User Guide for Pickup Provider's Transcription Reports

Office of Disability Determinations

October 2011

Electronic Records Express Website
Consultative Examination (CE) Services

Instructions for Pickup Provider's Transcription Reports

Pickup Provider's Transcription Reports is part of the "CE Administrative Staff Upload" feature. This allows a Provider to delegate the gathering and preparing of a CE submission to administrative staff. If the transcriptionist uploads the report to the **Electronic Records Express** website, this link allows a Provider's administrative staff to directly download the transcribed reports from the Provider's website Inbox.

The **Pickup Provider's Transcription Reports** link will only display once the CE administrative staff has been registered to use this function.

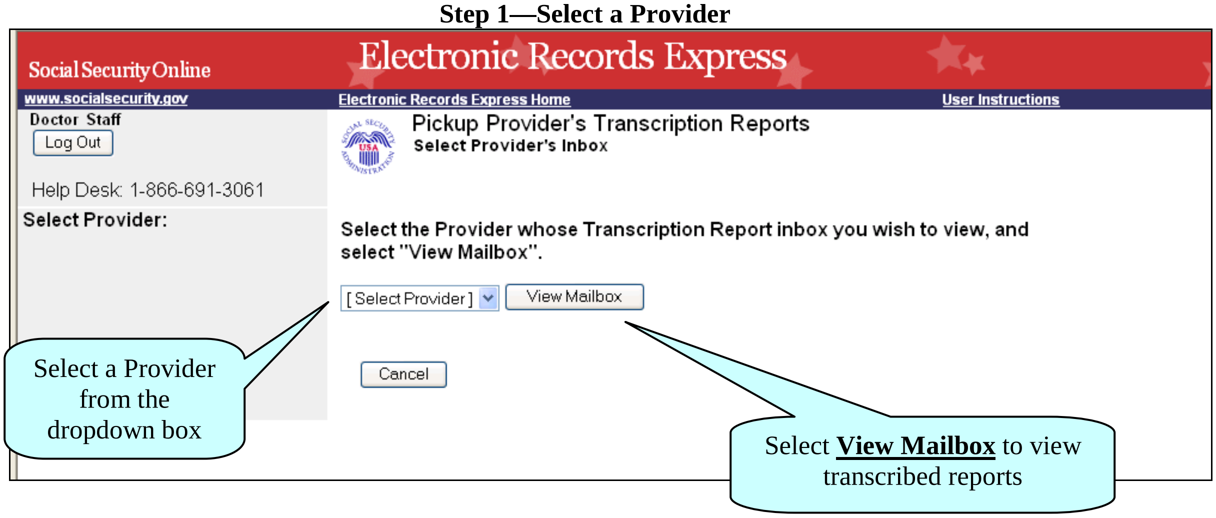
Please contact your [Medical/Professional Relations Officer]() if you are interested in having this function available to you.

Start the process by logging into the Electronic Records Express website using your username and password. Select the link, **Pickup Provider's Transcription Reports** under the **Consultative Examination (CE) Services** heading.

Electronic Records Express Home—Pickup Provider's Transcription Reports

Instructions for Pickup Provider's Transcription Reports

Step 1—Select a Provider

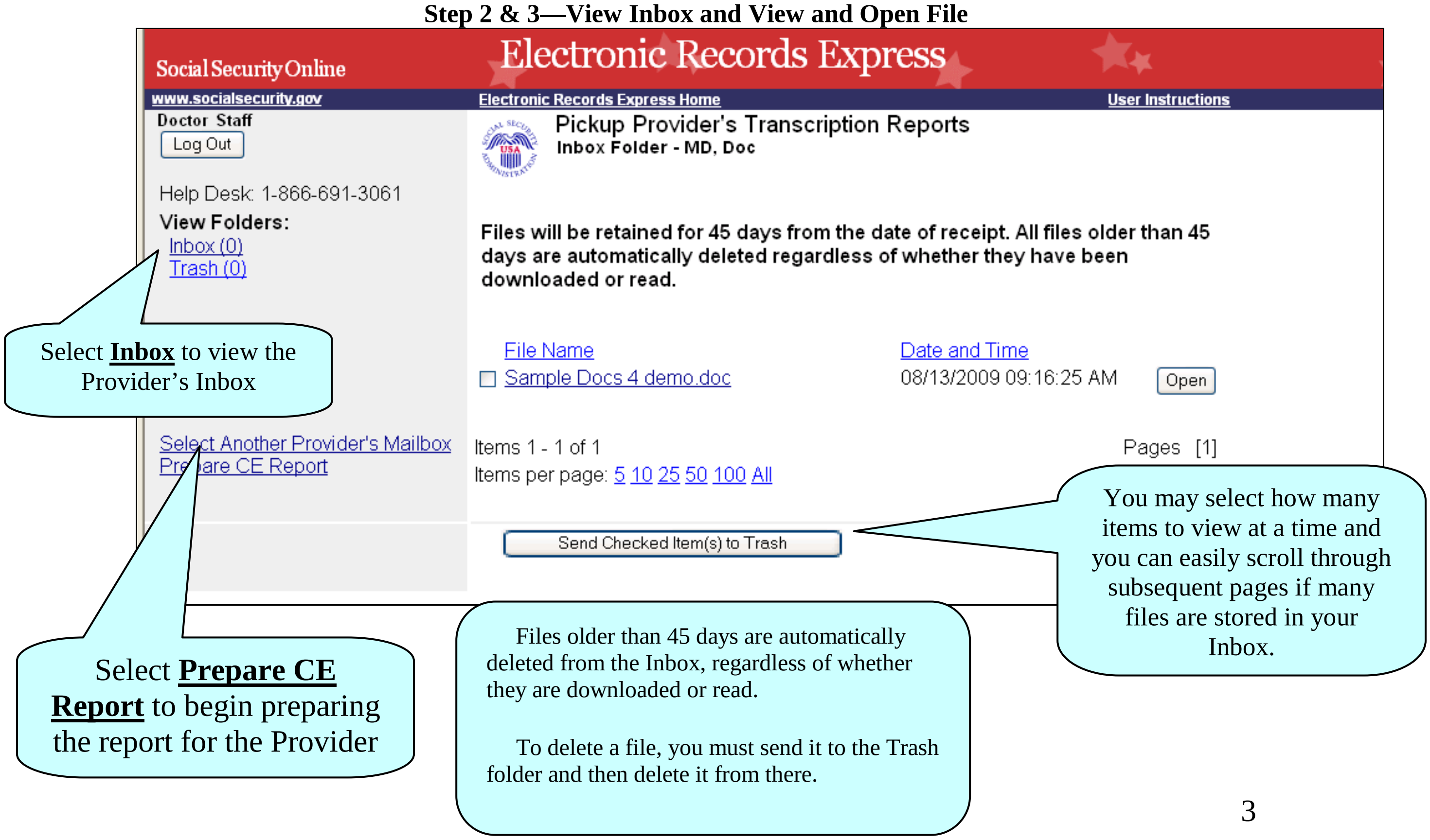


Step 1—Select a Provider

- Select a Provider from the dropdown box. *Only CE Providers associated with the username will display in the drop down list.*
- Select the **View Mailbox** button.

If you do not wish to continue with the transaction and you want to return to the **Home** page, select the **Cancel** button.

Step 2 & 3—View Inbox and View and Open File



Step 2—View Inbox

- To view the Provider’s inbox, select **Inbox** under the **View Folders:** heading.

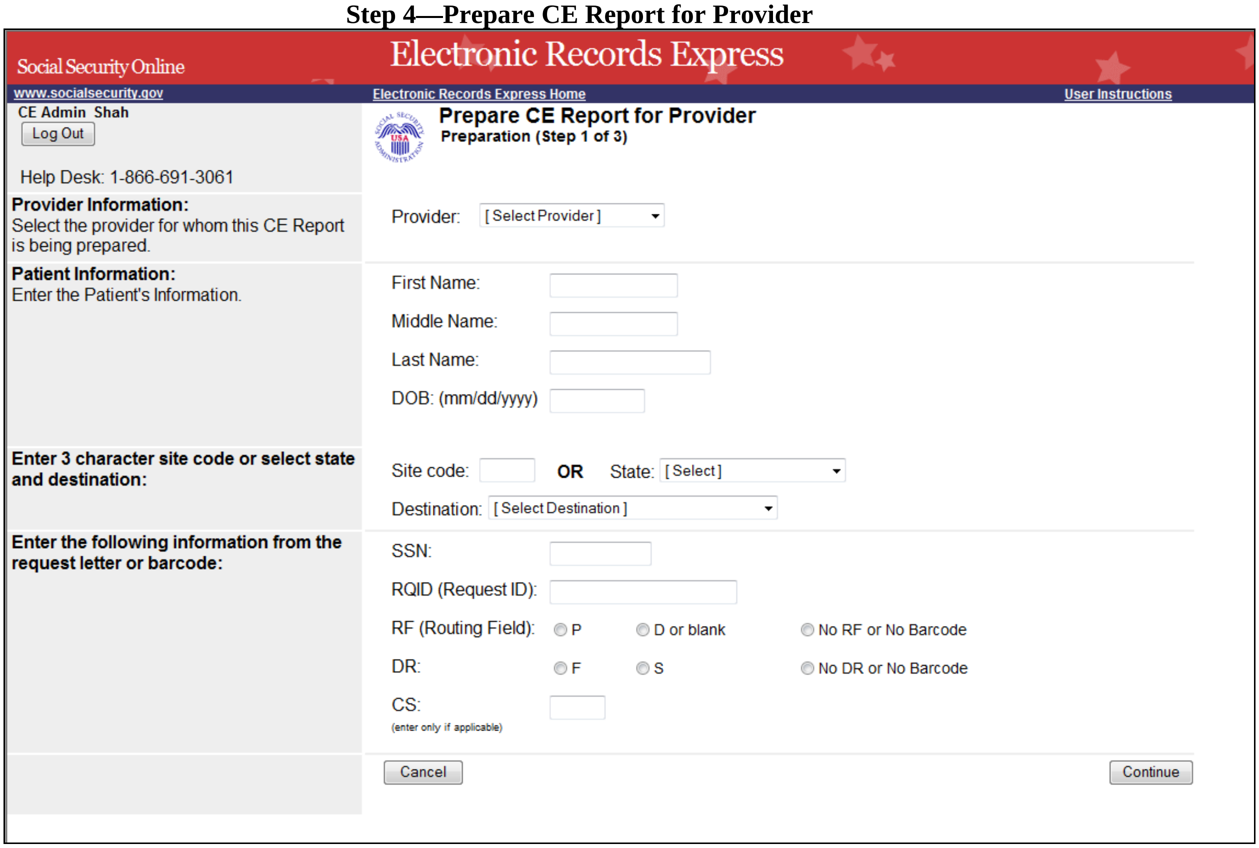
Step 3—View and Open File

- To view a file, select the file name you wish to view under the **File Name** heading or use the **Open** button. You may be prompted to either open or save the file.

- Open or save, as necessary

- Select **Prepare CE Report**.

Step 4—Prepare CE Report for Provider



Step 4—Prepare CE Report for Provider

- Select the appropriate **Provider** from the dropdown box.

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

- Enter the **DOB** (Date of Birth) of the patient.

- Select the DDS **Destination** from the dropdown list.

- Enter the Social Security Number (**SSN**). *Only files for one SSN can be sent with this transaction.*

- Enter the Request ID (**RQID**).

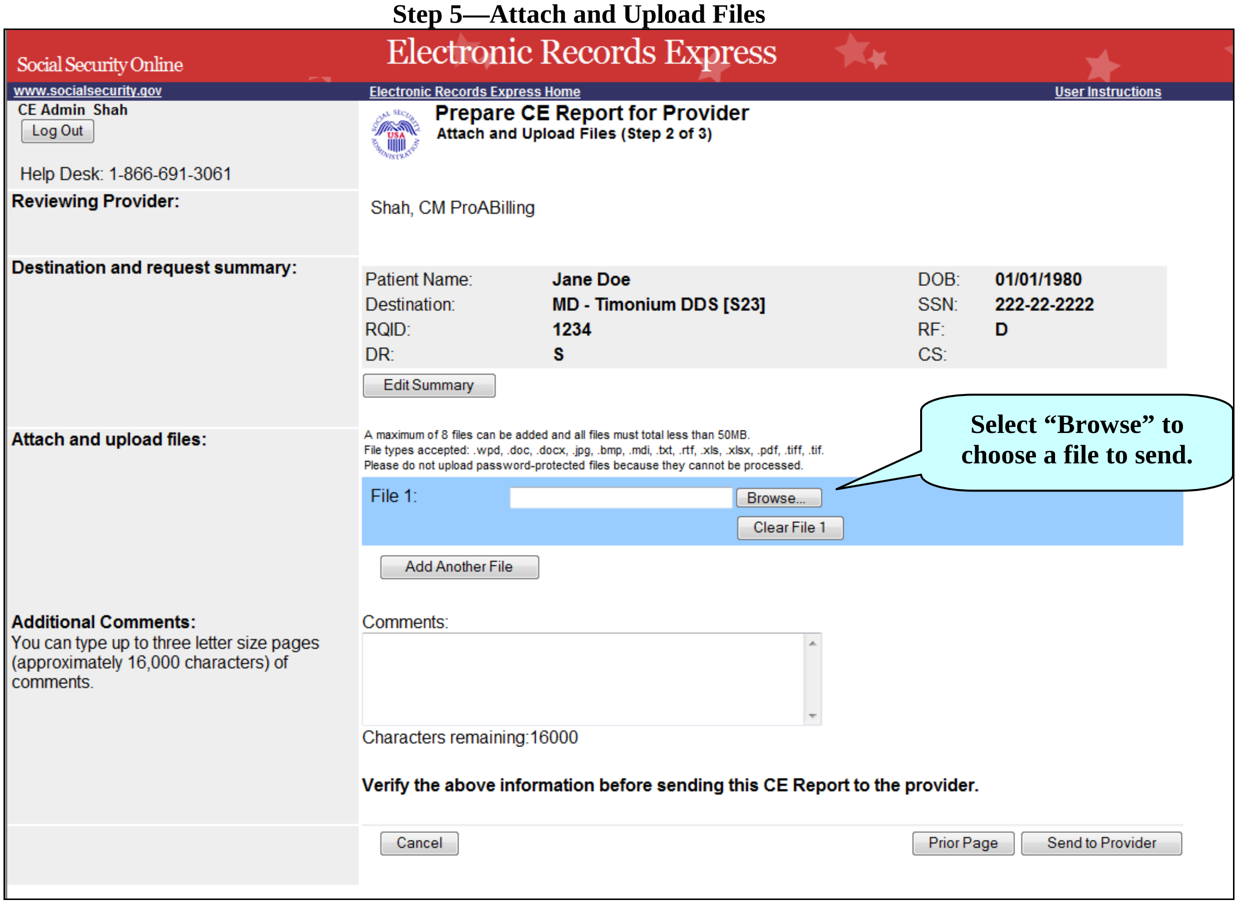
- Select the appropriate **RF** (Routing Field) option or **No RF or No Barcode** if not displayed on the request letter.

- 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 **Continue** to continue this transaction or the **Cancel** button to cancel the transaction.

Step 5—Attach and Upload Files

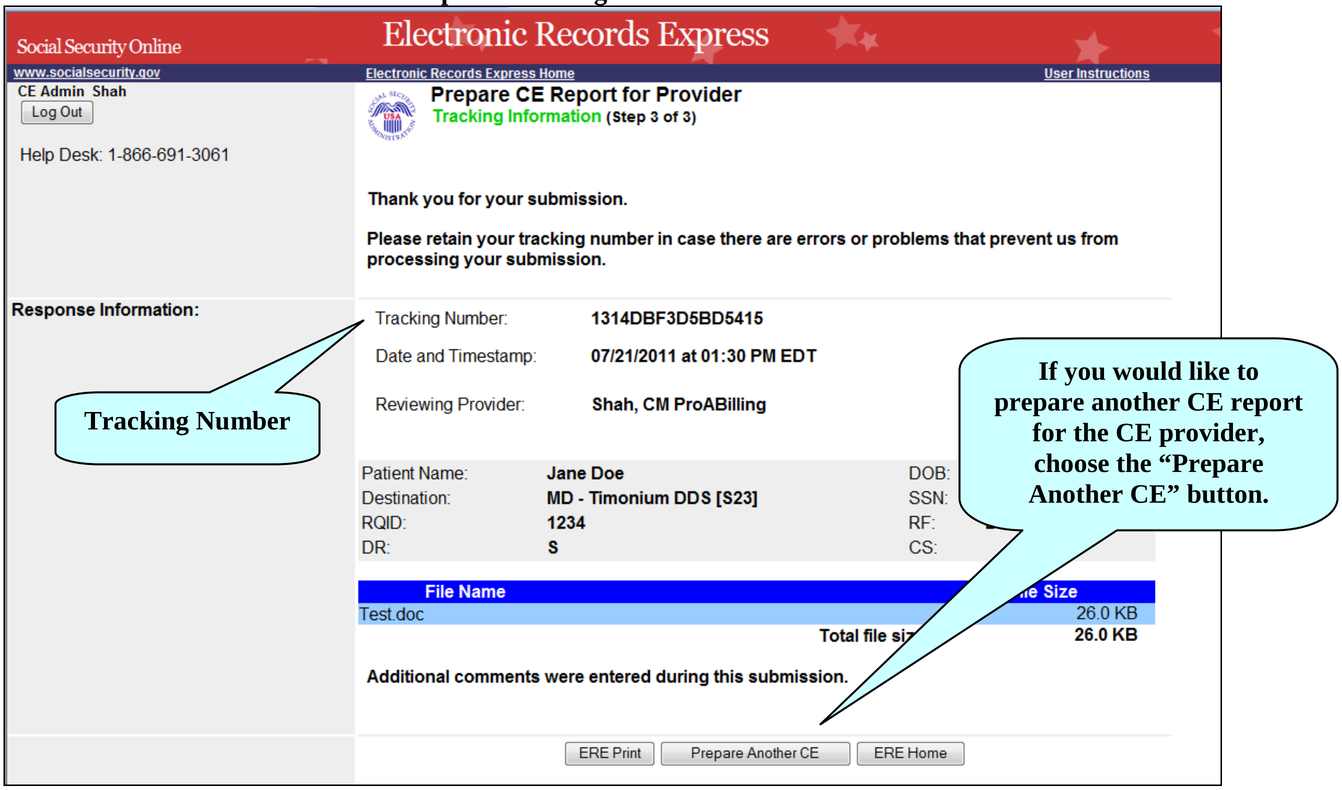


Step 5—Attach and Upload Files

- Review the **Destination and request summary** information. If changes are necessary, select the **Edit Summary** button.
- Select the **Browse** button to choose a file to send. (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 **Electronic Records Express** website displays the file name in the box to the left of the **Browse…** button.
- Select the **Add Another File** button to send additional files. *Only files for the SSN in Step 1 may be sent with this transaction.*
- 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. a count of remaining characters is shown beneath the box. The count of remaining characters shows beneath the box.
- Verify the information you provided.
- Select the **Send to Provider** button to send the report to the Provider. Your file will be delivered to the Provider's Electronic Records Express inbox and an email will alert him or her of the delivery.
- If you would like to return to the previous page, select the **Prior Page** button.

Select the **Cancel** button if you wish to cancel the transaction and return to the homepage.

Step 6 – Tracking Information



Step 6 – Tracking Information

- After your submission uploads, Electronic Records Express provides a **Tracking Information** page. The **Tracking Information** page provides a tracking number for you to keep and use if you want to check on the status of your submission. The **Tracking Information** page indicates the specific files and/or comments that you transmitted.

- If you do not receive the **Tracking Information** 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

  If you have additional CE reports to send, select **Prepare Another CE**. If you would like to return to the ERE Home page. select the **ERE Home** button.

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

Instructions to Move File To Trash

Step 1—Move File to Trash

From the Provider's Transcription Report Mailbox:

- Check the box(es) next to the **File Name** of the file(s) you want to add to **Trash.**
- Select **Send Checked Item(s) to Trash**.

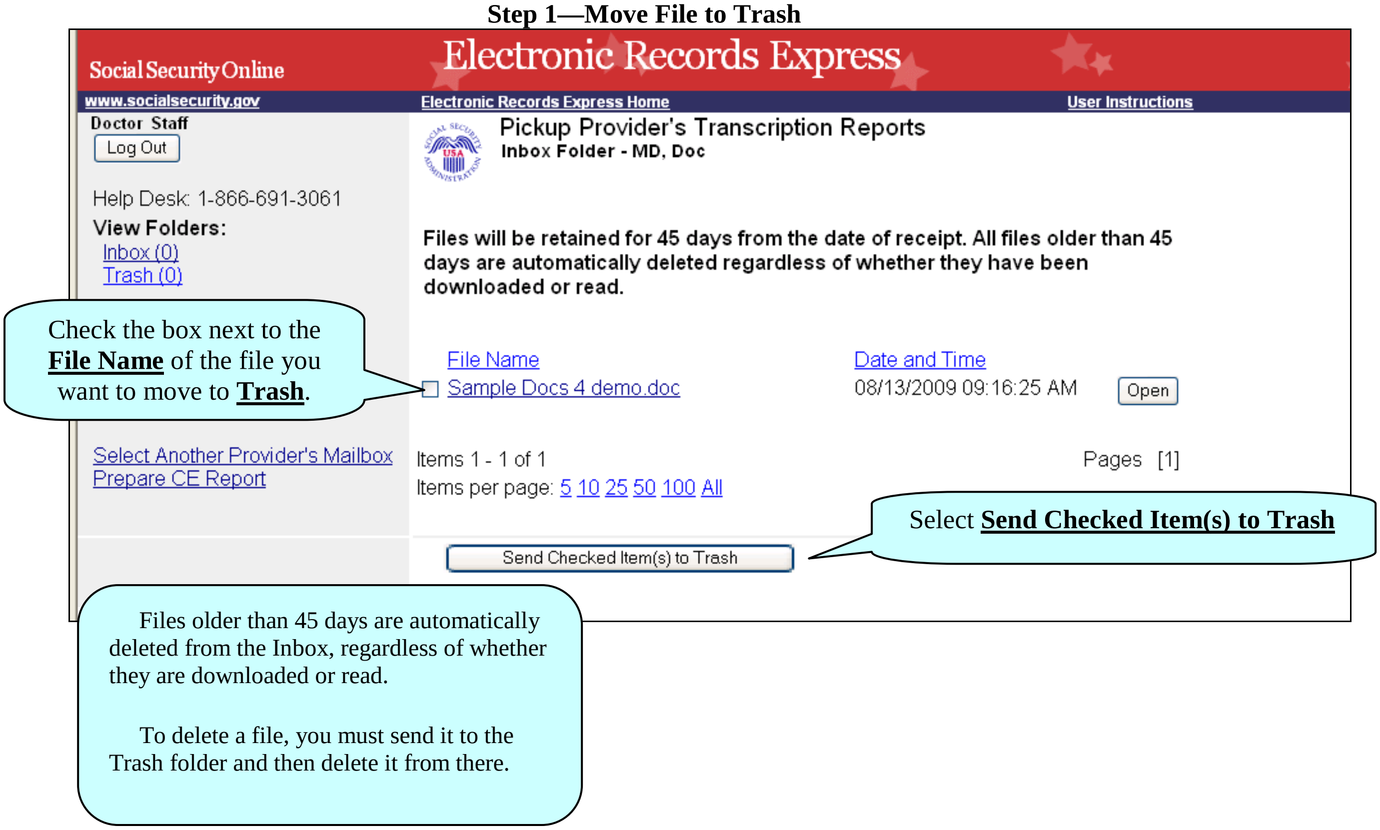
Step 2—View Items in Trash

- Select **Trash** under the **View Folders** heading.

Step 3—View and Open File

- Continue from Step 3 above, **Prepare Transcription Report for Provider**

Step 1—Move File to Trash



Access Keys

This application contains access keys to improve navigation and provide information. You will find a list of these keys in the table below:

Button	Access Key
Cancel	n
Delete Checked Item(s)	l
Log Out	l
Restore Checked Item(s)	r
Send Checked Item(s) to Trash	s
View Mailbox	x

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" button on your keyboard and the access key simultaneously

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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://service.govdelivery.com/service/help.html#general1*

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

- Click Get important information about Electronic Records Express website availability.
- Type your email address and select **Go**
- Confirm your email address
- Select "Send updates immediately by e-mail."
- Choose an optional password
- Select **Save**
- Select **Next**
- Subscribe to additional topics by checking the boxes or unsubscribe by un-checking the boxes
- Select **Save**
- Subscribe to topics from other agencies by checking the boxes or unsubscribe by un-checking the boxes
- Select **Save**

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