

## Field Request Data Exchange Requirements

Message Types – Contractor will be responsible for retrieving the below messages (as XML or Text files). Messages from the Office will be available on the Office’s secure web server. The Contractor will be responsible for delivering messages via the SSA secure bulk upload process or the Office’s secure web server as a backup option.

- Initial Request: from Office to Contractor
- Cancel Request: from Office to Contractor
- Status: from Contractor to Office

Medical Release Form (SSA-827) Process – The Contractor will be responsible for retrieving the TIFF images of the SSA-827 on the Office’s secure web server and associate it with the MER request.

Report Return – The Contractor will be responsible for delivering imaged documents via the SSA bulk delivery process, or the Office’s secure web server as a viable backup option.

- The Contractor is responsible for delivering reports as a .zip archive, which contains report images, image indexing XML, and text files in the Office-specified format.
- Image Format: TIFF or PDF(as determined by the Office)

Timing and scheduling

- Contractor is responsible for processing requests from the Office after midnight each business day.
- Contractor is responsible for delivering reports to the Office each business day by 10:00am.
- Contractor is responsible for providing an email with a daily total count of successfully retrieved reports.
- Follow up action (see appendix C)
- Contractor is responsible for electronically delivering sent and received counts to the Office.

## APPENDIX J

### Initial and Cancel Request Message (Office may require an XML equivalent to this message)

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01 TO-XXX -RECORD.
03 TO-XXX-TYPE PIC X(6).
03 TO-XXX-CLAIMANT-ID PIC X(9).
03 TO-XXX-TASK-ID PIC 99.
03 TO-XXX-CREATION-DT PIC X(6).
03 TO-XXX-MRO-REG PIC 9.
03 TO-XXX-ANALYST-INFO.
05 TO-XXX-ANALYST-LNAME PIC X(20).
05 TO-XXX-ANALYST-FNAME PIC X(13).
05 TO-XXX-ANALYST-REG PIC 9.
05 TO-XXX-ANALYST-MOD PIC X.
05 TO-XXX-ANALYST-UNIT PIC X(3).
05 TO-XXX-ANALYST-PIN PIC 9(4).
05 TO-XXX-ANALYST-PHONE PIC 9(10).
03 TO-XXX-CLAIM-INFO .
05 TO-XXX-CLAIM-FNAME PIC X(13).
05 TO-XXX-CLAIM-MI PIC X.
05 TO-XXX-CLAIM-LNAME PIC X(20).
05 TO-XXX-CLAIM-DOB PIC 9(6).
05 TO-XXX-CLAIM-ADDR-1 PIC X(30).
05 TO-XXX-CLAIM-ADDR-2 PIC X(30).
05 TO-XXX-CLAIM-CITY PIC X(20).
05 TO-XXX-CLAIM-STATE PIC X(2).
05 TO-XXX-CLAIM-ZIP PIC X(9).
03 TO-XXX-FAC-INFO.
05 TO-XXX-FAC-NAME PIC X(30).
05 TO-XXX-FAC-DEPT PIC X(30).
05 TO-XXX-FAC-STREET PIC X(30).
05 TO-XXX-FAC-CITY PIC X(20).
05 TO-XXX-FAC-STATE PIC X(2).
05 TO-XXX-FAC-ZIP PIC X(9).
05 TO-XXX-FAC-CODE PIC X(6).
03 TO-XXX-PATIENT-ID PIC X(15).
03 TO-XXX-INP-EARLIEST.
05 TO-XXX-INP-EARL-TO PIC X(6).
05 TO-XXX-INP-EARL-FROM PIC X(6).
03 TO-XXX-INP-RECENT.
05 TO-XXX-INP-RECENT-TO PIC X(6).
05 TO-XXX-INP-RECENT-FROM PIC X(6).
03 TO-XXX-REPORT-PERIOD.
05 TO-XXX-REPORT-PER-TO PIC X(6).
05 TO-XXX-REPORT-PER-FROM PIC X(6).
03 TO-XXX-REPORT-DATE PIC X(6).
03 FILLER PIC X(6).
03 TO-XXX-CLINIC PIC X(20).
03 TO-XXX-OUTPAT-1ST PIC X(6).
03 TO-XXX-OUTPAT-LAST PIC X(6).
03 TO-XXX-ALEG-1 PIC X(50).
03 TO-XXX-ALEG-2 PIC X(50).
03 TO-XXX-ALEG-ONSET PIC X(6).
03 TO-XXX-AKA-INFO.
05 TO-XXX-AKA-FNAME PIC X(13).
05 TO-XXX-AKA-LNAME PIC X(20).
05 TO-XXX-AKA-STREET PIC X(30).
05 TO-XXX-AKA-CITY PIC X(20).

```

**Status Message**  
**(Office may require an XML equivalent to this message)**

```
01 FROM-XXX-REC.
  03 FROM-XXX-CLAIMANT-ID          PIC X(9).
  03 FROM-XXX-TASK-ID              PIC 99.
  03 FROM-XXX-CREATION-DT          PIC X(6).
  03 FROM-XXX-ANALYST-REG          PIC 9.
  03 FROM-XXX-ANALYST-MOD          PIC X.
  03 FROM-XXX-ANALYST-UNIT         PIC X(3).
  03 FROM-XXX-ANALYST-PIN         PIC 9(4).
  03 FROM-XXX-STATUS-INFO.
    05 FROM-XXX-STAT-DATE          PIC X(6).
    05 FROM-XXX-STAT-VERB          PIC X(19).
    05 FROM-XXX-STAT-TYPE          PIC X(2).
  03 FILLER                        PIC X(130)
  03 FROM-XXX-SYSTEM-DATE          PIC X(6).
  03 FROM-XXX-FAC-CODE             PIC X(6).
  03 FILLER                        PIC X(56).
```

## FIELD STATUS

These statuses are returned by the field agent and annotated on the CPL log.

<b>Status</b>	<b>Meaning</b>
P1	Received and acknowledged by FIELD AGENT. To be received by the Office within 5 days of the origination date.
P2	Subsequent attempt by FIELD AGENT to obtain requested MER. This must be done within 21 days of the P1
AA	MER information found and returned. This is the only status that creates a pay record for the Pay-To sources listed on the treating source record. This will close off the request.
NR	No Record found in treating source records. This will close off the request
C1	Closed by FIELD AGENT after 3 attempts to get records. This will close off the request.
C2	FIELD AGENT Closure 35 days after the origination date. This will close off the request.
C3	Closed by the Office. Initially recorded on the FIELD AGENT Regional file as a CC then changed with acknowledgement from FIELD AGENT. This will close off the request.