

# Document Exchange Services

## Access Electronic Request

This function is a part of the Electronic Outbound Request (eOR) feature in which Consultative Examination (CE) and Medical Evidence of Record (MER) request letters are sent by electronic means via the Electronic Records Express website from the DDS to the provider (hospital, doctor, copy service, etc.). Through this link, the MER provider or CE Doctor has the ability to: view outstanding electronic requests, download request letters and other supporting documentation, and conveniently submit responses without having to enter any barcode index information.

The CE or MER provider will receive an email notification when a request is sent to them from the DDS. The email will include a link that will go directly to the details of the request.

The MER provider or CE Doctor will sign onto the Electronic Records Express home page using his/her username and password. Under the **Document Exchange Services** heading, select **“Access Electronic Request”**. This will take you to the page that allows you to access electronic requests sent electronically from the DDS.

### Electronic Records Express Home—Access Electronic requests

The screenshot displays the Electronic Records Express Home page. The browser window title is "Electronic Records Express - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha CI". The address bar shows "https://secureval.ssa.gov/apps7/ERE/home.do". The page header includes "Social Security Online" and "Electronic Records Express". The main content area is titled "Electronic Records Express Home" and "Welcome to Electronic Records Express". On the left, there is a "Doc Doctor" login section with the email "ruth.trent@ssa.gov" and a "Log Out" button. Below this, it says "From here you can also:" followed by links for "Modify your account information" and "Change your password". A green arrow points to the "Access Electronic Requests" link under the "Document Exchange Services" section. Other sections include "Evidence Submission Services", "Consultative Examination (CE) Services", and "Communication Services". A "Bulletin Board" on the right shows an update from 01/08/2008.

## Step 1—Access Electronic Requests

Social Security Online  
www.socialsecurity.gov

Electronic Records Express Home  
User Instructions

Doc Doctor  
Log Out

Access Electronic Requests  
View Electronic Requests - Open Requests

This page shows your open electronic requests, if any, sent to you from a Disability Service Center. Select the "View" link next to each request to review the latest details and respond or take other action on it.

You may select a column header to sort the displayed information by that column in ascending or descending order.

Name	SSN	DOB	Req Date	Status	Last Conf #	Appt Date	Follow-up
Four, Patient	XXX-XX-1111	02/10/1975	11/29/2007	NEW			<a href="#">View</a>
One, Patient	XXX-XX-1111	01/01/1950	01/01/2008	NEW		01/10/2008	<a href="#">View</a>
Three, Patient	XXX-XX-1111	03/01/1965	12/20/2007	NEW			<a href="#">View</a>
Two, Patient	XXX-XX-1111	01/01/1962	12/25/2007	NEW		01/12/2008	<a href="#">View</a>

Closed Requests Submitted Requests Home

Click on the column heading to sort the displayed information

Select "view" to view an individual request

**Note:** This page of the ERE website does not differentiate between MER and CE requests.

## Step 1—Access Electronic Requests

- This page allows you to view and sort the status of all requests received from the DDS.
- You may click on the column heading to sort the displayed information by that column in ascending or descending order
  - Name
  - SSN
  - DOB
  - Request Date
  - Status
  - Last Conf #
  - Appt Date
  - Follow-up
- To view an individual request, select "**View**" beside the row of the request you would like to view.
- To cancel and return to the ERE Homepage, select the "**Home**" button.

- To view Closed Requests, choose the “**Closed Requests**” button. Closed Requests are requests that are either accepted by the CE provider or cancelled by the DDS.
- Choose “**Submitted Requests**” to view requests that have been submitted to the DDS.

**Status Meanings**

- **New**—New request. Has not been opened.
- **Pending**—New request. Opened/viewed.
- **Prepared**—A CE Report has been prepared within the ERE Website for this request by the CE Admin staff.
- **Responded**—The provider has submitted a request response using the ERE Website.
- **Accepted**—The request response has been received by the DDS.
- **Cancelled**—The request has been cancelled. The cancellation came from

**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 will be removed from the list 120 days from the Request Date.

**Step 2—View Electronic Request Details—CE**

The screenshot shows the 'Electronic Records Express' interface. At the top, there's a navigation bar with 'Social Security Online' and 'Electronic Records Express Home'. Below that, the page title is 'Access Electronic Requests' and 'Electronic Request Details'. A warning message reads '\*\*\* Immediate Response Needed \*\*\*'. The main content is organized into three sections:

- Patient Information:** Name: Patient One, SSN: XXX-XX-1111, DOB: 01/01/1950.
- Request Information:** Provider Name: Doctor, Doc; Request Type: Consultative Exam; Request Date: 01/01/2008; Requesting Office: OR - Salem DDS [S40]; Request ID: ruthietrenttest0001 D; CE Appointment Date: 01/10/2008.
- Request Documentation:** Includes links for 'Request Letter', 'Authorization To Disclose Information', and 'Background MER'.

Two callout boxes provide additional information:

- A callout box points to the 'Request Documentation' section with the text: "Click on an underlined heading to view Request Documentation".
- A larger callout box titled "Supporting documentation may include:" lists:
  - Request Letter
  - Authorization to Disclose Information
  - Background MER
  - Supporting Documentation

**Note:** The Patient and Request information is automatically populated to this screen. This information cannot be edited by the ERE user replying to the request.

## Step 2—View individual electronic request—CE

- Selecting “**View**” in Step 1 will allow you to view an individual electronic request.
- To view the request documentation, click on the underlined document heading in the “**Request Documentation**” section.

### Step 2—View Electronic Request Details—CE

The screenshot displays the ERE web application interface. The browser title is "Electronic Records Express - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha CI". The address bar shows the URL: [https://secureval.ssa.gov/apps7/ERE/AER/view.do?requestid=20080104135656\\_716](https://secureval.ssa.gov/apps7/ERE/AER/view.do?requestid=20080104135656_716). The page content is organized into three main sections:

- Patient Information:**
  - Name: Patient One
  - SSN: XXX-XX-1111
  - DOB: 01/01/1950
- Request Information:**
  - Provider Name: Doctor, Doc
  - Request Type: Consultative Exam
  - Request Date: 01/01/2008
  - Requesting Office: OR - Salem DDS [S40]
  - Request ID: ruthietrenttest0001 D
  - CE Appointment Date: 01/10/2008
- Request Documentation:**
  - [Request Letter](#)
  - [Authorization To Disclose Information](#)
  - [Background MER](#)
  - [Supporting Documentation](#)
  - [Supporting Documentation](#)
  - [Supporting Documentation](#)

At the bottom of the page, there are four buttons: "Cancel", "Prior Page", "No Show Response", and "Respond". A callout box with a light blue background and a black border points to the "Respond" button, containing the text: "Click the 'Respond' button to respond to the DDS electronic request".

- To respond to the electronic request, select “**Respond**” and continue to **Step 3—Send CE Report**.
- To send a No Show Response to the DDS, choose the “**No Show Response**” button.
- Select a reason the exam was not performed. Based on the reason you select, comments may be required. Otherwise, comments are always optional.

- Type **Comments**, if needed. Provide an explanation of the reason the exam was not performed. Type-in and/or cut-and-paste your text (up to three letter size pages, approximately 16,000 characters) directly into the box provided.
- Select the “**Submit**” button to forward the information to the DDS.

### Step 3—Send CE Report

The screenshot shows a web browser window displaying the 'Electronic Records Express' application. The address bar shows the URL: <https://secureval.ssa.gov/apps7/ERE/AER/prepare.do>. The page is titled 'Patient and Request Information' and contains the following data:

Name:	Patient One	SSN:	XXX-XX-1111
DOB:	01/01/1950	Provider Name:	Doctor, Doc
Request Type:	Consultative Exam	Request Date:	01/01/2008
Requesting Office:	OR - Salem DDS [S40]	Request ID:	ruthientrest0001 D
CE Appointment Date:	01/10/2008		

Below the patient information, there is a 'Request Documentation' section with several links: [Request Letter](#), [Authorization To Disclose Information](#), [Background MER](#), [Supporting Documentation](#), and another [Supporting Documentation](#) link.

The 'Attach and upload files to this response:' section includes a note: 'A maximum of 8 files can be added and all files must total less than 50MB. File types accepted: .vpd, .doc, .docx, .jpg, .bmp, .mli, .txt, .rtf, .xls, .xlsx, .pdf, .tif, .tiff'. There is a 'File 1:' label, a text input field, a 'Browse...' button (highlighted by a callout bubble), and a 'Clear File 1' button. Below this is an 'Add Another File' button.

The 'Additional Comments:' section has a text area with the instruction: 'You can type up to three letter size pages (approximately 16,000 characters) of comments.'

### Step 3—Send CE Report

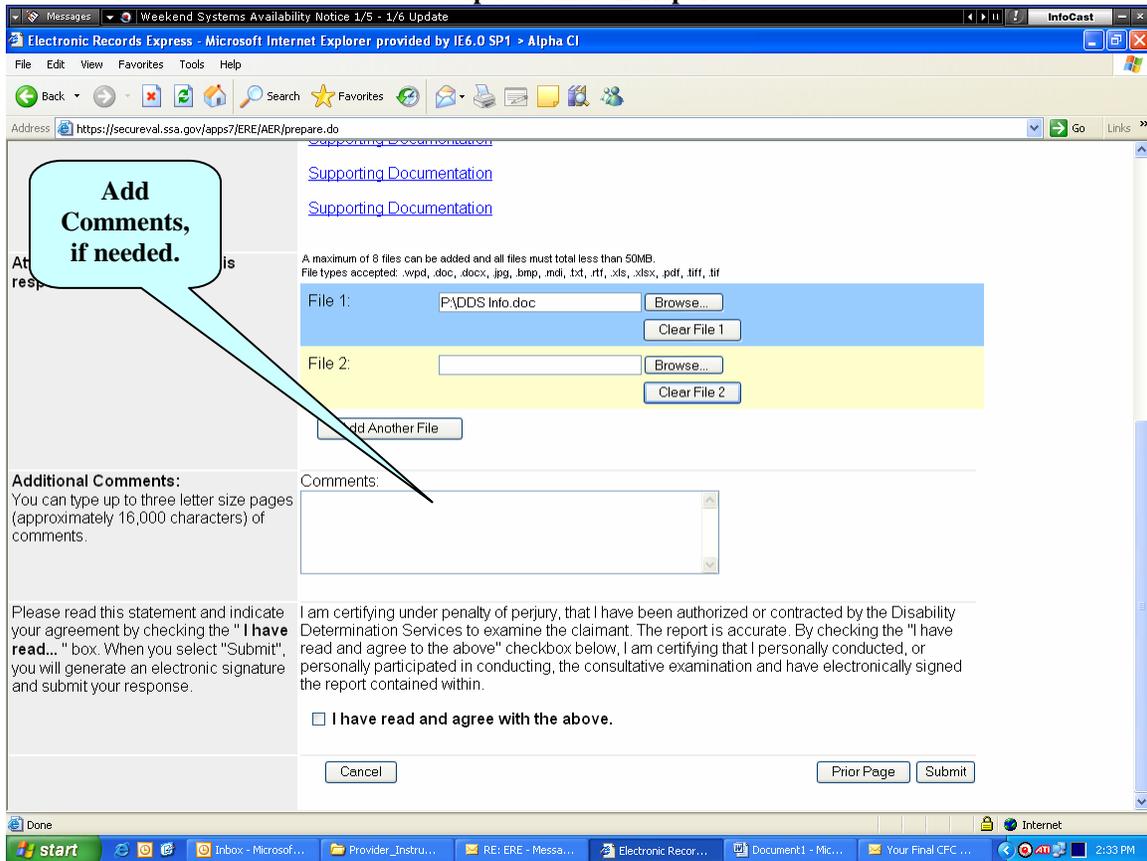
- Review the Patient and Request Information and Request Documentation.
- Select the “**Browse**” button to select a file to send. (Do not send files that are password protected.) The “Choose file” window will appear on your screen.
- Locate the file you wish to send and click the name with your mouse to highlight the file name. The document’s file name will be inserted into the “File name” box at the bottom of the “Choose file” window.
- Next click the “**Open**” button. The “Choose file” window will close and the Electronic Records Express website will show the file name displayed in the box to the left of the “**Browse...**” button. If you have chosen the incorrect file, click the “**Clear File 1**” button to clear the “File 1” field.

- Select the “**Add Another File**” button to send additional files. *Only files for the SSN entered in the Patient and Request Information may be sent with this transaction.*
- To clear the file, select the “**Clear File**” button next to the file you want to clear.

**Note:** A maximum of eight (8) additional files may be sent for one individual by clicking the “**Add Another File**” button and repeating the previous steps.

SSA’s Electronic Records Express website will accept the following file formats: **.wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif**

### Step 3—Send CE Report



- **Type Comments**, if needed. Provide an explanation of why you are not submitting a CE and any additional details. Type-in and/or cut-and-paste your text

(up to three letter size pages, approximately 16,000 characters) directly into the box provided.

- The next process is your “Electronic Signature”. This process allows you to certify that the claimant has been examined, a report has been prepared, and the report is accurate. Read the certification statement located 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 provide the electronic signature and to forward this information to the DDS office that sent the request.

Behind the scenes, a text file called the Signature Attestation Document will be created and packaged with the files and information you have submitted. This document will contain the following information:

- Index information you entered from the request letter
- The signature attestation statement to which you agreed
- Your full name—serving as your electronic signature

### **Important Note**

It is against SSA policy for a user to delegate the uploading of their Consultative Examination reports, via the **Send CE Report** website function, to staff members. Users interested in delegating this responsibility should consider using the **Send CE Report(s) with Scanned Signature** website function or CE Administrative Staff Upload (**Review/Submit CE Reports, Pickup Doctor’s Transcription Reports and Prepare CE Report for Doctor**).

## Step 4—Confirmation

The screenshot shows a web browser window displaying the Electronic Records Express Confirmation page. The browser's address bar shows the URL: <https://secureval.ssa.gov/apps7/ERE/AER/submit.do>. The page header includes "Social Security Online" and "Electronic Records Express Home". The main content area displays the following information:

**Send CE Report Confirmation**

Your information has been submitted and will be processed.

Confirmation Number: 117464C6A2A7C3D9  
Date and timestamp: 01-04-2008 at 14:34 EST

You will be notified by email if there are any errors or problems that prevent us from processing your submission.

Name:	Patient One	SSN:	XXX-XX-1111
DOB:	01/01/1950	Provider Name:	Doctor, Doc
Request Type:	Consultative Exam	Request Date:	01/01/2008
Requesting Office:	OR - Salem DDS [S40]	Request ID:	ruthitrenttest0001 D
CE Appointment Date:	01/10/2008		

File Name	File Size
DDS Info.doc	24.0 KB
Total file size: 24.0 KB	

Thank you for using Electronic Records Express.

Buttons: [Review Another Request](#), [Home](#)

## Step 4—Confirmation

- After the website uploads, a confirmation page is displayed to notify you that the transaction has been submitted. A confirmation number is generated for your reference.
- In the unlikely event that you do not receive the “Confirmation” page, you should resubmit the information.
- If you continue to have transmitting problems, contact the Electronic Records Express Website Help Desk at [EETechSupport@ssa.gov](mailto:EETechSupport@ssa.gov) or 1-866-691-3061.
- If you have additional CE reports to submit, you may select "**Review Another Request**" button. This will take you back to the screen in Step 1.

**NOTE:** It is **strongly recommended** that you print or take a screenshot of the Confirmation page for documentation.

---

**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:

<b>Button</b>	<b>Access Key</b>
Add Another File	2 – 8 (number corresponds to the file to be added)
Cancel	n
Continue	c
Edit	w
Home	m
Prior	p
Send Another Report	r
Send Another Response	r
Submit	b
Try Again	g

Other keyboard commands, hotkeys or access keys will vary based upon the 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.