

**GENERAL INFORMATION SYSTEM**  
**Center for Employment and Economic Supports**

**June 26, 2008**

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**TO:** Commissioners; TA Directors; FS Directors; MA Directors; WMS Coordinators

**FROM:** Russell Sykes, Deputy Commissioner, Center for Employment and Economic Supports

**SUBJECT:** *SDX Manual* Renamed *SDX Reference Guide*, Revised March 2008, and Available Online

**EFFECTIVE DATE:** Immediately

**CONTACT PERSON:**

- For questions about the *SDX Reference Guide* – SSI Bureau at (800) 343-8859, ext. 3-0332 or by e-mail to Archiah Phillips at [Archiah.Phillips@otda.state.ny.us](mailto:Archiah.Phillips@otda.state.ny.us)
- For questions about the *Medicaid ASWI Report* – Ken Merkelbach at (518) 474-5693, or by e-mail at [kxm05@health.state.ny.us](mailto:kxm05@health.state.ny.us)

The State Data Exchange (SDX) is a system used to provide information about SSI recipients in NYS to local social services districts and other users. Each local district receives a biweekly *SSI Report* of all SSI applicants, recipients, and former SSI recipients whose Medicaid expenses are the responsibility of that district. In addition to the biweekly *SSI Report*, local Medicaid units receive a *Medicaid ASWI (Auto SDX)* report almost daily on new SSI cases and SSI cases with certain changes that may affect eligibility for Medicaid.

GIS 05 TA/DC045 was issued on November 1, 2005, to inform districts that OTDA published a revised *SDX Manual* on the agency's intranet site. To continue to assist local district workers who use the SDX, OTDA has published the most current version of the manual that was revised in March 2008. In order to properly reflect the contents of this document, the manual, which is an abstract of a much larger voluminous manual, has been renamed to the *SDX Reference Guide*. The *March 2008* version of the *SDX Reference Guide* contains the current listing of all SDX field and code definitions.

The *SDX Reference Guide* is also useful to workers who utilize the *SDX-SSI Individual Status* screen on WMS. The screen allows you to access timely, authoritative information on a person's SSI status, including appeal and denial status. The screen displays information on all persons that have applied for, received, ceased to receive, or were denied SSI. It is important to note that there are a couple of intermediate steps between initial client contact with SSA and the actual posting of the official SSA record. Therefore, this screen should not be used to deny or discontinue benefits if no record has yet posted. The field names and codes on the screen are taken from SDX Manual now known as the *SDX Reference Guide*.

The *March 2008* version of the *SDX Reference Guide* can be found in the Center for Employment and Economic Supports section of the OTDA intranet site under "Manuals". The e-mail address is

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<http://otda.state.nyenet/dta/Manuals/sdx.pdf>). The *SDX Reference Guide* can also be found on CentraPort under Resources.

This address can be saved as a “Favorite” on your web browser to enable the user to easily access the *SDX Reference Guide*. Because this *SDX Reference Guide* is a PDF document, it can also be saved from the intranet site as a PDF document on a personal computer. It can then be used on that computer and emailed to other users.

The *SDX Reference Guide* has been designed with a search on the left side of the screen under “Bookmarks”. Click on the first letter of the field needed and you will automatically jump to the page of the *Reference Guide* for fields that begin with that letter. The *SDX Reference Guide* also includes a list of recent changes and a page listing the SDX and WMS District Codes.

**Questions** regarding access to the OTDA intranet site should be directed to your local network staff. Questions about the *SDX Reference Guide* or about the *Medicaid ASWI* (Auto SDX) report should be directed to the contacts noted above.