

User Guide for Prepare CE Report for Provider



Office of Disability Determinations

October 2011

Electronic Records Express Website Consultative Examination (CE) Services

Instructions for Prepare CE Report for Provider

The **Prepare CE Report for Provider** link 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.

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.

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

Electronic Records Express Home—Prepare CE Report for Provider

Consultative Examination (CE) Services
[Pickup Provider's Transcription Reports](#)
[Prepare CE Report for Provider](#)
[Send CE Report\(s\) with Scanned Signature](#)
[Send CE No Show Response](#)

Document Exchange Services
[Access Provider's Electronic Requests](#)
[Send Transcription Report To Provider](#)
[Pickup Transcription Reports](#)
[Teacher Questionnaire](#)
[Track Status of Submissions](#)

Communication Services
Secure Messaging: [Home](#) [Inbox](#)

Bulletin Board
Updated 07/07/2010
[What's New?](#)
 [Get important information about Electronic Records Express availability.](#)
[Email for more information](#) or call toll free:
1-866-691-3061

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. On the **Electronic Records Express Home** page, select the link, **Prepare CE Report for Provider**, under the **Consultative Examination (CE) Services** heading.

If you received an electronic CE request, you can find the request under the **Access Provider's Electronic Requests** link. Selecting this link brings you to the **View Provider's electronic Requests – Open Requests** page and you need to [**Select Provider**]. After selecting the provider, select the **View Provider's Electronic Records** button to see a list of the open

electronic requests. Select the **View Request** link in the list to proceed to the **Electronic Request Details** page. On the bottom of this page is the button, **Prepare CE Report for Provider**. Selecting this button provides the ability to attach and upload files to the response. .

Step 1—Prepare CE Report for Provider

The screenshot shows the 'Prepare CE Report for Provider' form. On the left, there is a sidebar with 'CE Admin Shah', a 'Log Out' button, and a 'Help Desk' number. The main form area has a title bar with 'Electronic Records Express Home' and 'User Instructions'. The form title is 'Prepare CE Report for Provider' with a subtitle 'Preparation (Step 1 of 3)'. A callout box points to the 'Provider' dropdown menu. The form fields include: 'Provider' (dropdown), 'First Name', 'Middle Name', 'Last Name', 'DOB: (mm/dd/yyyy)', 'Site code' and 'State' (dropdown), 'Destination' (dropdown), 'SSN', 'RQID (Request ID)', 'RF (Routing Field)' with radio buttons for 'P', 'D or blank', and 'No RF or No Barcode', 'DR' with radio buttons for 'F', 'S', and 'No DR or No Barcode', and 'CS' (with a note 'enter only if applicable'). At the bottom are 'Cancel' and 'Continue' buttons.

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.
- Select the DDS **Destination** from the dropdown menu.
- 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 2—Attach and Upload Files

Social Security Online
Electronic Records Express

www.socialsecurity.gov
Electronic Records Express Home
User Instructions

CE Admin Shah
[Log Out](#)

Help Desk: 1-866-691-3061

Reviewing Provider: Shah, CM ProABilling

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

Destination and request summary:

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

[Edit Summary](#)

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, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
Please do not upload password-protected files because they cannot be processed.

File 1: [Browse...](#) [Clear File 1](#)

[Add Another File](#)

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.

[Cancel](#)
[Prior Page](#)
[Send to Provider](#)

Select Browse to choose a file to send.

Step 2—Attach and Upload Files

- Review the **Destination and request summary** information. Make any changes by selecting 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.*

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 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 count of remaining characters shows beneath the box.
- Verify the information you have input.
- Select the Send to Provider button to send the report to the Provider. Your file is sent 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 Electronic Records Express Home page.

Step 3 – 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:	01/01/1980
Destination:	MD - Timonium DDS [S23]	SSN:	222-22-2222
RQID:	1234	RF:	D
DR:	S	CS:	

File Name	Total file size:
Test.doc	

Additional comments were entered during this submission.

ERE Print Prepare Another CE ERE Home

Tracking Number

If you would like to prepare another CE report for the CE provider, choose the "Prepare Another CE"

Step 3 – Tracking Information

- Electronic Records Express generates a **Tracking Information** page after you submit your transaction. This page contains a Tracking number that you can use to check the status of your submission. The **Tracking Information** page displays the **File Name** of your uploaded files.
- If you do not receive the **Tracking Information** page, please 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 prepare, select **Prepare Another CE**. If you would like to return to the **Electronic Records Express 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.

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
Add Another File	2 – 8 (number corresponds to the file to be added)
Cancel	n
Continue	c
Edit Summary	w
ERE Home	h
ERE Print	p
Log Out	l
Prepare Another CE	r
Prepare Payment Request	p
Prior Page	p
Send to Provider	s


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.

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****