# User Guide for Access Provider's Electronic Requests



## Office of Disability Determinations


## October 2017

# Electronic Records Express (ERE): Access Provider's Electronic Requests

## Instructions for Access Provider's Electronic Requests

This function is a part of the Electronic Outbound Request (eOR) feature. The DDS can electronically send Consultative Examination (CE) requests through the **Electronic Records Express** website to the CE Provider's administrative staff. This function allows the CE administrative staff to view outstanding electronic requests, download request letters and other supporting documentation, and conveniently submit responses to the CE Provider without having to enter any barcode index information.

Begin by logging into the **Electronic Records Express** with your username and password. Under the **Evidence Functions** heading, select **Access Provider's Electronic Requests.** This takes you to the page that allows you to access CE requests sent to the CE Provider from the DDS.

# Electronic Records Express (ERE): Access Provider's Electronic Requests

## Select Provider



## Step 1 - Select Provider

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

- Select a request type by clicking the arrow from the drop-down box under **Request Type** and clicking **Show**.

- If you do not wish to continue with the transaction and you want to return to the homepage, select the **ERE Home** button that would be shown on the bottom of the page.

## Access Provider's Electronic Requests – Open Requests

# Electronic Records Express (ERE): Access Provider's Electronic Requests

## Step 2 - View Provider's Electronic Request—Open Requests

- This page allows you to view and sort all requests received from the DDS.

- You may select a column header to sort the displayed information by that column in ascending or descending order. Sorted columns display a small arrow adjacent to the column header. The column headers are:

  - **Priority**
  - **Name**
  - **Last 4 of SSN**
  - **Request Date**
  - **Appt Date**
  - **Appt Time**
  - **Location**
  - **Request Status**
  - **Payment Status**
  - **Payment Request**

- Select **the claimant's name** in the **Patient Name** column to view an individual request.

- Select the **ERE Home** button to go to the Electronic Records Express Home page.

> ### Request Status Definitions
>
> - **New** - A new request that has not been opened.
> - **Pending** - A request that has been opened/viewed.
> - **Prepared** - A CE Admin staff has submitted a prepared report for the request.
> - **Responded** - Response submitted by provider through ERE Website.
> - **Accepted** - The DDS received the request response.
> - **Cancelled** - The DDS cancelled the request.
> - **Updated -** Updated initial request
> - **Update Pending-**Updated initial request and awaiting documents.

**Note:** The Electronic Request will be removed from the list based on the retention days received with the request if less than 120 days. Otherwise, Electronic Requests are removed from the list 120 days from the Request Date.

# Electronic Records Express (ERE): Access Provider's Electronic Requests

**View/Submit Consultative Examination (CE) Request – Prepare Report for Provider (eOR)**

## Social Security
The Official Website of the U.S. Social Security Administration

## ERE: View / Submit CE Request

User Resources

⚠ **Priority Request**

Immediate response needed.

Patient Name: **DOE, TESTCASE2001**
Patient DOB: **10/20/1979**
Request Type: **Consultative Exam**
Request ID: **20140805172441_728066**
Requesting Office: **WI - Wisconsin DDS [S56]**
Location: **1506 Woodlawn Drive test maryfield, Ellicott, MD 21045**

Patient SSN: **XXX-XX-2001**
Provider Name: **A CE Provider**
Request Date: **06/30/2010**
Disability Examiner: **testExaminer**
CE Appt Date & Time: **07/25/2010 11:24 AM**

### Service Items

**Service Item 1:**

Item Description: test104

Item Code: 200

**Service Item 2:**

Item Description: test105

Item Code: 201

**Service Item 3:**

Item Description: test106

Item Code: 202

### Request Details

**What's Changed:**

**Special Instructions:**

VAL CE Report Test for ERE Release

**Documentation:**

| File Name | Date Added |
|-----------|-----------|
| Request Letter | 08/05/2014 |
| Authorization To Disclose Information | 08/05/2014 |
| Supporting Documentation | 08/05/2014 |

## Electronic Records Express (ERE): Access Provider's Electronic Requests

### Request Response

**Select a response:**
- ⦿ Prepare Report for Provider
- ○ Send No Show Response

### Attach and Upload Files

- A maximum of 10 files can be added and all files must total less than 50MB.
- File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif
- Please do not upload password-protected files because they cannot be processed.

**Document Type:**

[                              ▾]

**File 1:** [                    ] [ Browse... ]

[ Remove File ]

[ Add Another File ]

### Additional Information

**Comments (Optional):**
(16,000 characters maximum)

[                                                ]

Characters remaining: 16000

[ Send to Provider ]  [ Previous ]  [ Cancel ]

**Step 3 - View/Submit Consultative Examination (CE) Request – Prepare Report for Provider (eOR)**

- To view the request documentation, click on the <u>blue</u> document heading in the **Documentations** section.

- Select the appropriate radio button in the Request Response section.

- Select the button to attach and upload files for this patient. (Do not send files that are password protected.)  The **Choose file** window appears.

# Electronic Records Express (ERE): Access Provider's Electronic Requests

- 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. If you have chosen the incorrect file, select the **Delete** button to clear the field.

- Select the **Add File** button to send additional files. Only files for the SSN in Step 1 can be sent with this transaction.

> **Note:** A maximum of 10 files may be sent <u>for one individual</u> by selecting *the* **Add File** button and repeating the previous steps.
>
> SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc**, **.docx, .jpg, .bmp, .txt, .rtf, .xls, xlsx, .pdf, .tiff, .tif.**
>
> 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. 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.

- Select the **Send to Provider** button to send the CE report to the CE Provider's ERE inbox.

# Electronic Records Express (ERE): Access Provider's Electronic Requests

**Confirmation**



**Social Security**
The Official Website of the U.S. Social Security Administration

## ERE: View / Submit CE Request

✅ Thank you for your submission.
**Prepare CE Report Submission - Tracking Information.**

Tracking Number: **147CA48D91F17AE6N**

Submitted on: **02/05/2015 at 03:43 PM EST**

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

🖨 Print this page

❓ User Resources

### Submission Summary
Tracking Information

### Patient & Appointment Information

Patient Name: **TESTCASE2001 DOE**

Patient SSN: **XXX-XX-2001**

Patient DOB: **10/20/1979**

Provider Name: **A CE Provider**

Request Type: **Cosultative Exam**

Request Date: **06/30/2010**

Requesting Office: **WI - Wisconsin DDS [S56]**

Request ID: **20140805172441_728066**

Disability Examiner: **testExaminer**

CE Appt Date & Time: **07/25/2010 11:24 AM**

Location: **1506 Woodlawn Drive Maryfield, Ellicott, 21045**

Document Type: **Consultative Examination Report (CE) - 0002**

### Uploaded File(s)

Attached Files

| File Name | File Size |
| --- | --- |
| consultative_exam.pdf | 243 KB |
| **Total File Size:** | 243 KB |

Comments: **Comments were added**

[ **Prepare Another CE Report** ]  [ ERE Home ]

# Electronic Records Express (ERE): Access Provider's Electronic Requests

**Step 4 - Confirmation**

- After your submission uploads, Electronic Records Express provides a **Confirmation** page that provides a tracking number for you to keep and use if you want to check on the status of your submission.

- If you do not receive the Confirmation 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 submit, you may select Prepare Another CE Report button. This takes you back to the screen in Step 1.

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

## 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://subscriberhelp.govdelivery.com/hc/en-us

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

1. Click "**Sign Up for Email/Text ERE System Notifications**" on the Electronic Records Express Home Page,
2. Type your email address and select **Submit**
3. Confirm your email address
4. Select "Send updates immediately by email."
5. Choose an optional password
6. Select **Submit**
   a. **You will receive a "Success" confirmation.**
7. Select **Close** to exit.

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