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

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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

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
- **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
  - SSA Regional Office recognized the accuracy of Massachusetts data analysis to identify SSI recipients missed for Medicare enrollment and utilizing this analysis to investigate current internal SSA processes
  - Achieved over 90% Medicare enrollment rate for aged SSI recipients
  - To date, real and 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