Medical and Vocational Expert User Guide

ERE for Experts: Get Status Report

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Overview

This guide provides Medical and Vocational Experts (ME/VEs) with instructions for accessing status reports. Status reports contain the full SSNs of the claimants assigned to the expert. The SSNs are required for accessing electronic folder (eFolder) documents. The reports also include scheduling information, itinerary due dates, and other information experts can use to manage their workload.

A Note for Companies

In the June 23, 2018 release of ERE for Experts, access was expanded to experts that work for companies. Companies are required to provide the names and SSNs of the experts providing medical and vocational expert services to SSA. The names and SSNs are added to the company's record in SSA's case processing system. When a company is scheduled to a case, all experts working for that company with ERE for Expert accounts will have access to the eFolder. Company experts accessing the status reports will have access to all cases assigned to the company. SSA schedules the company and not the individual expert. Therefore SSA does not have the ability to limit case access to specific company experts. It is the responsibility of the company to ensure claimant Personally Identifying Information (PII) is handled appropriately. Please refer to your Blanket Purchase Agreement (BPA) or Contract for information on handling PII.

When an expert gives notice to the company, the company must notify the Contracting Officer Representative (COR) prior to the expert's final day at the company. If an expert is terminated or quits effective immediately, the company has 1 business day from termination to notify the Contracting Officer Representative (COR). The COR will remove the expert from the company's record in SSA's case processing system. Once this action is completed the expert will no longer have access to any eFolders or status report information.

ERE for Experts Home

If you are not already logged into ERE for Experts, you must sign in using the specialized link https://secure.ssa.gov/ERECA/MEVE01View.

On the ERE home page, select the ***Get Status Reports*** link under ***Electronic Folder Services***.

Get Status Report Options

There are two options for obtaining a status report.

- ***Get Hearing Office Status Report*** – when selected will pull case information from Office of Hearing Operation case processing system.
- ***Get Appeals Council Status Report*** – when seleted will pull case information from the Appeals Coucil case processing system.

Status Report Options

There are three options for viewing status reports.

- ***Search for Individual Case*** – enter the SSN of a single claimant to quickly obtain key case information (claimant full name, hearing office with jurisdiction, hearing scheduled date/time, interrogatory due date, and ALJ name)
- ***View all cases*** – view key case information (claimant full name, hearing office with jurisdiction, hearing scheduled date/time, interrogatory due date, and ALJ name) for all assigned cases. If you have more than 100 cases, the oldest 100 will be displayed.
- ***Download***- download a spreadsheet with detailed case information for all assigned cases.

Search for Individual Case

Enter the SSN of a single claimant to quickly obtain key case information (claimant full name, hearing office with jurisdiction, hearing scheduled date/time, interrogatory due date, and ALJ name)

Hearing Office:

Appeals Council:

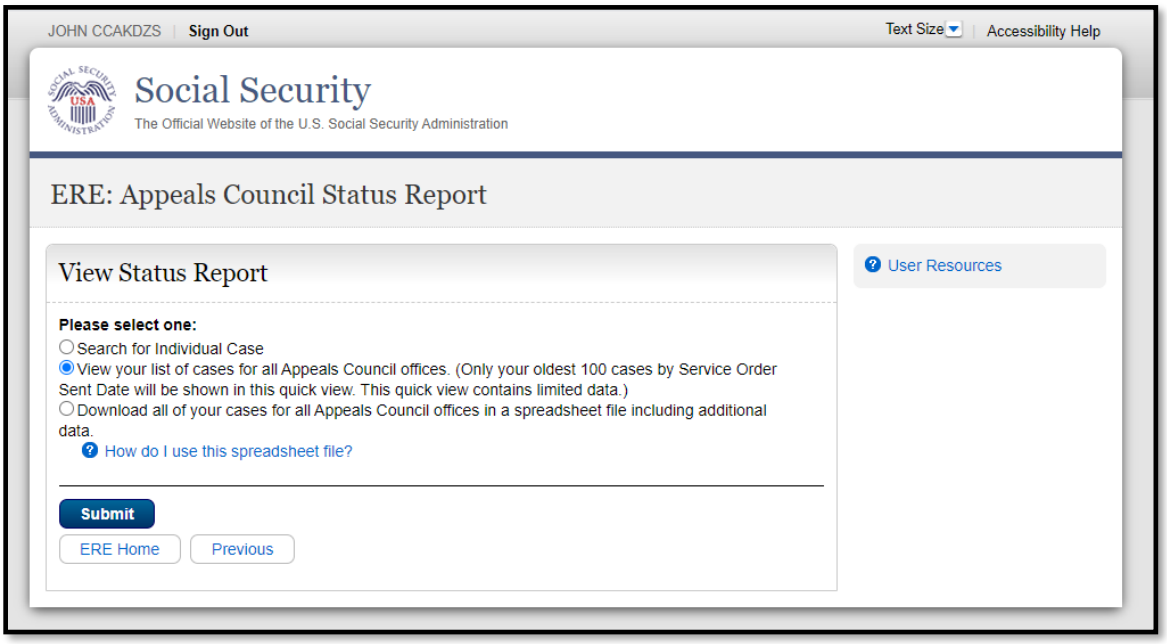
View All Cases

Hearing Office - View key case information (claimant full name, hearing office with jurisdiction, hearing scheduled date/time, interrogatory due date, and ALJ name) for all assigned cases. If you have more than 100 cases, the oldest 100 will be displayed.

Interrogatories will display at the top of the list, followed by scheduled hearings.

Hearing Office:

Appeals Council - View key case information (claimant full name, claimant SSN and Service Order Sent Date) for all assigned cases. If you have more than 100 cases, the oldest 100 will be displayed.



Download

Download a spreadsheet with detailed case information for all assigned cases.

Hearing Office:

Select "Open" to open the file in Excel or other spreadsheet software. Select "Save" to save the document to your computer.

The spreadsheet will contain the following information for all assigned cases:

- Contract Number: The Blanket Purchase Agreement (BPA) or Contract Number
- Claimant Last Name
- Claimant First Name
- Claimant Middle Name
- Claimant SSN: The full SSN of the claimant necessary for accessing eFolders.
- Hearing Office with Jurisdiction
- Interrogatory Due Date: If an interrogatory has been assigned, the due date will be listed. The spreadsheet will be sorted so interrogatories are at the top, followed by Planned Hearing Scheduled Date.
- Planned Hearing Scheduled Date: When a hearing has been scheduled, the hearing date will be listed.
- Planned Hearing Scheduled Time: When a hearing has been scheduled, the hearing time will be listed.
- Date of Expert Access: Access to a case is provided 30 days prior to the Planned Hearing; for Interrogatory, once case is assignd to the expert.
- Medical Expert Location: The location of the medical expert providing expert testimony. If proving testimony by phone, the field will say "Expert Location".
- Vocational Expert Location: The location of the vocational providing expert testimony. If proving testimony by phone, the field will say "Expert Location".

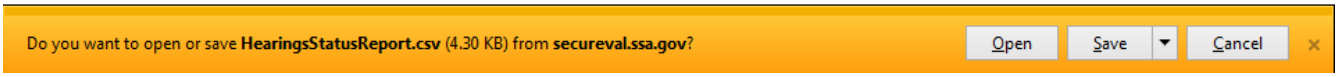
- Claimant Location
- ALJ Last Name
- ALJ First Name
- ALJ Location
- Electronic Folder: indicates of whether it is a fully electronic case (Y) or if it is a paper case (N)
- Data Source: list whether it is an HACPS case or CPMS case
- Comments

Demo Expert Status Report.xlsx

When the report is opened the columns will be compressed. Select all and expand the columns to fit the text by double-clicking between the columns when they are selected.

Appeals Council:

Select "Open" to open the file in Excel or other spreadsheet software. Select "Save" to save the document to your computer.



The spreadsheet will contain the following information for all assigned cases:

- Claimant Last Name
- Claimant First Name
- Claimant Middle Name
- Claimant SSN
- Service Order Sent Date

Appeals Council Status Report.xlsx