



OFFICE OF POLICY, PROCEDURES, AND TRAINING

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POLICY BULLETIN #20-10-ELI
STATE ONLINE QUERY (SOLQ) SYSTEM DESK GUIDE

<p>Date: March 10, 2020</p>	<p>Subtopic(s): Eligibility</p>
	<p>This policy bulletin is for Job Center, Non-Cash Assistance (NCA) Supplemental Nutrition Assistance Program (SNAP) Center, and HIV/AIDS Administration Services (HASA) staff authorized to access and use the State Online Query (SOLQ) system to verify receipt of Social Security Administration benefits. It is informational for all others.</p> <p>Purpose:</p> <p>This procedure introduces a new form: State Online Query (SOLQ) System Desk Guide (FIA-1224). The purpose of the FIA-1224 is to assist authorized staff using SOLQ to process accurate budgeting of SSA retirement, disability and survivor’s (RSDI) and Supplemental Security Income (SSI) benefits for CA and SNAP.</p> <p>The Desk Guide has the following sections and instructions:</p> <ol style="list-style-type: none"> 1. Title II – <ol style="list-style-type: none"> a. Title II Benefit Review – the different tabs on the screen and the information available in the tab b. Review – data that the staff should review in SOLQ c. In POS Enter – data relating to the demographics and budget that should be entered POS d. Definitions and Special Instructions – definition of common SOLQ terms and acronyms as well as instructions specific to Title II overpayment garnishments. 2. Title XVI – <ol style="list-style-type: none"> a. Title XVI SSI Benefit Review – the different tabs on the screen and the information available in the tab b. Review – data that the staff should review in SOLQ c. In POS Enter – data relating to the demographics and budget that should be entered POS d. Definitions and Special Instructions – definition of common SOLQ terms and acronyms.

HAVE QUESTIONS ABOUT THIS PROCEDURE?
Call 718-557-1313 then press 3 at the prompt followed by 1 or
send an e-mail to *FIA Call Center Fax* or fax to: (917) 639-0298

- Reminder** When verifying the amount of Social Security Retirement, Survivor's, Disability Insurance (RSDI) or Supplemental Security Income (SSI) benefits that a client is receiving, staff must select the SSN Verify tab at the top of the SOLQ screen.
- Reminder** Staff should access the SOLQ Summary screen to see the SSA/SSI benefit amount summary. This screen shows the distribution dates and amount paid.
- Reminder**
Historical payments When reviewing the payment history, staff must remember that the historical payments listed on this screen only indicate the changes in the entitlement amounts. This means that the changes only reflect increases or decreases in the benefit amount in the month that the increase or decrease started. It does not represent the last eight (8) payments the individual received.
- Reminder**
Income Source Code 30 for dependent spouse or child When a RSDI or SSI recipient has a spouse or child in the CA or SNAP household who is receiving benefits based on the RSDIS or SSI recipient's record, the staff should use **income source code 30** to budget the unearned income of the dependent spouse or child.
- Reminder** Staff must enter a case note about any reductions to the countable income because of a same source overpayment garnishment.

Effective Immediately

Related Item:

[PB #14-133-SYS](#) State Online Query (SOLQ) System

Attachment:

FIA-1224 State Online Query (SOLQ) System Desk Guide



State Online Query (SOLQ) System Desk Guide

Title II Benefit Review	Review	In POS Enter:	Definition and Special Instructions
<p>SSN Verify Tab</p> <p>(Client Demographics, SSN Verification Code)</p>	<ul style="list-style-type: none"> Name Date of Birth Social Security Number (SSN) Verification Code Claim Account Number and Beneficiary Identification Code (CAN/BIC) 	<ul style="list-style-type: none"> Any missing client demographic data 	<ul style="list-style-type: none"> Verification Code – Indicates that the SSN was verified or the reason for non-verification. CAN/BIC – Claim Account Number and Beneficiary Identification Code – the SSN under which the Title II claim exists. The CAN portion of the “claim number” is the SSN of the of the wage earner on whose record benefits are being paid If the SSN is not verified refer to PD #18-04-ELI for instructions on validation codes and necessary actions
<p>Summary Tab</p> <p>(Benefit Amounts, Dates of Entitlement, Application Dates)</p>	<ul style="list-style-type: none"> CAN/BIC Dual Entitlement Number 	<ul style="list-style-type: none"> The MBC Amount as the unearned income amount for RSDI Use income source code 30 for household members receiving dependent benefits (spouse or child) 	<ul style="list-style-type: none"> RSDI – Retirement, Survivors and Disability Insurance MBC – Monthly Benefit Credited MBC Amount – This is the amount rounded to the nearest dollar but before any deductions, like Medicare premium or overpayments, or garnishments. MBC type: <ul style="list-style-type: none"> C – benefits paid N – benefits not paid E – benefits not paid, due to delay/ pending or suspense Blank – benefits not paid
<p>Title II RSDX Tab</p> <p>(Benefits Amounts, Deductions Recoupments, Garnishments)</p>	<ul style="list-style-type: none"> Entitlement Dates (Initial and current) MBC Type, date and amount SSA Payment Data SSA Payment History 	<ul style="list-style-type: none"> The premium amount deducted as a medical expense. The <u>net</u> benefit amount, if it is reduced due to an overpayment made by the same source (same source overpayment garnishment) A case note about any deduction made due to same source overpayment 	<ul style="list-style-type: none"> Dependent benefits – the recipient is spouse or child of applicant/participant and receiving benefits based on the applicant’s or another person’s claim account number. Same Source Overpayment garnishment – benefits paid to the claimant by the SSA to which the client was not entitled. If the garnishment is for any other reason than a same source overpayment, budget the entire MBC and only give the medical deduction if the Payer in the RFI SSA/SSI Individual Info screen is indicated as Self.

SAMPLE

NOTE: If the SSI or SSD income cannot be verified through the SOLQ review, the staff must request an award letter from the client before continuing to process the application/recertification.

State Online Query (SOLQ) System Desk Guide (continued)

Title XVI Benefit Review	Review	In POS Enter:	Definition and Special Instructions
<p>SSN Verify Tab</p> <p>(Client Demographics, SSN Verification Code)</p>	<ul style="list-style-type: none"> • Name • Date of Birth • Social Security Number (SSN) • Verification Code • Claim Account Number and Beneficiary Identification Code (CAN/BIC) 	<ul style="list-style-type: none"> • Any missing client demographic data 	<ul style="list-style-type: none"> • Verification Code – Indicates that the SSN was verified or the reason for non-verification. • Claim Account Number and Beneficiary Identification Code – the SSN under which the Title XVI claim exists. The CAN of the portion of the “claim number” is the SSN of the of the wage earner on whose record benefits are being paid
<p>Summary Tab</p> <p>(Benefit Amounts, Dates of Entitlement, Application Dates)</p>	<ul style="list-style-type: none"> • CAN/BIC • Dual Entitlement Number • Entitlement Dates (Initial and current) 	<ul style="list-style-type: none"> • The MBC Amount as the unearned income amount for SSI 	<ul style="list-style-type: none"> • MBC – Monthly Benefit Credited – the Title II benefit due after any appropriate dollar rounding (considering a deductible of SMI premium) but prior to the actual collections of any obligation of the Beneficiary (including SMI premium). • MBC Amount - This is the amount rounded to the nearest dollar • MBC type: <ul style="list-style-type: none"> ○ C- benefits paid ○ N – Benefits not Paid ○ E – Benefits not paid, due to delay/ pending or suspense ○ Blank – benefits not paid
<p>Title XVI-SSI Tab</p> <p>(Benefits Amounts, Deductions, SSI Resource Data, Unearned and Earned Income Data)</p>	<ul style="list-style-type: none"> • MBC Type, date and amount • SSI Payment Data • SSI Payment Status Effective Date • Entitlement Dates (Initial and current) • Earned income data 	<ul style="list-style-type: none"> • Any RSDI that the client may also receive • Use income source code 30 for household members receiving dependent benefits (spouse or child) • Earned income 	<ul style="list-style-type: none"> • Dependent benefits – the recipient is spouse or child of applicant/participant and receiving benefits based on the applicant’s or another person's claim account number. • Note: The State Supplement portion of the SSI benefit will not appear in the SOLQ Data screens. Staff should refer to PB #14-124-ELI for instructions on retrieving and budgeting the state supplement.

NOTE: If the SSI or SSD income cannot be verified through the SOLQ review, the staff must request an award letter from the client before continuing to process the application/recertification.