

User Guide for Review/Submit Prepared Requests



Office of Disability Determinations

October 2011

Consultative Examination (CE) Services

Instructions for Review/Submit Prepared Requests

This link allows CE providers to review and submit requests prepared by administrative staff.

Please note that you are responsible for information submitted on the Electronic Records Express (ERE) website when using your ERE User ID and password. You should never share your ERE User ID or password with others.

The **Review/Submit Prepared Requests** link displays on the **Electronic Records Express Home** page when the CE provider registers to use this function.

Start by logging into Electronic Records Express using your username and password. Select the link, **Review/Submit Prepared Requests** under the **Consultative Examination (CE) Services** heading.

Electronic Records Express Home—Review/Submit Prepared Requests

Screenshot of the Electronic Records Express Home page. The page features a red header with "Social Security Online" and "Electronic Records Express". Below the header is a navigation bar with "www.socialsecurity.gov", "Frequently Asked Questions", and "User Instructions". The main content area is divided into three columns. The left column shows user information for "John Public" and links for "FAQ's" and "User Instructions". The middle column is titled "Electronic Records Express Home" and contains three sections: "Evidence Submission Services" with links for "Send Response for Individual Case" and "Send Grouped Files"; "Consultative Examination (CE) Services" with links for "Review/Submit Prepared Requests", "Send CE Report", and "Send CE No Show Response"; and "Document Exchange Services" with links for "Access Electronic Requests", "Pickup Transcription Reports", "Teacher Questionnaire", and "Track Status of Submissions". The right column is titled "Bulletin Board" and shows an update from 08/22/2010 with links for "What's New?", "Get important information about Electronic Records Express availability", and "Email for more information". A red arrow points to the "Review/Submit Prepared Requests" link in the middle column.

You will see the page shown below after selecting the **Review/Submit Prepared Requests** link. This page shows all requests prepared for you by your staff. None of the prepared requests can be submitted to the DDS until you review and submit each one.

Step 1—Review/Submit Prepared Requests

The screenshot shows the 'Electronic Records Express' interface. At the top, it says 'Social Security Online' and 'Electronic Records Express'. Below that, it says 'Review/Submit Prepared Requests' and 'Review Prepared Requests'. A callout box on the left says 'Reports Prepared by CE Administrative staff'. A callout box on the right says 'Choose "Review Response" to review the information input by the CE Administrative Staff'. Below the text is a table with columns: Name, Last 4 of SSN, DOB, Date/Time Prepared, Prepared By, Response Status, Response Request, Payment Status, and Payment Request. The first row shows 'Doe, Jay' with SSN '5555', DOB '11/11/1950', and 'NEW' status. The 'Response Request' column has a link 'Review Response'. The second row shows 'LastName, FirstName' with SSN '8002', DOB '01/02/1979', and 'NEW' status. The 'Response Request' column has a link 'Review Response'. At the bottom, there is a button labeled 'ERE Home'.

Prepared Response Status definitions:

- **NEW**—an unviewed response. New responses are also bolded in the list.
- **VIEWED**—A response that has been viewed or possibly reviewed, but has not yet been submitted to the requesting office.
- **PENDING**—A response that has been reviewed and submitted to the requested office, but has not yet been fully processed by the website. Once the website completely processes a response and sends it to the requesting office, that response is removed from this list.

Step 1—Review/Submit Prepared Requests

- You may select the header of each column to sort the displayed information by that column in ascending or descending order. After sorting a column, a small arrow appears adjacent to that column header.
- Select **Review Response** next to each CE report to review CE report preparation, patient, and destination information.

Note: CE reports are removed once you have successfully submitted it, or 30 days from the date of preparation, regardless of whether you have taken action on it.

Select **Review Response** to view the CE report. Once selected, the page below appears.

Step 1—Review/Submit CE Report

Social Security Online
Electronic Records Express

[www.socialsecurity.gov](#)
Electronic Records Express Home
[User Instructions](#)

John Public
[Log Out](#)

Help Desk: 1-866-691-3061

CE Report Information:

Patient Information:

Request Information:

Special Instructions:

Files already loaded by your preparer:
Selecting the "Review" link for a file will open a "File Download" box so that you can open the file. If you want to revise a file, save it to your local computer and make your revisions.

Delete the old version of the file. Then upload the saved file using the "Browse" button.

To delete a file from the patient's information, select the checkbox next to the file to be deleted."

Attach and upload files to this response:

Additional Comments:
Comments already here were entered by your preparer.

Please read this statement and indicate your agreement by checking the "I have read..." box. When you select "Submit", you will generate an electronic signature and submit your response.

Review/Submit CE Reports

Attach and Upload Files

Prepared By:	John Public
Date Prepared:	09/03/2010
Patient Name:	JohnInitial Ditto
SSN:	XXX-XX-0001
DOB:	10/20/2006
Provider Name:	John Public
Request Type:	Consultative Exam
Request Date:	07/17/2009
Requesting Office:	AZ - Phoenix DDS [S03]
Request ID:	20100721DREW_003 D
Disability Examiner:	
CE Appointment Date and Time:	07/25/2010
Service Item 1:	

Select file(s) to be deleted from this patient's information.

conf_num.rtf [Review](#)

Tiff conversion status in prod.rtf

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

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

[Add Another File](#)

Comments:
test

Characters remaining: 15996

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 to the above.

[Cancel](#) [Delete](#) [Prior Page](#) [Submit](#)

Choose "Browse..."

Provide Comments in the text box if needed.

Check this box to Sign the CE report.

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Step 2—Attachments and Additional Information

Step 2—Attachments and Additional Information

- To review the files already loaded by your preparer, select **Review**. After selecting **Review**, you may be asked to open or save the file. If you want to revise the file, save it to your computer and make your revisions. Then upload the saved file using the **Browse** button.
- To delete a file from the patient's information select the checkbox next to the file you wish to delete and select the **Delete** button.
- To attach and upload additional files for this patient, select the **Browse...** button. (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 file name displays 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 can 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 remaining character count shows beneath the box.
- If the information is correct and there are no other documents to attach, the next step is your "Electronic Signature". This process allows you to certify that you examined the patient, reviewed the report, and the report is accurate. Read the certification statement at the bottom of the screen and indicate your understanding by checking the box beside **I have read and agree with the above**. By checking the box, you affirm your intent to sign the report. This process eliminates the need for you to physically sign and send the paper report to the DDS.
- Select the **Submit** button to forward this information to the selected DDS and continue to **Step 3**.
- To return to the previous page select **Prior Page**.
- To cancel the transaction and return to the **Home** page select **Cancel**.

Step 3—Tracking Information

Social Security Online
www.socialsecurity.gov
CEPRO ONLY
Log Out
Help Desk: 1-866-691-3061

Electronic Records Express Home
User Instructions
Review/Submit Prepared Requests
Tracking Information

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: 1229876911578168
Date and Timestamp: 07/20/2009 at 10:00 AM EDT

Name: Theresa McGehee DOB: 07/01/1970
Destination: ME - Winthrop DDS [S22] SSN: XXX-XX-1234
RQID: 123456789 RF: P
DR: F CS:

File Name	File Size
Demo File.doc	24.0
Total file size: 24.0	

Files already loaded by your preparer:
RESPONSEFILE1.doc

Your report was electronically signed.

ERE Print Review Another Request ERE Home

Tracking Number

To review another CE select the "Review Another Request" button.

Step 3—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 that you transmitted.
- 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 requests to review, select the **Review Another Request** button.
- Select **ERE Home** to return to the **Home** page.

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)
Add Another Invoice	2 – 4 (number corresponds to the file to be added)
Cancel	n
Continue	c
Delete	l
Edit Summary	w
ERE Home	h
ERE Print	p
Log Out	l
Prior Page	p
Request Payment	y
Review Another Request	r
Submit	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****