



# USER GUIDE

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## Comprehensive Electronic Records Express

Consultative Examination Providers

OFFICE OF DISABILITY DETERMINATION

Updated – June 2021

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## ACCESSING THE ELECTRONIC RECORDS EXPRESS SYSTEM

In order to access the Electronic Records Express (ERE) application you must have a valid User ID and password. Contact your local state Disability Determination Services (DDS) office, or call the Social Security ERE Help Desk at 1-866-691-3061 or send them an email at [electronic-records-express@ssa.gov](mailto:electronic-records-express@ssa.gov) for additional information.

### Sign In

The user logs into to the ERE application with a registered User ID and password. When logging on for the first time the user will be prompted to change their password.

**NOTE:** Open a single browser session to log into the ERE application. After login, do not open multiple browser tabs.

The screenshot shows the Social Security Electronic Records Express (ERE) Sign In page. The page header includes the Social Security logo and the text "Electronic Records Express (ERE)". The main content area is titled "Sign In" and contains an "Acknowledgement for Website Access" section. This section states that the user understands that the Social Security Administration will validate the information provided against the information in Social Security Administration's systems. Below this, the user is asked to certify that they understand they may be subject to penalties for fraudulent information, agree to be responsible for all actions taken with their Username, are aware that knowingly and willfully making any representation to falsely obtain information from Social Security records is punishable by a fine or imprisonment, and are authorized to do business under their Username. A statement follows: "By entering your Username, Password and clicking on the 'Sign In' button, you certify that you have read, understand and agree to the above statements." There are two input fields: "Username" and "Password". At the bottom of the form are two buttons: "Sign In" (in blue) and "Cancel". To the right of the main form, there are two sidebars. The top sidebar is titled "Help & Support" and provides contact information: "Email: [EETechSupport@ssa.gov](mailto:EETechSupport@ssa.gov)" and "Call Us (toll free): 1-866-691-3061". The bottom sidebar is titled "Privacy Statement" and states: "Your privacy is important. For details about our use of your information, we encourage you to read our [Privacy Act Statement](#)."

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. You should never share your ERE User ID or password with others.

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## EVIDENCE FUNCTIONS – ACCESS ELECTRONIC REQUESTS

This function allows providers (hospital, doctor, copy service, etc.) to respond to Consultative Examination (CE) and Medical Evidence request letters sent electronically to the ERE Website from the requesting DDS office. Using the Access Electronic Requests link providers will be able to view, download, respond, and submit documentation related to the electronic request sent by the DDS.

Electronic requests can be accessed by directly logging into ERE with a valid username and password. Once on the ERE Homepage, under the **Evidence Services** heading, select **Access Electronic Requests**. Electronic requests can also be accessed by receiving an email notification when a request is sent to an associated ERE account from the DDS. The email will include a link that will direct a user to enter their ERE User ID and password. After logging in, the user is taken to the individual request associated with the email that was received.

The screenshot shows the Social Security Administration's Electronic Records Express (ERE) homepage. At the top left is the SSA logo and the text "Social Security Official Website of the U.S. Social Security Administration". The main heading is "Electronic Records Express (ERE)". On the right side, it says "OMB No. 0000-0000 Paperwork Reduction Act".

The main content area is divided into several sections:

- System Notices (2)** - System Notice Updated: 02/12/2016; Whats New? - What's New Updated: 02/01/2016. Includes a link to "Sign Up for Email ERE System Notifications".
- Evidence Services** (with a help icon):
  - Access Electronic Requests (highlighted by an orange arrow)
  - Send Individual Response
  - Send Grouped Response
  - Send CE Report
  - Send CE No Show Response
  - Review/Submit Prepared Requests
  - Track Status of Submissions
  - Teacher Questionnaire (PDF)
- Account Functions** (with a help icon):
  - Modify Your Account
  - Change Your Password
  - Manage Your Email Notifications
- Messaging Services** (with a help icon):
  - Secure Messaging

On the right side, there is a **Help & Support** section with the following information:

- Email: [EETechSupport@SSA.gov](mailto:EETechSupport@SSA.gov)
- Call Us (toll free): 1-866-691-3061
- [? User Resources](#)

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Access Electronic Requests

ERE: Access Electronic Requests

Provider: CEProvider, RaviKamati      Request Type: Open Requests

Show

User Resources

| Priority | Patient Name   | SSN (Last 4) | Request Date | Appt Date  | Appt Time | Location | Request Status | Payment Status | Payment Request |
|----------|----------------|--------------|--------------|------------|-----------|----------|----------------|----------------|-----------------|
|          | Decker, Marrie | 4377         | 09/18/2017   | 01/01/2015 | 03:30 PM  | CSC      | NEW            | NEW            | Need Report     |
|          | Jung, Park     | 5644         | 09/18/2019   | 02/01/2020 | 03:30 PM  | SSA      | NEW            | NEW            | Need Report     |

ERE Home

### Provider/Request Type

This page allows a user to view the **Provider** list via a dropdown and sort the status of all requests received from the DDS. A user may also change the request type by clicking the arrow from the drop-down box under **Request Type** and selecting a different request type and clicking **Show**. The request types are:

- Open Requests – Displays requests sent by the DDS,
- Closed Requests – Displays requests cancelled by a DDS,
- Submitted Requests – Displays requests that have been submitted,
- Requests Open Over 90 Days – Displays requests sent by the DDS over 90 days ago,
- For DDS sites that do Fiscal payments, a user will also have an Open Payments request type – Displays requests that were completed and a payment request needs to be sent to the DDS.

### Request Status Definitions

- ✚ **New** – A new request that has not been opened.
- ✚ **Pending** – A request that has been opened/viewed.
- ✚ **Prepared** – A CE Admin staff has submitted a prepared report for the request.
- ✚ **Responded** – Response submitted by provider through ERE Website.
- ✚ **Accepted** – The DDS received the request response.
- ✚ **Cancelled** – The DDS cancelled the request.

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- ✚ **Updated** – Updated initial request
- ✚ **Update Pending** – Updated initial request and awaiting documents.

**NOTE:** The Electronic Request will be removed from the list based on the retention days received with the request if less than 120 days. Otherwise, Electronic Requests will be removed from the list 120 days after the request is sent.


## Step 1 – Open Requests

- A user may select a column header to sort the displayed information by that column in ascending or descending order. Sorted columns display a small arrow adjacent to the column header. The column headers are:
  - **Priority**
  - **Patient Name,**
  - **SSN (Last 4)**
  - **Request Date,**
  - **Appt Date,**
  - **Appt Time,**
  - **Location,**
  - **Request Status,**
  - **Payment Status, and**
  - **Payment Request**
- Select a name in the **Patient Name** column to view an individual request and proceed to Step 2.

# Comprehensive Electronic Records Express


User Guide for Consultative Examination Providers

## View/Submit Request Details and File Upload

**Social Security**  
Official Website of the U.S. Social Security Administration

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ERE: View / Submit CE Request

 **Priority Request**  
Immediate response needed.

Patient Name: **Jones, Tom**                      Patient SSN: **XXX-XX-001**  
Patient DOB: **XX/XX/XX09**                      Provider Name: **Mr Test test test**  
Request Type: **Consultative Exam**                      Request Date: **03/01/2016**  
Request ID: **20140805172441\_728066**                      Disability Examiner: **testExaminer**  
Requesting Office: **WI - Wisconsin DDS [S56]**                      CE App't Date & Time: **03/07/2016 10:00 AM**  
Location: **1506 Woodlawn Dr., Baltimore, Md, 21045**

### Service Items

**Service Item 1:**  
Item Description: test104  
Item Code: 200

**Service Item 2:**  
Item Description: test105  
Item Code: 201

**Service Item 3:**  
Item Description: test106  
Item Code: 202

### Request Details

**What's Changed:**

**Special Instructions:**  
VAL CE Report Test for ERE Release

**Documentation:**

| File Name   | Date Added |
|---|------------|
| <a href="#">Request Letter</a>                        | 08/05/2014 |
| <a href="#">Authorization To Disclose Information</a> | 08/05/2014 |
| <a href="#">Supporting Documentation</a>              | 08/05/2014 |



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Request Details

What's Changed:

Special Instructions:

Documentation:

| File Name                | Date Added |
|--------------------------|------------|
| Request Letter           | 07/24/2020 |
| Supporting Documentation | 07/24/2020 |
| Supporting Documentation | 07/24/2020 |
| Supporting Documentation | 07/24/2020 |

### Request Response

Was a Consultative Exam performed?

Yes  No

### Attach and Upload Files

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif
- Please do not upload password-protected files because they cannot be processed.

Document Type:  
Consultative Examination Report (CE) - 0002

Add Files:  No file chosen

### Additional Information

Comments (Optional):  
(4,000 characters maximum)

Characters remaining: 4000

### Consultative Examination Authorization Agreement

Please read this statement and indicate your understanding by checking the "I have read and agree to the above" checkbox below. When you select "Submit", you will generate an electronic signature and submit your response.

I am certifying, under penalty of perjury, that I have been authorized or contracted by the Disability Determination Services to examine the claimant. I have a valid license and have not been federally excluded. The report is accurate. By checking the "I have read and agree to the above" checkbox below, I am certifying that I personally conducted, or personally participated in conducting, the consultative examination and have electronically signed the report contained within.

I have read and agree with the Agreement above.



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 2 – View / Submit Request Details and File Upload

**NOTE:** The Patient and Request information is automatically populated to this screen, and therefore cannot be edited.

- To view the files contained in the documentation section under the “**Request Details**” header simply left click on the file name. User will be prompted to either open or save the selected file. Open and view file.
- Review and verify the **Patient Information**, **Request Information**, and all documentation associated with the request.
- Depending on the type of request, the user will be asked if a Consultative Exam was performed or if there is an Evidence record to submit. If user selected “yes”, then they will be required to attach and upload files associated with the claimant:
  - Select the **Document Type** of the file(s)
  - Select the button to identify a file to send. (Do not send files that are password protected.) The **Choose file** window appears on your screen.
  - Locate the file you wish to send and highlight the file name. The document’s file name moves into the **File name** box at the bottom of the **Choose file** window.
  - Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.
  - Click the **Add File** button to send up to a maximum of 25 additional files.
- If user selected “no”, then they will be required to select a reason for not performing the Consultative Exam and provide required comments or reason for no evidence record to submit.

**NOTE:** Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

- **Comments** can be typed into the **Additional Information** section, if needed. Type in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- You will be asked to attest to an “**Authorization Agreement**” By checking the, “I have read and agree to the above” statement, an electronic signature will be generated and you will have

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## User Guide for Consultative Examination Providers

electronically signed and certified the report that is being submitted to the DDS regarding the claimant.

- Select the **Submit** button to provide the electronic signature and the claimant information to the DDS office that sent the request.

### IMPORTANT NOTE

It is against SSA policy for a user to delegate the uploading of their CE reports, via the **Access Electronic Requests** website function, to staff members. Users interested in delegating this responsibility should consider using the **Send CE with Scanned Signature** website function or CE Administrative Staff Upload (**Review/Submit Prepared Requests**, and **Prepare Report for Provider**).

### Step 3a – Confirmation (Site does not do fiscal)

**Social Security**  
Official Website of the U.S. Social Security Administration

ERE: View / Submit CE Request

**Thank you for your submission.**  
CE Report Submission - Tracking Information.

Tracking Number: **1276D6802B1230B5**  
Submitted on: **09/29/2013 at 04:16 PM ET**

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

[Print this Page](#)

[User Resources](#)

#### Submission Summary

Tracking Information

#### Patient & Appointment Information

Patient Name: **Janice Goodwin**  
Patient SSN: **XXX-XX-0001**  
Patient DOB: **01/20/2010**  
Provider Name: **Sam Angulara**  
Request Type: **Consultative Exam**  
Request Date: **03/04/2010**  
Requesting Office: **MD - Timonium DDS [S23]**  
Request ID: **000000241156125**  
Disability Examiner: **Mark Evans**  
CE Appt Date & Time: **09/20/2013 09:00 AM ET**  
Location: **1314 Lombard, Baltimore, MD 21224**

#### Uploaded File(s)

| File Name               | File Size    |
|-------------------------|--------------|
| GoodwinCE.doc           | 56 KB        |
| <b>Total File Size:</b> | <b>56 KB</b> |

Additional Information  
Comments: **No comments added**  
**You have electronically signed.**

[Review Another Request](#) [ERE Home](#)

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 3b – Confirmation (Site does fiscal)

**Social Security Administration**  
Official Website of the U.S. Social Security Administration

ERE: View / Submit CE Request

**Thank you for your submission.**  
**CE Report Submission - Tracking Information.**  
Tracking Number: **1276D6802B1230B5**  
Submitted on: **09/29/2013 at 04:16 PM ET**  
Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

[Print this Page](#)

[User Resources](#)

**Submission Summary**  
Tracking Information

**Patient & Appointment Information**

Patient Name: **Janice Goodwin**  
Patient SSN: **XXX-XX-0001**  
Patient DOB: **01/20/2010**  
Provider Name: **Sam Angulara**  
Request Type: **Consultative Exam**  
Request Date: **03/04/2010**  
Requesting Office: **MD - Timonium DDS [S23]**  
Request ID: **00000241156125**  
Disability Examiner: **Mark Evans**  
CE Appt Date & Time: **09/20/2013 09:00 AM ET**  
Location: **1314 Lombard, Baltimore, MD 21224**

**Uploaded File(s)**

| File Name               | File Size    |
|-------------------------|--------------|
| GoodwinCE.doc           | 56 KB        |
| <b>Total File Size:</b> | <b>56 KB</b> |

**Additional Information**  
Comments: **No comments added**  
**You have electronically signed.**

[Review Another Request](#) [Submit Payment Request](#) [ERE Home](#)

### Step 3a & 3b – Confirmation

After the submission uploads, ERE provides a **Confirmation** page that includes a Submission Summary and a Tracking number that should be retained in case there are errors or problems that prevent the DDS from processing a submission or if a user wants to check on the status of a particular submission.

- If you do not receive the **Confirmation** page, you should resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- To respond to another request, select the **Review Another Request** button.
- For **fiscal** see **Step 3b** and select the **Submit Payment Request** button.

**NOTE:** We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

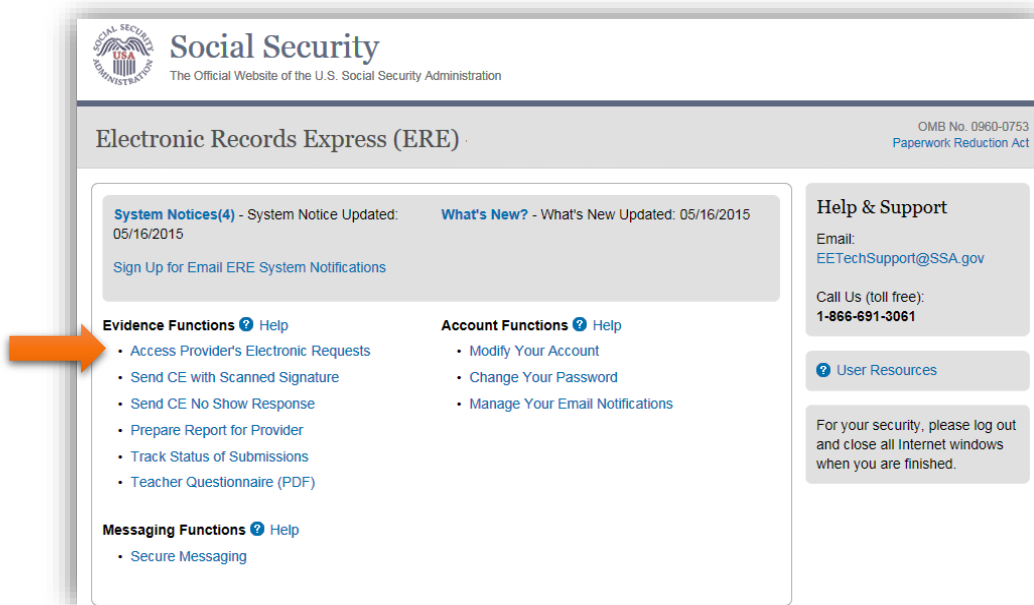
# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

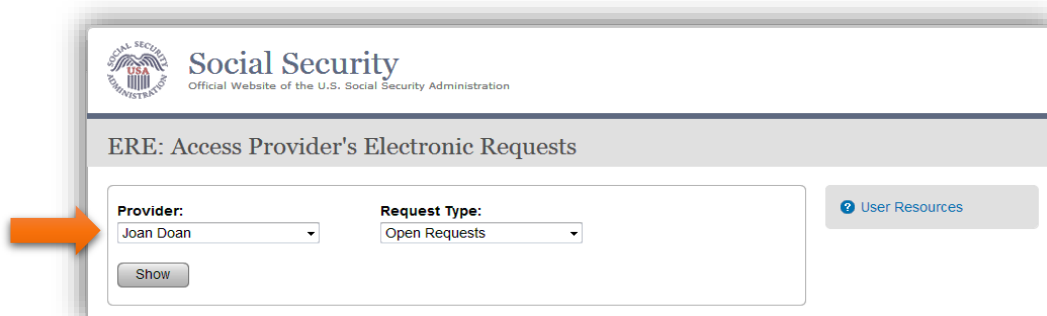
## EVIDENCE FUNCTIONS – ACCESS PROVIDER’S ELECTRONIC REQUESTS

This function is a part of the Electronic Outbound Request (eOR) feature. The DDS can electronically send CE requests through the **ERE** website to the CE Provider’s administrative staff. This function allows the CE administrative staff to view outstanding electronic requests, download request letters and other supporting documentation, and conveniently submit responses to the CE Provider without having to enter any barcode index information.

Begin by logging into the **ERE** with your username and password. Under the **Evidence Functions** heading, select **Access Provider’s Electronic Requests**. This takes you to the page that allows you to access CE requests sent to the CE Provider from the DDS.



### Select Provider



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 1 – Select Provider

- Select a **Provider** from the dropdown box. Only CE Providers associated with your username will display in the drop down list.
- Select a request type by clicking the arrow from the drop-down box under **Request Type** and clicking **Show**.
- If you do not wish to continue with the transaction and you want to return to the homepage, select the **ERE Home** button that would be shown on the bottom of the page.

### Open Requests

**Provider:** A CE Provider

**Request Type:** Open Requests

Show

User Resources

| Priority | Patient Name      | SSN (Last 4) | Request Date | Appt Date  | Appt Time | Location     | Request Status | Payment Status | Payment Request |
|----------|-------------------|--------------|--------------|------------|-----------|--------------|----------------|----------------|-----------------|
| !        | DOE, TESTCASE2001 | 2001         | 06/30/2010   | 07/25/2010 | 11:24 AM  | TestingPlace | NEW            |                |                 |

ERE Home

### Step 2 – View Provider’s Electronic Request – Open Requests

- This page allows you to view and sort all requests received from the DDS.
- You may select a column header to sort the displayed information by that column in ascending or descending order. Sorted columns display a small arrow adjacent to the column header. The column headers are:
  - **Priority**
  - **Name**
  - **Last 4 of SSN**
  - **Request Date**

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- **Appt Date**
  - **Appt Time**
  - **Location**
  - **Request Status**
  - **Payment Status**
  - **Payment Request**
- Select **the claimant's name** in the **Patient Name** column to view an individual request.
  - Select the **ERE Home** button to go to the ERE Homepage.

### Request Status Definitions


- + **New** – A new request that has not been opened.
- + **Pending** – A request that has been opened/viewed.
- + **Prepared** – A CE Admin staff has submitted a prepared report for the request.
- + **Responded** – Response submitted by provider through ERE Website.
- + **Accepted** – The DDS received the request response.
- + **Cancelled** – The DDS cancelled the request.
- + **Updated** – Updated initial request

**NOTE:** The Electronic Request will be removed from the list based on the retention days received with the request if less than 120 days. Otherwise, Electronic Requests will be removed from the list 120 days after the request is sent.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## View/Submit CE Request – Prepare Report for Provider (eOR)



### Social Security

The Official Website of the U.S. Social Security Administration

#### ERE: View / Submit CE Request

**Priority Request**  
Immediate response needed.

|   |   |
|---|---|
| Patient Name: <b>DOE, TESTCASE2001</b>                                  | Patient SSN: <b>XXX-XX-2001</b>                 |
| Patient DOB: <b>XX/XX/XX09</b>  | Provider Name: <b>A CE Provider</b>             |
| Request Type: <b>Consultative Exam</b>                                  | Request Date: <b>06/30/2010</b>                 |
| Request ID: <b>20140805172441_728066</b>                                | Disability Examiner: <b>testExaminer</b>        |
| Requesting Office: <b>WI - Wisconsin DDS [S56]</b>                      | CE Appt Date & Time: <b>07/25/2010 11:24 AM</b> |
| Location: <b>1506 Woodlawn Drive test maryfield, Ellicott, MD 21045</b> |   |

#### Service Items

**Service Item 1:**  
Item Description: **test104**  
Item Code: **200**

**Service Item 2:**  
Item Description: **test105**  
Item Code: **201**

**Service Item 3:**  
Item Description: **test106**  
Item Code: **202**


#### Request Details

**What's Changed:**

**Special Instructions:**  
VAL CE Report Test for ERE Release

**Documentation:**

| File Name   | Date Added |
|---|------------|
| <a href="#">Request Letter</a>                        | 08/05/2014 |
| <a href="#">Authorization To Disclose Information</a> | 08/05/2014 |
| <a href="#">Supporting Documentation</a>              | 08/05/2014 |





# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

**Request Response**

**Select a response:**

Prepare Report for Provider

Send No Show Response

**Attach and Upload Files**

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif
- Please do not upload password-protected files because they cannot be processed.

**Document Type:**

**File 1:**

**Additional Information**

**Comments (Optional):**  
(16,000 characters maximum)

Characters remaining: 16000

### Step 3 – View/Submit CE Request – Prepare Report for Provider (eOR)

- To view the request documentation, click on the blue document heading in the **Documentations** section.
- Select the appropriate radio button in the Request Response section.
- Select the button to attach and upload files for this patient. (Do not send files that are password protected.) The **Choose file** window appears.
- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.

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- Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.
- Select the **Add File** button to send additional files. Only files for the SSN in Step 1 can be sent with this transaction.

**NOTE:** A maximum of 25 files may be sent for one individual by selecting *the Add File* button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .txt, .rtf, .xls, xlsx, .pdf, .tiff, .tif.**

Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

- Type **Comments**, if needed. Type-in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- Select the **Send to Provider** button to send the CE report to the CE Provider's ERE inbox.

## Confirmation

**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: View / Submit CE Request

Thank you for your submission.  
Prepare CE Report Submission - Tracking Information.

Tracking Number: **147CA48D91F17AE6N**  
Submitted on: 02/05/2015 at 03:43 PM EST

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

Print this page

**Submission Summary**  
Tracking Information

**Patient & Appointment Information**

Patient Name: **TESTCASE2001 DOE**  
Patient SSN: **XXX-XX-2001**  
Patient DOB: **10/20/1979**

[User Resources](#)

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 4 – Confirmation

- After your submission uploads, ERE provides a **Confirmation** page that provides a tracking number for you to keep and use if you want to check on the status of your submission.
- If you do not receive the Confirmation page, you should resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- If you have additional CE reports to submit, you may select **Prepare Another CE Report** button. This takes you back to the screen in Step 1.

**NOTE:** We strongly recommended that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – PREPARE CE REPORT FOR PROVIDER

### Instructions for Prepare Report for Provider

The **Prepare Report for Provider** function allows a CE provider’s administrative staff to prepare a CE report and send it to the appropriate CE provider. The CE provider then reviews and submits the report to the requesting office.

The **Prepare Report for Provider** link is available only for users registered to use this function of the website.




If you did not receive an electronic CE request, you must have the SSA or DDS CE request letter available to complete your action. Your first step is to log into the Electronic Records Express website with your username and password.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Destination and Request Information (Step 1 of 3)



**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Prepare Report for Provider

1 Destination Information 2 Review & Add Information 3 Confirmation

**Enter Provider Information**  
Select the provider for whom this Consultative Exam is being prepared.

**Reviewing Provider:**  
Wong, Doctor

**Enter Patient Information**

**Patient Name:**  
John Doe  
First Middle Last

**Patient Date of Birth:**  
XX/XX/XX09  
mm/dd/yyyy

**Destination and Request Information**  
Please refer to your request letter or barcode to complete this information.

**Select destination by:** [More Info](#)  
 Site Code  State

**Site Code:** S02  
**State:** AK-Alaska  
**Destination:** AK - Alaska DDS [S02]

**Social Security Number (SSN):**  
XXX-XX-001

**RQID (Request ID):**  
abc123

**RF (Routing Field):**  
 P  
 D or Blank  
 No RF or No Barcode

**DR:**  
 F  
 S  
 No DR or No Barcode

**CS (only if applicable):**  
123

**Document Type:**  
CE Psychiatry - 3174

Enter the Claimant's SSN found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

[User Resources](#)

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 1 – Prepare CE Report for Provider

- Select the Provider for whom you are preparing the CE Report from the dropdown box.

**NOTE:** If you are responding to an electronic request, you have already provided this information.

- Enter the First and Last Name of the patient (the Middle Name is not a required field).

**NOTE:** If you are responding to an electronic request, this identifying information has been completed for you.

- Enter the Date of Birth (**DOB**) of the patient in mm/dd/yyyy format.
- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

**OR**

- Select the **State** from the dropdown. After choosing the **State**, the **Destination** list updates with the offices in the State you selected. Select the **Destination** from the dropdown.
- Enter the Social Security Number (**SSN**). *Only files for one SSN can be sent with this transaction.*
- Enter the Request ID (**RQID**).
- Select the appropriate **RF** (Routing Field) option or No RF or No Barcode if not displayed on the request letter.
- Select the appropriate **DR** (Document Return Code) option or No DR or No Barcode if not displayed on the request letter.
- Enter the **CS** (Check Sum Digits) if available, or leave this field blank if not displayed on the request letter.
- Select the **Document Type** to be sent from the drop down box.
- Select “Next” to continue this transaction or the Cancel button to cancel the transaction

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Review and Add Information (Step 2 of 3)

The screenshot shows the 'ERE: Prepare Report for Provider' interface. At the top, the Social Security Administration logo and name are displayed. Below the title, a progress bar indicates three steps: 1. Destination Information (checked), 2. Review & Add Information (active), and 3. Confirmation. The main content area is titled 'Review' and contains an 'Edit' button and 'Destination Information' section. The information includes: Reviewing Provider: Wong, Doctor; Patient Name: John Doe; Patient DOB: XX/XX/XX09; Destination: AK - Alaska DDS [S02]; SSN: XXX-XX-001; RQID: abc123; RF: D or Blank; DR: F; CS: 123; Document Type: CE Psychiatry - 3174. Below this is the 'Attach and Upload Files' section, which includes instructions on file limits and types, a 'File 1:' section with a 'Choose File' button and 'No file chosen' text, and a 'Delete' button. An 'Add File' button is also present. At the bottom of the form is an 'Additional Comments' section with a text area and a character count of 16000. The bottom of the page features three buttons: 'Send to Provider', 'Previous', and 'Cancel'.

### Step 2: Review and Add Information

- Review the **Destination and Request** information. Make any changes by selecting the **Edit** button.
- Select the button to identify a file to send. (Do not send files that are password protected.) The **Choose file** window appears on your screen.

## Comprehensive Electronic Records Express

### User Guide for Consultative Examination Providers

- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.
- Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.
- Select the **Add File** button to send additional files.

**NOTE:** A maximum of 25 files may be sent for one individual by selecting *the Add File* button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.**

Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

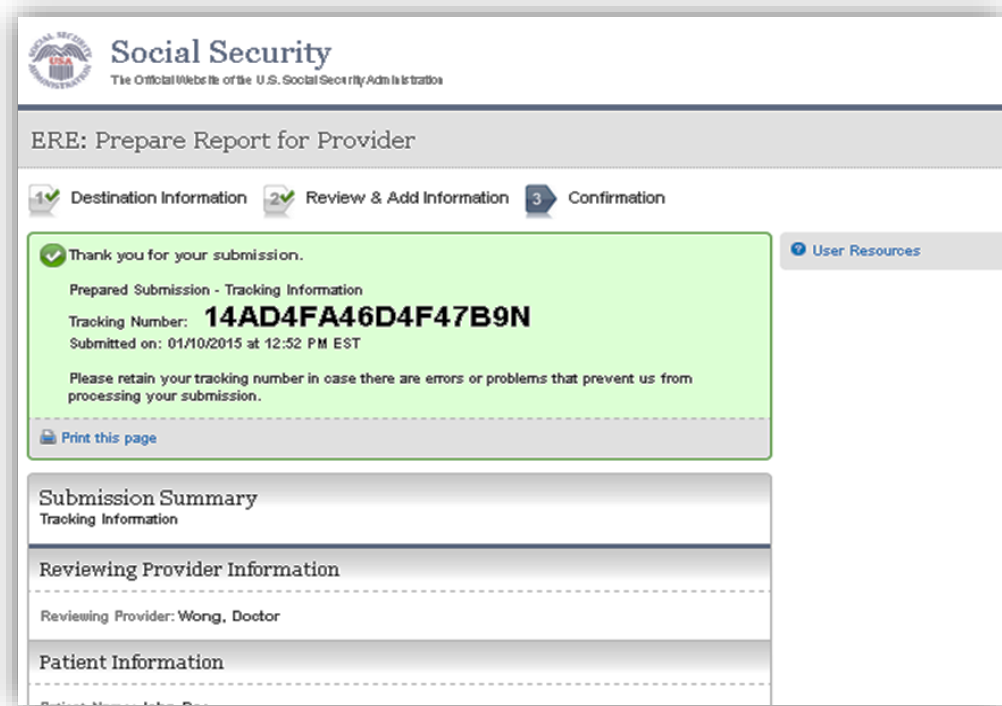
- Type **Comments**, if needed. The Comment field is where you can provide additional information. (Up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- Verify the input information.
- Select the **Send to Provider** button to send the report. Your file is sent to the Provider's ERE inbox and an email will alert them of the delivery.
- If you would like to return to the previous page, select **Previous**.
- Select the **Cancel** button if you wish to cancel the transaction and return to the ERE Homepage.



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Confirmation (Step 3 of 3)



### Step 3: Confirmation

- ERE generates a **Confirmation** page after you submit your transaction. This page contains a Tracking number that you can use to check the status of your submission. The **Confirmation** page indicates the specific files and/or comments that you transmitted.
- If you do not receive the **Confirmation** page, please resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- If you have additional CE reports to prepare, select **Prepare Another CE Report** and repeat the steps outlined above.

**NOTE:** We strongly recommended that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – REVIEW/SUBMIT PREPARED REQUESTS

This function allows CE providers to review and submit requests prepared by administrative staff. The **Review/Submit Prepared Requests** link displays on the **ERE Home** page when the CE provider registers to use this function.

Start by logging into ERE using your username and password. Select the link, **Review/Submit Prepared Requests** under the **Evidence Functions** heading.

### Review/Submit Prepared Requests



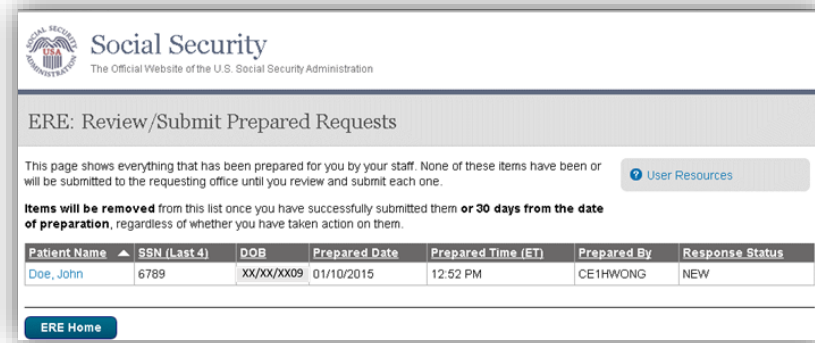
The screenshot shows the Social Security Administration's Electronic Records Express (ERE) home page. The page header includes the Social Security Administration logo and the text "Social Security The Official Website of the U.S. Social Security Administration". Below the header, the page is titled "Electronic Records Express (ERE)". On the right side, there is a box for "Help & Support" with contact information: "Email: EETechSupport@SSA.gov" and "Call Us (toll free): 1-866-691-3061". A "User Resources" link is also present. The main content area is divided into several sections: "System Notices(3) - Updated: 12/30/2014" with a link to "Sign Up for Email/Text ERE System Notifications"; "What's New? - Updated: 03/15/2015"; "Evidence Functions" with a "Help" icon and a list of links: "Access Electronic Requests", "Send Individual Response", "Send CE Report", "Send CE No Show Response", "Review / Submit Prepared Requests", "Track Status of Submissions", and "Teacher Questionnaire (PDF)"; "Account Functions" with a "Help" icon and a list of links: "Modify Your Account", "Change Your Password", and "Manage Your Email Notifications"; and "Payment Functions" with a "Help" icon and a link: "Submit Payment Request". An orange arrow points to the "Review / Submit Prepared Requests" link in the Evidence Functions section.

You will see the page shown below after selecting the **Review/Submit Prepared Requests** link. This page shows all requests prepared for you by your staff. None of the prepared requests can be submitted to the DDS until you review and submit each one.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Review/Submit Prepared Requests



### Review/Submit Prepared Requests

- You may select the header of each column to sort the displayed information by that column in ascending or descending order. After sorting a column, a small arrow appears adjacent to that column header.
- Select the claimant's name in the Patient Name column to review CE report preparation, patient, and destination information.

### Response Status Definitions

- ✚ **New** – A new request that has not been opened.
- ✚ **Pending** – A request that has been opened/viewed.
- ✚ **Viewed** – A response that has been viewed or possibly reviewed, but has not yet been submitted to the requesting office.


**NOTE:** CE reports are removed once you have successfully submitted it, or 30 days from the date of preparation, regardless of whether you have taken action on it.

Select the claimant's name to view the CE report. Once selected, the page below appears.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Review Desintation Information (Step 1 of 3)



**Social Security**  
The Official Website of the U.S. Social Security Administration

### ERE: Review/Submit Prepared Request

1 Destination Information   2 Review & Add Information   3 Confirmation

Prepared By: **Admin Wong**   Date Prepared: **01/10/2015**   Reviewing Provider: **Doctor Wong**   [User Resources](#)

#### Patient Information

**Patient Name:**  
John   Middle   Doe  
First   Middle   Last

**Patient Date of Birth:**  
XX/XX/XX09

#### Destination and Request Information

**State:** AK-Alaska

**Destination:** AK - Alaska DDS [S02]

**Social Security Number (SSN):** XXX-XX-001

**RQID (Request ID):** abc123

**RF (Routing Field):**  
 P  
 D or Blank  
 No RF or No Barcode

**DR:**  
 F  
 S  
 No DR or No Barcode


**CS:**  
(enter only if applicable)  
123

Enter the Claimant's SSN found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

**Next**   Cancel

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers



**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Review/Submit Prepared Request

1 ✓ Destination Information   2 Review & Add Information   3 Confirmation

### Review

Destination and Request Information

---

Patient Name: **John Doe**      Patient DOB: **XX/XX/XX09**  
Destination: **AK - Alaska DDS [502]**      RF: **D or Blank**  
SSN: **XXX-XX-001**      DR: **F**  
RGID: **abc123**      CS: **123**

### File(s) Loaded By Preparer

Document Type:  
CE Psychiatry - 3174

| File Name | File Size | Action                                |
|-----------|-----------|---------------------------------------|
| eOR.doc   | 42 KB     | <input type="button" value="Delete"/> |

**To revise a file:**

1. Click on the file name to open
2. Save the file to your computer
3. Edit and save the file
4. Attach the new file (below)
5. Delete the original file loaded by your preparer

### Attach and Upload Files

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif
- Please do not upload password-protected files because they cannot be processed.

File 1:  No file chosen

### Additional Information

**Comments (optional):**  
(16,000 characters Maximum)

This is a prepared request on 1/10/2015.

Characters remaining: 15960

### Consultative Examination Authorization Agreement

**Please read this statement and indicate your agreement by checking the "I have read..." box. When you select "Submit", you will generate an electronic signature for your response.**

I am certifying under penalty of perjury, that I have been authorized or contracted by the Disability Determination Services to examine the claimant. The report is accurate. By checking the "I have read and agree" checkbox below, I am certifying that I personally conducted, or personally participated in conducting, the consultative examination and have electronically signed the report contained within.

I have read and agree with the Agreement above.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Review and Add Information (Step 2 of 3)

To review the files already loaded by your preparer, select **the file name**. After selecting, you may be asked to open or save the file. If you want to revise the file, save it to your computer, make your revisions, then upload the saved file.

To delete a file from the patient's information select the **Delete** button in the **Action** column next to the file you wish to delete.

Select the button to attach and upload additional files for this patient. (Do not send files that are password protected.) The **Choose file** window appears.

Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.

- Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.
- Select the **Add File** button to send additional files. *Only files for the SSN in Step 1 can be sent with this transaction.*

**NOTE:** A maximum of 25 files may be sent for one individual by selecting the **Add File** button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .txt, .rtf, .xls, xlsx, .pdf, .tiff, .tif**.

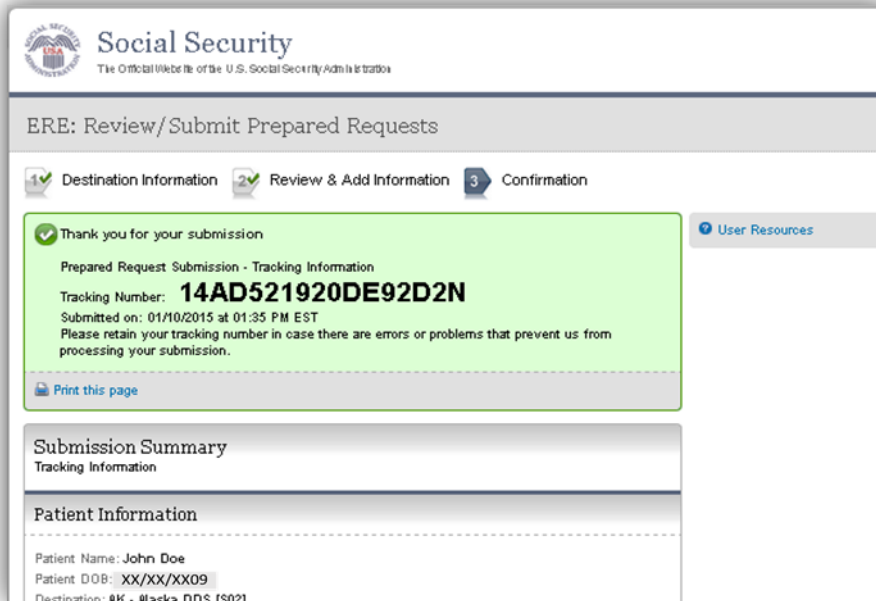
Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

- Type **Comments**, if needed. The Comment field is where you can provide additional information. Type-in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The remaining character count shows beneath the box.
- The next step is your "Electronic Signature". This allows you to certify that the claimant has been examined, a report has been prepared, and the report is accurate. Read the certification statement located at the bottom of the screen and indicate your understanding by checking the box beside, "I have read and agree with the agreement above." By checking the box, you affirm your intent to sign the report. This process eliminates the need for you to physically sign and send the paper report to the DDS.
- Select the **Submit** button to forward this information to the selected DDS.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Confirmation (Step 3 of 3)



- After your submission uploads, ERE provides a **Confirmation** page. This page provides a tracking number for you to keep and use if you want to check on the status of your submission. The **Confirmation** page indicates the specific files that you transmitted.
- If you do not receive the **Confirmation** page, please resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- If you have additional requests to review, select the **Review Another Request** button.
- Select **ERE Home** to return to the Homepage.

**NOTE:** We strongly recommended that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – SEND CE NO SHOW RESPONSE

On the ERE Home page, under the Evidence Functions heading, select Send CE No Show Response.

Selecting this link takes you to a page that allows input of information about the claimant that did not show up for the scheduled CE appointment. Unless you received the request electronically from the DDS, you will need to have the DDS request letter to enter information in the next few steps.

If you received the CE request from the DDS electronically, you can locate the request under **Access Electronic Requests** if you are the CE provider or **Access Provider's Electronic Requests** if you are CE administrative staff.

**Social Security**  
The Official Website of the U.S. Social Security Administration

### Electronic Records Express (ERE)

**System Notices(3)** - Updated: 08/19/13      **What's New?** - Updated: 03/15/2015  
[Sign Up for Email/Text ERE System Notifications](#)

**Evidence Functions** ? Help

- [Send Individual Response](#)
- [Send CE Report](#)
- [Send CE No Show Response](#)
- [Send Grouped Response](#)
- [Review / Submit Prepared Requests](#)
- [Track Status of Submissions](#)
- [Teacher Questionnaire \(PDF\)](#)

**Account Functions** ? Help

- [Modify Your Account](#)
- [Change Your Password](#)
- [Manage Your Email Notifications](#)

**Messaging Functions** ? Help

- [Secure Messaging](#)

**Payment Functions** ? Help

- [Submit Payment Request](#)

**Help & Support**  
Email: [EETechSupport@SSA.gov](mailto:EETechSupport@SSA.gov)  
Call Us (toll free): **1-866-691-3061**

[? User Resources](#)

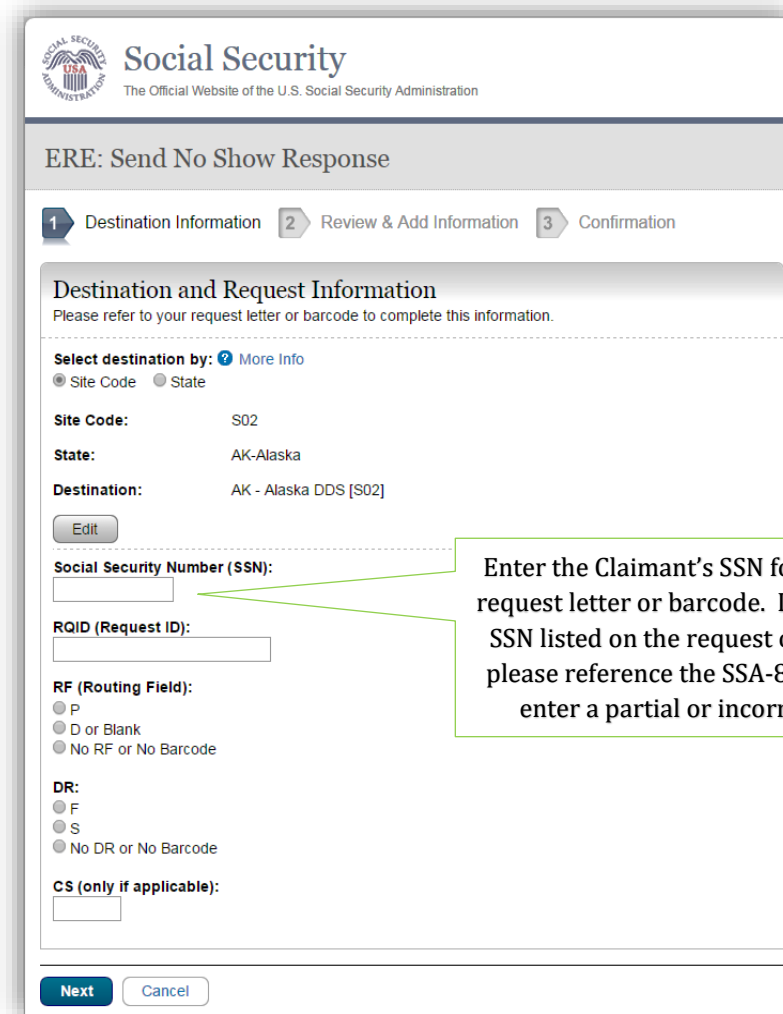
For your security, please log out and close all Internet windows when you are finished.



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Destination and Request Information (Step 1 of 3)



**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Send No Show Response

1 Destination Information 2 Review & Add Information 3 Confirmation

### Destination and Request Information

Please refer to your request letter or barcode to complete this information.

Select destination by:  More Info  
 Site Code  State

Site Code: S02  
State: AK-Alaska  
Destination: AK - Alaska DDS [S02]

Social Security Number (SSN):

RQID (Request ID):

RF (Routing Field):  
 P  
 D or Blank  
 No RF or No Barcode

DR:  
 F  
 S  
 No DR or No Barcode

CS (only if applicable):

Enter the Claimant's SSN found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

### Step 1 – Destination and Request Information

- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

OR

- Select the **State** from the dropdown. After choosing the **State**, the **Destination** list updates with the offices in the State you selected. Select the **Destination** from the dropdown.
- Obtain the following information from the CE request letter if you did not receive the request electronically (this information populates for you if you received an electronic CE request):

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- Enter the Social Security Number (**SSN**). *Only files for one SSN can be sent with this transaction.*
- Enter the Request ID (**RQID**). The Request ID is the document number or serial number that is usually located on the request letter near the barcode.
- Select the appropriate **RF** (Routing Field) option, or **No RF or No Barcode** if not displayed on the request letter.
- Select the appropriate **DR** (Document Return Code) option, or **No DR or No Barcode** if not displayed on the request letter.
- Enter the **CS** (Check Sum Digits) if available, or leave this field blank if not displayed on the request letter.
- Select the **Document Type** from the drop down box.
- Select **Next** to go to the next step or select **Cancel** to return to the Homepage.

### Review and Add Information (Step 2 of 3)

The screenshot displays the Social Security Administration's 'ERE: Send No Show Response' interface. At the top, the SSA logo and 'Social Security Official Website of the U.S. Social Security Administration' are visible. Below the title, a progress bar shows three steps: 1. Destination Information (checked), 2. Review & Add Information (active), and 3. Confirmation. The 'Review' section includes an 'Edit' button and a 'Destination and Request Information' table with the following details:

|                                      |        |
|--------------------------------------|--------|
| Destination: MD - Timonium DDS [S23] | RF: P  |
| SSN: 000-00-0701                     | DR: F  |
| RQID: 00000241156125                 | CS: 01 |

Below the table is the 'Add No Show Reason and Comments' section, which prompts the user to 'Select a reason and provide comments about why the exam was not performed.' It features a 'Reason for No Show Response' section with four radio button options: 'No contact with patient', 'Patient cancelled appointment (comments required)', 'Patient showed up for appointment, but could not be evaluated (comments required)', and 'Other (comments required)'. A 'Comments' section follows, with a text area and a 'Characters remaining: 16000' indicator. At the bottom, there are 'Submit', 'Previous', and 'Cancel' buttons.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Step 2 – Review and Add Information (Complete Reason)

- Select the reason the exam was not performed. Based on the reason you select, comments may be required.
- Type Comments, if needed. Provide information about why the exam was not performed. Type-in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The remaining character count shows beneath the box. .
- Select the **Submit** button to forward the information to the Destination selected in Step 1.

## Confirmation (Step 3 of 3)

The screenshot shows the Social Security Administration's website interface for the 'ERE: Send No Show Response' process. The page is titled 'ERE: Send No Show Response' and features a progress indicator with three steps: 1. Destination Information, 2. Review & Add Information, and 3. Confirmation (the current step). A green confirmation box displays a 'Thank you for your submission' message, including tracking information: Tracking Number: 14AD0347BF07EB9AN, Submitted on: 01/09/2015 at 02:38 PM EST. Below this, there is a 'Print this page' button. The 'Submission Summary' section is divided into 'Destination and Request Information' and 'Request Response'. The 'Destination and Request Information' section lists: Destination: AK - Alaska DDS [S02], SSN: XXX-XX-001, RQID: abc123adfa, RF: D or Blank, DR: F, CS: 123. The 'Request Response' section shows: Reason: Patient cancelled appointment (comments required), Comments: Comments were added. At the bottom, there are two buttons: 'Send Another Response' and 'ERE Home'.

**Social Security Administration**  
The Official Website of the U.S. Social Security Administration

### ERE: Send No Show Response

1 ✓ Destination Information   2 ✓ Review & Add Information   3 Confirmation

✓ **Thank you for your submission**

No Show Response Submission - Tracking Information  
Tracking Number: **14AD0347BF07EB9AN**  
Submitted on: **01/09/2015 at 02:38 PM EST**

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

[Print this page](#)

[User Resources](#)

#### Submission Summary

Tracking Information

##### Destination and Request Information

Destination: **AK - Alaska DDS [S02]**  
SSN: **XXX-XX-001**  
RQID: **abc123adfa**  
RF: **D or Blank**  
DR: **F**  
CS: **123**

##### Request Response

Reason: **Patient cancelled appointment (comments required)**  
Comments: **Comments were added**

[Send Another Response](#)   [ERE Home](#)

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 3 – Confirmation

- After your submission, ERE provides a **Confirmation** page. The **Confirmation** page provides a tracking number for you to keep and use if you want to check on the status of your submission. The **Confirmation** page indicates the specific files and/or comments that you transmitted.
- If you do not receive the **Confirmation** page, please resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- If you have additional CEs to send, you can select **Send Another Response**.

To Submit Payment Request, after reviewing the summary select the **Request Payment** button at the bottom of your screen as shown in the image above (*Confirmation with fiscal*).

**NOTE:** We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – SEND CE REPORT

The **Send CE Report** feature of the website allows the CE provider to submit and electronically sign one individual CE report and send it to the DDS. To submit a CE report using this feature of the ERE website, select the link, **Send CE Report** under the **Evidence Functions** heading. You need the CE request letter with the barcode available to complete the processing steps, unless you receive your request electronically from the DDS.

The **Claimant's SSN** can be found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

***You can only use the Send CE Report function if you are the CE Provider. The CE administrative staff cannot use this function.***

**NOTE:** If you received the CE request from the DDS electronically, you can find the request under **Access Electronic Requests**. After accessing the request, you can view the request and respond using the Send CE Report function.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Destination and Request Information (Step 1 of 3)

**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Send CE Report

1 Destination Information 2 Review & Add Information 3 Confirmation

**Destination and Request Information** [User Resources](#)

Please refer to your request letter or barcode to complete this information.

Select destination by: [More Info](#)

Site Code  State

Site Code: S0J

State: AR-Arkansas

Destination: AR - EST DDS [S0J]

Social Security Number (SSN):

RQID (Request ID):

RF (Routing Field):

P

D or Blank

No RF or No Barcode

DR:

F

S

No DR or No Barcode

CS (only if applicable):

Document Type:

Consultative Examination Report (CE) - 0002 ▼

Enter the Claimant's SSN found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

### Step 1 – Destination and Request Information

- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

OR

# Comprehensive Electronic Records Express


## User Guide for Consultative Examination Providers

- Select the **State** from the dropdown. After choosing the **State**, the **Destination** list updates with the offices in the State you selected. Select the **Destination** from the dropdown.
- Obtain the following information from the CE request letter if you did not receive the request electronically (this information populates for you if you received an electronic CE request):
  - Enter the Social Security Number (**SSN**). *Only files for one SSN can be sent with this transaction.*
  - Enter the Request ID (**RQID**). The Request ID is the document number or serial number that is usually located on the request letter near the barcode.
  - Select the appropriate **RF** (Routing Field) option, or **No RF or No Barcode** if not displayed on the request letter.
  - Select the appropriate **DR** (Document Return Code) option, or **No DR or No Barcode** if not displayed on the request letter.
  - Enter the **CS** (Check Sum Digits) if available, or leave this field blank if not displayed on the request letter.
  - Select the **Document Type** from the drop down box.
  - Select **Next** to go to the next step or select **Cancel** to return to the **Home** page.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Review and Add Information (Step 2 of 3)



### Social Security

The Official Website of the U.S. Social Security Administration

## ERE: Send CE Report

1 Destination Information   **2 Review & Add Files**   3 Confirmation

### Review

Destination and Request Information

|                                  |       |
|----------------------------------|-------|
| Destination: AR - E&T DD § [80J] | RF: P |
| SSN: XXX-XX-1234                 | DR: F |
| ROID: ADFADF                     | CS:   |

### Attach and Upload Files

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tif, .tiff.
- Please do not upload password-protected files because they cannot be processed.

Add files:  No file chosen

**Additional Comments:**  
(16,000 characters maximum)

Characters remaining: 16000

### Consultative Examination Authorization Agreement

Please read this statement and indicate your understanding by checking the "I have read..." box below. When you select "Submit", you will generate an electronic signature and submit your response.

I am certifying, under penalty of perjury, that I have been authorized or contracted by the Disability Determination Services to examine the claimant. The report is accurate. By checking the "I have read and agree to the above" checkbox below, I am certifying that I personally conducted, or personally participated in conducting, the consultative examination and have electronically signed the report contained within.

I have read and agree with the Agreement above.



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Step 2 – Review and Add Information

- Review the **Destination and Request summary information**, and verify the accuracy of the information selected in Step 1. If any of the information is incorrect, make the corrections by selecting the **Edit** button.

**NOTE:** If you respond to an electronic request, you will not be able to edit this information. Your screen will not look exactly like the screen shown above.

- Select the button to identify a file to send. (Do not send files that are password protected.) The **Choose file** window appears on your screen.
- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.
- Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.
- Select the **Add File** button to send additional files.

**NOTE:** A maximum of 25 files may be sent for one individual by selecting *the Add File* button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.**

Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

- Type **Comments**, if needed. Type-in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- The next step is your "Electronic Signature". This step asks you to certify that you examined the claimant, prepared or reviewed the report, and the report is accurate. Read the certification statement located at the bottom of the screen and indicate your understanding by checking the box beside **I have read and agree with the Agreement above**. By checking the box, you affirm your intent to sign the report. You do not need to physically sign and send the paper report to the DDS.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- Select the **Submit** button to provide electronic signature and forward the signed report to the selected DDS office.
- The website creates a text file and adds it to the files and information you submit. This document contains the following information:
  - Index information you entered from the request letter
  - The signature attestation statement to which you agreed
  - Your name, as it is registered in ERE – serving as your electronic signature.

### Confirmation (Step 3 of 3) - no fiscal

**Social Security Administration**  
The Official Website of the U.S. Social Security Administration

### ERE: Send CE Report

1 ✓ Destination Information   2 ✓ Review & Add Information   3 Confirmation

✓ **Thank you for your submission**

CE Report Submission - Tracking Information  
Tracking Number: **14ACF48F3BEDEF2CN**  
Submitted on: 01/09/2015 at 10:21 AM EST

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

[Print this page](#)

#### Submission Summary

Tracking Information

##### Destination and Request Information

Destination: **WA - Spokane DDS [V14]**  
SSN: **XXX-XX-001**  
RQID: **adfadf**  
RF: **P**  
DR: **F**  
CS: **adfa**  
Document Type: **Consultative Examination Report (CE) - 0002**

##### Uploaded File(s)

| File Name                          | File Size    |
|------------------------------------|--------------|
| LCR-Contact ODAR Office Email.docx | 29 KB        |
| <b>Total File Size</b>             | <b>29 KB</b> |

Comments: **Comments were added**

Your response was electronically signed.

[Send Another Response](#)   [ERE Home](#)

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Confirmation (Step 3 of 3) - with fiscal

**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Send CE Report

1 ✓ Destination Information   2 ✓ Review & Add Information   3 Confirmation

✓ Thank you for your submission

CE Report Submission - Tracking Information  
Tracking Number: **14ACF48F3BEDEF2CN**  
Submitted on: 01/09/2015 at 10:21 AM EST

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

[Print this page](#)

**Submission Summary**  
Tracking Information

**Destination and Request Information**

Destination: **WA - Spokane DDS [V14]**  
SSN: **XXX-XX-001**  
RQID: **adfadf**  
RF: **P**  
DR: **F**  
CS: **adfa**  
Document Type: **Consultative Examination Report (CE) - 0002**

**Uploaded File(s)**

| File Name                          | File Size    |
|------------------------------------|--------------|
| LCR-Contact ODAR Office Email.docx | 29 KB        |
| <b>Total File Size</b>             | <b>29 KB</b> |

Comments: **Comments were added**

Your response was electronically signed.

[Send Another Response](#)   [ERE Home](#)   [Request Payment](#)

### Step 3 – Confirmation

- After your submission, ERE provides a **Confirmation** page. The **Confirmation** page provides a tracking number for you to keep and use if you want to check on the status of your submission. The **Confirmation** page indicates the specific files and/or comments that you transmitted.
- If you do not receive the **Confirmation** page, please resubmit the materials.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- If you have additional CEs to send, you can select **Send Another Response**.
- To Submit Payment Request, after reviewing the summary select the **Request Payment** button at the bottom of your screen as shown in the image above (*Confirmation with fiscal*).

**NOTE:** We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

### IMPORTANT NOTE

It is against SSA policy for a user to delegate the uploading of their CE reports, via the **Access Electronic Requests** website function, to staff members. Users interested in delegating this responsibility should consider using the **Send CE with Scanned Signature** website function or CE Administrative Staff Upload (**Review/Submit Prepared Requests, and Prepare Report for Provider**).

# Comprehensive Electronic Records Express

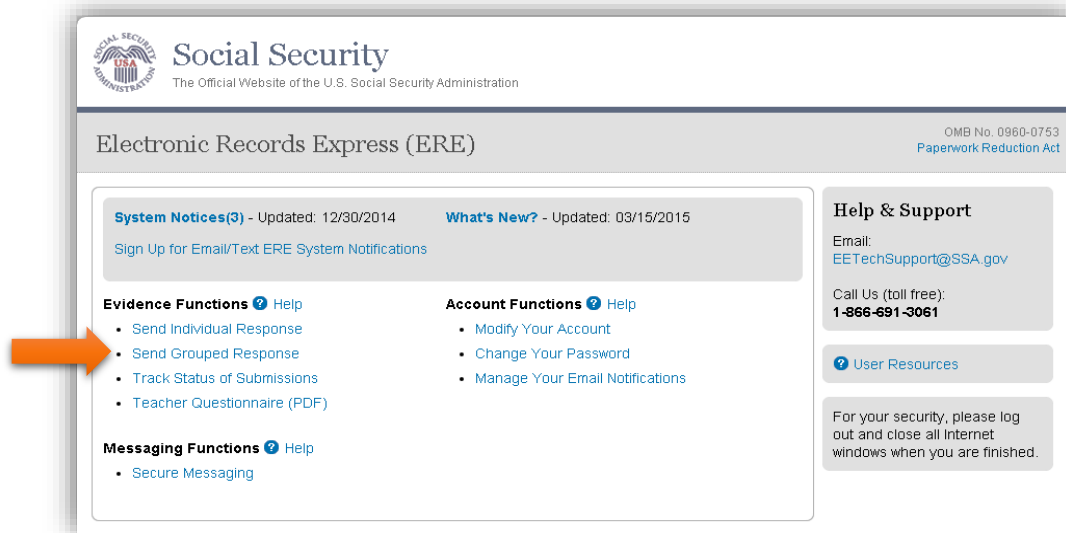
User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – SEND GROUPED RESPONSE

Use the Send Grouped Response function on the ERE website to send multiple files on a single upload. You can use this function by combining the multiple files into a single .zip file.

- You need the SSA/DDS evidence request letter that contains the barcode available to complete the processing steps of Send Grouped Response. If you received the request electronically from the DDS, you cannot use “Send Grouped Response” function to respond.
- The barcode sheet must be the topmost (first page) of the record set belonging to one individual. Similarly, a group of files containing the records of many individuals must always have a barcode sheet for each individual when transmitted together as a group of files combined in one file.
- ERE only accepts zipped files (.zip) that contain .tif, .tiff, or .pdf files. You may use combinations of file types within a single transmission session on the ERE website.
- Each individual's barcode sheet must be the topmost (first page) of the record. For example, a .zip file containing five record sets for five different individuals must have five barcode sheets. A barcode sheet must be the topmost (first page) of each individual's record.

Under the **Evidence Functions** heading, select **Send Grouped Response**.



# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Preparing Your Files:

Group the records based on whether there is a 2-D/enhanced barcode on the request letter. The barcode should look like the barcode below:



You must separate records that have a 2-D barcode from records that do not have a 2-D barcode. Submit records with a 2-D barcode in one upload. The 2-D barcode must be the first page of the file.

**NOTE:** The **Send Grouped Response** function only accepts .zip files. You must follow the rules listed below or your upload will not process.

- The **.zip** file must not contain directories
- The **.zip** file must be valid and cannot be empty.
- The **.zip** file must contain only **.tiff**, **.tif**, **.pdf**, and files.
- The **.zip** file must not contain empty (zero-byte) files.
- The **.zip** file must contain one or more **.tiff**, **.tif**, **.pdf** files with either all enhanced barcodes or no enhanced barcodes.
- Each **.tiff** file within a **.zip** file should follow these specifications:
  - One **.tif** file per patient with the request letter on the first page
  - **.tiff** version 4, 5, or 6
  - Intel format (little-endian byte order)
  - CCITT Group 4 Compression
  - Black & White color (Bitonal)
  - 200x200 dots per inch (DPI) resolution

**NOTE:** Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Destination and Request Information (Step 1 of 3)

The screenshot shows the Social Security Administration's 'ERE: Send Grouped Response' interface. At the top, the Social Security logo and 'The Official Website of the U.S. Social Security Administration' are visible. Below the title, a progress bar indicates three steps: 1. Destination Information (active), 2. Review & Add Information, and 3. Confirmation. The main content area is titled 'Destination and Request Information' and includes a 'User Resources' link. The form contains the following fields and options:

- Select destination by:** [More Info](#)
  - Site Code
  - State
- Site Code:** S02
- State:** AK-Alaska
- Destination:** AK - Alaska DDS [S02]
- Edit** button
- Does the first page of all the documents contain an enhanced 2-D barcode?** [More Info](#)
  - Yes
  - No

At the bottom of the form, there are **Next** and **Cancel** buttons.

### Step 1: Destination and Request Information

- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

OR

- Select the **State** from the dropdown. After choosing the **State**, the **Destination** list updates with the offices in the State you selected. Select the **Destination** from the dropdown.
- If the topmost (first page) of each record contains an enhanced 2-D barcode, select “Yes”. Otherwise, select “No”.
- Select the **Next** button to proceed to **Step 2: Review and Add Information**

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Review and Add Information (Step 2 of 3)

The screenshot shows the Social Security Administration's 'ERE: Send Grouped Response' interface. At the top, the Social Security logo and 'The Official Website of the U.S. Social Security Administration' are displayed. Below the title, a progress bar indicates three steps: 1. Destination Information (completed), 2. Review & Add Files (current step), and 3. Confirmation. The main content area is divided into two sections. The first section, titled 'Review', contains an 'Edit' button and the text 'Destination Information'. Below this, the destination is listed as 'ME - Winthrop DDS [S22]' and 'Barcode Present? Yes'. The second section, titled 'Attach and Upload Files', provides instructions: 'A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.', 'ONLY zipped files can be uploaded.', 'Those zipped files must only contain .tif, .tiff or .pdf files.', 'You may not upload a zip within a zipped file.', and 'Please do not upload password-protected files because they cannot be processed.' Below these instructions is an 'Add Files:' section with a 'Choose Files' button and the text 'No file chosen'. At the bottom of the form are three buttons: 'Submit', 'Previous', and 'Cancel'.

### Step 2: Review and Add Information

- Review the Destination and Request Information and verify the accuracy of the information selected in Step 1. If any of the information is incorrect, make the corrections by selecting the **Edit** button.
- Select the button to identify a file to send. (Do not send files that are password protected.) The Choose **file** window appears on your screen.
- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.
- Select the Open button. The Choose file window closes and the file name displays. If you have chosen the incorrect file, select the Delete button to clear the field.
- Select the Add File button to send additional zipped files.
- Select the Submit button to forward the information to the Destination selected in Step 1.



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Confirmation (Step 3 of 3)



### Step 3: Confirmation

- After your submission uploads, ERE provides a **Confirmation** page. The **Confirmation** page provides a tracking number for you to keep and use if you want to check on the status of your submission.
- If you do not receive the **Confirmation** page, you should resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- To respond to another request, select the **Send Another Response** button.

**NOTE:** We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

## EVIDENCE FUNCTIONS – SEND CE WITH SCANNED SIGNATURE

On the **ERE Home** page, under the **Evidence Functions** heading, select **Send CE with Scanned Signature**. This link takes you to the page that allows providers or administrative staff to submit CE reports. The provider physically signs a hardcopy of the CE report, scans the signed copy of the CE report, and submits the CE report through this function.



- You need the SSA/DDS evidence request letter that contains the barcode available to complete the processing steps of **Send CE with Scanned Signature**. If you received the request electronically from the DDS, you cannot use “Send CE with Scanned Signature” function to respond.
- The **Claimant’s SSN** can be found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.
- The barcode sheet must be the topmost (first page) of the record set.
- ERE only accepts zipped files (.zip) that contain .tif, .tiff, or .pdf files. You may use combinations of file types within a single transmission session on the ERE website.

**NOTE:** The **Send CE with Scanned Signature** function only accepts .zip files. You must follow the rules listed below or your upload will not process.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- The **.zip** file must not contain directories.
- The **.zip** file must be valid and cannot be empty.
- The **.zip** file must contain only **.tiff, .tif, and .pdf** files.
- The **.zip** file must not contain empty (zero-byte) files.
- The **.zip** file must contain one or more **.tiff, .tif, and .pdf** files with either all enhanced barcodes or no enhanced barcodes.
- Each **.tiff** file within a **.zip** file should follow these specifications:
  - One **.tif** file per patient with the request letter on the first page
  - **.tiff** version 4, 5, or 6

Submit records with 2-D barcodes together, and submit records without the 2-D barcode together. In the group of records with the barcode, the 2-D barcode must be included on the first page of the documents.

**NOTE:** The barcode is essential for properly routing records and reports to the appropriate claimant's electronic disability claims folder. Please be careful not to alter the readability of the barcode (e.g., writing over the barcode or date-stamping the barcode). This is particularly important for providers who are scanning copies of the DDS request letter to be uploaded via the ERE website (i.e., using the **Send Grouped Response** and **Send CE with Scanned Signature** functions).

### Destination and Request Information (Step 1 of 3)

The screenshot displays the Social Security Administration's website interface for the 'ERE: Send CE with Scanned Signature' process. The page is titled 'Social Security' and 'The Official Website of the U.S. Social Security Administration'. The main heading is 'ERE: Send CE with Scanned Signature'. Below this, there is a progress indicator with three steps: '1 Destination Information', '2 Review & Add Information', and '3 Confirmation'. The current step, 'Destination and Request Information', is highlighted. On the right side of this section, there is a link for 'User Resources'. The form contains the following fields and options:

- Select destination by:**  More Info
- Site Code  State
- Site Code:** AR
- State:** AR-Arkansas
- Destination:** AR - EST DDS [S0J]
- 
- Does the first page of all the documents contain an enhanced 2-D barcode?**  More Info
- Yes  No

At the bottom of the form, there are two buttons: 'Next' (highlighted in blue) and 'Cancel'.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Step 1 – Destination and Request Information

- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character Site code from the barcode. The Site code begins with a letter, followed by two digits. If you make a mistake, you may backspace and enter the correct letter or digits;

**OR**

- Select the State from the dropdown. After choosing the State, the Destination list updates and lists the offices in the State you selected. Select the Destination from the dropdown.

There are two bullets to choose from on this page. Select the first bullet if the first page of your documents has an enhanced 2-D barcode that looks like the barcode below (the barcode may not display the DR field):



**OR**

Select the second bullet if the first page of your document does not contain a barcode.

Select the Next button to proceed to Step 2.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Review and Add Information (Step 2 of 3)

The screenshot shows the Social Security Administration's 'ERE: Send CE with Scanned Signature' interface. At the top, the Social Security logo and 'The Official Website of the U.S. Social Security Administration' are displayed. Below the title, a progress bar indicates three steps: 1. Destination Information (completed), 2. Review & Add Information (current step), and 3. Confirmation. A 'User Resources' link is visible on the right. The main content area is divided into two sections: 'Review' and 'Attach and Upload Files'. The 'Review' section contains an 'Edit' button and 'Destination Information' with the text 'Destination: AR - EST DDS [S0J]' and 'Barcode Present? Yes'. The 'Attach and Upload Files' section lists instructions: a maximum of 25 files (totaling less than 200MB), only zipped files, specific file formats (.tif, .tiff, .pdf), no zips within zips, and no password-protected files. Below this is a file selection area with 'File 1:' and a 'Choose File' button (currently showing 'No file chosen'), a 'Delete' button, and an 'Add File' button. At the bottom, there are 'Submit', 'Previous', and 'Cancel' buttons.

### Step 2 – Review & Add Information

- Select the button to identify a file to send. (Do not send files that are password protected.) The **Choose file** window appears on your screen.
- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.
- Select the Open button. The Choose file window closes and the file name displays. If you have chosen the incorrect file, select the Delete button to clear the field.
- Select the Add File button to send additional zipped files.
- Select the Submit button to forward the information to the Destination selected in Step 3.

**NOTE:** Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Confirmation (Step 3 of 3)

**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Send CE with Scanned Signature

1 ✓ Destination Information   2 ✓ Review & Add Information   3 Confirmation

✓ **Thank you for your submission**

CE Scanned Signature Submission - Tracking Information

Tracking Number: **14AD0A274DAA01BBN**

Submitted on: **01/09/2015 at 04:38 PM EST**

Please retain your tracking number in case there are errors or problems that prevent us from processing your submission.

[Print this page](#)

**User Resources**

**Submission Summary**  
Tracking Information

**Destination Information**

Destination: **AR - EST DDS [SOJ]**

Barcode Present? **Yes**

### Step 3 – Confirmation

After your submission uploads, ERE provides a **Confirmation** page. The **Confirmation** page provides a tracking number for you to keep and use if you want to check on the status of your submission.

- If you do not receive the **Confirmation** page, you should resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.
- To respond to another request, select the **Send Another Response** button.

**NOTE:** We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

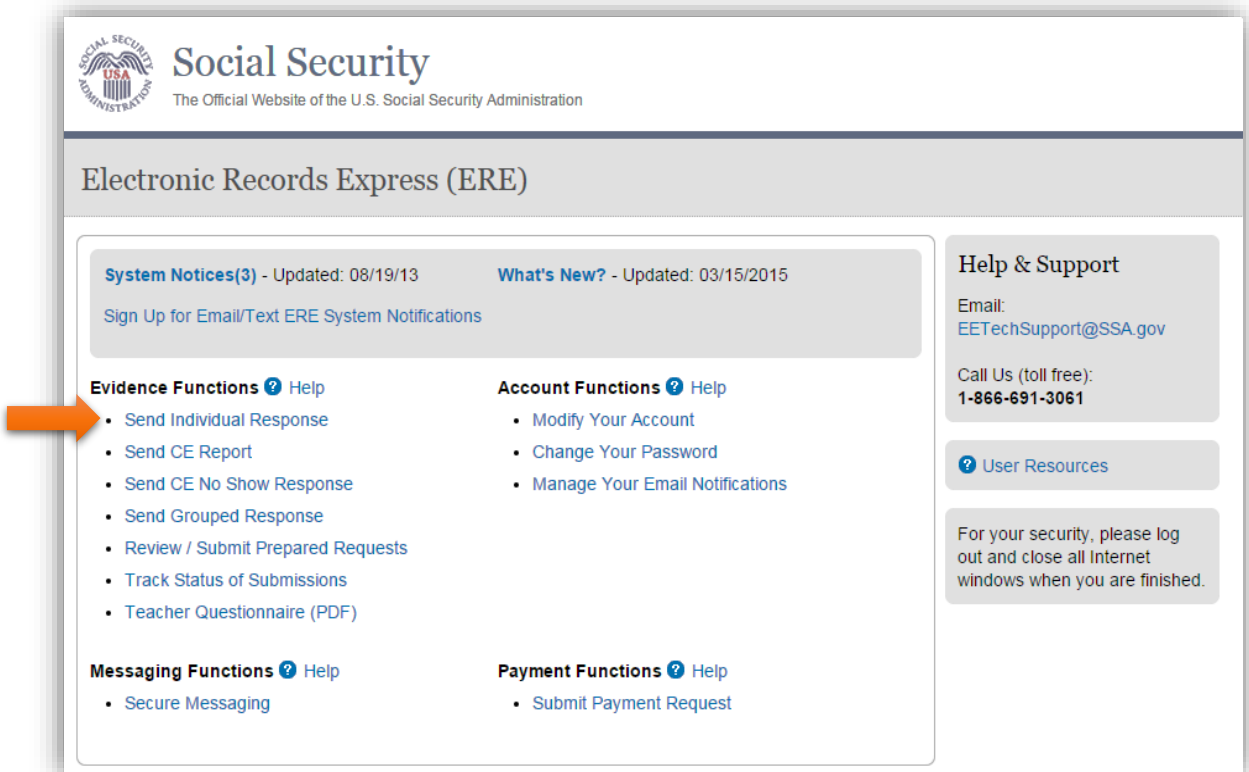
# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – SEND INDIVIDUAL RESPONSE

The **Send Individual Response** link is available only for users registered to use this function of the website.

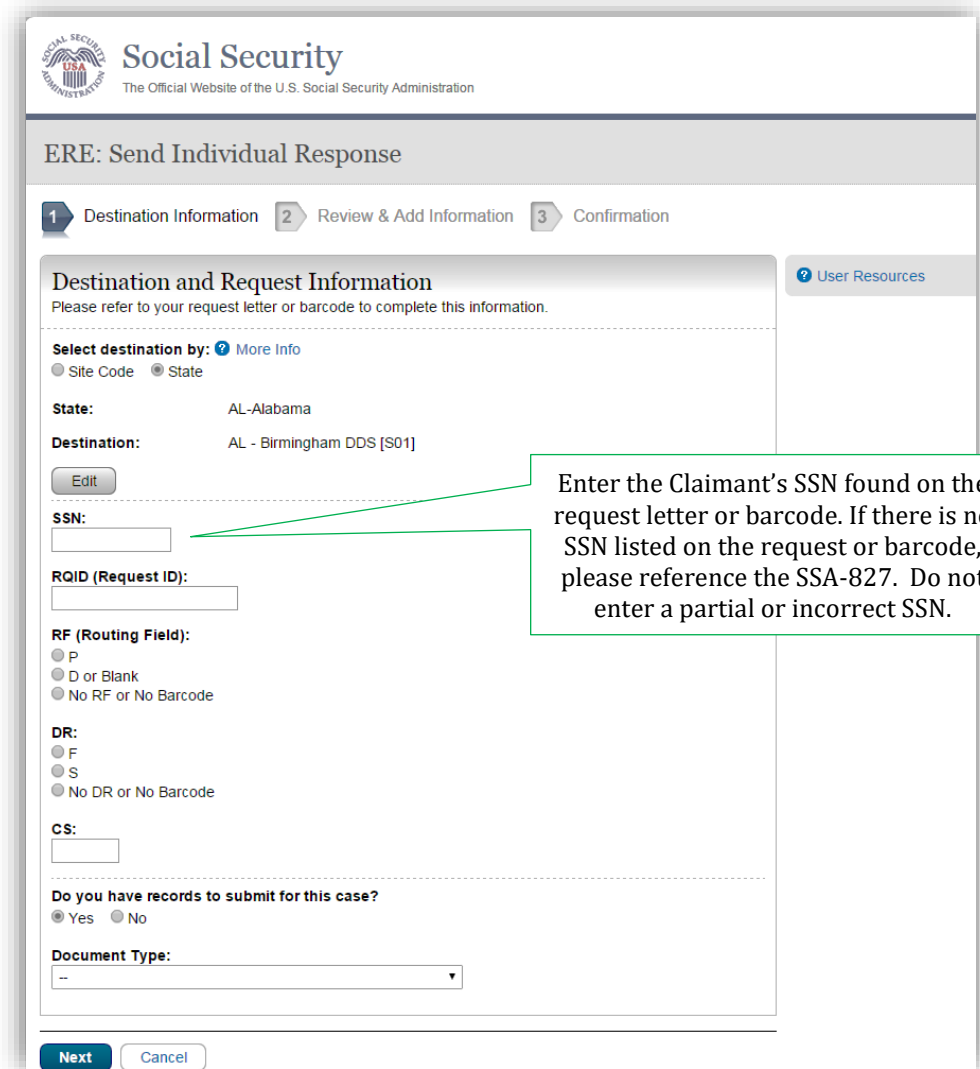
On the ERE Homepage, select the link, **Send Individual Response**, under the **Evidence Functions** heading.



# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

### Destination and Request Information (Step 1 of 3)



**Social Security**  
The Official Website of the U.S. Social Security Administration

ERE: Send Individual Response

1 Destination Information 2 Review & Add Information 3 Confirmation

**Destination and Request Information** [User Resources](#)

Please refer to your request letter or barcode to complete this information.

Select destination by: [More Info](#)

Site Code  State

State: AL-Alabama

Destination: AL - Birmingham DDS [S01]

SSN:

RQID (Request ID):

RF (Routing Field):

P  
 D or Blank  
 No RF or No Barcode

DR:

F  
 S  
 No DR or No Barcode

CS:

Do you have records to submit for this case?

Yes  No

Document Type:

Enter the Claimant's SSN found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

### Step 1 – Destination and Request Information:

- Select the Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

OR

- Select the **State** from the dropdown. After choosing the **State**, the **Destination** list updates with the offices in the State you selected. Select the **Destination** from the dropdown.



## Comprehensive Electronic Records Express

### User Guide for Consultative Examination Providers

- Obtain the following information from the CE request letter if you did not receive the request electronically (this information populates for you if you received an electronic CE request):
  - Enter the Social Security Number (**SSN**). *Only files for one SSN can be sent with this transaction.*
  - Enter the Request ID (**RQID**). The Request ID is the document number or serial number that is usually located on the request letter near the barcode.
  - Select the appropriate **RF** (Routing Field) option, or **No RF or No Barcode** if not displayed on the request letter.
  - Select the appropriate **DR** (Document Return Code) option, or **No DR or No Barcode** if not displayed on the request letter.
  - Enter the **CS** (Check Sum Digits) if available, or leave this field blank if not displayed on the request letter.
  - Select “**Yes**” to submit records (attach and upload files, comments, and/or electronic signature).
  - Select the **Document Type** from the drop down box.
  - Select **Next** to go to the next step or select **Cancel** to return to the **Home** page.
  - Continue to Step 2 - Attach and Upload Files, Comments, and/or Electronic Signature.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## Review & Add Information (Step 2 of 3)

The screenshot shows the 'Social Security' logo and 'The Official Website of the U.S. Social Security Administration' at the top. The main heading is 'ERE: Send Individual Response'. Below this is a progress indicator with three steps: '1 Destination Information' (checked), '2 Review & Add Information' (active), and '3 Confirmation'. The 'Review' section contains an 'Edit' button and the title 'Destination and Request Information'. The form fields are: Destination: AL - Birmingham DDS [S01], RF: D or Blank, SSN: XXX-XX-001, DR: F, RQID: 000000000000024587, CS: 012, and Document Type: Medical Evidence of Record (MER)-0001. The 'Attach and Upload Files' section includes instructions: 'A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.', 'File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tif, .tiff', and 'Please do not upload password-protected files because they cannot be processed.' Below this is a file upload area for 'File 1' with a 'Choose File' button, 'No file chosen' text, and a 'Delete' button. An 'Add File' button is also present. The 'Additional Comments' section has a text area with a '(16,000 characters maximum)' limit and a 'Characters remaining: 16000' indicator. At the bottom are 'Submit', 'Previous', and 'Cancel' buttons.

### Step 2 – Attach and Upload Files, Comments, and/or Electronic Signature

- Verify the accuracy of the information input in Step 1 against the information displayed on your request letter. If any of the information is not correct, make the corrections via the input fields by selecting the **Edit** button.
- Choose a file to send. (Do not send files that are password protected.) The **Open** file window will appear on your screen.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- Locate the file you wish to send and highlight the file name. The document's file name appears in the File name box at the bottom of the **Open** file window.
- Select the **Open** button. The **Open** file window closes and the ERE website displays the file name. If you have chosen the incorrect file, select the **Delete** button to clear the **File 1** field.
- Select the **Add File** button to send additional files. You may add up to ten files for this transaction. **Only files for the SSN entered in Step 1 can be sent with this transaction.**

**NOTE:** Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

- Type **Additional Comments**, if needed. The Additional Comment field is where you can provide additional information. Type-in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- Select the **Submit** button to forward the information to the Destination selected in Step 1.
- Continue to Step 3 – Tracking Information.

## Confirmation (Step 3 of 3)

The screenshot displays the Social Security Administration's website interface for the 'ERE: Send Individual Response' process. The page title is 'ERE: Send Individual Response'. A progress bar at the top shows three steps: 1. Destination Information (checked), 2. Review & Add Information (checked), and 3. Confirmation (active). A green box with a checkmark icon contains the message: 'Thank you for your submission'. Below this, it says 'Individual Response Submission - Tracking Information' and provides the Tracking Number: **14981CDBEB2DAEF5N**. The submission date and time are 'Submitted on: 11/05/2014 at 04:13 PM EST'. A note asks the user to retain their tracking number. A 'Print this page' link is visible. Below the green box is a 'Submission Summary' section with two sub-sections: 'Tracking Information' and 'Destination and Request Information'. The 'Destination and Request Information' section shows: Destination: **AL - Birmingham DDS [S01]**, SSN: **123-45-6789**, and a partially visible POB field.

# Comprehensive Electronic Records Express

## User Guide for Consultative Examination Providers

- Review Submission Summary and retain tracking number.
- It provides a tracking number for you to keep and use if you want to check on the status of your submission.
- If you do not receive the **Confirmation** page, you should resubmit the materials.
- If you continue to have transmitting problems, contact your local state DDS office for assistance.

**NOTE:** We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

# Comprehensive Electronic Records Express

User Guide for Consultative Examination Providers

## EVIDENCE FUNCTIONS – TEACHER QUESTIONNAIRE

This function allows school personnel to access the Teacher Questionnaire (SSA-5665-BK) on the ERE website. School personnel will be able to download the questionnaire, complete the form and send the form via the ERE website to the DDS using the **Send Individual Response** feature under the **Evidence Functions** heading on the Home page.

Start by logging into ERE with your username and password. On the ERE Homepage, under the **Evidence Functions** heading, select “**Teacher Questionnaire (PDF)**”. This will take you to the Teacher Questionnaire form.



Selecting this link directs you to get the Teacher Questionnaire as a PDF document. The first pages of the form provide brief explanations of why SSA is requesting the completion of the form and other general information.

Since this form is an important element in the decision of whether a child qualifies for disability benefits, please be sure to read all instructions and questions carefully and complete the form in its entirety and to the best of your ability, answering all questions appropriate to the child you are evaluating.

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## Step 1: Complete the Teacher Questionnaire

- Choose the **Teacher Questionnaire (PDF)** hyperlink under **Evidence Functions** from the ERE Home website page. The **Teacher Questionnaire PDF** link will take you to the Teacher Questionnaire form as a PDF document.
- Print and complete the Teacher Questionnaire form.

## Step 2: Return Teacher Questionnaire to DDS

- You should have the SSA/DDS request letter readily available to complete the processing steps.
- Follow the user instructions for **Send Individual Response** to send the completed Teacher Questionnaire to the DDS.

## EVIDENCE FUNCTIONS – TRACK STATUS OF SUBMISSIONS

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### Overview

The ERE **Track Status of Submissions** application allows you to track the status of your submissions. You can select from multiple search criteria: **Tracking Number**, **Request ID (RQID)**, **Claimant's SSN**, **Date** of submission and **Status** of submission.

The Track Status of Submissions application is comprised of the following pages:

- **Search** Screen
- **Results** Screen
- **Details** Screen

### Search Screen

You may search for information about files submitted within the past 180 calendar days after entering one or more of the following criteria on the **Search Submissions** page:

1. **Tracking Number** – The **Tracking Number** is a unique number assigned to a submission. When searching by a Tracking Number, all other fields are disabled.
2. **RQID (Request ID)** - The **RQID** is a unique identifier located on the request letter near or on the barcode. When searching by **RQID**, all other fields are disabled. The **RQID** is case sensitive.
3. **Claimant's SSN** - You can search using the individual's Social Security Number (**SSN**).
4. **Date, Status or Site.**
  - **Date** - use the **Date** search and choose one of the following **Date** options:
    - **Last 45 days** - Searches submissions within the last 45 days
    - **Single day** (date must be within 180 calendar days from the current date)
      - **Date of Submission**
      - **Start Time** (Eastern Time)
      - **End Time** (Eastern Time)
    - **Date Range** (date must be within 180 calendar days from the current date)
      - **From Date** – The start date for your search

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- **To Date** – The end date for your search
- **Status** - Search all your submissions within the past 180 calendar days or choose one of the following statuses:
  - **Sent** – Search your successful submissions within the past 180 days
  - **Error** – Search your failed submissions within the past 180 days
  - **Contacted** – Search your submissions that required ERE Tech Support to contact you to resolve a problem with the original submission
- **Site** - Search all your submissions within the past 180 days by **Site** or narrow your search by choosing one of the following options:
  - **State** – searches your submissions for a specific State
  - **Site Code** – searches your submissions for a specific Site Code

**NOTE:** The radio buttons for **Search by date - Last 45 Days**, **Search by status-All**, and **Search by site-All** are automatically selected after choosing the **Track Status of Submissions** link from the ERE Homepage.

### Inquiry Results Page

The **Inquiry Results** page displays a list of your submissions from the past 180 calendar days that met the criteria you selected on the **Search Submissions** page. The list contains the following information about your submissions:

- **Tracking Number** – a unique number generated by ERE to identify your submission.
- **Date and Eastern Time** – The Date and Eastern Time your submission was uploaded to the website.
- **Status** – The status displayed in this column will be one of the following:
  - Sent – Your submission was successful
  - Error – Your submission failed
  - Contacted – A problem occurred with the original submission and ERE Tech Support contacted you to resolve the issue
  - Processing – Your submission is processing
- **Site Code** – The Site Code for your submission



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- **Last 4 of SSN** – The last four digits of the individual’s Social Security Number (SSN)
- **RQID** - Request ID

**NOTE:** Each column may be sorted in ascended or descending order by selecting the column heading.

### Inquiry Results - Detail Page

The **Inquiry Results - Detail** page displays details of your submission from the Tracking Number selected from the Results screen.

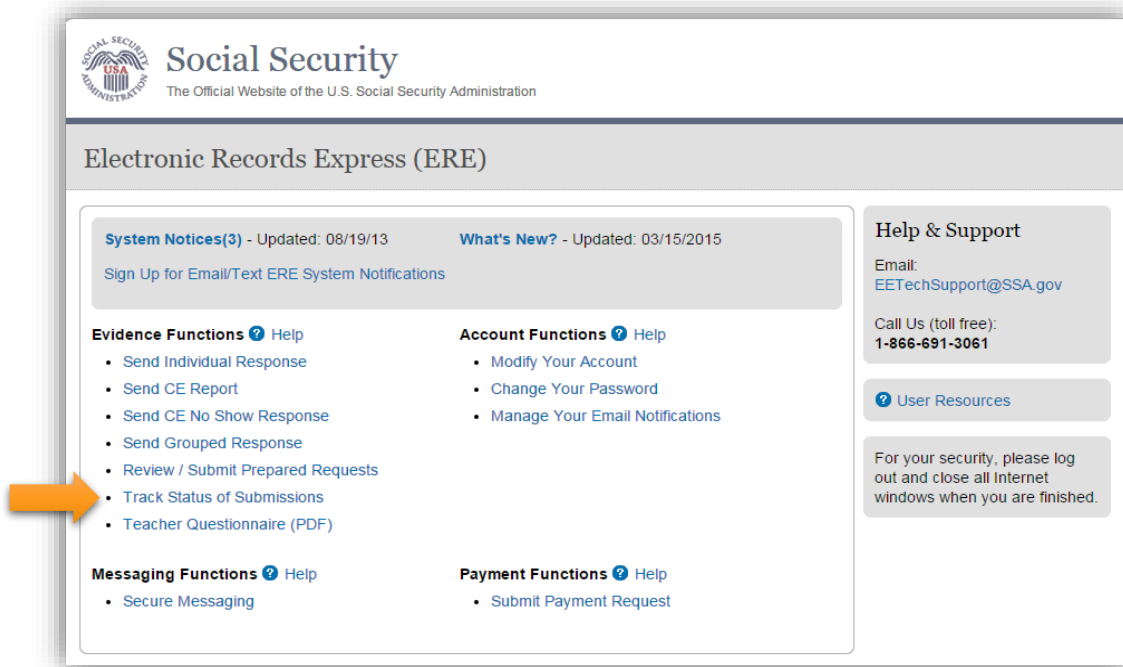
The **Inquiry Results - Detail** screen displays the following submission information:

- **Tracking Number**
- **Submission Date and Eastern Time**
- **Submission Status**
- **Site Code**
- **Last 4 of SSN**
- **Number of Files Uploaded**
- **RQID (Request ID)**
- **Filename** – The name of your uploaded file, including the extension
- **File Status** - The status displayed in this column will be one of the following:
  - Sent – Your submission was successful
  - Error – Your submission failed
  - Contacted – You were contacted by ERE Tech Support to resolve a problem with the original submission
  - Processing – Your submission is processing
- **File Size** – The size of your file in bytes

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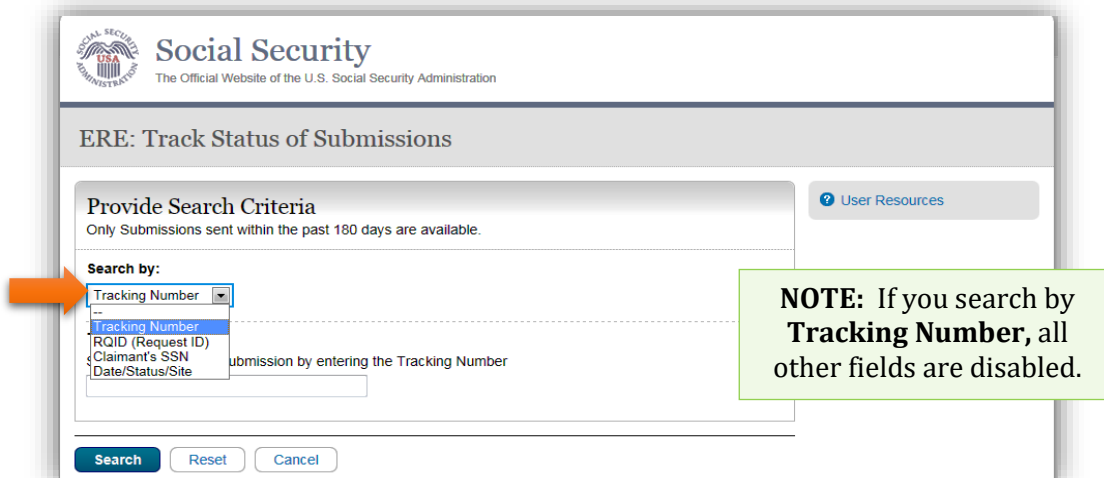
From the ERE Homepage, select **Track Status of Submissions** under the **Evidence Functions** heading.



You may search by entering the Tracking Number, Request ID, Claimant's SSN, other date choices, submission status, or site. When searching submissions by Tracking Number or Request ID, all other fields are disabled.

**NOTE:** You can only search for information about your submissions within the past 180 calendar days.

### Search by Tracking Number



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- Step 1** – Enter the **Tracking Number** in the first block. The **Tracking Number** is the unique number assigned to your original submission.
- Step 2** – Select the **Search** button.
- Step 3** – View your search results on the **Inquiry Results** page. The search provides your submissions from the past 180 calendar days that match the **Tracking Number** you entered on the previous page. Select the **Tracking Number** hyperlink to go to the **Inquiry Results – Detail** page.

## Search by Request ID

The screenshot displays the 'ERE: Track Status of Submissions' interface. At the top, the Social Security Administration logo and name are visible. Below the header, the page title 'ERE: Track Status of Submissions' is shown. A 'Provide Search Criteria' section contains a note: 'Only Submissions sent within the past 180 days are available.' and a 'User Resources' link. The 'Search by:' dropdown menu is set to 'RQID (Request ID)', highlighted by an orange arrow. Below this, the 'RQID (Request ID):' section provides instructions: 'Search for a specific submission by entering the RQID (Request ID) found on the request letter or barcode (case sensitive).' and includes a text input field. A green note box on the right states: 'NOTE: When searching by RQID (Request ID), all other fields are disabled.' At the bottom, there are 'Search', 'Reset', and 'Cancel' buttons.

- Step 1** – Enter the **RQID** found on the request letter or barcode in the second block. The **RQID** field is case sensitive.
- Step 2** – Select the **Search** button. Any files you submitted in the past 180 days with that **RQID** display on the **Inquiry Results** page.

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## Search by Claimant's SSN

**NOTE:** When searching by **Claimant's SSN** (Social Security Number), all other fields are disabled.

**Step 1 –** Enter the **Claimant's SSN** found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.

**Step 2 –** Select the **Search** button. Any files you submitted in the past 180 days with that **SSN** display on the **Inquiry Results** page.

## Search by Date, Status or Site

**Search by:** Date/Status/Site

**Date/Status/Site:** Search for a specific submission by using the following options.

**Date:**

- Last 45 Days
- Single Day
- Date Range:

**Status:**

- All
- Sent
- Error
- Contacted

**Site:**

- All
- State
- Site Code

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## Default Search

- Step 1** – The **Last 45 Days** and **All** buttons are automatically selected. To search your submissions in the last 45 days, simply select the **Search** button.
- Step 2** – All your submissions in the Last 45 Days display. You may sort the results in ascending or descending order by selecting of the underlined headings (**Tracking Number**, **Date and Eastern Time**, **Status**, **Site Code**, **Last 4 of SSN**, or **RQID**).
- Step 3** – Select the **Tracking Number** to view the details of the submission. You may also select the **Prior Page** button to return to the **Search Submissions** page.
- Step 4** – View submission details. You may select **Prior Page** to return to **Inquiry Results** or **Start New Search** to begin a new search for submissions. You may sort the results in ascending or descending order by selecting an underlined heading (**Filename**, **File Status** or **File Size**).

## Search by Submission Date, Status or Site



The screenshot displays the Social Security Administration's "ERE: Track Status of Submissions" interface. At the top, the Social Security logo and "The Official Website of the U.S. Social Security Administration" are visible. Below the header, the page title "ERE: Track Status of Submissions" is shown. A "Search Results" section includes a "User Resources" link. A message states: "Display submissions from the past 180 days. Select the Tracking Number to view status." A table with the following data is presented:

| <u>Tracking Number</u> | <u>Date</u> | <u>Time(ET)</u> | <u>Status</u> | <u>Site Code</u> | <u>SSN(Last 4)</u> | <u>RQID</u> |
|------------------------|-------------|-----------------|---------------|------------------|--------------------|-------------|
| 13341C14C1BD19B4       | 10/26/2011  | 15:42 PM        | Processing    | V76              | 1111               | 1           |

At the bottom of the table, there are three buttons: "Edit Search", "New Search", and "ERE Home". An orange arrow points to the RQID value "1" in the table.

When searching by submission **date**, **status**, and **site**, you may choose any combination of **date**, **status**, and **site** searches. Note that your search results will only include your submissions from the past 180 calendar days.

### Search by Date:

- **Last 45 Days** – Searches all your submissions from the last 45 days
- **Single Day** – Searches all your submissions from a single day (the date must be within the past 180 calendar days)

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- **Date Range** – Searches all your submissions made in a date range (dates must be within past 180 calendar days)

### Search by Status:

- **All** – Searches all your submissions
- **Sent** – Searches your successful submissions
- **Error** – Searches your failed submissions
- **Contacted** – Searches all submissions that resulted in ERE Tech Support contacting you to resolve an issue

**AND**

### Search by Site:

- **State** – Searches all your submissions for a specific State.
- **Site Code** – Searches your submissions for a specific Site Code.

**Step 1** – Select the option for the date to search - **Last 45 Days, Single Day, or Date Range**

- If you choose the **Single Day** option, you must enter the **Date of Submission** (MM/DD/YYYY). This date must be within the past 180 days.
- If you choose the **Date Range** option, you must enter the **From Date** (MM/DD/YYYY) and **To Date** (MM/DD/YYYY). These dates must be within the past 180 days.

**Step 2** – Select the **status** search option: **All, Sent, Error, or Contacted**. (The **All** option defaults for you.)

**Step 3** – Select the **site** search option: **All, State, or Site Code**. (The **All** option defaults for you.)

- If you choose the **State** option, you must select a State from the dropdown box.
- If you choose the **Site Code** option, you must select a site from the destination dropdown box. You may also type the site code in the **Site Code** box (example: V59). You can first choose the state from the **State** dropdown box that narrows your choices in the **Destination** dropdown box.

**Step 4** – Select the **Search** button. If you have any submissions from the past 180 days that match your search criteria, these results are provided on the **Inquiry Results** page.

**Step 5** – Select the **Tracking Number** to obtain the details of the submission

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**Step 6 –** View submission details. You may select **Back to Search Results** to return to the **Inquiry Results** page or **New Search** to return to the **Search Submissions** page.

**Social Security**  
The Official Website of the U.S. Social Security Administration

### ERE: Track Status of Submissions

Tracking Number: **13341C14C1BD19B4**      RQID (Request ID): 1  
Submission Status: **Processing**      Site Code: **V76**  
SSN (Last 4): **1111**      Number of User Uploaded Files: **5**  
Submitted On: **10/26/2011 15:42 PM**

[User Resources](#)

| File Name        | File Status | File Size |
|------------------|-------------|-----------|
| freeFormText.txt | Processing  | 4 bytes   |
| 827.doc          | Processing  | 23 KB     |
| eSignature.txt   | Processing  | 577 bytes |
|                  | Processing  | 13 KB     |
|                  | Processing  | 11 KB     |

[ERE Home](#)   [Back to Search Results](#)   [New Search](#)

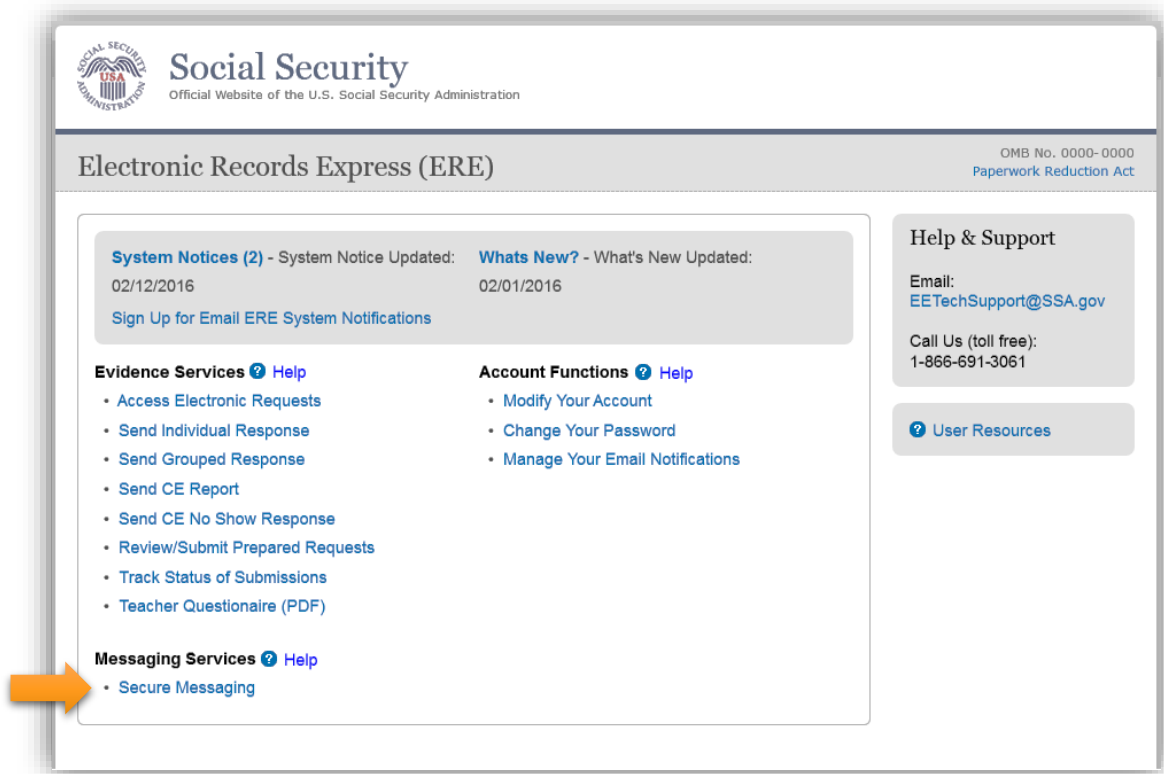
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## MESSAGING FUNCTION – SECURE MESSAGING

The Secure Messaging function allows registered ERE users to exchange confidential messages and sensitive documents. Only registered users can send and receive secure messages, and messages can only be sent to other registered users (no forwarding to external email addresses). Messages and documents are stored in a central repository on a protected system within the SSA network. All messages and documents are scanned for virus infection before processing.

ERE sends email notices to users via a Secure Message. The email notification contains a link to the ERE website. You must log into the ERE to retrieve the message. **Messages have a limited lifetime of 20 days from creation date.**



Select the **Secure Messaging** link from the ERE Homepage to view the **Secure Messaging Inbox**.



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## Secure Messaging – Inbox

The screenshot shows the Social Security Administration's ERE: Secure Messaging inbox. At the top left is the Social Security Administration logo and the text "Social Security Official Website of the U.S. Social Security Administration". Below this is a header "ERE: Secure Messaging". On the left side, there is a "Compose" button and a "Folders" list containing "Inbox (1)", "Pending", "Drafts (1)", "Sent (1)", and "Blocked". Below the folders is a "User Resources" button. The main area is titled "Inbox" and contains the text "Your messages are delivered here." followed by a table of messages. The table has columns for selection, status, attachments, from, subject, received (ET), expires (ET), and size. Below the table are "Delete Selected" and "ERE Home" buttons.

| <input type="checkbox"/> | ! |  | From         | Subject              | Received (ET)    | Expires (ET)     | Size |
|--------------------------|---|--|--------------|----------------------|------------------|------------------|------|
| <input type="checkbox"/> |   |  | User, A      | <a href="#">test</a> | 01/27/2016 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Ames, Tom    | <a href="#">test</a> | 01/27/2016 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Lisel, Laura | <a href="#">test</a> | 01/15/2016 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Downs, Ann   | <a href="#">test</a> | 01/12/2016 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Smith, Marie | <a href="#">test</a> | 01/10/2016 11:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Jones, James | <a href="#">test</a> | 01/03/2016 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Baylor, Glen | <a href="#">test</a> | 12/28/2015 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Miller, Ben  | <a href="#">test</a> | 12/28/2015 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Ames, Tom    | <a href="#">test</a> | 12/21/2015 10:44 | 10/16/2014 00:00 | 1 KB |
| <input type="checkbox"/> |   |  | Smart, Max   | <a href="#">test</a> | 12/18/2015 10:44 | 10/16/2014 00:00 | 1 KB |

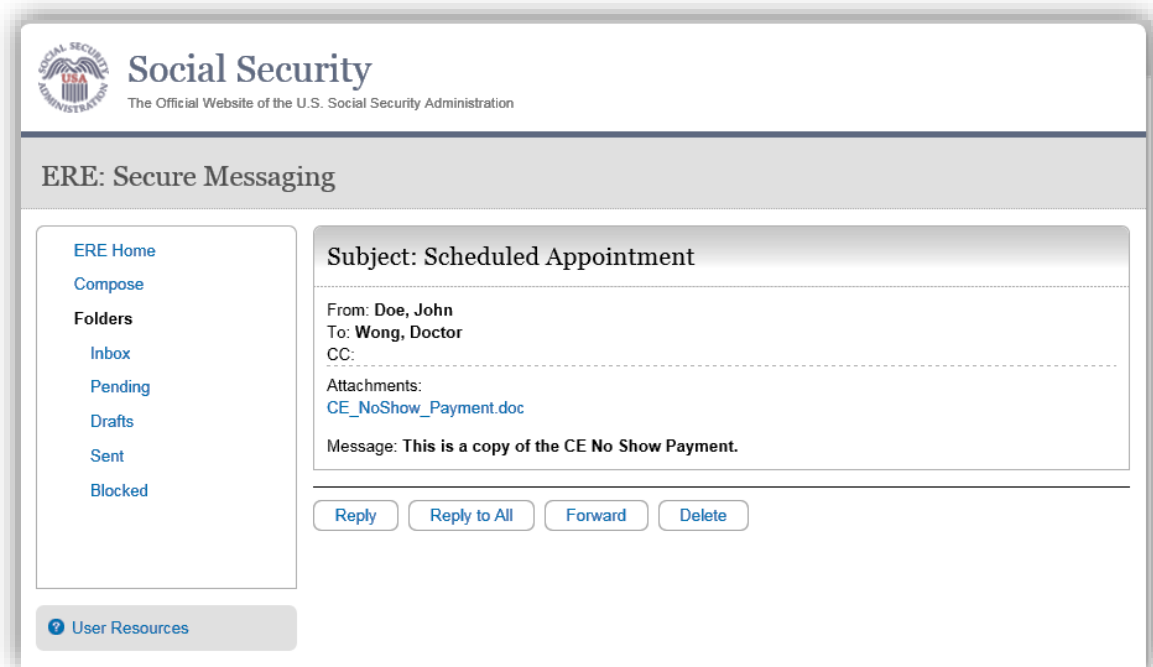
### View an Individual Message:

To view an individual message, select the hyperlink of the message you would like to view in the **Subject** column.

### Reply to a Message:

- Use the **Reply**, **Reply to All**, or **Forward** button to respond to the message. Follow the instructions for **Compose and Send a Message** below to send the message; or
- Choose the **Delete** button to delete the message; or
- To view another message, select **Check Mail** or **Mailbox Home**. **Viewed messages remain in the Inbox until they are automatically deleted (20 days from creation date) or manually deleted.**

## Secure Messaging – Message



### Compose and Send a Message:

- You may respond directly to a received message by choosing the **Reply**, **Reply to All** or **Forward** button.
- If composing a new message select the **Compose** link. The form for creating a new message displays.

**NOTE:** Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

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## Compose Message

The screenshot shows the 'Compose' interface for the Social Security Administration's ERE: Secure Messaging system. At the top left is the Social Security Administration logo and the text 'Social Security Official Website of the U.S. Social Security Administration'. Below this is the title 'ERE: Secure Messaging'. On the left side, there is a navigation menu with 'Compose' selected, and other options: 'Inbox (1)', 'Pending', 'Drafts (1)', 'Sent (1)', and 'Blocked'. Below the menu is a 'User Resources' button. The main 'Compose' area has fields for 'To:', 'Cc:', and 'Subject:'. There is a 'Search Contacts' button next to the 'Cc:' field. Below these fields is an 'Importance:' dropdown menu. A file upload section shows 'File 1:' with a 'Choose File' button and 'No file chosen' text, and a 'Delete' button. Below that is an 'Add File' button. The 'Your Message:' field is a large text area. At the bottom of the text area, it says 'Characters remaining: 1000000'. At the very bottom of the form are three buttons: 'Send', 'Save as Draft', and 'Cancel'.

- Enter the destination recipient(s) in the **To:** and/or **Cc:** fields. (You can only send Messages to registered users of Secure Messaging.)
  - The easiest way to enter a recipient is by selecting the **Search Contacts** button. This opens up to a light box and it allows you to filter by a user's first or last name. (You can only send Messages to registered users displayed in this list.)

The screenshot shows a 'Search Contacts' dialog box. It has a title bar with a close button (X). Below the title is the section 'Instructions:' with three numbered steps: 1. Enter your contact's name and click the Search button. 2. Select your contact and click the To or Cc button to include them in your message. 3. Lastly, click Add to return to your message. Below the instructions is the section 'Name:' with the text 'Enter your contact's name.' and two input fields labeled 'First' and 'Last'. At the bottom of the dialog is a 'Search' button.

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**Search Contacts**

**Instructions:**

1. Enter your contact's name and click the Search button.
2. Select your contact and click the To or Cc button to include them in your message.
3. Lastly, click Add to return to your message.

**Name:**  
Enter your contact's name.

First  Last

| <input type="checkbox"/> | Name           | City      | State     | Organization   | Organization Type  | Site Name              | User ID |
|--------------------------|----------------|-----------|-----------|----------------|--------------------|------------------------|---------|
| <input type="checkbox"/> | Smith, Aaron   | Baltimore | Maryland  |                | SSA/State/DDS Site | MD-Baltimore DDS [S23] | HG612   |
| <input type="checkbox"/> | Smith, Aaron   | Baltimore | Maryland  | Law Office 45  | Attorney's Office  |                        | SA5453  |
| <input type="checkbox"/> | Smith, Adela   | Las Vegas | Nevada    |                | SSA/State/DDS Site | NV-Vegas DDS [R24]     | GWDF5   |
| <input type="checkbox"/> | Smith, Alfie   | Rockford  | Illinois  |                | SSA/State/DDS Site | IL-Rockford DDS [E21]  | HJHJGT5 |
| <input type="checkbox"/> | Smith, Anton   | Rockford  | Illinois  | Hospital 567   | Hospital/Clinic    |                        | WR43    |
| <input type="checkbox"/> | Smith, Arcus   | Rockford  | Illinois  |                | SSA/State/DDS Site | IL-Rockford DDS [E21]  | JHT5    |
| <input type="checkbox"/> | Smith, Becca   | Rockville | Maryland  |                | SSA/State/DDS Site | MD-Rockville DDS [E43] | ERT324  |
| <input type="checkbox"/> | Smith, Brennan | New York  | New York  |                | SSA/State/DDS Site | NY-New York DDS [F54]  | BNGHG6  |
| <input type="checkbox"/> | Smith, Carl    | Auburn    | Alabama   | Law Office 234 | Attorney's Office  |                        | ER312   |
| <input type="checkbox"/> | Smith, Carla   | Yamhill   | Louisiana |                | SSA/State/DDS Site | LA-Yamhill DDS [E32]   | GFA2    |

To...

Cc...

- Search for the name using the **Filter By** text box. As you type the name in the box, you advance to the corresponding location in the list.
- Highlight the name of the user you are sending a message to and insert it in either the **To:** box or the **Cc:** box by selecting the **To:** or **Cc:** button on the search window.
- Repeat this step until you have entered all desired destination recipients
- Select **Add** to include the selected recipients in your message.
- Enter a **Subject**, and then select the level of **Importance** from the drop-down list.
- Attach files as necessary.

**NOTE:** A maximum of 10 files may be sent for one individual by selecting *the Add File* button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .txt, .rtf, .xls, xlsx, .pdf, .tiff, .tif.**

Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to re-submit your documents without macros.

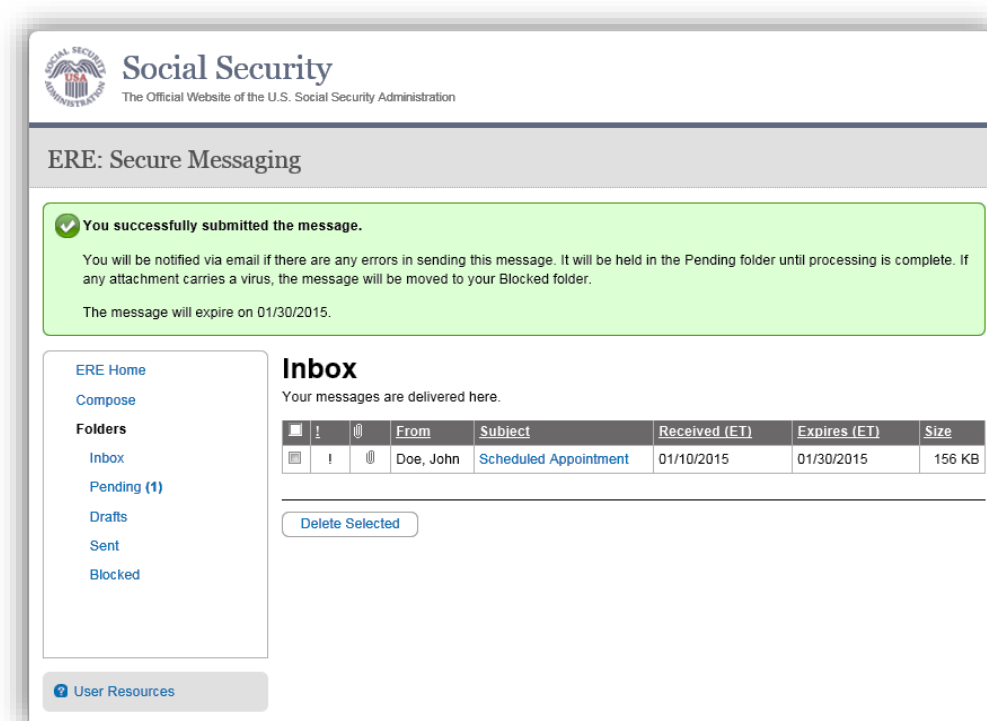
- Enter any text message that needs to be included in the large text box.
- The overall size of the message cannot exceed 51 MB (50MB total for file attachments and 1MB for message text).

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- Send the message by selecting the **Send** button. Or, you can save an unfinished message for later by selecting the **Save as Draft** button. (Creating a draft message starts the 20-day lifespan of the message.)
- A copy of the sent message is saved in the **Sent** folder.

### Compose Message – Confirmation



The screenshot shows the Social Security Administration's ERE: Secure Messaging interface. At the top, there is a green confirmation message: "You successfully submitted the message." Below this, it states: "You will be notified via email if there are any errors in sending this message. It will be held in the Pending folder until processing is complete. If any attachment carries a virus, the message will be moved to your Blocked folder. The message will expire on 01/30/2015." On the left, there is a navigation menu with links for "ERE Home", "Compose", "Folders" (including "Inbox", "Pending (1)", "Drafts", "Sent", "Blocked"), and "User Resources". The main content area is titled "Inbox" and shows a table of messages. The table has columns for "From", "Subject", "Received (ET)", "Expires (ET)", and "Size". One message is listed: "Doe, John" with subject "Scheduled Appointment", received on 01/10/2015, expires on 01/30/2015, and is 156 KB. Below the table is a "Delete Selected" button.

### View Blocked Messages:

Blocked messages are messages the user attempted to upload with an attachment in which the ERE virus scan found a suspected virus. Quarantined messages are blocked from transmission and the suspected file is deleted. In addition to the benefit of knowing about the suspected file, users need to know that the message has been blocked.

- Select the **Blocked** link. The blocked messages list displays.
- To take action on the message:
  - To delete the message, select the checkbox next to the message and select the **Delete** button.

## ERE ACCESS/SHORTCUT KEYS

---

This application contains access keys to improve navigation and provide information. To use these keys select the “Alt” or “Ctrl” button on your keyboard and the access key simultaneously. You will find a list of these keys in the table below:

### Access/Shortcut Keys for Evidence Functions

| Button        | Access Key |
|---------------|------------|
| Next          | n          |
| Submit        | p          |
| User Resource | u          |

### Access/Shortcut Keys for Secure Messaging Function

| Button         | Access Key |
|----------------|------------|
| Delete         | l          |
| Send           | s          |
| Save as Draft  | r          |
| Reply          | r          |
| Replay All     | y          |
| Forward        | w          |
| Apply          | y          |
| To             | t          |
| Cc             | c          |
| Add            | a          |
| User Resources | u          |

Other keyboard commands, hotkeys or access keys will vary based upon browser and the version of the browser that you are using. A list of these commands can be found in the Help section of your browser. The Help feature can be located on the Menu bar of your browser or by using the F1 function key on the keyboard. Any assistive devices that you may be using will also have a list of these shortcut keys in their Help section.

**NOTE:** To use these keys select the “Alt” or “Ctrl” button on your keyboard and the access key simultaneously.

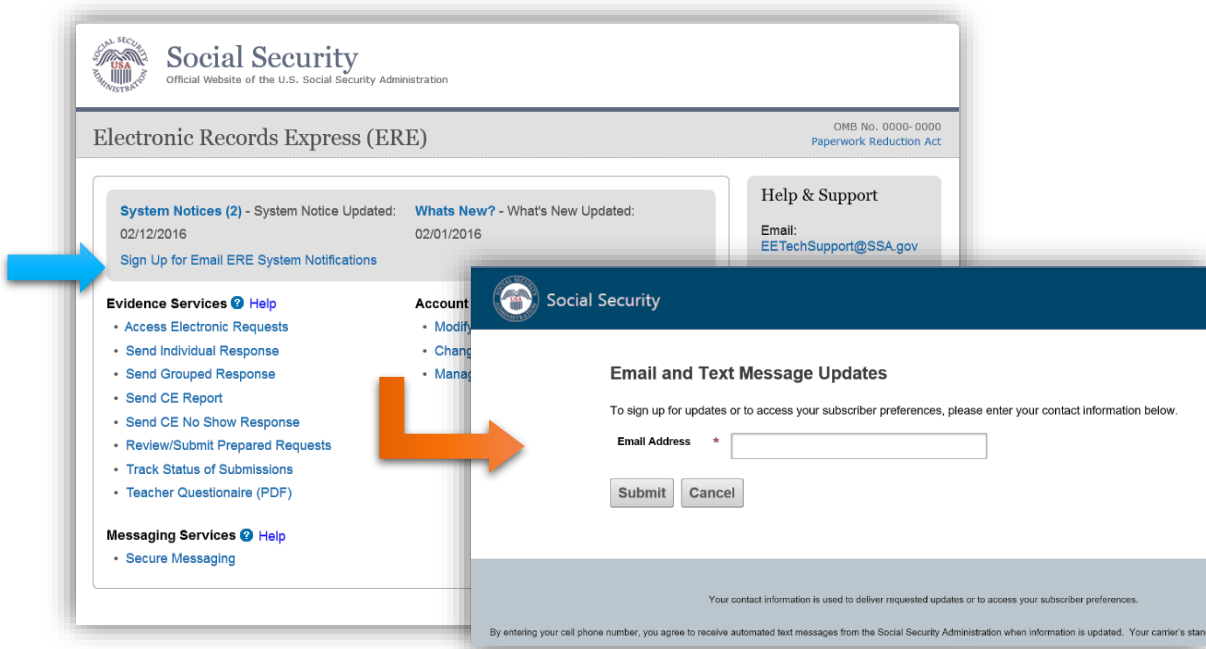
# Comprehensive Electronic Records Express

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## HOW TO GET IMPORTANT INFORMATION ABOUT ERE WEBSITE AVAILABILITY

You may subscribe to receive ERE website availability notifications through the GovDelivery services on the Social Security Administration's ERE internet website: [Social Security Online: Electronic Records Express](https://www.ssa.gov/ere). Please see the following website for *GovDelivery* FAQs: <https://subscriberhelp.govdelivery.com/hc/en-us>

To subscribe to the ERE website availability notification, follow these instructions:



- Click **“Sign Up for Email/Text ERE System Notifications”** on the ERE Homepage,
- Type your email address and select **Submit**
- Confirm your email address
- Select **“Send updates immediately by email.”**
- Choose an optional password
- Select **Submit**
- **You will receive a “Success” confirmation.**
- Select **Close** to exit.

**\*\***Once you have subscribed, you will receive a *Subscription Acknowledgement* e-mail with instructions on how to update your user profile **\*\***

## TIMING OUT / AVOIDING USER ERRORS

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### Timing Out

The website will time out after 30 minutes of inactivity. After 2 hours, the website will log you out and you must re-senter your User ID and Password to continue.

### Avoiding User Errors

Errors can occur for many reasons. The following list briefly explains some common ERE website user errors:

- Bookmarking the Confirmation page – **Never bookmark pages within the ERE website.**
- Once you have submitted documents by selecting the **Submit** button, you should NOT use the **Back** button or close your Internet browser file until you receive the Confirmation page.

### ERE Electronic File Format Option:

The ERE website currently supports the following file formats:

|              |             |              |
|--------------|-------------|--------------|
| <b>.wpd</b>  | <b>.doc</b> | <b>.txt</b>  |
| <b>.pdf</b>  | <b>.xls</b> | <b>.docx</b> |
| <b>.tiff</b> | <b>.tif</b> | <b>.rtf</b>  |
| <b>.xlsx</b> |             |              |