

Restricted Data Investigator _____ Institution _____ HRS RDA# (if known) _____

The Health and Retirement Study distributes **only** the cross-reference file that will allow researchers to link the CMS data products with HRS public use data.

After obtaining CMS DUA, data files are made available through separate licensing agreement with Acumen LLC. Fees apply; see [MedRIC Fee Structure](#) for details.

For most Medicare and Medicaid files, researchers may apply for three different levels of data:

- Level 1. The **standard** release, which contains enrollment and utilization information but omits geographic identifiers and masks provider identifiers, which should meet the needs of most users
- Level 2. A **geographic** release, which adds beneficiary state, county and zip code to the above
- Level 3. A **provider** release, which includes complete provider identifiers and geographic information for respondents and providers.

Researchers requesting Level 2 or Level 3 must provide additional information in the box below.

CMS DUA #, if known

| Data Set | File Years Requested | Level 1 Standard | Level 2 Geographic | Level 3 Provider |
|---|----------------------|---|--------------------|------------------|
| Medicare Parts A&B Claims & Summary Files | | | | |
| Medicare OASIS | | | | |
| Medicare MDS | | | | |
| Medicaid MAX | | | | |
| Medicare Part D | | <i>Check Here if Part D is requested Only custom data sets available, as specified on CMS Worksheet</i> | | |

Brief justification of requests for data sets with geographic or provider variables. *Note: This should be addressed in detail in your research proposal to access HRS restricted data.*