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

Jenifer Hartman

University of Massachusetts Medical School

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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?

OPPORTUNITY IDENTIFICATION
• 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

PLATFORM APPLICATIONS
• 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

DATA CONSOLIDATION AND ASSESSMENT
• 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 $5.8 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

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

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 $5.8 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 2,280 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 Medicare 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