



Targeted Messaging

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1. Targeted Messaging Overview

About Targeted Messaging

Targeted Messaging delivers patient-specific, clinically relevant messages directly to healthcare providers. It supports **electronic messaging, fax, and mail**, using provider demographics to choose the best delivery method. This multi-channel approach modernizes provider communication and improves delivery success while reducing development costs.

Why it matters: Targeted Messaging ensures providers receive timely, patient-specific information that supports better decision making. Using secure, standards-based communication and efficient recommendation grouping, it reduces administrative burden and strengthens care coordination. Built-in validation and reporting further help organizations track delivery, spot issues quickly, and resolve errors.

Bottom line: Targeted Messaging promotes patient safety and better health outcomes by enabling accurate, timely information exchange and helping organizations navigate both regulatory and technical challenges.

See the [Process Overview](#) section for more information.

About This Implementation Guide

This guide supports the implementation of Targeted Messaging, which uses a **flat file format** and **Secure File Transfer Protocol (SFTP)** for message exchanges. It describes the Targeted Messaging batch file formats, processing flows, and all related technical and operational requirements.

This guide is intended for a customer's business and technical stakeholders who are responsible for implementing Targeted Messaging within their patient management software.

Note: The terms **patient** and **member** are used interchangeably throughout this guide.

2. Integration and Production

The following section defines related technical and support elements needed to achieve certification for moving the product into production, along with our Integration and Compliance processes.

Integration Process

When a customer begins integrating a Surescripts product into their application(s), they will be provided access to all the Surescripts documentation pertaining to the product being implemented. In addition, customers will be provided access to the staging environment to design, develop and test the product integration within their application.

Note: The time frame of the project can vary depending on the customer's resource allocation for the project.

Meeting Requirements

During Integration, customers will ensure their system has met all product requirements. The message validation testing will focus on message format, application workflow and display in accordance with Surescripts documentation. Upon successful completion of message validation and, when applicable, other pre-production network requirements (e.g., Identity Proofing, Attestations, DEA audit), customers will be enabled in production.

For requirements, consider the following:

- To ensure high-quality transactions, Surescripts applies additional business rules above and beyond the schema defined requirements that will cause a message to be successful or rejected.
- Surescripts test cases do not cover all possible scenarios in production. Customers are responsible for testing any other applicable scenarios specific to their production environment.
- In accordance with the customer's legal agreement with Surescripts, each customer is responsible for ensuring compliance with all applicable laws including, but not limited to, local and state laws/regulations where doing business.

Transition to Production

Once message validation testing is complete and the contract is approved, the customer is ready to move into production. Surescripts will configure the production connection and ensure successful operations with the customer.

Before moving to production, Surescripts Account Management will collaborate with the customer and internal Surescripts teams to review the following items:

- **Production support contacts**
To be captured in an Escalation Matrix—a tool that specifies how Surescripts should contact customers for support needs, including case routing and escalation paths.
- **Support process and training**
- **Support availability**

Note: The Escalation Matrix for use by Surescripts customers can be found in the *Network Operations Guide*.

Compliance

Surescripts goal is efficiency and consistency across the network so all customers can meet the highest measures of patient safety, end-to-end reliability, and quality. To ensure that customers comply with and adhere to the approved certification requirements, Surescripts:

- Monitors customers in production to ensure all network customers remain in compliance with certification requirements and contractual terms.
- Initiates a remediation process for identified compliance issues.

To ensure network and patient safety, customer agrees to notify Surescripts of any modifications through use of the Surescripts recertification form. Upon receipt of this form, changes will be reviewed, and a determination made as to what (if any) level of certification may be required before being placed into production.

When changes are made to a customer's implementation, the customer should advise their account manager. The customer will be given a recertification guide to provide details regarding the changes made. Upon receipt of the completed document, the details will be reviewed, and a determination will be made as to what (if any) level of recertification is necessary.

As a reminder, Surescripts conducts certification with customers to ensure the application adheres to network requirements. Surescripts will enforce mandatory fields as required by the Standards body and Surescripts guide requirements. To maximize interoperability, customers are recommended to support optional fields that have been created to address gaps in discrete data needs and the many solutions that are in place for the benefit of the receiver. Surescripts encourages, but does not guarantee, the use of optional discrete fields to support end user workflows.

This guide is intended for certification on our network only and is not intended to ensure compliance with state and federal law. In accordance with the customer's legal agreement with Surescripts, each customer is responsible for conducting its own due diligence to ensure compliance with all applicable laws and requirements, including, but not limited to, local and state laws and regulations in which the customer's application is deployed and used.

Secure FTP

This product uses SFTP to transfer files between Customer and Surescripts. Refer to the Surescripts-supplied *Connectivity and Authentication Guide* for details on these requirements.

SFTP Locations	
Incoming Files (To Surescripts)	/to_surescripts (Permission: Upload)
Outgoing Files (From Surescripts)	/from_surescripts (Permissions: Download, Delete)
History	/history (Permissions: View-Only)

File Transfer Tips:

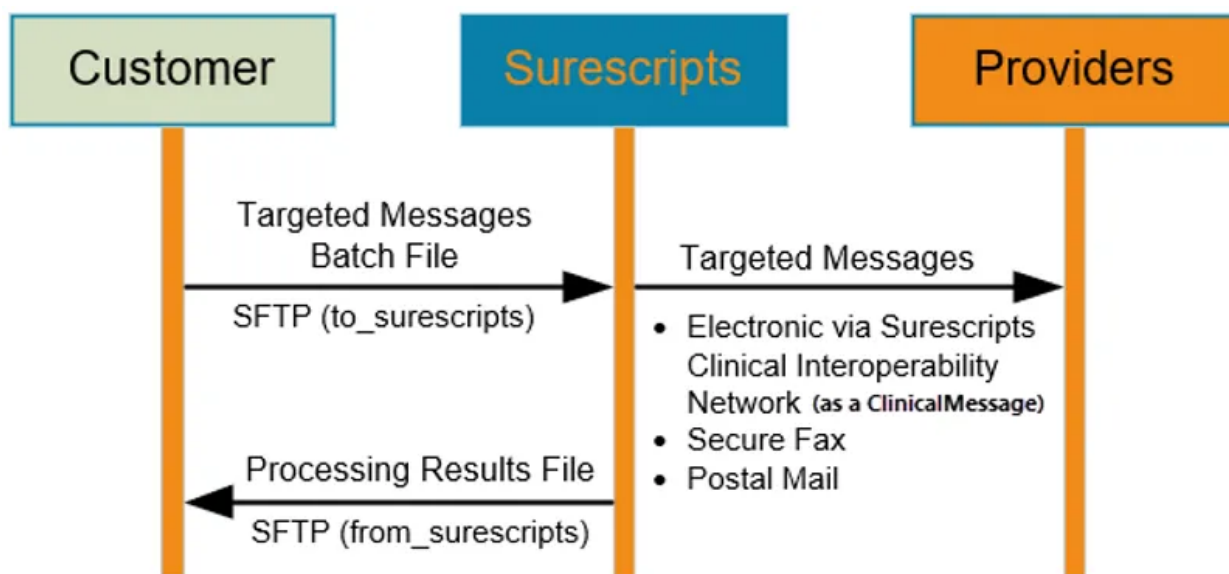
- Customers will post files to the **/to_surescripts** folder.
- Customers have **View-Only** rights on the **/history** folder. This folder contains a copy of client files. The Surescripts system will automatically delete files older than 14 days.
- Customers have **Download** and **Delete** rights on the **/from_surescripts** folder. This folder contains the Surescripts Delivery Report files. Customers may delete these files directly, while the Surescripts system will automatically delete files older than 14 days.

3. Process Overview

This section seeks to provide customers with an understanding of the steps and timing associated with Targeted Messaging's processing of files that delivers communications to providers. While some elements will vary according to the type of message and file implemented, the general process remains consistent.

Workflow

Below is an end-to-end process diagram showing the interactions between the customer, Surescripts, and providers for Targeted Messaging communications. See [Targeted Message Output Examples](#) for examples of output displays for Targeted Messages from provider EHRs.



This process workflow is repeated for each file that Customer submits via [Secure SFTP](#). Specific steps taken will vary by customer implementation and file contents.

Processing Sequence

Step	Action
1	File upload validation: Surescripts will validate each file when it is first uploaded to ensure it meets the minimum criteria to be processed. Validations practices include: • Ensure file extension/type aligns with available processing formats. • Confirm file name aligns with naming convention. • Check fields in the header row to ensure the file can be processed. Errors found as part of the upload validation will not result in a Delivery Report but can be viewed in the File Load tool of the Workbench environment.
2	Data validation: The processing system checks that: • File is complete relative to the header and trailer sections' requirements. • Header values align with expected/valid values for the given customer. • Field content is valid against schema requirements. The process then confirms that mandatory elements are present and conditional requirements have been met. Fatal errors, such as field content validation errors, will result in a Delivery Report file where the records in error will be flagged, as described in the Delivery Report section.
3	Message delivery: Targeted Messaging reviews validated file rows to group records into possible messages and determine which delivery route(s), and to which endpoint(s), a given message may take. Although each message will only be delivered to one destination, multiple destinations may be attempted during processing.
3	Electronic Messages: a Messages are converted to a Direct Standard-compliant message and sent to the destination provider's electronic system. Surescripts will wait up to one hour to receive a delivery receipt for messages before attempting an alternative delivery method. Note: If a provider has more than one Direct address available Targeted Messaging will attempt delivery to the address that is the next best match until all addresses are attempted or a system accepts the message.
3	Fax messages: b Messages are formatted using a template defined during the implementation process and sent to the fax number included in the Customer's file. Note: Customers are responsible for verifying all fax numbers before including them in the file to ensure faxes are only sent to PHI-secure fax numbers.
3	Mail messages: c Similar to fax messages, messages are formatted using a template defined during the implementation process. Mail templates can vary from fax templates but often include the same content and format with different cover pages. The indication of successful mail messages is the handoff to a secure print/mail vendor designated by Surescripts. Ultimate delivery of the mail message will vary and relies on the United States Postal Service (USPS). Note: Mailing addresses will only be used if the included address is valid according to the Coding Accuracy Support System (CASS).

Step	Action
4	Delivery report creation: Once all messages have been processed, the system creates a delivery report and sends it to the Customer via SFTP. The delivery report contains the processing outcome of each record, and may also include the following items: • Delivery method of each record(s): electronic, fax or mail. • Corresponding message ID of delivered messages. • Outcome of address validation for mail delivery. • Other processing errors, when applicable. For details on what types of errors and content to expect in the delivery report file, see Delivery Report File and Field Details.

Timing

Note: The timing information provided in this section reflects typical processing behavior and does not constitute a **Service-Level Agreement (SLA)**. Actual processing times may vary based on system load, file size, and message composition.

Targeted Messaging is available to accept and process customer files daily via SFTP connection. Upon receiving and validating the file, Surescripts initiates delivery of all included Targeted Messages.

Typically, after files are processed, a Delivery Report file is sent within six hours. This estimate may be extended depending on several factors, however. To help maintain efficient processing, customers should consolidate their messages into as few files per day as technically possible, as only one file per customer will be processed at a time.

Due to the response times allotted for provider systems to accept electronic messages, most files require at least 75 minutes to finish processing. After file processing is complete, Surescripts then sends the Delivery Report file via SFTP.

While electronic and fax messages are delivered to the indicated endpoint (Direct address or Fax number) at the time the Delivery Report file is published, mail messages indicate only the handoff to a secure printing and mailing facility. Printed mail delivery times depend on the printing lead time and the United States Postal Service (USPS).

Processing Consideration

Targeted Messaging can process a large amount of messages in a short amount of time. As additional files are submitted, processing time increases regardless of their message count.

For example, sending 100,000 messages in one file would complete processing in much less time than using three different files to send only 300 messages.

Determining Delivery Route

Message routing rules rely heavily on demographic information provided in the file, as each delivery method requires a minimum set of information. The table below specifies the elements that must be present to enable each delivery method. To achieve the best possible outcome, customers are encouraged to include as much information as possible about the intended recipient.

Note: For best results with electronic messaging, Surescripts recommends including the street address of the provider's practice. However, if it is possible that the message will be delivered through Mail, the given address must be the address to which you want the letter sent.

Recipient Demographic Information	Electronic	Fax	Mail
Provider NPI	Required	Recommended	Recommended
Provider Last Name	Optional	Recommended	Required
Address Line 1	Recommended	Optional	Required
ZIP Code	Recommended	Optional	Required
Fax Number	Optional	Required	Optional
City	Optional	Optional	Required
State	Optional	Optional	Required

Identifying Recipient Electronic Address

Targeted Messaging prioritizes electronic delivery to ensure that the most secure and efficient method is used for all communications. The directory address for providers may not always match the address provided in the submitted file. To account for this, Surescripts will match the electronic address with providers using the following priority order:

1. **Provider NPI + Address Line 1 + ZIP Code**
2. **Provider NPI + ZIP Code**
3. **Provider NPI**

Combining Records to Form Messages

Targeted Messaging combines multiple records to the same provider into a single outbound message in order to reduce provider burden and increase delivery efficiency. The rules for combining records differ depending on whether the file is a **Standard Targeted Messaging** file or an **Immunization Notification** file.

Standard Targeted Messaging Files

Standard Targeted Messaging files allow multiple recommendations to be merged into a single message when the records have identical information in certain fields.

Criteria for Combining Records (Standard Targeted Messaging):

- Patient ID
- Patient Name
- Provider NPI
- Provider Name
- Provider Demographics
- Template ID
- Short recommendation

Note: For **fax** and **mail** delivery, message templates limit the number of supporting evidence rows that can be included in a single message. If the file includes more supporting evidence rows than the template allows, only the allowed number are included in the message. Any extra rows are left out and listed in the Delivery Report.

Immunization Notification Files

Immunization notification files allow multiple recommendations to be merged into a single message when the records have identical information in certain fields.

Criteria for Combining Records (Immunization Notifications):

- Patient ID
- Patient Name
- Provider NPI
- Provider Name
- Provider Demographics
- Template ID
- Care Location
- Administration Date

Note: For Immunization Notification files delivered via **fax** or **mail**, up to *three immunizations per page* may be included. Additional immunizations for the same patient generate additional pages but remain grouped into the same outbound notification as long as they meet the specified criteria.

4. Submission File and Field Details

This section details the shared requirements for all Targeted Messaging file formats.

Field Schema Requirement Designation

Throughout this guide, fields are designated as either mandatory, conditional, optional, or not used. This provides a uniform way to distinguish which fields the system requires, expects, or simply recommends for most workflows.

Code	Description
mandatory	The element must always be populated. If missing in the header or trailer the file will fail. If missing in a record, the record will fail. If 10% or more of the records in a file fail, the file will stop processing.
conditional	This element must be populated when the given conditions are met.
optional	For the best outcome of messages Surescripts recommends populating the element, but does not place any conditional or mandatory validation on it.
not used	Not used in this product but is included since it's used in other similar Surescripts products. (Often indicates a mandatory blank space.)

Character Types and Formats

See the [American Standard Code for Information Interchange \(ASCII\)](#) for a list of valid code representations for accepted character types. Use of characters outside these types will be rejected, which may cause records or entire files to fail.

Alphanumeric data must only contain ASCII characters with decimal values of 32 through 126, excluding the delimiter characters listed in the Delimiter Characters section.

Numeric data must be composed of the integers 0-9.

The field schemas use the following character type notations:

Character Type	Notation
Alphanumeric	an
Date	dt
Numeric	n
Time	tm

Date Formats:

Notation	Meaning
CC	Two-digit century, such as 19 in the year 1999
YY	Two-digit year, such as 99 in the year 1999
MM	Two-digit month (01=January, etc.)
DD	Day of the month (01-31)

Time Formats:

Notation	Meaning
HH	Two digits of hour (00-23)
MM	Two digits of minute (00-59)
SS	Two digits of second (00-59)
DD	Two digits of decimal seconds (00-99)

Delimiter Characters

The following table contains delimiter characters used in inbound and outbound files. Unique fields must be separated using the pipe (|) character only. Unique records (rows) within the file must be separated by using either the line feed (LF) or both carriage return (CR) and LF characters together.

Character	Description	ASCII Hexadecimal Value
	Pipe	0x7c
LF	Line Feed	0x0a
CR	Carriage Return	0x0d

Although the following characters are considered delimiter characters, they must **not** be used within submitted files. Inclusion of any of these characters will be read as field delimiters and cause records containing these characters to be flagged as an error:

Character	Description	ASCII Hexadecimal Value
*	Asterisk	0x2a
\	Backslash	0x5c
:	Colon	0x3a
~	Tilde	0x7e

File Naming and Formats

To ensure proper file processing, as well as our ability to properly support customers with processed files, there are a few key rules that must be followed. Review the table below for more information:

Rules	Instructions
File Naming Convention	The naming convention for Targeted Messaging batch files is PNLCustomerNameCCYYMMDDXX where CCYYMMDD is the file transmission date and XX is a unique sequence for that day. Surescripts provides the CustomerName portion, which will consist of 3-14 letters unique to the Customer. Notice that Standard files begin with PNL, while Immunization files begin with IMM. Standard Targeted Messaging file name example: PNLAcme2025120101.txt Immunization notification file name example: IMMAcme2025120101.txt
File Compression Methods (optional)	Prior to transmitting them to Surescripts, we recommend using standard file compression methods. The supported compression protocols are gzip, bzip2, and zip. Each compressed file must contain only one Targeted Messaging file and the compressed archive file must have the same name as the Targeted Messaging file it contains, appended with the corresponding compression method file extension. For example, a file named PNLAcme2025120101.txt, compressed using gzip would be transmitted in a file named PNLAcme2025120101.txt.gz.
Transmitting files to Surescripts	Deliver the file to Surescripts using FTP and place in the /to_surescripts folder or other appropriate location per the customer's FTP setup.

Assigning Authority ID Usage

An Assigning Authority ID, commonly known as an OID or Home Community ID, is a globally unique ID that systems use to represent themselves as well as to recognize each other in the secure exchange of clinical information. The Assigning Authority ID is a critical component to allowing EHR systems to accurately match patients. If an EHR is unable to match a message to a patient in their system, the message is most likely to be rejected.

For Targeted Messaging messages to be processed successfully into EHR systems, each customer will need to use a unique Assigning Authority ID. In the file schemas in Section 6 and 7, the Assigning Authority ID is denoted as:

- Source System ID (for Standard files)
- Patient Issuer ID (for Immunization files)

Surescripts strongly encourages customers to use their sending organizations' existing OID when populating these fields. If sending on behalf of downstream customers, the OID should be that of the organization who assigned the associated unique patient ID.

If the sender does not have an OID, Surescripts recommends registering for one through [HL7](#) or another available OID registry. If for some reason one cannot be obtained, work with your implementation specialist to proceed.

Context Codes in Messaging

This section describes context codes that are supported for standard Targeted Messaging files. Use of context codes is considered best practice to enable EHRs to more accurately route messages within their systems.

Note: In addition to the codes listed below, the codes from the [HL7 FHIR R4 Document Type Codes Value Set](#) may also be used.

Context Code	Explanation
61357-0	Medication Pharmaceutical (advice.brief Document). Default for MEDS
52034-6	Payer Letter
95411-5	SARS Coronavirus 2 Ab.neut
34133-9	General Communication
75468-9	Medication Adherence

5. Delivery Report File and Field Details

A Targeted Messaging Delivery Report is sent to the customer after the submitted file has been processed and the Targeted Messages have been sent. This file contains the records from the Targeted Messaging file with additional columns that indicate:

- Delivery method of each record(s): electronic, fax or mail.
- Corresponding message ID of delivered messages.
- Outcome of address validation for mail delivery.
- Other processing errors, when applicable.

The Targeted Messaging Delivery Report will be written to the customer's FTP account in a folder named **from_surescripts** or other appropriate folder per the customer's FTP setup.

File Name and Format

The Targeted Messaging Delivery Report file name will be based on the original Targeted Messaging file name appended with a period ("."), followed by a unique processing id, and then **.rsp**. This single file will then be added to a compressed archive file. The name of the archive file will be the Delivery Report file name appended with **.gz**.

Example:

Original File Name: PNLAcme2025122101.txt

Delivery Report File Name: PNLAcme2025122101.1235413425555.rsp

Compressed Delivery Report File Name: PNLAcme2025122101.1235413425555.rsp.gz

Note: Each field in the Targeted Messaging Delivery Report is delimited by the pipe (|) character. Each line in the file is separated using the line feed (LF) character.

Field Codes and Descriptions

Throughout the Targeted Messaging Delivery Report there are some fields with coding information made available for additional processing and reconciliation by the system which generated the original submission file. These fields should be evaluated upon receipt, to determine whether additional follow-up is needed or if the outreach made by Targeted Messaging was sufficient for Customers' needs.

Load Status

The Load Status – **Field 14 in headers** – indicates the overall file loading and processing outcome. This is different from the individual record status and errors.

Code	Description
01	The file was loaded and processed. No errors were encountered during processing.
02	The file was loaded and processed. Errors were encountered during processing. Individual records should be reviewed for outcome and to determine further need for processing by the Customer
03	The file contained errors and was unable to complete loading. Individual records will not be included in this Delivery Report file.
04	An error occurred during processing, unrelated to the structure of the file. The file can be resubmitted. Contact Surescripts Customer Support if the issue persists.

Delivery Method

The Delivery Method – **Field 2 in records** – indicates if, and how, a message was delivered. There are five different codes that may appear, depending on the implementation and information included in the submission file.

Successful Delivery:

Code	Description
E	This code indicates that the message was delivered electronically using Direct messaging.
F	This code indicates that the message was delivered to the fax number indicated in Field 3 – Delivery Fax Number. The fax will be a PDF of the fax version of the template indicated in the original submission file.
P	This code indicates that the message was delivered to the mailing address indicated in fields 4-8. The printed letter will be a PDF of the mail version of the template indicated in the original submission file.

Note: Successful message delivery does not preclude errors occurring for a given record. Delivery status is indicative of the overall message, which may include multiple records. Refer to [Combining Records to Form Messages](#) for more information about how records are grouped into messages.

Failed Delivery:

Code	Description
N	This code indicates that the message was created, but no successful delivery was recorded. See the Error Code and Error Description fields in the Delivery Report for more information.
X	This code indicates that the record could not be formed into a message for delivery. See the Error Code and Error Description fields in the Delivery Report for more information.

Address Processing Summary

The Address Processing Summary – **Field 9 in records** – reflects the outcome of the address normalization and validation process that occurred. For a list of possible outcomes, refer to the table found here: [MelissaData - Address Errors](#).

Error Codes and Descriptions

During the validation and processing of a Targeted Messaging file, there are opportunities for a wide variety of errors to occur. The tables below explain what error codes and descriptions may appear in the Delivery Report file, as well as where in the processing the error can occur. Please note that **PNL** refers to standard Targeted Messaging.

File and Record Validation Level Errors:

C od e	Description	Explanation
20 01	Mandatory PNL field is not present or is invalid.	A field required by the file schema was not provided in the submission file.
20 03	PNL template not found.	The template file was not found for a given message. Recheck the spelling of the template or contact your implementation specialist.
30 01	PNL could not be delivered by electronic transmission, fax, or postal mail. The primary care provider address is not deliverable.	The record was formed into a message, but that message couldn't be delivered.
30 02	Max rows on template exceeded. Row not delivered.	The message was sent but this record was not included in the supporting evidence due to space limitations found on the template used. Ensure that the supporting evidence included in files aligns with template limits established during implementation. Note: This error is only applicable for fax and mail messages.
90 00	An unexpected processing exception occurred.	The system encountered an unexpected problem during processing of the record. Note: If an error rate of more than 10% occurs, all records that didn't encounter a more specific error will receive this error.
90 01	Error sending PNL message.	A message was formed and delivery was attempted. However, the message was ultimately unable to be delivered. This could be due to EHR systems rejecting the message, invalid/undeliverable fax numbers or an invalid mailing address.
90 02	System timed out when sending PNL Message.	The message was sent electronically but an acceptance message was not received from the destination EHR system. Note: This error will only occur if the system could not attempt sending the messaging using a different method.

6. Standard Targeted Messaging File Schema

This section details the requirements for the standard Targeted Messaging file format. This format allows for dynamic communications from senders to providers and is commonly used for outreaches such as closing gaps in care, alerting prescribers to medication and formulary changes, and recommending patient care changes. This format supports grouping multiple records of supporting evidence into a table to add clarity to messages.

For more information refer to the following topics:

[Customer-Submitted File Information](#)

[Targeted Message Delivery Report](#)

6.1. Customer-Submitted File Information

This section details the file format which customers will use to submit standard Targeted Messaging files.

Header Information

This section specifies and describes the different header fields included in the Targeted Messaging file, which Surescripts uses to populate the message that will be sent to a member's provider.

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies record type. Value: HDR
2	Version/Release Number	an6	mandatory	Version Number of this specification. Value: MED001
3	Sender ID	an3..30	mandatory	ID as assigned by Surescripts identifying customer sending the file. Examples: P0100000000001, T0100000000001
4			not used	Empty element that must be included.
5	Receiver ID	an1..30	mandatory	ID identifying the receiver of the file. Value: S00000000000001
6			not used	Empty element that must be included.
7	Transmission Control Number	an1..10	mandatory	Unique identifier defined by the sender. Note: The sender shall ensure that the combination of the Sender ID and the Transmission Control Number remains unique for a minimum period of 18 months. Example: 0000001000
8	Transmission Date	dt8	mandatory	Date transaction was created (D8 – CCYYMMDD). Example: 20251201
9	Transmission Time	tm8	mandatory	Time transaction was created (HHMMSSDD). Example: 12200101
10	Transmission File Type	an1..3	mandatory	Identifier telling the type of transaction. Value: PNL
11	Transmission Action	an1	mandatory	This is included to be consistent with other types of Surescripts files. Value: A
12	Extract Date	dt8	mandatory	Date that file was created formatted as CCYYMMDD. Example: 20251201
13	File Type	an1	mandatory	Indicates if the file is meant for processing in either the testing or production environment. • T=Test • P=Production
14	Context Code	an..64	optional	Code used to indicate the intended purpose of the message, allowing provider vendor systems to optimize the workflows and routing of messages. See Section 4.6 for more information. Default: 61357-0

Record Information

This section specifies and describes the Targeted Messaging file's different record fields, which Surescripts will validate and use to populate the unique messages that will be sent to the targeted provider.

Records that do not meet the base validations are not processed further and are included in the Targeted Messaging Delivery Report File with an applicable error code.

Note: Validation does not test data types, valid value rules or formats. All elements are treated as plain text during validation.

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: PNL
2	Record Sequence Number	n1..10	mandatory	Unique number for each record in the file.
3	Source System ID	an1..70	mandatory	The Assigning Authority ID (OID) of the targeted message sender. See Assigning Authority ID Usage for more information about populating this field.
4	Template ID	an1..20	mandatory	Identifier used to specify the Targeted Message template to be used for a given message. Available codes are assigned to the customer during implementation.
5	Clinical Rule Date	dt8	mandatory	Date the data was entered/captured formatted as CCYYMMDD. Example: 20251201
Recipient/Target Provider Details				
6	NPI	n10	conditional	NPI of the member's provider. Note: Required for electronic delivery.
7	First Name	an1..30	conditional	First name of the member's provider.
8	Last Name	an1..50	mandatory	Last name of the member's provider.
9	Address, line 1	an1..120	conditional	Street information in mailing address of member's provider Note: Required for electronic and postal mail delivery.
10	Address, line 2	an1..120	conditional	Space for additional street information in mailing address of member's provider.
11	City	an1..50	conditional	City in mailing address of member's provider. Note: Required for postal mail delivery.
12	State	an2	conditional	USPS state abbreviation for mailing address of member's provider. Note: Required for postal mail delivery.
13	ZIP Code	n 5/9	conditional	ZIP Code in mailing address of member's provider. Use the format 99999 or 999999999. Note: Required for electronic and postal mail delivery.
14	Phone Number	n10	conditional	Contact telephone number for the provider receiving the notification. Note: Do not include dashes (-) or parentheses.
15	Fax Number	n10	conditional	Fax number for provider to receive confidential patient information. Note: Sender must verify this as a PHI-secure fax number.
Patient/Member Details				
16	First Name	an1..30	mandatory	Member's first name.
17	Last Name	an1..50	mandatory	Member's last name.

Field #	Field Name	Data Type	Code	Description
18	Address, line 1	an1..120	conditional	Street information in member's mailing address.
19	Address, line 2	an1..120	conditional	Additional street information in member's mailing address.
20	City	an1..50	conditional	Member's city mailing address.
21	State	an2	conditional	State in member's mailing address. Note: Use USPS state abbreviation.
22	Zip Code	an5/9	conditional	ZIP Code in member's mailing address. Use the format 99999 or 999999999.
23	Phone Number	an10	conditional	Member's contact phone number. Note: Do not include dashes (-) or parentheses.
24	Gender	an1	conditional	Member's administrative gender code. Values: F = Female M = Male U = Unknown/Other
25	Member ID	an1..15	mandatory	Sender's internal identifier for the member. Note: To ensure accuracy in patient matching, the Patient ID value should be consistent with the Patient ID value shared in other Surescripts products.
26	Date of Birth	dt8	mandatory	Member's date of birth formatted as CCYYMMDD.
Supporting Evidence Details				
27	Fill Date	dt8	conditional	Date the prescription was filled. Note: use format CCYYMMDD.
28	Medication Label Name	an1..256	conditional	Medication name, strength, and units of measure.
29	Quantity	an1..20	conditional	Medication quantity being dispensed.
30	Day's Supply	n1..3	conditional	Day's supply of the medication for the patient.
31	Prescriber of Record First Name	an1..30	conditional	First name of medication prescriber.
32	Prescriber of Record Last Name	an1..50	conditional	Last name of medication prescriber.
33	Prescriber of Record Phone Number	an10	conditional	Contact telephone number for medication prescriber. Note: Do not include dashes (-) or parentheses.

Field #	Field Name	Data Type	Code	Description
34	Pharmacy Name	an1..120	conditional	Dispensing pharmacy name.
35	Pharmacy Phone	n10	conditional	Contact telephone number for dispensing pharmacy. Note: Do not include dashes (-) or parentheses.
36	Mutually defined	an1..35	conditional	This is a non-required placeholder reserved for user-specific elements.
37	Plan Name	an1..35	conditional	Member's insurance plan name.
Recommendation Details				
38	Short Recommendation	an1..128	mandatory	Short description of the recommendation being notified.
39	Recommendation Action	an1..35	conditional	Suggested actions for provider to take against the recommendation.
40	Recommendation Context	an1..1024	mandatory	Extended description of the recommendation being sent.
41	Supplemental Privacy	an1..512	conditional	A space for additional information on the recommendation being sent. Note: This field is often used as a second paragraph for Recommendation Context.
Electronic Message Customizations				
42	Context Code Override	an0..64	mandatory	Replaces the Context Code assigned in the header or the default (61357-0) with a record-specific value.
43	Subject Override	an0..256	conditional	Replaces the default message subject line text with a record-specific value. Default: Healthcare Recommendation
44	Message Override	an0..1024	mandatory	Replaces the default message body text with a record specific value. Default: A recent review of pharmacy claims has identified the following drug therapy opportunities for your patient. Please see attachment for details.

Trailer Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies record type. Value: TRL
2	Total Records	n1..10	mandatory	Total number of Detail Records.

6.2. Targeted Message Delivery Report

A delivery report is provided for all files that were partially or successfully loaded. The file contains the processing outcome of both the file as well as the individual records included.

Header Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: SHD
2	Version / Release Number	an1..3	mandatory	Version number of this specification. Value: MED001
3	Sender ID	an3..30	mandatory	ID for Surescripts as the creator of the file. Value: S00000000000001
4	Recipient ID	an3..30	mandatory	ID assigned by Surescripts, which matches the Sender ID value in the submitted file. Examples: P01000000000001, T01000000000001
5	Recipient Participant Password	an10	not used	Empty element.
6	Transmission Control Number	an1..10	mandatory	Unique identifier generated by Surescripts for a specific delivery report.
7	Transmission Date	dt8	mandatory	Date transmission was created formatted as CCYYMMDD.
8	Transmission Time	tm8	mandatory	Time transmission was created formatted as HHMMSSDD.
9	Transmission File Type	an1..3	mandatory	Identifier for the type of file. Value: IMR
10	Transmission Number - Originating	an1..10	mandatory	Number of the original transmission.
11	Transaction Date - Originating	dt8	mandatory	Submitted file's Transmission Date value.
12	Transmission Time - Originating	tm8	mandatory	Submitted file's Transmission Time value.
13	File Type	an1	mandatory	Indicates if the file was processed in either the testing or production environment. Value: T = Test or P = Production
14	Load Status	an2	mandatory	Code explaining loading status of the original file.

Record Information

Field #	Field Name	Data Type	Code	Description
1	Response Record Type	an3	mandatory	Identifies the record type. Value: SDT
2	Targeted Messaging Delivery Method	an1	mandatory	The method that was used to successfully deliver the Targeted Message. See Delivery Method for possible codes.
3	Targeted Messaging Fax Number	n10	conditional	The fax number that was used for fax delivery of the Targeted Message. This field is populated when fax is the delivery method.
Provider Address Standardization Outcome				
4	Address, line 1	an1 ..12 0	conditional	Standardized version of submitted provider's address, line 1 value, to be used when mail delivery is attempted.
5	Address, line 2	an1 ..12 0	conditional	Standardized version of submitted provider's address line 2 value, to be used when mail delivery is attempted.
6	City	an1 ..35	conditional	Standardized version of submitted provider's City value, to be used when mail delivery is attempted.
7	State	an2	conditional	Standardized version of submitted provider's State value, to be used when mail delivery is attempted.
8	ZIP Code	n 5/9	conditional	Standardized version of submitted provider's ZIP Code value, to be used when mail delivery is attempted.
9	Provider Address Processing Summary	an1 ..2 00	conditional	Summary text describing the processing outcome of submitted provider's address demographics.
10	Provider Address Deliverable	an1	conditional	Indicates whether the provider mailing address in this record was determined to be deliverable during processing. Value: Y = Deliverable or N = Undeliverable Note: If no address is provided in the original file, the field will be blank.
Message Tracking and Outcome Information				
11	Targeted Message ID	an1 ..4 0	conditional	A unique identifier for the outreach/message, after records grouping was completed. All records that were identified for part of a single outreach will have the same value. See Combining Records to Form Messages for more information about records grouping is performed.

Field #	Field Name	Data Type	Code	Description
12	Message ID	an1 ..4 0	conditional	ID for the message transaction used to deliver the Targeted Message. All Targeted Message records included in the same delivery message will have the same value. See Combining Records to Form Messages for more information about how messages are grouped for delivery to providers.
13	Batch ID	an1 0	conditional	This is the first 10 digits of the Targeted Message ID but can be used as an additional unique identifier as needed.
14	Error Code	an 4	conditional	Code identifying an error encountered during processing that prevented delivery of a record to the provider. See Section 5.2.4 for more information about error codes and descriptions.
15	Error Description	an1 ..2 00	conditional	Text description of the error code specified in Field 14, if applicable.
16 +	Echo of the fields provided in the submission file up to, but not including, the electronic customization fields: 42, 43, and 44.			

Trailer Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies record type. Value: STR
2	Total Delivered Electronically	n1..10	mandatory	Total number of rows in the Targeted Messaging file delivered electronically.
3	Total Delivered Fax	n1..10	mandatory	Total number of rows in the Targeted Messaging file delivered by fax.
4	Total Delivered Mail	n1..10	mandatory	Total number of rows in the Targeted Messaging file delivered by postal mail.
5	Total Not Delivered	n1..10	mandatory	Total number of rows in the Targeted Messaging file not delivered.
6	Total Rows in Error	n1..10	mandatory	This represents the total rows in the Targeted Messaging file that resulted in errors. Note: Records not processed due to insufficient provider information are not included in this number.
7	Total Records Received	n1..10	mandatory	The total number of records received in the Targeted Messaging file.

7. Immunization Notifications File Schema

This section details the requirements for the Immunization Notifications for Targeted Messaging file format. This format allows pharmacies to notify the required providers when Immunizations are administered to patients. This is typically used to notify primary care providers in alignment with state regulations.

Note: Use of Targeted Messaging does not replace any state mandated reporting measures, such as reporting to state immunization registries.

For more information refer to the following topics:

[Customer-Submitted Immunization File Information](#)

[Immunization Delivery Report](#)

7.1. Customer-Submitted Immunization File Information

This section details the file format which customers will submit for Immunization notification files.

Header Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: HDR
2	Version/Release Number	an3	mandatory	Version number of this specification. Value: 020
3	Sender ID	an3..30	mandatory	ID assigned by Surescripts that identifies the customer sending the file. Examples: P01000000000001, T01000000000001
4	Sender Participant Password	an10	not used	Empty element that must be included.
5	Receiver ID	an1..30	mandatory	ID for Surescripts as the receiver of the file. Value: S0000000000000001
6	Source Name	an1..35	not used	Empty element that must be included.
7	Transmission Control Number	an1..10	mandatory	Unique identifier defined by the sender of the file. Note: The sender shall ensure that the combination of the Sender ID and the Transmission Control Number remain unique for a minimum of 18 months. Example: 0000001000
8	Transmission Date	dt8	mandatory	Date that transaction was created formatted as CCYYMMDD. Example: 20251201
9	Transmission Time	tm8	mandatory	Time that transaction was created formatted as HHMMSSDD. Example: 12200101
10	Transmission File Type	an1..3	mandatory	Identifier indicating the type of records contained in the file. Value: PNL
11	Transmission Action	an1	mandatory	This is included to be consistent with other types of Surescripts files. Value: A
12	Extract Date	dt8	mandatory	Date that file was created formatted as CCYYMMDD. Example: 20251201
13	File Type	an1	mandatory	Indicates if the file is meant for processing in either the testing or production environment. Value: T = Test or P = Production
14	Context Code	an0..64	not used	The context code 11369-6 is always used for Immunization messages.

Record Information

This section specifies and describes the different record fields involved in the Immunization notification file, which Surescripts will validate and use to populate the unique messages that will be sent to the targeted provider.

Records that do not meet the base validations are not processed further and are included in the Targeted Messaging Delivery Report File with an applicable error code.

Note: Validation does not test data types, valid value rules or formats. All elements are treated as plain text during validation.

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: PNL
2	Record Sequence Number	n1..10	mandatory	Unique number for each record in the file.
3	Patient ID	an1..15	mandatory	Sender's internal identifier for the patient. Note: To ensure accuracy in patient matching, the Patient ID value should be consistent with the Patient ID value shared in other Surescripts products.
4	Source System ID	an1..70	mandatory	The Assigning Authority ID (OID) of the targeted message sender. See Assigning Authority ID Usage for more information about populating this field.
Patient/Member Details				
5	Last Name	an1..50	mandatory	Patient's last name.
6	First Name	an1..30	mandatory	Patient's first name.
7	Middle Name	an1..30	conditional	Patient's middle name.
8	Phone Number	n..10	conditional	Patient's contact phone number. Note: Do not include dashes (-) or parentheses.
9	Date of Birth	dt8	mandatory	Patient's date of birth formatted as CCYYMMDD.
10	Gender	an1	conditional	Patient's administrative gender. Value: F = Female, M = Male, or U = Unknown/Other
11	Address, line 1	an1..120	conditional	Street information in patient's mailing address.
12	Address, line 2	an1..120	conditional	Additional street information in patient's mailing address.
13	City	an1..50	conditional	City of patient's mailing address.
14	State	an2	conditional	State of patient's mailing address. Note: Use USPS state abbreviation.
15	ZIP Code	n 5/9	conditional	ZIP Code in patient's mailing address. Use the format 99999 or 999999999.
Recipient/Target Provider Details				
16	NPI	n10	conditional	NPI number of the patient's provider. Note: Required for electronic delivery.
17	State License Number	an1..15	conditional	State License number of the patient's primary care provider.

Field #	Field Name	Data Type	Code	Description
18	Provider ID	an1..15	conditional	Participant's internal ID for the patient's primary care provider.
19	Last Name	an1..50	mandatory	Last name of patient's provider.
20	First Name	an1..30	conditional	First name of patient's provider.
21	Address, line 1	an1..120	conditional	Street information in mailing address of patient's provider. Note: Required for electronic and postal mail delivery.
22	Address, line 2	an1..120	conditional	Space for additional street information in mailing address of patient's provider.
23	City	an1..50	conditional	City in mailing address of patient's provider.
24	State	an2	conditional	USPS state abbreviations for mailing address of patient's provider. Note: Required for postal mail delivery.
25	ZIP Code	n5/9	conditional	ZIP code in mailing address of patient's provider. Use the format 99999 or 999999999. Note: Required for electronic and postal delivery.
26	Phone Number	n1..10	conditional	Contact telephone number for the provider receiving the notification. Do not include dashes (-) or parentheses.
27	Fax Number	n10	conditional	Fax number for provider to receive confidential patient information. Note: Sender must verify this as a PHI secure fax number.
Vaccine Information (for Immunization-Related Messages)				
28	CPT Code	n5	conditional	Assigned procedural code for vaccine.
29	CVX Code	an2..3	conditional	Assigned vaccine code.
30	Vaccine name	an1..199	mandatory	Descriptive name of vaccine.
31	Manufacturer Name	an1..199	mandatory	Name of vaccine manufacturer.
32	MVX Code	an1..20	conditional	Administrative code for the vaccine manufacturer.
33	Lot Number	an1..20	mandatory	Lot number associated with administered vaccine.
34	Expiration Date	dt 6/8	mandatory	Vaccine's expiration date, formatted as CCYYMMDDDD or CCYYMM.

Field #	Field Name	Data Type	Code	Description
35	VIS Name	an1..30	conditional	Name of Vaccine Information Statement (VIS) provided to the patient.
36	VIS Date	dt 6/8	conditional	Publication date on VIS.
37	Administered Date	dt8	mandatory	Date that vaccine was administered to patient.
Administration Details				
38	[blank field]	--	not used	Legacy data field which is no longer used.
39	Dose	n1..20	mandatory	Amount of vaccine administered.
40	Units	an1..35	mandatory	Units for amount administered. Example: mL
41	[blank field]	--	not used	Legacy data field which is no longer used.
42	Route Description	an1..199	mandatory	Descriptive route for administration. Example: intramuscular
43	[blank field]	--	not used	Legacy data field which is no longer used.
44	Site Description	an1..199	mandatory	Administration site of vaccine. Example: left arm
45	[blank field]	--	not used	Legacy data field which is no longer used.
46	Dose in Series	n1..2	conditional	If vaccination series, the number that the administered dose is in the series. Example: 1
47	Number in Series	n1..2	conditional	If vaccination series, the total number of doses expected. Example: 3
Administering Provider				
48	Internal ID	an1..15	conditional	Participant's internal ID for the administering provider.
49	Provider NPI	n10	conditional	NPI of the administering provider.
50	Last Name	an1..50	conditional	Last name of administering provider.
51	First Name	an1..30	conditional	First name of administering provider.

Field #	Field Name	Data Type	Code	Description
52	State License Number	an1..15	conditional	State License number of the administering provider.
Administration/Care Facility				
53	NPI	n10	conditional	NPI of the administering location.
54	Name	an1..120	conditional	Descriptive name for administering location.
55	Address, line 1	an1..120	mandatory	Street information in mailing address of administering location.
56	Address, line 2	an1..120	conditional	Space for additional street information in mailing address of administering location.
57	City	an1..50	mandatory	City in mailing address of administering location.
58	State	an2	mandatory	USPS state abbreviations for mailing address of administering location.
59	ZIP Code	n 5/9	mandatory	ZIP code in mailing address of administering location. Use the format 99999 or 999999999.
60	Phone Number	n1..10	mandatory	Contact telephone number for the administering location. Do not include dashes (-) or parentheses.
Processing Information				
61	Template ID	an1..20	mandatory	Identifier used to specify the Targeted Messaging template to be used for a given notification. Available codes are assigned to the customer during implementation.
62	Source System ID	an1..35	mandatory	Assigning Authority ID (OID) of the Targeted Messaging sender. See Assigning Authority ID Usage for more information about populating this field.
63	Signed Consent for Minor	a1	conditional	Indication whether signed consent was obtained for a vaccine administered to a minor. Value: Y = Yes, N = No
64	Professional Consultation Complete	a1	conditional	Indication whether professional consultation was completed at administration. Value: Y = Yes, N = No
65	Eligibility Consultation Complete	a1	conditional	Indication whether eligibility consultation was completed at administration. Value: Y = Yes, N = No
Legacy/Not Used				
66	[blank field]	--	not used	Legacy data field which is no longer used.

Field #	Field Name	Data Type	Code	Description
67	[blank field]	--	not used	Legacy data field which is no longer used.
68	[blank field]	--	not used	Legacy data field which is no longer used.
69	[blank field]	--	not used	Legacy data field which is no longer used.
Electronic Message Customizations				
71	Context Code Override	an0..64	conditional	Replaces the Context Code assigned in the header or the default (11369-6) with a record-specific value.
72	Subject Override	an0..256	conditional	Replaces the default message subject line text with a record-specific value. Default: Immunization Notification
73	Message Override	an0..1024	conditional	Replaces the default message body text with a record specific value. Default: One of your patients recently received an immunization at one of our clinics. Please see attachment for details.

Trailer Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: TRL
2	Total Records	n1..10	mandatory	Total number of records in file, including the header and trailer records.

7.2. Immunization Delivery Report

A Delivery Report file is provided for all files that were partially or successfully loaded. The file contains details about the processing outcome of both the file as well as the individual records included.

Header Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: SHD
2	Version / Release Number	an1..3	mandatory	Version Number of this specification. Value: 020
3	Sender ID	an3..30	mandatory	ID for Surescripts as the creator of the file. Value: S00000000000001
4	Recipient ID	an3..30	mandatory	ID assigned by Surescripts, which matches the Sender ID value in the submitted file. Examples: P01000000000001, T01000000000001
5	Recipient Participant Password	an10	not used	Empty element.
6	Transmission Control Number	an1..10	mandatory	Unique identifier generated by Surescripts for a specific delivery report.
7	Transmission Date	dt8	mandatory	Date transmission was created formatted as CCYYMMDD.
8	Transmission Time	tm8	mandatory	Time transmission was created formatted as HHMMSSDD.
9	Transmission File Type	an1..3	mandatory	Identifier for the type of file. Value: IMR
10	Transmission Number - Originating	an1..10	mandatory	Submitted file's Transmission Control Number value.
11	Transmission Date - Originating	dt8	mandatory	Submitted file's Transmission Date value.
12	Transmission Time - Originating	tm8	mandatory	Submitted file's Transmission Time value.
13	File Type	an1	mandatory	Indicates if the file was processed in either the testing or production environment. Value: T = Test or P = Production
14	Load Status	an2	mandatory	Code explaining loading status of the original file.

Record Information

Field #	Field Name	Data Type	Code	Description
1	Response Record Type	an3	mandatory	Identifies the record type. Value: SDT
2	Delivery Method	an1	mandatory	The method that was used to successfully deliver the Targeted Message. See Delivery Method for possible codes.
3	Fax Number	n10	conditional	The fax number that was used for fax delivery of the Targeted Message. This field is populated when Delivery Method = F .
Provider Address Standardization Outcome				
4	Address, line 1	an1..120	conditional	Standardized version of submitted provider's address, line 1 value, to be used when mail delivery is attempted.
5	Address, line 2	an1..120	conditional	Standardized version of submitted provider's address line 2 value, to be used when mail delivery is attempted.
6	City	an1..35	conditional	Standardized version of submitted provider's City value, to be used when mail delivery is attempted.
7	State	an2	conditional	Standardized version of submitted provider's State value, to be used when mail delivery is attempted.
8	ZIP Code	n5/9	conditional	Standardized version of submitted provider's ZIP Code value, to be used when mail delivery is attempted.
9	Provider Address Processing Summary	an1..200	conditional	Summary text describing the processing outcome of submitted provider's address demographics.
10	Provider Mailing Address Deliverable	an1	conditional	Indicates whether the provider mailing address in the submitted record was determined to be deliverable during processing. Value: Y = Deliverable or N = Undeliverable Note: If no address is provided in the original file, the field will be blank.
Message Tracking and Outcome Information				
11	Targeted Message ID	an1..40	conditional	A unique identifier for the notification, after records grouping was completed. All records that were identified for part of a single outreach will have the same value. See Combining Records to Form Messages for more information about how records are combined into messages.

Field #	Field Name	Data Type	Code	Description
12	Message ID	an1..40	conditional	ID for the message transaction used to deliver the Targeted Message. All Targeted Message records included in the same delivery message will have the same value. See Combining Records to Form Messages for more information about how messages are combined for delivery to providers.
13	Error Code	an4/4	conditional	Code identifying an error encountered during processing that prevented delivery of a record to the provider. See Error Codes and Descriptions for more information.
14	Error Description	an1..200	conditional	The description of the error code listed in Field 13, if applicable.
15	Echo of the fields provided in the submission file up to, but not including, the electronic customization fields: 70, 71, and 72.			

Trailer Information

Field #	Field Name	Data Type	Code	Description
1	Record Type	an3	mandatory	Identifies the record type. Value: STR
2	Total Delivered Electronically	n1..10	mandatory	Total number of rows in the Targeted Messaging file delivered electronically.
3	Total Delivered Fax	n1..10	mandatory	Total number of rows in the Targeted Messaging file delivered by fax.
4	Total Delivered Mail	n1..10	mandatory	Total number of rows in the Targeted Messaging file delivered by postal mail.
5	Total Not Delivered	n1..10	mandatory	Total number of rows in the Targeted Messaging file not delivered.
6	Total Rows in Error	n1..10	mandatory	This represents the total rows in the Targeted Messaging file that resulted in errors. Note: Records not processed due to insufficient provider information are not included in this total.
7	Total Records Received	n1..10	mandatory	The total number of records included in the Targeted Messaging file.

8. Targeted Message Output Examples

This section provides examples of the various Targeted Message formats.

Note: Examples are for illustrative purposes only, as message display and placement will vary based on the provider's EHR configuration.

Figure 1.1. Example electronic Targeted Message recommending that the provider prescribe a new drug to a patient.

Important drug therapy Information from Organization

Patient	John Doe		
Date of birth	February 12, 1949	Sex	Male
Contact info	123 Patient Street Crosspaths, AR 72201, US Tel: (123)206-8719	Patient IDs	55057619200 2.16.840.1.113883.3.2865
Document ID	MessageID 2.16.840.1.113883.3.2054		
Document Created	August 8, 2025, 17:50:30		
Author	Organization Name		
Contact info	123 Test Street Wonderwall, MN 55125, US Tel: 800-123-4567		
Information recipient	Doctor Bob		
Contact info	900 2nd Ave S Ste 1300 Minneapolis, MN 55402-3244, US Tel: (123)453-2639		
Document maintained by	Organization Name		
Contact info	123 Test Street Wonderwall, MN 55125, US Tel: 800-123-4567		

Table of Contents

- Statin Use in Patients with Diabetes
- Confidential/Protected Health Information (PHI) Provider Follow-Up

A recent review of pharmacy claims has identified the following drug therapy opportunity for your patient.

Statin Use in Patients with Diabetes

Action requested: Submit Exclusion Code

Last year, your patient met the exclusion criteria for statin therapy with (RHABDOMYOLYSIS_MYOPATHY: G7289). If this exclusion still applies, please submit the proper ICD-10, HCPCS, SNOMED CT or UBREV codes for your patient. If the exclusion does not apply, please consider prescribing your patient a statin to help decrease cardiovascular risk.

Generic statin recommendation: rosuvastatin, atorvastatin, pravastatin, lovastatin, fluvastatin

The chart below details the patient's pharmacy claims used to identify the above drug therapy opportunity. The medication list is current as of 20250808.

Date Filled	Drug Name / Strength	Dispensed Quantity	Days Supply	Pharmacy Name	Pharmacy Phone	Prescriber of Record	Prescriber Phone Number
20250526	METFORMIN 500 MG TABLET, EXTENDED RELEASE		100	Pharmacy World	9874296123	Doctor Bob	1234532039

Confidential/Protected Health Information (PHI) Provider Follow-Up

This and any documents accompanying this transmission contain confidential health information that is legally privileged. This information is intended only for the use of the individual or entity named above. The authorized recipient of this information is prohibited from disclosing this information to any other party unless required to do so by law or regulation. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution or action taken in reliance on the contents of these documents is strictly prohibited. If you have received this information in error, please notify the sender immediately and arrange for the return or destruction of these documents.

Figure 1.2. Example electronic Targeted Message recommending that the provider increase the length of a patient's drug prescription.

Extended Day Supply Notification from Organization			
Patient	Justin Timberlake		
Date of birth	January 1, 1800	Sex	Male
Contact info	123 Skyfall Lane PHONIX, AZ 85710, US Tel: (123)555-1235	Patient IDs	123456789 2.16.840.1.113883.3.5959
Document Id	MessageID 2.16.840.1.113883.3.2054		
Document Created	February 12, 2025, 16:03:44		
Author	Organization Name		
Contact info	123 Test Lane Crestview, AZ 85260-6719, US Tel: 123-456-7899		
Information recipient	Doctor Bob		
Contact info	900 2nd Ave S Ste 1300 Minneapolis, MN 55402-3244, US Tel: (123)123-1234		
Document maintained by	Organization Name		
Contact info	9501 East Shea Blvd Crestview, AZ 85260-6719, US Tel: 123-456-7899		

Table of Contents

- Extended Day Prescription Conversion Request
- Confidential/Protected Health Information (PHI) Provider Follow-Up

Extended Day Prescription Conversion Request

Action requested: Consider Increasing Rx Days' Supply

Our analysis of claims data suggests that your patient's prescription benefit allows for a longer supply of their medications than they are currently receiving. Studies indicate that providing an extended-day supply can support better adherence for patients managing chronic conditions.

Consider discussing the advantages of extended-day supplies with your patient and prescribing 90- or 100-day quantities when appropriate. Doing so may help reduce their out-of-pocket expenses and support consistent adherence to maintenance medications.

Date Filled	Current Product	Quantity	Days Supply	Pharmacy Name	Pharmacy Phone	Prescriber of Record
20220126	METFORMIN TAB 1000MG	60	30	ABC PHARMACY	1234567812	Doctor Bob

Confidential/Protected Health Information (PHI) Provider Follow-Up

The information provided in this communication is for general informational purposes only and is not intended as medical advice, diagnosis, or treatment. Always seek the advice of a qualified healthcare professional regarding any medical condition or treatment. Do not disregard professional medical advice or delay seeking it because of information contained in this communication.

Figure 1.3. Example fax/mail Targeted Message notifying a prescriber of a product substitution.

Important Drug Interchange Notification from Pharmacy World

Dear George McFly,

We are notifying you that an FDA designated interchangeable biosimilar was substituted for the originally prescribed reference product in accordance with state substitution laws. This interchange was performed to ensure timely therapy and maintain formulary compliance while preserving therapeutic equivalence. We have documented the specific biosimilar product and manufacturer in the patient's record and are providing this information to support continuity of care. Please contact us if you have any questions or if future substitutions should be managed differently.

Prescriber name: George McFly

Prescriber phone: (651) 555-1234 Prescriber fax: (651) 555-4321

Prescriber address: 123 Badmed St. Apt 1
Minneapolis, MN 55455-1234

Patient name: Ross doLittle Sammy DOB: 03/03/1950

Patient phone: (612) 333-6123

Patient address: 765 Oak St. Penthouse
Edina, MN 55445-6666

Pharmacy name: Pharmacy World Pharmacy phone: (612) 555-0987

The below details the patient's biosimilar medication dispensed:

Date Filled	Drug Name/Strength	Quantity	Days Supply	Manufacture
20181205	Xgeva TAS 150MG	25	50	Mighty Pharma

IMPORTANT WARNING: This message is intended for the use of the person or entity to whom it is addressed and may contain information that is privileged and confidential, the disclosure of which is governed by applicable law. If the reader of this message is not the intended recipient, or the employee or agent responsible for delivering it to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this information is STRICTLY PROHIBITED. If you have received this message in error, please notify us immediately.

Msg ID: 839b234c9d0e09f6a9c80126e2359f72c3

9. Immunization Message Output Examples

This section provides examples of various Immunization Message formats.

Note: Examples are for illustrative purposes only, as message display and placement will vary based on the provider’s EHR configuration.

Figure 2.1. Example electronic Immunization Message notifying a patient’s primary care provider about an immunization the patient received.

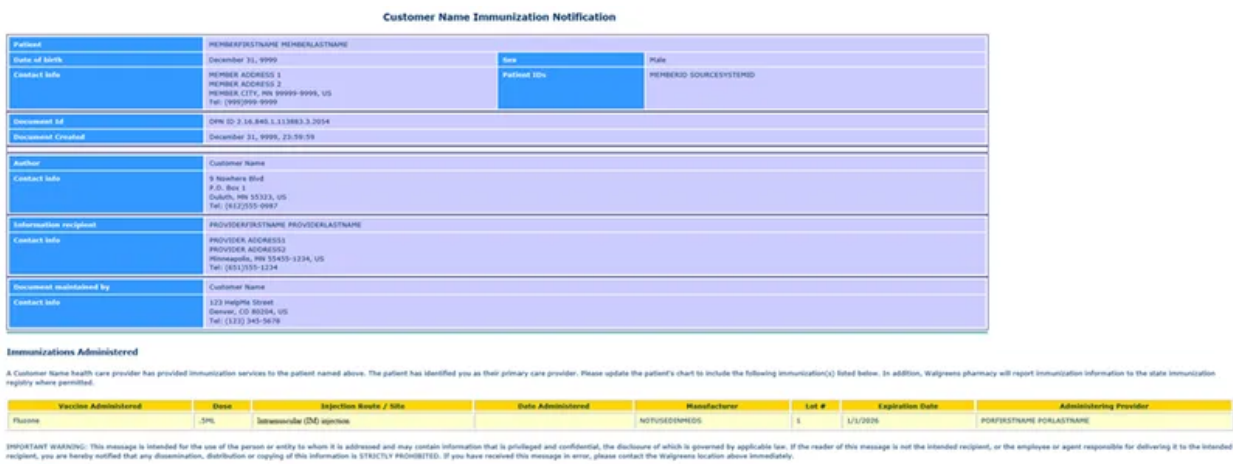


Figure 2.2. Example faxed Immunization Message notifying a patient's primary care provider about an immunization the patient received.

Dear Physician:

Customer Name has provided immunization services to the patient listed below. He or she has identified you as their primary care provider. Please update their chart to include the immunization(s) listed below.

In addition, Customer Name will report immunization information to the state registry where permitted.

Sincerely,
Customer Name

Physician name: PCPFIRST McFly

Physician phone: (651) 555-1234 Physician fax: (651) 555-4321

Physician address: PCPADD1 PCPADD2
PCPCITY, MN 55455-1234

Patient name: PatFirst PatMiddle PatLast DOB: 03/03/1950

Patient phone: (612) 333-6123

Patient address: PatAddress PatAddress2
PatCity, MN 55445-6666

Pharmacy address: PharmAdd1 PharmAdd2 Pharmacy phone: (612) 555-0987
PharmCity, MN 55323

Vaccine Administered	Dose	Injection Site/Route	Date Administered	Lot Number	Expiration Date	Consultation Provided
Chicken Pox	100 Liters	SuperSize Needle / Left Arm	01/01/2012	1	01/01/1999	
Chicken Pox	100 Liters	SuperSize Needle / Left Arm	01/01/2012	1	01/01/1999	
Chicken Pox	100 Liters	SuperSize Needle / Left Arm	01/01/2012	1	01/01/1999	

IMPORTANT REMINDER: This message is intended for the use of the person or entity to whom it is addressed and may contain information that is privileged and confidential, the disclosure of which is governed by applicable law. If the reader of this message is not the intended recipient, or the employee or agent responsible for delivering it to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this information is STRICTLY PROHIBITED. If you have received this message in error, please contact the Walgreens location above immediately.

10. Disclaimers

Guide Disclaimer

In the event that the Participant chooses to make any software changes based upon recommendations in this guide, the Participant acknowledges and agrees that Surescripts Network shall bear no responsibility or liability for the Participant's changes or any effects thereof. The Participant shall also be required to transition to the new guide at such time as said guide is published, which may involve different or additional parameters than are published in this guide.

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11. Document Change Log

▼ 2026-08-21

Section Title	Change Description
N/A	N/A - Developer Portal - initial release