

User Guide for Pickup Provider's Transcription Reports



Office of Disability Determinations

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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

The screenshot displays the 'Electronic Records Express Home' page. At the top, there is a red header with 'Social Security Online' and 'Electronic Records Express'. Below this is a navigation bar with 'www.socialsecurity.gov', 'Frequently Asked Questions', and 'User Instructions'. The main content area is divided into several sections:

- Left Sidebar:** Displays user information for 'John Public' (John.Public@ssa.gov, (410)3456789) with a 'Log Out' button. Below this are links for 'FAQ's', 'User Instructions', and 'From here you can also:' followed by 'Modify your account information' and 'Change your password'.
- Center Content:** Features the 'Electronic Records Express Home' title and a 'Welcome to Electronic Records Express' message. It lists three main service categories:
 - Consultative Examination (CE) Services:** Includes a link for 'Pickup Provider's Transcription Reports' (highlighted with a black arrow), 'Prepare CE Report for Provider', 'Send CE Report(s) with Scanned Signature', and 'Send CE No Show Response'.
 - Document Exchange Services:** Includes 'Access Provider's Electronic Requests', 'Send Transcription Report To Provider', 'Pickup Transcription Reports', 'Teacher Questionnaire', and 'Track Status of Submissions'.
 - Communication Services:** Includes 'Secure Messaging: Home Inbox'.
- Right Sidebar:** Contains a 'Bulletin Board' section updated on 07/07/2010, with a 'What's New?' link and a message about getting important information about Electronic Records Express availability via email or toll-free call (1-866-691-3061).

Instructions for Pickup Provider's Transcription Reports

Step 1—Select a Provider

Social Security Online
www.socialsecurity.gov
Electronic Records Express Home
User Instructions

Doctor Staff
Log Out
Help Desk: 1-866-691-3061

Select Provider:

Select the Provider whose Transcription Report inbox you wish to view, and select "View Mailbox".

[Select Provider] View Mailbox

Cancel

Select a Provider from the dropdown box

Select **View Mailbox** to view transcribed reports

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

Social Security Online
www.socialsecurity.gov
Electronic Records Express Home
User Instructions

Doctor Staff
Log Out
Help Desk: 1-866-691-3061

View Folders:
[Inbox \(0\)](#)
[Trash \(0\)](#)

Select **Inbox** to view the Provider's Inbox

Select **Prepare CE Report** to begin preparing the report for the Provider

Select Another Provider's Mailbox
Prepare CE Report

Pickup Provider's Transcription Reports
Inbox Folder - MD, Doc

Files will be retained for 45 days from the date of receipt. All files older than 45 days are automatically deleted regardless of whether they have been downloaded or read.

File Name	Date and Time	
<input type="checkbox"/> Sample Docs 4 demo.doc	08/13/2009 09:16:25 AM	<input type="button" value="Open"/>

Items 1 - 1 of 1
Items per page: [5](#) [10](#) [25](#) [50](#) [100](#) [All](#)

Pages [1]

You may select how many items to view at a time and you can easily scroll through subsequent pages if many files are stored in your Inbox.

Files older than 45 days are automatically deleted from the Inbox, regardless of whether they are downloaded or read.

To delete a file, you must send it to the Trash folder and then delete it from there.

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

Social Security Online
www.socialsecurity.gov
Electronic Records Express Home
User Instructions

CE Admin Shah
Log Out

Help Desk: 1-866-691-3061

Provider Information:
Select the provider for whom this CE Report is being prepared.

Provider: [Select Provider]

Patient Information:
Enter the Patient's Information.

First Name: []
Middle Name: []
Last Name: []
DOB: (mm/dd/yyyy) []

Enter 3 character site code or select state and destination:

Site code: [] OR State: [Select]
Destination: [Select Destination]

Enter the following information from the request letter or barcode:

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: []
(enter only if applicable)

Cancel Continue

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

Social Security Online
Electronic Records Express

www.socialsecurity.gov
Electronic Records Express Home
User Instructions

CE Admin Shah

Help Desk: 1-866-691-3061

Reviewing Provider:

Shah, CM ProABilling

Destination and request summary:

Prepare CE Report for Provider
Attach and Upload Files (Step 2 of 3)

Patient Name:	Jane Doe	DOB:	01/01/1980
Destination:	MD - Timonium DDS [S23]	SSN:	222-22-2222
RQID:	1234	RF:	D
DR:	S	CS:	

Attach and upload files:

A maximum of 8 files can be added and all files must total less than 50MB.
File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .mdi, .bt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
Please do not upload password-protected files because they cannot be processed.

File 1:

Additional Comments:
You can type up to three letter size pages (approximately 16,000 characters) of comments.

Comments:

Characters remaining: 16000

Verify the above information before sending this CE Report to the provider.

Select "Browse" to choose a file to send.

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

Social Security Online
www.socialsecurity.gov

Electronic Records Express Home

User Instructions

CE Admin Shah
Log Out

Help Desk: 1-866-691-3061

Prepare CE Report for Provider
Tracking Information (Step 3 of 3)

Thank you for your submission.

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

Response Information:

Tracking Number: 1314DBF3D5BD5415

Date and Timestamp: 07/21/2011 at 01:30 PM EDT

Reviewing Provider: Shah, CM ProABilling

Patient Name: Jane Doe DOB: [REDACTED]
Destination: MD - Timonium DDS [S23] SSN: [REDACTED]
RQID: 1234 RF: [REDACTED]
DR: S CS: [REDACTED]

File Name	File Size
Test.doc	26.0 KB
Total file size: 26.0 KB	

Additional comments were entered during this submission.

ERE Print Prepare Another CE ERE Home

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

The screenshot displays the 'Electronic Records Express' interface. The header includes 'Social Security Online', 'www.socialsecurity.gov', 'Electronic Records Express Home', and 'User Instructions'. The main content area is titled 'Pickup Provider's Transcription Reports' and 'Inbox Folder - MD, Doc'. It contains a table with columns for 'File Name', 'Date and Time', and an 'Open' button. A single file is listed: 'Sample Docs 4 demo.doc' with a date of '08/13/2009 09:16:25 AM'. Below the table, there are links for 'Select Another Provider's Mailbox' and 'Prepare CE Report', and a 'Send Checked Item(s) to Trash' button. A callout box on the left points to the checkbox next to the file name, stating: 'Check the box next to the **File Name** of the file you want to move to **Trash**.' A callout box on the right points to the 'Send Checked Item(s) to Trash' button, stating: 'Select **Send Checked Item(s) to Trash**'. A callout box at the bottom left states: 'Files older than 45 days are automatically deleted from the Inbox, regardless of whether they are downloaded or read. To delete a file, you must send it to the Trash folder and then delete it from there.'

Check the box next to the **File Name of the file you want to move to **Trash**.**

File Name	Date and Time	Open
<input type="checkbox"/> Sample Docs 4 demo.doc	08/13/2009 09:16:25 AM	Open

Select **Send Checked Item(s) to Trash**

Files older than 45 days are automatically deleted from the Inbox, regardless of whether they are downloaded or read.

To delete a file, you must send it to the Trash folder and then delete it from there.

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****