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.

1. View SSA Benefit Change Summary History (BENDEX, WTPY) – when selected, workers navigate to the new SSA Historical Information Summary page.

2. View SSI Benefit Change Summary History (SDX, WTPY, State SSI) – when selected, workers navigate to the new SSI Historical Information Summary page.

3. View SSBC Potential Duplicate Benefits in Another State – when selected, workers navigate to the SSA Details page for ONLY SSBC records.
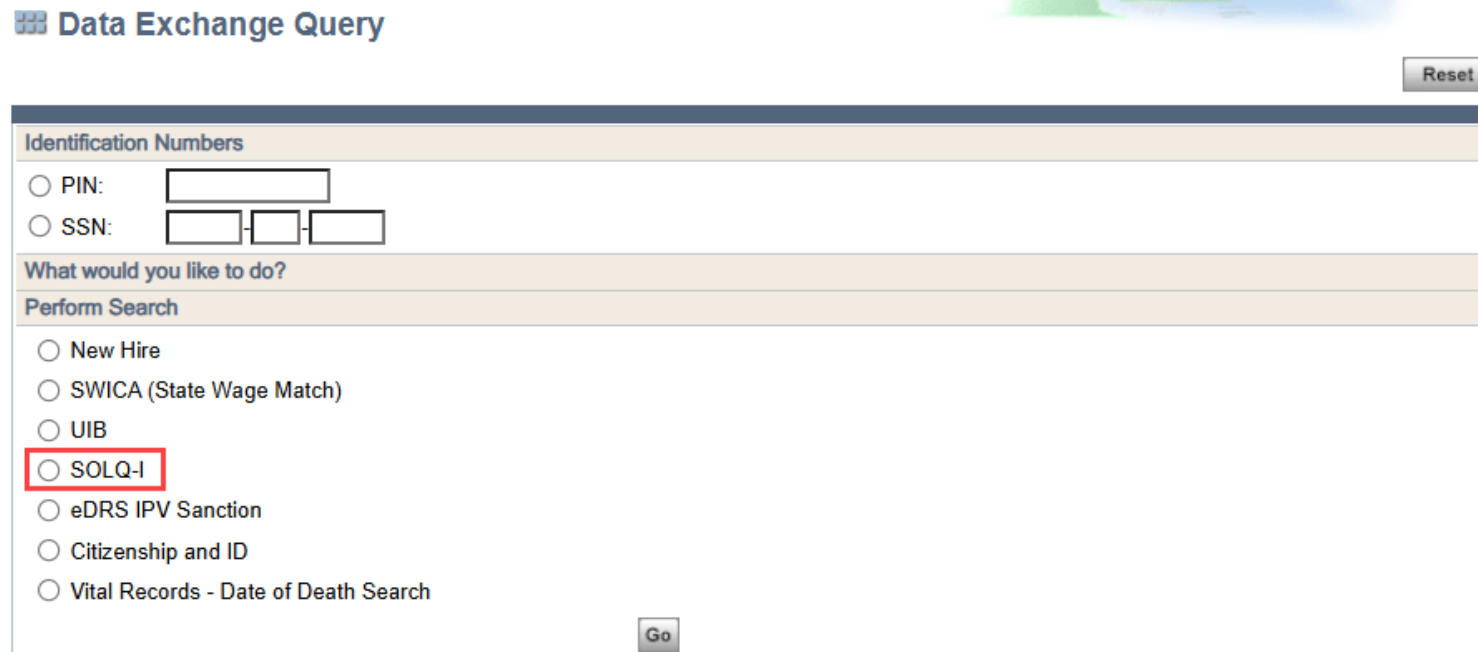
Data Exchange Query Page Cont'd

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.

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.

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 Benefit and Medicare Details

SSA Details and Medicare

SSA Benefit Details

Name:	PIN:	Record Number: 1
SSN Claim Number:	Cross Reference Claim:	Date Received from SSA: 11/14/2024
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: $0.00	Dual/Triple Entitlement Indicator:	Dual Entitlement Claim:
Triple Entitlement Claim:	Railroad Indicator:	
Disability Onset Date: 6/2009	Date of Death:	
Overpayment Deduction End Date:		
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 Entitlement Details

	PART-A	PART-B
Eligibility:	Yes	Yes
Entitlement Date:	11/2024	11/2024
Termination Date:		
Premium Amount:	$150.00	$200.00
Payor:	$52	BENEFICIARY
3rd Party Premium Payor Begin Date:		
3rd Party Premium Payor End Date:		

Gross Benefit Payment History

Benefit Received Month and Year	Gross Benefit Amount	
No data found.		

◄ Previous

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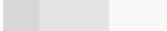
- Payment Status Effective Date
- SSI Gross Amount
- Gross Federal SSI Amount
- Gross State SSI Amount
- SSI Assistance Amount
- Recoupment Amount (Federal SSI Overpayment)
- Gross SSI-E Amount

- 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

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.

Supplemental Security Income (SSI) Historical Information Summary

SSI Historical Information Summary

Demographic Information
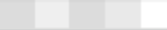
| Name: | | PIN: | |
| SSN: | | Birth Date: | |
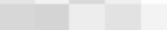
SSI Benefit Summary

Supplemental Security Income

Record Number	Date Federal SSI Received	Gross Federal SSI Amount	Date State SSI Received From iC	Gross State SSI Amount	Total Recoupment Amount	Benefit Payment Date	Changes from Previous Record Number	Benefit Details
1	11/19/2024	$80.00	11/19/2024	$10.00	$0.00	11/01/2024	Conversion	🔍

Unearned Income

History Details

Date Received From SSA	Income Type	Start Date	Stop Date	Amount	Claim / ID Number
11/14/2024	SOCIAL SECURITY	12/2023	12/2023	$0.00	
11/14/2024	SOCIAL SECURITY	12/2023	12/2023	$0.00	
11/14/2024	SOCIAL SECURITY	06/2024	06/2024	$9,999.99	
11/14/2024	SOCIAL SECURITY	07/2024	10/2024	$0.00	
11/14/2024	SOCIAL SECURITY	12/2024		$1,704.00	

◀ Previous

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.

SSI Benefit Details

Payee Demographic Details

PIN:	SSN:	Record Number: **18**
Name:	Match Date: **11/07/2024**	
Payee Name:	Birth Date:	Gender: **FEMALE**
Payee Type: **DISABLED INDIVIDUAL**	Citizen / Alien Code: **IDENTITY & CITIZENSHIP VERIFIED BY NUMIDENT INTERF**	Date of Death:
Address:	Benefit Payment Date: **11/01/2024**	

Payment Details

Details	Federal	State
Match Date:	11/07/2024	11/07/2024
Payment Status Effective Date:	CURRENT PAY 04/1993	
Gross SSI Amount:	$40.00	$0.00
Recoupment Amount (Federal SSI Overpayment):	$25.00	
Gross SSI-E Amount:		$50.00
SISS/SISE/CTS Recoupment Amount (State SSI Overpayment):		$0.00
Net SSI Amount:	$15.00	
Over/Under Payment Indicator:		
State Grandfather Indicator:		

Other Details

MA Eligibility Code:	**ELIGIBLE FOR MEDICAID (1634 STATES ONLY).**
Eligibility Begin Date:	**06/01/1993**

Federal SSI Payment History

History Details

Date	SSI Gross Amount	SSI Net Amount	SSI Recovery Amount	Payment Flag
		No data found.		

◀ Previous

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.

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.

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

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 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 - BENDEX Potential Duplicate Benefits in Another State

SSA Benefit Details

PIN:	SSN:	
Name:	Updated Date: 11/11/2024	
Name Received:	Birth Date: 09/03/1952	Gender: FEMALE
SSN Claim Number:	Date Of Death:	
Record Details: NEW YORK	Payment Status: CURRENT PAYMENT	
Income Type: SOCIAL SECURITY RETIREMENT	Current Entitlement Month: 09/2018	Benefit Payment Date: 12/2024
Railroad Indicator:	Initial Entitlement Month: 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 Payor Begin Date:		02/2018
3rd Party Premium Payor End Date:		

Gross Benefit Payment History

Date	Gross Amount	
	No data found.	

Match Date
MM / DD / YYYY Go

Previous   Next

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.

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.

Questions?