Data Exchange Modernization (SDX, BENDEX & SOLQ-I) **IMAC** Presentation January 2025

Overview

Effective February 22, 2025, the Social Security Administration (SSA) data exchange and other pages in CWW will be enhanced to:

- Fix reported data exchange problems and other problems identified during project research
- Decrease discrepancies and alerts
- Improve worker efficiency

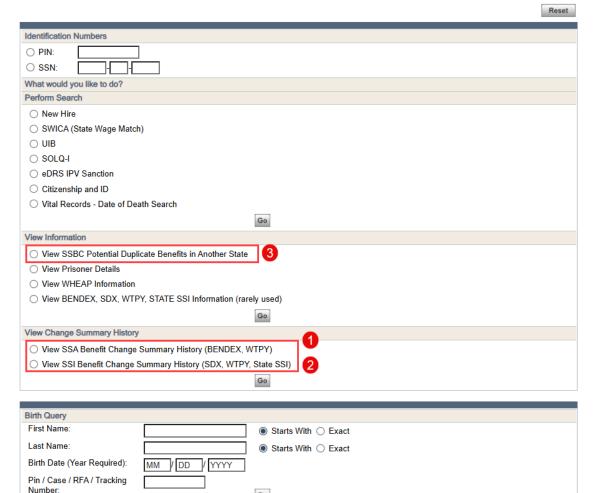
Changes to CWW

Data Exchange Query Page

The following new query fields will be added to the Data Exchange Query page.

- View SSA Benefit Change Summary History (BENDEX, WTPY) – when selected, workers navigate to the new SSA Historical Information Summary page.
- View SSI Benefit Change Summary History (SDX, WTPY, State SSI) – when selected, workers navigate to the new SSI Historical Information Summary page.
- View SSBC Potential Duplicate Benefits in Another State – when selected, workers navigate to the SSA Details page for ONLY SSBC records.

🚟 Data Exchange Query



Go

Data Exchange Query Page Cont'd

CWW will be enhanced to display only SOLQ-I records when the SOLQ-I radio button is selected. Historical match records received from data exchange matches SDX, BENDEX and WTPY will no longer display.

🖽 Data Exchange Query	A STATE AND A STAT
	Reset
Identification Numbers	
O PIN:	
○ SSN:	
What would you like to do?	
Perform Search	
◯ New Hire	
SWICA (State Wage Match)	
⊖ UIB	
⊖ SOLQ-I	
O eDRS IPV Sanction	
○ Citizenship and ID	
○ Vital Records - Date of Death Search	
Go	

SSA Historical Information Summary Page

A new SSA Historical Information Summary page will be added to CWW.

This page is a summary view of historical SSA information containing "true" changes, sorted by income type. "True" changes include changes to the following:

- SSN or SSN Claim Number
- Date of Death
- Income Type or Payment Status
- Gross or Net Benefits amounts
- Initial or Current Entitlement month
- Disability Onset Date
- Dual, Triple Entitlement Claim or Indicator
- Cross Reference Claim

- Over Payment Deduction Amount or End Date
- Direct Deposit Code
- Medicare Eligibility, Entitlement or Termination Date
- Medicare Payor
- Railroad Indicator
- Payee Address or Zip Code
- SSI Overpayment or Garnishment Amount Withheld

SSA Historical Information Summary Page Cont'd

This page is accessed from the Data Exchange Query page after clicking on the view SSA Benefit Change Summary History (BENDEX, WTPY) radio button.

By clicking the magnifying glass the worker navigates to the new SSA Benefit and Medicare Details page.

Note: On February 22, 2025, the latest SSA match received for each income type will display as Conversion to create the first record on the summary page.

BB SSA Historical Information Summary SSA Historical Information Summary Demographic Information Name: PIN: SSN: Birth Date SSA Benefit Summary Collapse Al Epand All Claim SSN SOCL SECRTY DISABLTY/WAGE ERNR(SSDI) Record Date Received Benefit Gross Net Benefit **Dual/Triple** Changes from Benefit and Payment Status From SSA Payment Date Benefit Amount Entitlement **Previous Record** Medicare Number Indicator Number Details Amount 2 11/14/2024 12/2024 CURRENT \$691.00 \$69.10 Gross Benefit ٩ Amount, Net Benefi PAYMENT Amount, Initial Entitlement Month. Medicare Part-A Eligibility, Medicare Part-A Entitlement Date. Medicare Part-A Premium Amount, Medicare Part-A Pavor, Medicare Part-B Premium Amount 01/26/2019 11/2018 CURRENT \$818.00 \$817.40 Conversion 0 PAYMENT Previous

SSA Benefit and Medicare Details Page

A new SSA Benefit and Medicare Details page has been created to remove unnecessary or duplicate fields so that displayed information is organized in a user-friendly format.

Workers can use this page to view additional details of the SSA match that created the change record added to the SSA Historical Information Summary page.

SSA Details and Medicare					
SSA Details and Medicare SSA Benefit Details					
SSA Benefit Details	1000	PIN:		Record Number:	1
SSN Claim Number:		Cross Reference Claim:		Date Received from SSA:	-
Income Type:	SOCIAL SECURITY DISABILITY / WAGE EARNER	Payment Status:	CURRENT PAYMENT	Benefit Payment Date:	12/2024
Gross Benefit Amount:	\$691.00	Net Benefit Amount:	\$69.10	Current Entitlement Month:	12/2009
Garnishment Amount Withheld:	\$0.00	SSI Overpayment Amount Withheld:	\$0.00	Initial Entitlement Month:	11/2024
Overpayment Deduction Amount: Triple Entitlement Claim:	\$0.00	Dual/Triple Entitlement Indicator: Railroad Indicator:		Dual Entitlement Claim:	
Disability Onset Date:	6/2009	Date of Death:			
Overpayment Deduction End Date: Direct Deposit Code:	checking account				
Payee Name:					
Payee Address Line 1:		Pavee Ad	dress Line 2:		
Payee Address Line 3:			dress Line 4:		
Payee Address Line 5:		Payee Ad	dress Line 6:		
Payee Zip Code:					
Medicare Entitlement Detail	-				
	PART-A			PART-B	
Eligibility:	Yes 🗐			Yes 🛅	
Entitlement Date:	11/2024			11/2024	
Termination Date:					
Premium Amount:	\$150.00			\$200.00	
Payor:	\$52 📺			BENEFICIAR	Y 🔳
3rd Party Premium Pay Date: 3rd Party Premium Pay Date:					
Gross Benefit Payment Hist					
Benefit Received Month and	Year Gross Benefit Ar	mount			

SSI Historical Information Summary Page

Like the SSA Historical Information Summary page, the new SSI Historical Information Summary page is a summary view of historical SSI information containing "true" changes. "True" changes include changes to the following:

- Payment Status Effective Date
- SSI Gross Amount
- Gross Federal SSI Amount
- Gross State SSI Amount
- SSI Assistance Amount
- Recoupment Amount (Federal SSI Overpayment)
- Gross SSI-E Amount

- SISS/SISE/CTS Recoupment Amount (State SSI Overpayment)
- Net SSI Amount
- Over/Under Payment Indicator
- State Grandfather Indicator
- MA Eligibility Code
- Eligibility Begin Date

SSI Historical Information Summary Page Cont'd

Date Received From SSA

11/14/2024

11/14/2024

11/14/2024

11/14/2024

11/14/2024

Income Type

SOCIAL SECURITY

SOCIAL SECURITY

SOCIAL SECURITY

SOCIAL SECURITY

SOCIAL SECURITY

This page is accessed from the Data Exchange Query page after clicking on the view SSI Benefit Change Summary History (SDX, WTPY, State SSI) radio button.

By clicking the magnifying glass, the worker will be navigated to the new SSI Benefit Details page.

Note: On February 22, 2025, the latest SSI match received will display as Conversion to create the first record on the summary page. 333 Supplemental Security Income (SSI) Historical Information Summary SSI Historical Information Summary Demographic Information Name: PIN: SSN: Birth Date: SSI Benefit Summary Supplemental Security Income Record Date Federal SSI Gross Date State SSI Gross State Total Recoupment Benefit Payment Changes from Benefit **Received From** Previous Record Number Received Federal SSI SSI Amount Amount Date Details Number iC Amount 11/19/2024 11/19/2024 ٩ \$80.00 \$10.00 \$0.00 11/01/2024 Conversion Unearned Income **History Details**

Stop Date

12/2023

12/2023

06/2024

10/2024

Amount

\$0.00

\$0.00

\$0.00

\$9,999.99

\$1,704.00

Start Date

12/2023

12/2023

06/2024

07/2024

12/2024

Previous

Claim / ID Number

SSI Benefit Details Page

A new SSI Benefit Details page has been created to remove unnecessary or duplicate fields so that displayed information is organized in a user-friendly format.

Workers can use this page to view additional details of the SSI match that created the change record added to the SSI Historical Information Summary page.

Powee Dom	graphic Details								
PIN:	graphic Details		SSN:	and and a	Decerd Number 42				
					Record Number: 18				
Name:			Match Date:	11/07/2024					
Payee Nar	ne:	in the second	Birth Date:		Gender: FEMALE				
Payee Typ	e: DISABLE		Citizen / Alie	Code: IDENTITY & CITIZENS VERIFIED BY NUMIDE INTERF					
Address:	20	1000	Benefit Payn	nent Date: 11/01/2024					
Payment D	etails								
Details				Federal	State				
Match Date:				11/07/2024	11/07/2024				
Payment Status Effective Date:				CURRENT PAY 04/1993	CURRENT PAY 04/1993				
Gross SSI Amount:				\$40.00	\$0.00				
Recoupment Amount (Federal SSI Overpayment):			nt):	\$25.00	\$25.00				
Gross SSI-E	Amount:				\$50.00				
SISS/SISE/	CTS Recoupmer	t Amount (State S	SI Overpayment):		\$0.00				
Net SSI Am	ount:			\$15.00	\$15.00				
Over/Under	Payment Indicat	or:							
State Grand	father Indicator:								
Other Detai	s								
MA Eligibil	ity Code:		ELIGIBLE FOR	MEDICAID (1634 STATES ONLY)	. =				
Eligibility E	egin Date:		06/01/1993						
Federal SS	l Payment Histo								
History Det									
Date	SSI Gross Amount	SSI Net Amount	SSI Recovery Amount	Payment Flag					
				No data found.					

Unearned Income Page

The magnifying glass on the Unearned Income page will navigate workers to the new SSA Historical Information Summary page or the new SSI Historical Information Summary page.

The magnifying glass will always display and be enabled when there is historical SSA or SSI information tied to the individual.

There will no longer be a need to run SOLQ-I for the magnifying glass to display.

🕮 Unea	arned Incom	ne				Cancel 🗌 Re
Effective P	Verlod					
Begin Mo	onth: 03/2	025	End Month:		Last Updated:	03/05/2025
Delete R	eason: 🔳					
Income Inf	formation					
 Individua 	£			SSN:	Sec	uence: 1
Income 1	Type:	SISS - STAT	E SUPPL SECURIT	Y INCOME	2	
 Verificati 	on:	DX - SYST	EM GENERATED UP	PDATE		
Claim SS	IN Number:	N/A				
Income 8	Segin Date:	05/01/2024		Income End 0	Date:	
Income (Discontinued?	No		Date Loss Of	Income Reported:	
Frequent	cy Period:	M - MONTH		Number of Pa	lys:	1
Income A	vailable?	Yes		Monthly Conv	verted Amount	\$75.00
Monthly	MA Amount	\$75.00				
	BC+ Taxable	\$0.00				
Agreeme	nt Date:			Verification:		
Disregard	s, Expenses and L	.05985				
SSI Past	Account Amount	5				
SSIE Exp	penses:	\$. Verification:	1	
FFU Chi	d Support Disrega	ard Amount: \$		 Current Disregard Amount: 	s	
	LA / Disabled Adu d Amount:	t Children \$				
Monthly	Personal Capital L	.osses: \$				
Attendan	VE benefits inclu ce/Housebound A nusual Medical E	llowance				
	endance/Housebo e and/or Unusual Amount:			Verification		
Details						
Delete	Gross Incom	e Amount		fication		
	\$					
	BC+ Taxable	Amount	Veri	fication		

Prior SSI Page

The magnifying glass will be enabled when there is historical SSI information associated with the individual. If no historical SSI data is associated with the selected individual, the magnifying glass will be disabled.

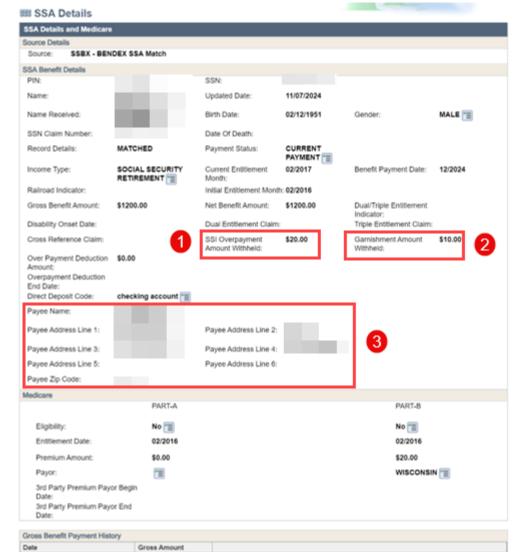
BB Prior SS	I					Cancel 🗌 Reset
Effective Period						
Begin Month:	03 / 2025	End Month:	MM / YYYY	Last Updated		
Delete Reason	(1 			
Additional Inform	nation					
Individual:			22M PP 🗸			
Date Last Rece	eived SSI:	MM (DD)	YYYY 🔞	9		
Is the individual i	ineligible for SSI due to					
A SSA COLA in	crease (503)?	Yes 🗸 Ve	rification: CC - CO	LLATERAL CONTACT	ORAL	× 🗉
 Entitlement / In Children Benef 	crease in Disabled Adult its?	No 🗸 Ve	rification:			× 🗉
	ement to widow(er)s benefits /idow-Widowers II)?	No 🗸 Ve	rification:			× 🗉
Comments:	Called SSA and Confirmed tha concurrently and verified the d			nefits		
	Current Size = 0 characters (24	0 characters max.)				
Obsolete Inform	ation (Is the individual ineligible	or SSI due to)				
	ge in actuarial formula for Vidow-Widowers I)?	✓ Ve	rification:			~ 1
			00 E	nter New Begin Month:	MM / YYYY	
			Updated on or before	Contraction of Contraction		
Add Case C	omment			Cancel	🗆 📢 Previo	us Next 🕨

SSA Details Page (Current)

The current SSA Details page has been enhanced to remove unnecessary or duplicate fields and organized in a user-friendly format.

The following fields will be added to the SSA Details page:

- 1. SSI Overpayment Amount Withheld
- 2. Garnishment Amount Withheld
- 3. Payee Name/Address Fields



No data found.

MM (DD / YYYY @

<u>ا</u>

Match Date

4

SSA Details Page Cont'd

Additionally, the state name, instead of the CF code, will display within the Record Details field when alert 373: RECV BENEFITS IN OTHER STATE is created for SSBC conflict matches.

For example: CF140 would display as ٠ Illinois

Note: On occasion, the SSA Details page may be used for historical research as the new SSA Historical Information Summary page is updated with changes over time. Only the last record prior to implementation displays on the new historical summary pages.

🚟 SSA Details



SSA Details and Medicare	•				
Source Details			_		
Source: SSBC - BEN	IDEX Potential Duplicate E	Benefits in Another State	•		
SSA Benefit Details					
PIN:		SSN:			
Name:	- Contra - C	Updated Date:	11/11/2024		
Name Received:	20 A A	Birth Date:	09/03/1952	Gender:	FEMALE
SSN Claim Number:		Date Of Death:			
Record Details:	NEW YORK	Payment Status:	CURRENT PAYMENT		
Income Type:		Current Entitlement Month:	09/2018	Benefit Payment Date:	12/2024
Railroad Indicator:		Initial Entitlement Month	n: 09/2017		
Gross Benefit Amount:	\$1700.00	Net Benefit Amount:	\$1700.00	Dual/Triple Entitlement Indicator:	
Disability Onset Date:	06/2015	Dual Entitlement Claim:		Triple Entitlement Claim:	
Cross Reference Claim:		SSI Overpayment Amount Withheld:	\$0.00	Garnishment Amount Withheld:	\$0.00
Over Payment Deduction Amount:	\$0.00				
Overpayment Deduction End Date:	06/2019				
Direct Deposit Code:	checking account 📺				
Payee Name:					
Payee Address Line 1:		Payee Address Line 2:			
Payee Address Line 3:		Payee Address Line 4:			
Payee Address Line 5:		Payee Address Line 6:			
Payee Zip Code:					
Medicare					
	PART-A			PART-B	
Eligibility:	No			No 📺	
Entitlement Date:	09/2017			09/2017	
Premium Amount:	\$0.00			\$0.00	
Payor:				WISCONSIN	
3rd Party Premium Pay Date: 3rd Party Premium Pay Date:	-			02/2018	
Gross Benefit Payment Hist	ory				
Date	Gross Amount				

Match Date

MM /DD /YYYY Go

4



SSI Data Exchange Payment Details Page (Current)

The following enhancements will be made to the SSI Data Exchange Payment Details page:

- 1. Source description text will be updated to display:
 - NON WTPY STATE (Updated weekly)
 - SOLQ-I Real Time Update (application, person add, renewal)
 - WTPY
- 2. The null display in the Payment Status/Effective Date row will be fixed to correctly populate the Payment Status/Effective Date or a blank.

Note: On occasion, the SSI Data Exchange Details page may be used for historical research as the new SSI Historical Information Summary page is updated with changes over time. Only the last record prior to implementation displays on the new historical summary pages.

SSI Details Source Details 1 Source: NON WTPY - STATE (Updated Weekly) Payee Demographic Details PIN: SSN: Client Name: Match Date: 11/19/2024 Payee Name: Birth Date MALE T Gender: PROVEN BORN IN U.S., U.S. Payee Type: Citizen / Alien Code: Date of CITIZEN. Death: Address: Benefit Payment Date: 11/01/2024 **Payment Details** Details Federal State Match Date: 11/19/2024 11/19/2024 Payment Status Effective Date CURRENT PAY 2 Gross SSI Amount \$80.00 \$10.00 Recoupment Amount (Federal SSI \$0.00 Overpayment): Gross SSI-E Amount: \$0.00 \$0.00 SISS/SISE/CTS Recoupment Amount (State SSI Overpayment): Net SSI Amount: \$80.00 Over/Under Payment Indicator Underpaymen State Grandfather Indicator: No Other Details Disability FINAL Disability Date: 08/31/2023 Renal Patient DETERMINATION-Determination: ALLOWANCE Direct Deposit: checking account Denial 1 Denial Date: Determination \$2829.00 Eligibility Begin Prior Initial Prior Initial Date Payment Payment Date: Amount: Federal SSI Payment History History Details **SSI Gross** SSI Net **SSI Recovery** Date Payment Flag Amount Amount Amount \$2,829.00 11/01/2024 \$2,829.00 \$0.00 01/01/000 \$0.00 01/01/0001 \$0.00 \$0.00 Match Date

Auto-Update Enhancements

The Unearned Income, Medicare, and Benefits Received pages are auto updated based on the data received in CARES from the SSA via BENDEX/WTPY/SOLQ-I.

- Sometimes the SSA sends Social Security payment information before an individual is entitled to the payment. As a result, BENDEX Begin Date logic will be updated to accurately populate the Begin Month field on the Unearned Income and Benefits Received pages in the future month.
- Currently, SOLQ-I is updating multiple sequences of end dated records. After implementation, if a repeating \$0 amount is received, no sequence will be created or updated for the \$0 record on the Unearned Income and Medicare pages.

Alerts and Case Comments Enhancements

The following alerts will no longer be created. Instead, a case comment will be entered.

- 370 FYI SS INCOME UPDATED
- 371 NEW SS INCOME ADDED
- 381 MEDICARE INFO END DATED
- 382 SS INCOME END DATED

New Alerts

The following new alerts will be created:

- 635 VERIFY INDIVIDUAL INCOME TYPE SSRE OR SSDI will display when the member is receiving SSRE but applied for disability through SSA.
- 636 CONTACT SSA TO VERIFY THE DEFERRED PAYMENT AMOUNT will display when the benefit payment status code is a deferred status type.

Note: More information about these (and other changes/fixes) will be communicated in a separate SSA DX CARES Bulletin prior to implementation.

SDX Discrepancy Enhancements

Currently, during the SOLQ-I process, the following discrepancy is created in situations where a Federal SSI payment exists without a State SSI payment:

> Federal SSI – Add State SSI (SISS)

After implementation, this discrepancy will be created with the BENDEX batch process.

B CARES Worker Web Home						
 Recent Cases/RFAs/ACCESS Applications/Change Reports/PINs 						
My Dashboard				Vie	w Workload D	ashboar
Work Items			Days Left 1	o Complete		
Category	Total	<1	1-7	8-14	15-30	>30
Applications	<u>2627</u>	<u>2487</u>	1		<u>5</u>	<u>134</u>
Renewals / Reviews	<u>106</u>	<u>101</u>			1	4
SMRFs	0					
Potential Errors	<u>8</u>	<u>8</u>				
Discrepancies	<u>83</u>	<u>83</u>				
Not Started	<u>83</u>	<u>83</u>				
- IM SDX	<u>83</u>	<u>83</u>				
— W2 SDX	<u>83</u>	<u>83</u>				
- CC SDX	83	83				

Questions?