

Electronic Correspondence  
Referral System for the Web  
(ECRS Web) Quick Reference  
Card

Rev. 2023/2 *October*

CWF Assistance Request Codes

Enter CWF assistance requests for existing  
MSP records

Table 1: Required Fields on CWF  
Assistance Request Detail Pages

Field	Description
DCN	Document Control Number
MEDICARE ID	Beneficiary’s Health Insurance Claim Number (HICN) or Medicare Beneficiary Identifier (MBI)
ACTIVITY CODE	Activity code
ACTION(S)	Action codes
SOURCE	Source of request information
IMPORT HIMR MSP DATA	Select to import HIMR data for the existing MSP record
MSP TYPE	Type of MSP coverage
PATIENT RELATIONSHIP	Patient relationship

Field	Description
AUXILIARY RECORD #	Record number of MSP auxiliary occurrence at CWF  Note: Part D contractors must enter “001” when the Auxiliary record number is unknown.
ORIGINATING CONTRACTOR	Contract number of contractors that created original MSP occurrence at CWF
EFFECTIVE DATE	Effective date of MSP coverage
TERMINATION DATE	Date MSP coverage ended
FIRST NAME	Informant’s first name
LAST NAME	Informant’s last name
ADDRESS	Informant’s address
CITY	Informant’s city
STATE	Informant’s state
ZIP	Informant’s zip code
RELATIONSHIP	Informant’s relationship to the beneficiary
INSURANCE COMPANY NAME	Insurance company name
INSURANCE TYPE	Type of insurance coverage
POLICY NUMBER	Insurance policy number (not required if group number is entered)
GROUP NUMBER	Insurance policy group number (not required if policy number is entered)

Field	Description
EMPLOYER NAME	Name of the beneficiary’s employer
ADDRESS	Employer’s address
CITY	Employer’s city
STATE	Employer’s state
ZIP	Employer’s zip code
CHECK NUMBER	Check number
CHECK DATE	Date on the check
CHECK AMOUNT	Amount of the check
PRE-PAID HEALTH PLAN DATE	Pre-paid Health Plan date
SOCIAL SECURITY NUMBER	Beneficiary’s social security number
DIAGNOSIS CODES	Diagnosis codes Required when ACTION is DX.
ICD Indicator	Type of diagnosis code. Select “ICD-9” or “ICD-10”. Required if corresponding Diagnosis Code is submitted.
REMARKS	Remarks

Table 2: Required Fields for  
Source Codes on CWF Assistance  
Requests

Value	Required Fields
CHEK	FIRST NAME LAST NAME ADDRESS CITY STATE ZIP RELATIONSHIP CHECK NUMBER CHECK DATE CHECK AMOUNT
LTTR	FIRST NAME LAST NAME ADDRESS CITY STATE ZIP RELATIONSHIP
PHON	FIRST NAME LAST NAME ADDRESS CITY STATE ZIP RELATIONSHIP

Table 3: Related Action Codes on CWF Assistance Requests

Value	Description
AI	Change attorney information
AP	Add policy and/or group number
AR	Add CWF remark codes
CD	Change date of injury/date of loss
CP	Incorrect ESRD Coordination Period
CT	Change termination date
CX	Change Prescription Values (BIN, Group, PCN)
DA	Develop for attorney information
DD	Develop for the diagnosis code
DE	Develop for employer information
DI	Develop for insurer information
DO	Mark occurrence for deletion
DR	Investigate closed or deleted record
DT	Develop for termination date
DX	Change diagnosis codes
EA	Change employer address
ED	Change effective date
EF	Develop for the effective date
EI	Change employer information
ES	Employer size below minimum (20 for working aged; 100 for disability)
ID	Investigate possible duplicate for deletion
II	Change insurer information
IT	Change insurer type

Value	Description
LR	Create duplicate liability record
MT	Change MSP type
MX	SSN/Medicare ID mismatch
NR	Create duplicate no-fault record
OH	Change effective date of other drug coverage
PC	Update prescription person code
PH	Add PHP date
PN	Develop for/add PCN
PR	Change patient relationship
TD	Add termination date
VP	Update a record for a vow of poverty
WN	Notify BCRC of updates to WCMSA cases

Table 4: Required Fields for Action Codes on CWF Assistance Requests

Value	Required Fields	Description
AI	INFORMANT FIRST NAME, INFORMANT LAST NAME, INFORMANT CITY, INFORMANT STATE, INFORMANT ZIP, INFORMANT RELATIONSHIP (must be ‘A’), INSURANCE TYPE	Attorney information

Value	Required Fields	Description
AP	POLICY NUMBER and/or GROUP NUMBER INSURANCE TYPE Note: available for EGHP MSP types only	Insurer information for drug records Insurance Type
AR	REMARK Code (at least one)	Remarks
CD	GROUP NUMBER Note: ** available for contractor 79001, NON EGHP MSP types D, E, L, and W only ***	DOI/DOL changes
CP	Note: ** available for ESRD MSP type B only ***	Verification of coordination period
CT	TERMINATION DATE INSURANCE TYPE	Termination Date Insurance Type
DX	DIAGNOSIS CODES (at least one)	Diagnosis codes
EA	EMPLOYER NAME	Employer information
ED	EFF DATE NEW EFF DATE	Effective Date New Effective Date
EI	EMPLOYER NAME, EMPLOYER ADDRESS, EMPLOYER CITY, EMPLOYER STATE, EMPLOYER ZIP Type data in all fields to update employer info at CWF.	Employer information

Value	Required Fields	Description
II	INSURANCE COMPANY NAME If you leave the following fields blank, the system overwrites the previous value on the MSP auxiliary record at CWF: STREET, CITY, ST, ZIP, GROUP NO, POLICY NO, SUBSCRIBER NAME Type data in all fields to update insurer info at CWF. Leave all fields blank to delete insurer info at CWF.	Insurance Company Name
IT	INSURANCE TYPE NEW INSURANCE TYPE	Insurance type New Insurance Type
MT	MSP TYPE NEW MSP TYPE	MSP Type New MSP Type
MX	SOCIAL SECURITY NUMBER	SSN/Medicare ID mismatch
PH	PRE-PAID HEALTH PLAN DATE	Pre-paid Health Plan date
PR	PAT REL NEW PAT REL INSURANCE TYPE	Patient Relationship New Patient Relationship Insurance Type
TD	TERMINATION DATE INSURANCE TYPE	Termination date Insurance Type
WN	Note: ** available for Contractor 79001 only ***	WCMSA Notification

Prescription Drug Assistance Request Codes

Table 5: Required Fields for Source Codes on Prescription Drug Assistance Requests

Value	Required Fields
CHEK	INFORMANT FIRST NAME, INFORMANT LAST NAME, INFORMANT ADDRESS, INFORMANT CITY, INFORMANT STATE, INFORMANT ZIP, INFORMANT RELATIONSHIP, CHECK NUMBER, CHECK DATE, CHECK AMT
LTTR	INFORMANT FIRST NAME, INFORMANT LAST NAME, INFORMANT ADDRESS, INFORMANT CITY, INFORMANT STATE, INFORMANT ZIP, INFORMANT RELATIONSHIP
PHON	INFORMANT FIRST NAME, INFORMANT LAST NAME, INFORMANT ADDRESS, INFORMANT CITY, INFORMANT STATE, INFORMANT ZIP, INFORMANT RELATIONSHIP

Table 6: Action Codes on Prescription Drug Assistance Requests

Value	Description
AP	Add policy and/or group number

Value	Description
BN	Develop for prescription BIN
CT	Change termination date
CX	Change prescription values (BIN, Group, PCN)
DO	Mark occurrence for deletion
EA	Change employer address
ED	Change effective date
EI	Change employer information
GR	Develop for group number
II	Change insurer information
IT	Change insurer type
MT	Change MSP type
OH	Change effective date of other drug coverage
PC	Update prescription person code
PN	Develop for/add PCN
PR	Change patient relationship
TD	Add termination date

Table 7: Required Fields for Action Codes on Prescription Drug Assistance Requests

Value	Required Fields	Description
AP	PERSON CODE	Person Code (when Record Type is SUP)
-	INFMT NAME, ADDRESS, CITY, ST, ZIP	Informant information (when Source Type is Letter, Check, or Phone)

Value	Required Fields	Description
-	COVERAGE TYPE	Coverage Type (when Policy Number, BIN, PCN, ID, Supplemental Type, or Person Code are entered)
-	POLICY NUMBER	Policy Number OR Group Number required when Source Code is NOT D, E, L, or W
-	GROUP NUMBER	Group Number required when Coverage Type=U
BN	PERSON CODE	Person Code (when Record Type is SUP)
CT	TERM DATE PERSON CODE	Termination Date Person Code (when Record Type is SUP)
CX	PERSON CODE BIN, PCN, GROUP	Person Code (when Record Type is SUP) BIN, PCN, OR Group Number is required
DO	PERSON CODE	Person Code (when Record Type is SUP)
EA	PERSON CODE EMPLOYER NAME	Person Code (when Record Type is SUP) Employer Name

Value	Required Fields	Description
ED	NEW EFF DATE PERSON CODE	New Effective Date Person Code (when Record Type is SUP)
EI	PERSON CODE EMPLR NAME, ADDRESS, CITY, ST, ZIP	Person Code (when Record Type is SUP)  Employer information
GR	PERSON CODE	Person Code (when Record Type is SUP)
IT	PERSON CODE, INS TYPE NEW INS TYPE	Person Code (when Record Type is SUP)  Insurance type New Insurance Type
MT	MSP TYPE, NEW MSP TYPE, RECORD TYPE	MSP Type New MSP Type Record Type (must be PRI)
PC	PERSON CODE	Person Code
PN	PERSON CODE	Person Code (when Record Type is SUP)
PR	PERSON CODE, NEW PAT REL	Person Code (when Record Type is SUP) New Patient Relationship

Value	Required Fields	Description
TD	PERSON CODE, TERM DT	Person Code (when Record Type is SUP) Termination Date

**MSP Inquiry Codes**  
 Note: Action codes are not required for MSP inquiries.

**Table 8: Required Fields on MSP Inquiry Detail Pages**

Field	Description
DCN	Document Control Number
MEDICARE ID	Beneficiary’s Health Insurance Claim Number (HICN) or Medicare Beneficiary Identifier (MBI)
ACTIVITY CODE	Activity code
SOURCE	Source of request information
PATIENT RELATIONSHIP	Patient’s relationship Note: required when action code is blank and MSP type is F; action code is CA and MSP type is L; or action code is CL and MSP type is D, E, or L.
EFFECTIVE DATE	Effective date of MSP coverage
TERMINATION DATE	Date MSP coverage ended

Field	Description
CMS GROUPING CODE	CMS grouping code
FIRST NAME	Informant’s first name
LAST NAME	Informant’s last name
ADDRESS	Informant’s address
CITY	Informant’s city
STATE	Informant’s state
ZIP	Informant’s zip code
RELATIONSHIP	Informant’s relationship to the beneficiary
INSURANCE COMPANY NAME	Name of beneficiary’s insurer
ADDRESS LINE 1	First line of insurer’s address Note: required when Insurance Company Name is entered.
CITY	Insurer’s city Note: required when Insurance Company Name is entered.
STATE	Insurer’s state Note: required when Insurance Company Name is entered.
ZIP	Insurer’s zip code Note: required when Insurance Company Name is entered.
INSURANCE TYPE	Type of insurance

Field	Description
EMPLOYER NAME	Name of beneficiary’s employer Note: required when MSP Type is F and Send to CWF is Yes.
ADDRESS	Employer’s address Note: required when MSP Type is F and Send to CWF is Yes.
CITY	Employer’s city Note: required when MSP Type is F and Send to CWF is Yes.
STATE	Employer’s state Note: required when MSP Type is F and Send to CWF is Yes.
ZIP	Employer’s zip code Note: required when MSP Type is F and Send to CWF is Yes.
CHECK NUMBER	Check number
CHECK AMOUNT	Amount on the check
CHECK DATE	Date on the check
DIAGNOSIS CODES	Diagnosis codes Note: If the MSP Type is A, B, or G, the system will prevent the entry of diagnosis codes.
ICD Indicator	Type of diagnosis code. Select “ICD-9” or “ICD-10”. Required if corresponding Diagnosis Code is submitted

Field	Description
BIN	BIN Note: required when Coverage Type is U.
PCN	PCN Note: required when Coverage Type is U.
GROUP	Group number Note: required when Coverage Type is U.
ID	ID number Note: required when Coverage Type is U.
SUPPLEMENTAL TYPE	Type of supplemental insurance Note: must be L when Record Type is Supplemental.
PERSON CODE	Person code Note: required when Record Type is Supplemental and Supplemental type is L.

Table 9: Related Action Codes on MSP Inquiries

Value	Description
CA	Class action suit
CL	Closed or settled case

Table 10: Required Fields for Action Codes on MSP Inquiries

Value	Required Fields
CA	MSP TYPE PATIENT RELATIONSHIP (when MSP Type is L) EFFECTIVE DATE (when MSP Type is L) CMS GROUPING CODE (when MSP Type is L) INSURANCE COMPANY NAME, INSURANCE TYPE DIAGNOSIS CODES Informant Name, Address, City, State and Zip are required unless Insurance Company Address, City, State and Zip have been entered. Note: Must enter “A” as relationship if Informant information is entered.

Value	Required Fields
CL	MSP TYPE (must be D, E, or L) PATIENT RELATIONSHIP (must be D, E, or L) EFFECTIVE DATE (must be D, E, or L) TERMINATION DATE (must be D, E, or L) DIAGNOSIS CODES Informant Name, Address, City, State and Zip are required unless Insurance Company Address, City, State and Zip have been entered. Note: Must enter “A” as relationship if Informant information is entered.

Table 11: Required Fields for Source Codes on MSP Inquiries

Value	Required Fields
CHEK	FIRST NAME LAST NAME ADDRESS CITY STATE ZIP RELATIONSHIP CHECK NUMBER CHECK AMOUNT CHECK DATE
LTTR	FIRST NAME LAST NAME ADDRESS CITY STATE ZIP RELATIONSHIP

Value	Required Fields
PHON	MSP TYPE FIRST NAME LAST NAME ADDRESS CITY STATE ZIP RELATIONSHIP

Prescription Drug Inquiry Codes

Table 12: Required Fields on Prescription Drug Inquiry Detail Pages

Field	Description
DCN	Document Control Number
MEDICARE ID	Beneficiary’s Health Insurance Claim Number (HICN) or Medicare Beneficiary Identifier (MBI)
ACTIVITY CODE	Activity code
SOURCE	Source of request information
MSP TYPE	MSP type Note: Leave MSP Type blank when Record Type is Supplemental
PATIENT RELATIONSHIP	Patient’s relationship Note: required when action code is blank and MSP type is F.

Field	Description
SEND TO MBD	Select Yes to send inquiry to MBD
SUBMTTER TYPE	Submitter type
CHECK NUMBER	Check number
CHECK DATE	Date on the check
CHECK AMOUNT	Amount on the check
INFORMANT FIRST NAME	Informant’s first name
INFORMANT LAST NAME	Informant’s last name
INFORMANT ADDRESS	Informant’s address
INFORMANT CITY	Informant’s city
INFORMANT STATE	Informant’s state
INFORMANT ZIP	Informant’s zip code
INFORMANT RELATIONSHIP	Informant’s relationship to the beneficiary
INSURANCE COMPANY NAME	Name of the insurance carrier for drug coverage.
EFFECTIVE DATE	Effective date of prescription coverage
TERMINATION DATE	Date prescription coverage ends Note: automatically populated when Coverage Type is U.
BIN	BIN Note: required when Coverage Type is U.



Field	Description
PCN	PCN Note: required when Coverage Type is U.
GROUP	Group number Note: required when Coverage Type is U.
ID	ID number Note: required when Coverage Type is U.
PERSON CODE	Person code Note: required when Record Type is Supplemental, or when Record Type is blank and Supplemental type is L.

Table 13: Required Fields for Source Codes on Prescription Drug Inquiries

Value	Required Fields
CHEK	CHECK NUMBER CHECK DATE CHECK AMOUNT INFORMANT FIRST NAME INFORMANT ADDRESS INFORMANT CITY INFORMANT STATE INFORMANT ZIP INFORMANT RELATIONSHIP

Value	Required Fields
LTTR	INFORMANT FIRST NAME INFORMANT ADDRESS INFORMANT CITY INFORMANT STATE INFORMANT ZIP INFORMANT RELATIONSHIP
PHON	INFORMANT FIRST NAME INFORMANT ADDRESS INFORMANT CITY INFORMANT STATE INFORMANT ZIP INFORMANT RELATIONSHIP

Table 14: Prescription Drug Supplemental Type Codes on Prescription Drug Inquiries

Value	Description
L	Supplemental
M	Medigap
N	Non-qualified SPAP
O	Other
P	PAP
Q	Qualified SPAP
R	Charity
S	ADAP
T	Federal Government Programs
1	Medicaid
2	Tricare
3	Major Medical

Table 15: Coverage Type Codes on Prescription Drug Inquiries

Value	Description
U	Drug Network
V	Drug Non-network
Z	Health Reimbursement account

**General Codes**  
The following codes apply to CWF assistance requests, MSP inquiries, and workers’ compensation set-aside trust cases.

Table 16: General - Activity Codes

Value	Description
C	Claims (Pre-Payment) (22001)
D	Debt Collection (42021)
G	Group Health Plan (42003)
I	General Inquiry (42004)
N	Liability, No-Fault, Workers’ Compensation, and Federal Tort Claim Act (FTCA) (42002)

Table 17: General - MSP Type Codes (Non-EGHP)

Value	Description
D	Automobile Insurance, No Fault
E	Workers’ Compensation
L	Liability
W	Workers’ Compensation Set-Aside

Table 18: General - MSP Type Codes (EGHP)

Value	Description
A	Working Aged
B	End-Stage Renal Disease (ESRD)
C	Conditional Payment
F	Federal (Public)
G	Disabled
H	Black Lung
I	Veterans

Table 19: General - Source Codes

Value	Description
CHEK	Unsolicited check
LTTR	Letter
PHON	Phone call
SCLM	Medicare Secondary Claim payment
SRVY	Survey (Part D only)

Table 20: General - Status Codes

Value	Description
CM	Completed
DE	Delete (do not process) ECRS request
HD	Hold, individual not yet a Medicare beneficiary (WC) (RAC)
IP	In process, being edited by COB
NW	New, not yet read by COB

Table 21: General - Reason Codes

Value	Description
01	Not yet read by BCRC, used with NW status
02	Being processed by BCRC, used with IP status
03	Under development by BCRC, used with IP status
04	Update sent to CWF, used with IP status
05	Error received from CWF, being resolved by BCRC, used with IP status
06	Sent to EDB for beneficiary info, used with IP status
07	Auditor follow-up development in progress, used with IP status
10	Not processing
11	Not yet eligible for Medicare, used with HD status
12	Needs diagnosis, used with HD status (for WC set-aside trust cases only)
13	Future-dated workers' compensation case, used with HD status (for WC set-aside trust cases only)
14	Duplicate request, development already in process, used with HD status
15	Requested Prescription Drug action(s) accepted - Posted to MBD
30	No action taken per SEE approval - Medicare primary
31	Action code and comments conflict
32	Record terminated/deleted due to OBRA 93

Value	Description
33	WCSA record – can only be updated by RO, record closed by CWF Analyst
34	Record is “N” validity – we do not develop for “N” records
36	Policy Holder Retired (G record)
37	Beneficiary verified existing record, no update needed
38	Outreach development already in process
45	Insufficient information to process, used with HD status (RAC only)
46	RAC did not update hold records, used with DE status (RAC only)
50	Requested action(s) accepted - Posted to CWF
51	No changes (additions, modifications, or deletions) made to CWF, used with CM status
52	Returned–rejected by CWF; conflicting information, used with CM status
53	Returned–duplicate ECRS request, used with CM status
54	100 or more thresholds met, Disability
55	20 or more thresholds met, Working Aged
56	OBRA does not apply, no update
57	Record already updated
58	Non-compliant GHP
59	Employer verified existing record, no update
60	Invalid Medicare ID
61	No Part A entitlement

Value	Description
62	Development letter sent, closed, no response to development
63	Development complete, no MSP
64	Development letter sent
65	Deceased, used with CM status
66	ESRD/DIB conflict
67	No response from CWF
68	Closed for Self-Report
69	Developed to GHP, no response
70	Developed to non-EGHP, no response
71	Developed to beneficiary; closed, no response received
72	Developed to informant, no response
73	Medicare beneficiary retired
74	Spouse retired
75	GHP lifetime of yearly benefits past maximum amount
76	No coverage with insurance company
77	Medicare Supplemental Plan
78	Employer has less than 20 employees (No MSP)
79	Per employer, Medicare beneficiary is not covered under spouse’s GHP
80	Employer has less than 100 employees (No MSP)
81	Medicare is primary due to ESRD coordination period being met
82	Per insurance, seasonal employee and not eligible for the month
83	Incoming request conflicts with information on file

Value	Description
84	Missing information, unable to update CWF
85	Venue changed
86	Unable to verify address, used with CM status (for CWF assistant requests only)
87	MSP record exists, used with CM status (for MSP inquiries only)
88	No update, not lead contractor
91	Duplicate in process
92	Change of Venue not allowed after 90 days
93	No Part D Enrollment found
94	Closed, no response/no update
96	Per hierarchy guidelines, request cannot be honored.
97	Existing record is invalid and has been deleted. New record created to include changes requested.

Table 22: General - Patient Relationship Codes

Value	Description
01	Patient is policy holder
02	Spouse
03	Natural child, insured has financial responsibility
04	Natural child, insured has no financial responsibility
05	Stepchild
06	Foster child
07	Ward of the Court

Value	Description
08	Employee
09	Unknown
10	Handicapped dependent
11	Organ donor
12	Cadaver donor
13	Grandchild
14	Niece/nephew
15	Injured plaintiff
16	Sponsored dependent
17	Minor dependent of a minor dependent
18	Parent
19	Grandparent dependent
20	Domestic partner

Table 23: General - Informant Relationship Codes

Value	Description
A	Attorney representing beneficiary
B	Beneficiary
C	Child
D	Defendant’s attorney
E	Employer
F	Father
I	Insurer
M	Mother
N	Non-relative
O	Other relative
P	Provider

Value	Description
R	Beneficiary representative (other than attorney)
S	Spouse
U	Unknown
W	Pharmacy

Table 24: General - Relationship to Insured Codes

Value	Description
B	Beneficiary
C	Child
E	Employer
F	Father
M	Mother
N	Non-relative
O	Other relative
S	Spouse
U	Unknown

Table 25: General - Insurance Type Codes

Value	Description
A	Insurance or Indemnity (OTHER TYPES)
B	Group Health Organization (GHO)
C	Preferred Provider Organization (PPO)
D	Third Party Administrator arrangement under an Administrative Service Only (ASO) contract without stop loss from any entity (TPA/ASO)

Value	Description
E	Third Party Administrator arrangement with stop loss insurance issued from any entity (STOP LOSS TPA)
F	Self-Insured/Self-Administered (SELF-INSURED)
G	Collectively-Bargained Health and Welfare Fund (HEALTH/WELFAR)
H	Multiple Employer Health Plan with at least one employer who has more than 100 full- and/or part-time employees (EMPLOYER+100)
I	Multiple Employer Health Plan with at least one employer who has more than 20 full- and/or part-time employees (EMPLOYER+20)
J	Hospitalization Only Plan covering inpatient hospital services (HOSPITAL ONLY)
K	Medical Services Only Plan covering only non-inpatient medical services (MEDICAL ONLY)
M	Medicare Supplemental Plan, Medigap, Medicare Wraparound Plan, or Medicare Carve Out Plan (SUPPLEMENTAL)
R	GHP Health Reimbursement Arrangement
S	GHP Health Savings Account
Blank	Unknown (UNKNOWN)