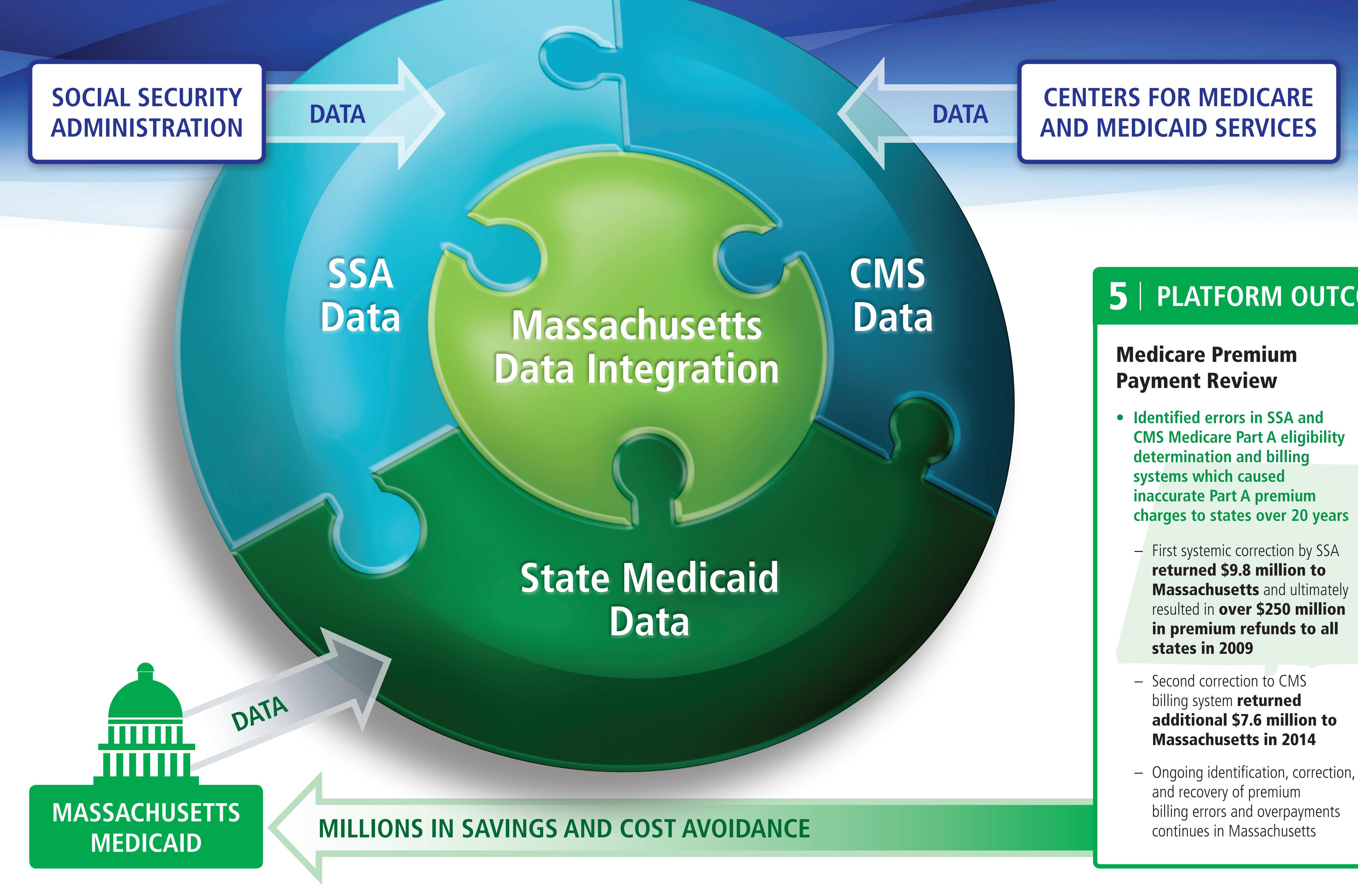## 1 | OPPORTUNITY IDENTIFICATION

- Massachusetts Medicaid recipients are not receiving all Medicare and Social Security benefits to which they may be entitled
  – Medicaid recipients who appear eligible for Medicare benefits are not enrolled
  – Medicaid recipients appear to have been missed or erroneously denied for Medicare and other Social Security benefits
- The Massachusetts Medicaid Program is providing health care benefits which should be covered by Medicare
- Can state and federal data sets be integrated to evaluate Medicaid recipient eligibility status and maximize recipient benefits and state savings?

2 | DATA CONSOLIDATION AND ASSESSMENT

- Identify available state and federal data sets containing information which may be utilized to assess and predict recipient entitlement to Medicare and other Social Security benefits, such as:
  – Both direct feeds from federal agencies and extracts created from state production systems
  – Current and historical data
  – Newly available data sets
- Determine key data elements and establish relationships to integrate diverse data sets and establish a consolidated base for cross-checking platforms

3 | BUSINESS INTELLIGENCE

- Develop and execute algorithms, queries, and filters to compare individual recipient status across data sets
- Detect discrepancies within and between demographic and eligibility data
- Identify federal errors that impact eligibility and entitlement
- Identify potential missing benefits and predict state savings and revenue

SOCIAL SECURITY ADMINISTRATION → DATA

CENTERS FOR MEDICARE AND MEDICAID SERVICES ← DATA

SSA Data
CMS Data
Massachusetts Data Integration
State Medicaid Data

MASSACHUSETTS MEDICAID → DATA

MILLIONS IN SAVINGS AND COST AVOIDANCE

4 | PLATFORM APPLICATIONS

- Produce referral reports and supporting documentation for SSA and CMS to review and resolve eligibility issues
- Utilize platforms for ongoing monitoring of recipient status across data sets and confirmation of newly approved federal benefits
- Perform quality assurance reviews to verify that inaccurate and missed benefits have been fully corrected and granted to recipients

5 | PLATFORM OUTCOMES FOR MASSACHUSETTS MEDICAID

Medicare Premium Payment Review

- Identified errors in SSA and CMS Medicare Part A eligibility determination and billing systems which caused inaccurate Part A premium charges to states over 20 years
  – First systemic correction by SSA **returned $9.8 million to Massachusetts** and ultimately resulted in **over $250 million in premium refunds to all states in 2009**
  – Second correction to CMS billing system **returned additional $7.6 million to Massachusetts in 2014**
  – Ongoing identification, correction, and recovery of premium billing errors and overpayments continues in Massachusetts

Medicare and Disability Entitlement Correction

- Identified 2,380 under-65, disabled Medicaid recipients potentially missed for Medicare and Social Security cash benefits by SSA
  – To date, benefits corrected and Medicare granted for over 1,000 recipients, achieving **over $8 million in estimated annual savings**
  – Achieved CMS agreement to refund and/or waive retroactive Medicare premium charges resulting from the federal error, leading to **additional $1.7 million in savings to date**
  – Total potential cost avoidance **savings estimated at $10 million to $15 million annually**

Medicare Outreach and Enrollment

- Identified over 2,100 aged SSI and Medicaid recipients potentially eligible for, but never enrolled in, Medicare
  – **Achieved over 90% Medicare enrollment rate** for aged SSI recipients
  – To date, realized **over $7.1 million in estimated annual savings**
- SSA Regional Office recognized the accuracy of Massachusetts data analysis to identify SSI recipients missed for Medicare enrollment and utilized this analysis to investigate current internal SSA processes