

User Guide for Access Electronic Requests



Office of Disability Determinations


October 2017

Instructions for 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 **Home** page, under the **Evidence Functions** 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.

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

Electronic Records Express (ERE) OMB No. 0000-0000
[Paperwork Reduction Act](#)

System Notices (2) - System Notice Updated: 02/12/2016 [Sign Up for Email ERE System Notifications](#)

Whats New? - What's New Updated: 02/01/2016

Help & Support

Email: EETechSupport@SSA.gov

Call Us (toll free): 1-866-691-3061

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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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Social Security
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ERE: Access Electronic Requests

Request Type:
Open Requests

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Priority	Patient Name	SSN (Last 4)	Request Date	Appt Date	Appt Time	Location	Request Status	Payment Status	Payment Request
	Jones, Tom	1234	03/01/2016	03/07/2016	10:00 AM	TestingPlace	New	New	Need Report
	Norse, Nora	9765	02/20/2016	02/28/2016	3:00 PM	TestingPlace	New	New	Need Report
	Pratt, Paula	0464	02/01/2016	02/10/2016	11:00 AM	TestingPlace	Prepared	Prepared	Need Report
	Silver, Daniel	8521	02/12/2016	02/17/2016	3:30 PM	TestingPlace	Updated	Updated	Need Report
	Junior, Randy	2345	03/02/2016	03/07/2016	11:20 AM	TestingPlace	New	New	Need Report
	Klaus, Sharon	3456	03/03/2016	03/08/2016	11:20 AM	TestingPlace	New	New	Need Report
	Messick, Glenn	4567	01/29/2016	02/04/2016	11:20 AM	TestingPlace	Updated	Updated	Need Report
	Miller, Benjamin	5678	01/20/2016	01/28/2016	11:20 AM	TestingPlace	Updated	Updated	Need Report
	Miller, Matthew	4563	01/15/2016	01/20/2016	1:30 PM	TestingPlace	Prepared	Prepared	Need Report
	O'Hare, Ian	1438	12/27/2015	01/05/2016	9:30 AM	TestingPlace	Prepared	Prepared	Need Report
	Richards, Anne	3625	12/10/2015	12/21/2015	2:30 PM	TestingPlace	New	New	Need Report
	Twenty, Amy	5415	01/08/2016	01/13/2016	10:30 AM	TestingPlace	Updated	Updated	Need Report

[ERE Home](#)

Access Electronic Requests – Request Type

- This page allows a user to view 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** by 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,

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- 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.
- **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 from the Request Date.

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.

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View/Submit Request Details and File Upload

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ERE: View / Submit CE Request [User Resources](#)

Priority Request
Immediate response needed.

Patient Name: Jones, Tom
Patient DOB: 10/20/1979
Request Type: Consultative Exam
Request ID: 20140805172441_728066
Requesting Office: WI - Wisconsin DDS [S56]
Location: 1506 Woodlawn Dr., Baltimore, Md, 21045

Patient SSN: 111-22-1234
Provider Name: Mr Test test test
Request Date: 03/01/2016
Disability Examiner: testExaminer
CE App't Date & Time: 03/07/2016 10:00 AM

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
Request Letter	08/05/2014
Authorization To Disclose Information	08/05/2014
Supporting Documentation	08/05/2014

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Request Details

What's Changed:

Special Instructions:
Dev TEST 2 12.1

Documentation:

File Name	Date Added
Request Letter	12/31/2014
Authorization To Disclose Information	12/31/2014
Background MER	12/31/2014
Supporting Documentation	12/31/2014

Request Response

Was a Consultative Exam performed?
 Yes No

Attach and Upload Files

- A maximum of 10 files can be added and all files must total less than 50MB.
- File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .bt, .xls, .xlsx, .pdf, .rtf, .tif, .tiff
- Please do not upload password-protected files because they cannot be processed.

Document Type:
--

File 1: No file chosen

Additional Information

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

Characters remaining: 16000

Consultative Examination Authorization Agreement

Please read this statement and indicate your agreement by checking the "I have read and agree to the above" checkbox. 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.

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.

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.

- 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 10 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 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.

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Important Note

It is against SSA policy for a user to delegate the uploading of their Consultative Examination 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**).

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Step 3a - Confirmation (Site does not do fiscal)

Sam Angulara | [Sign Out](#)
Text Size ▼ | [Accessibility Help](#)



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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.

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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
Total File Size:	56 KB

Additional Information

Comments: **No comments added**

You have electronically signed.

[Review Another Request](#)


[ERE Home](#)

Local intranet | Protected Mode: Off
 100%

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.

Step 3b - Confirmation (Site does fiscal)

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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
Total File Size:	56 KB

Additional Information

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

[Review Another Request](#)

[Submit Payment Request](#)

[ERE Home](#)

Local intranet | Protected Mode: Off 100%

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Step 4—Confirmation

After the submission uploads, Electronic Records Express 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 the Electronic Records Express Website Help Desk at EETechSupport@ssa.gov or 1-866-691-3061.
- 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.

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How to Get Important Information about Electronic Records Express Website Availability

You may subscribe to receive ERE website availability notifications through the GovDelivery services on the Social Security Administration's Electronic Records Express internet website: [Social Security Online: Electronic Records Express](#). 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:

1. Click "**Sign Up for Email/Text ERE System Notifications**" on the Electronic Records Express Home Page,
2. Type your email address and select **Submit**
3. Confirm your email address
4. Select "Send updates immediately by email."
5. Choose an optional password
6. Select **Submit**
 - a. **You will receive a "Success" confirmation.**
7. 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****

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