Automated User Account Setup

Electronic Records Express

Sponsor Instruction Guide

Office of Disability Programs
Office of Process Policy

May 2006

Automated User Account Setup – Sponsor Instruction Guide

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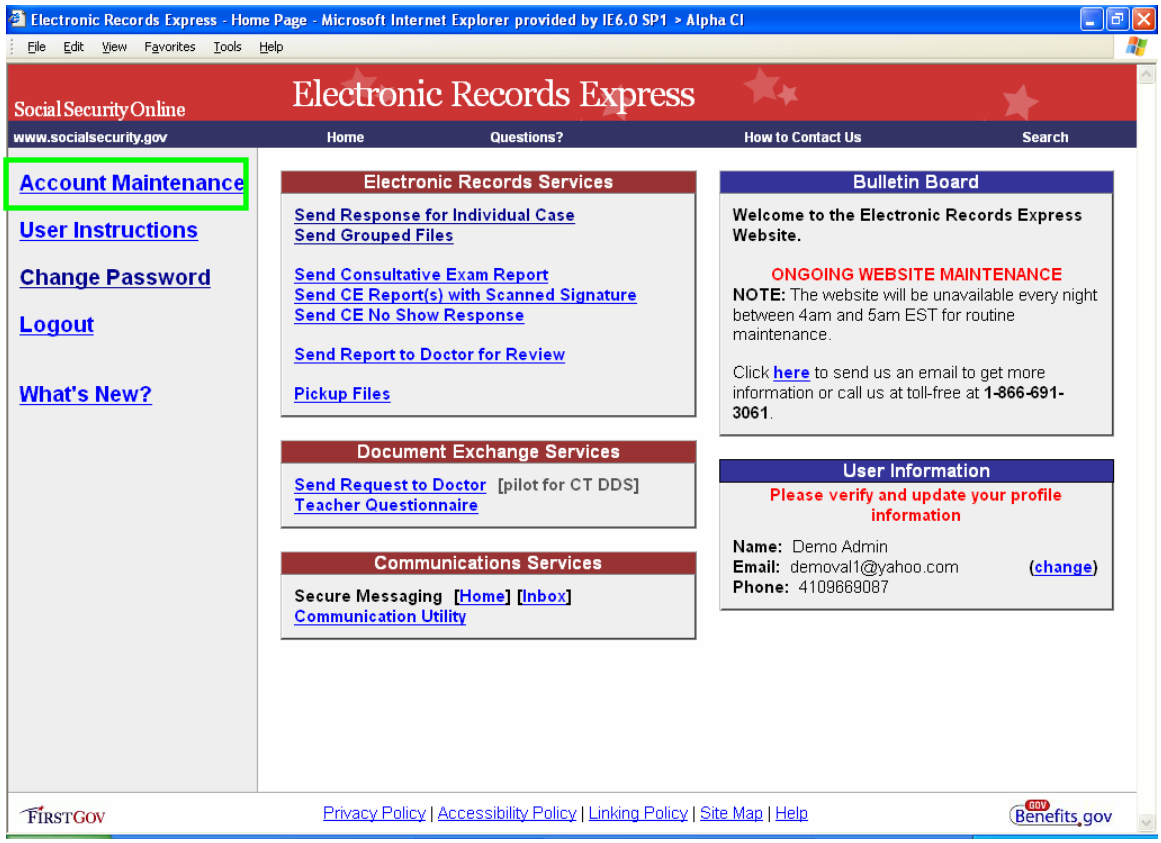
Access the Account Maintenance Menu

You should login to the Electronic Records Express website using your personal User ID and password. The website address is: http://eme.ssa.gov. Upon a successful login, you will see the Electronic Records Express home page. In the left navigation panel, select the "Account Maintenance" hyperlink.



Next, you will see the Account Maintenance Menu screen which is shown below.

From the Account Maintenance Menu, you can select options which will allow you to create users, search accounts, and perform maintenance on your own account.

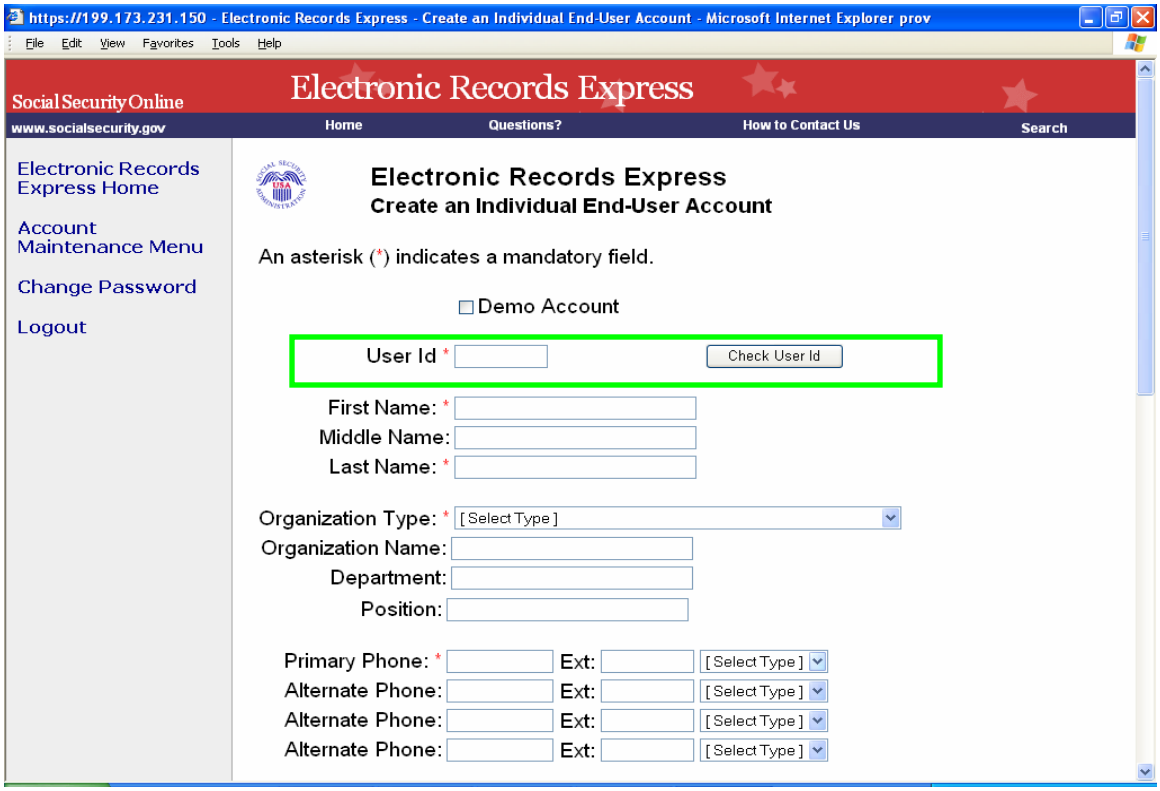
Create an Individual End-User Account

From the Account Maintenance Menu, select the "Create an Individual End User Account" hyperlink.

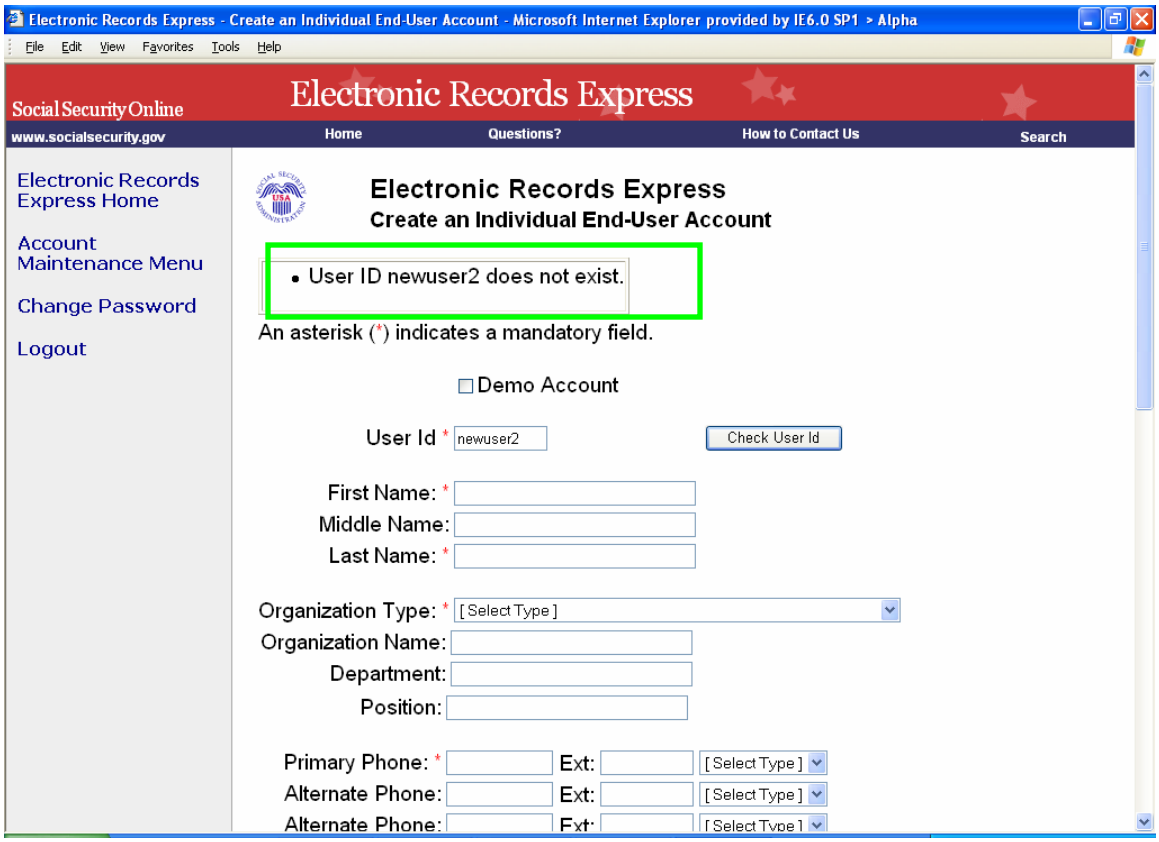
Note that mandatory fields on this web page are marked with a red asterisk.

You may select the "Demo Account" checkbox at the top of the page. Doing so will set up a demo account. This is probably not an option you want to select for your providers as files submitted under a demo account login do not get received by DMA and routed into the electronic folder. Therefore, please be certain that you are not selecting this checkbox when you are setting up medical evidence providers to use the Electronic Records Express Services website to upload files to the DDS.

Enter a User ID in the text box shown below. SSA Policy requires that all User IDs be exactly 8 characters in length and they must contain at least 1 numeric and 1 alphabet character. Special characters (e.g., &, %, #, @, etc.) are not permitted. Once you have typed in the User ID, click the **Check User ID** button.

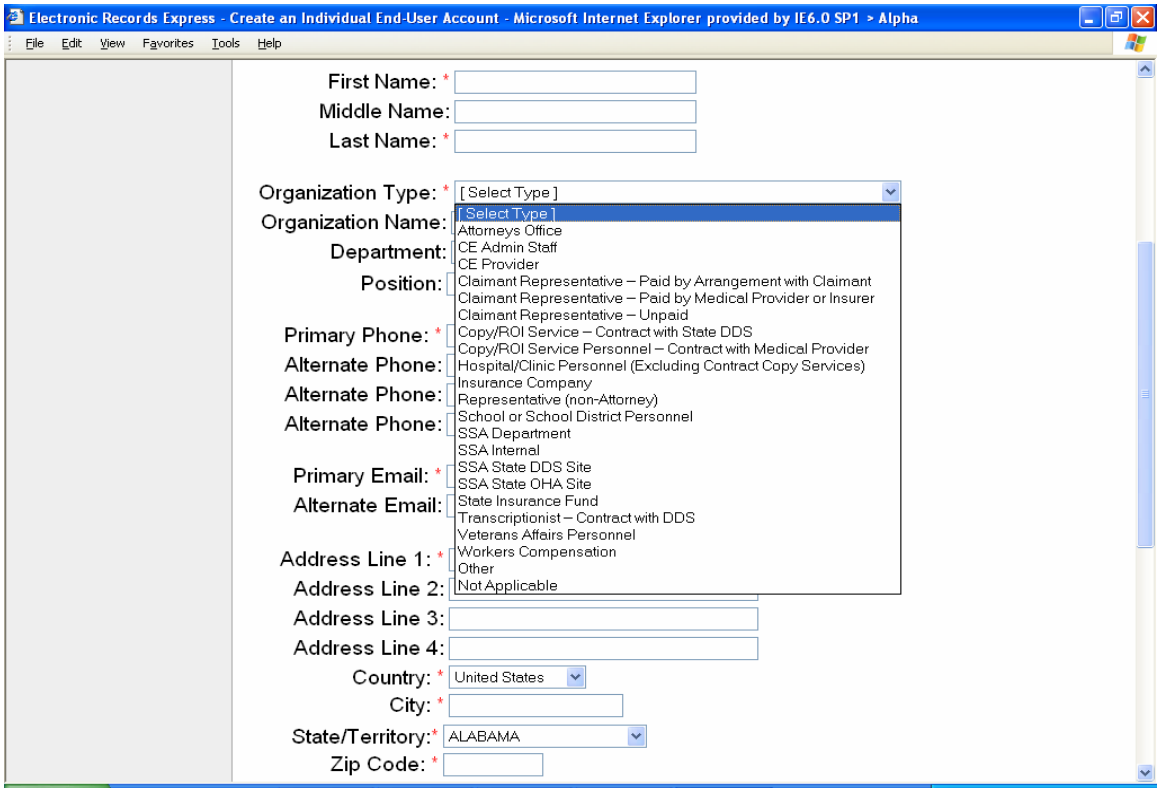


The screenshot below shows that the User ID "newuser2" does not exist. So, this may be used as a User ID for the account signup. If the User ID you entered had already existed, you would have to select a different User ID to signup the provider.



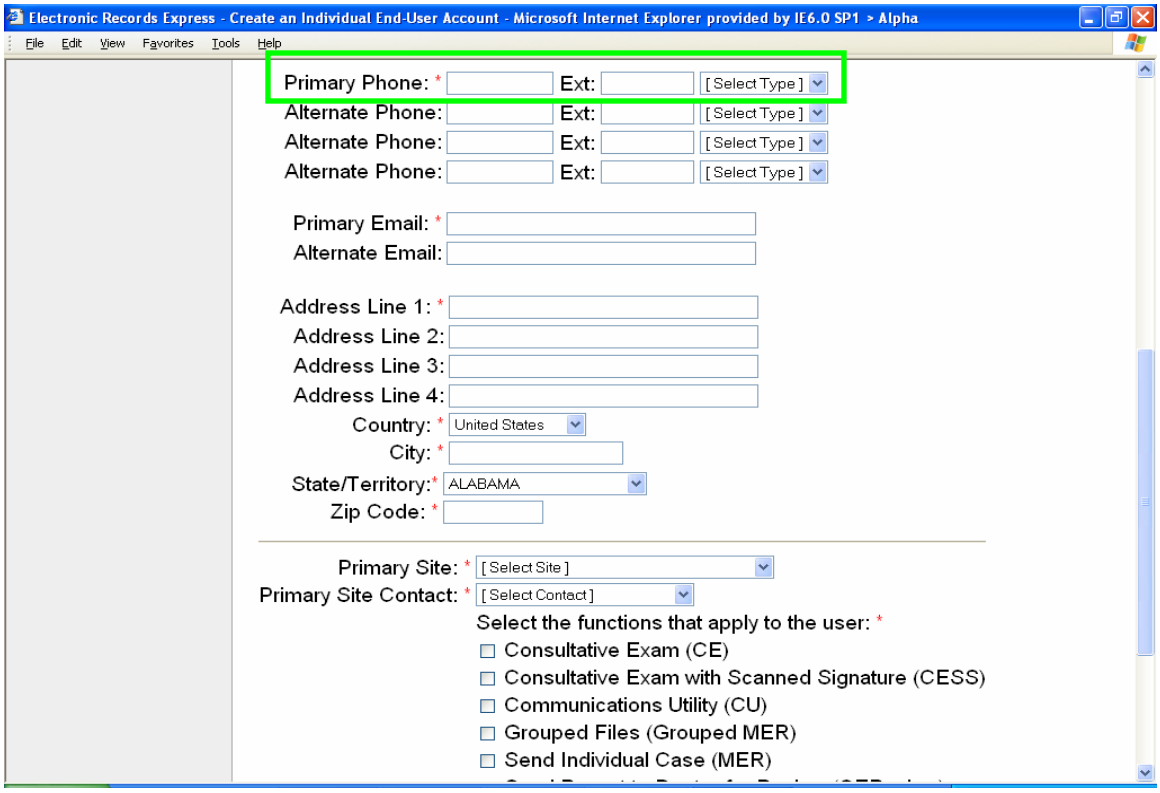
Next you'll continue to enter information into the web page:

- First Name
- Last Name
- Select an organization type from the drop down menu
- Organization Name
- Department
- Position title of the new user

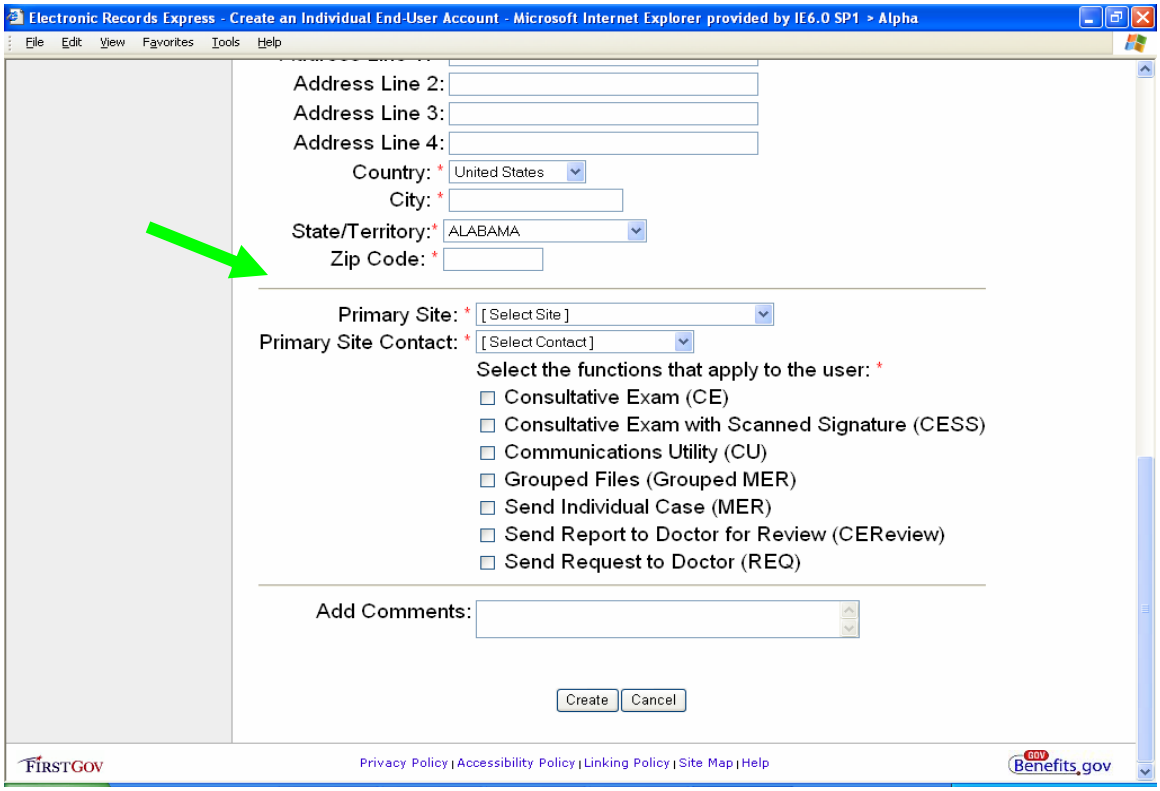


Continue entering information into the web page:

- Primary telephone number
- Select type of phone number from the drop down menu (work, fax, cell, pager, other)
- You may enter up to 3 additional alternate telephone numbers
- Enter primary email address
- You may enter an alternate email address
- Enter the address for the user

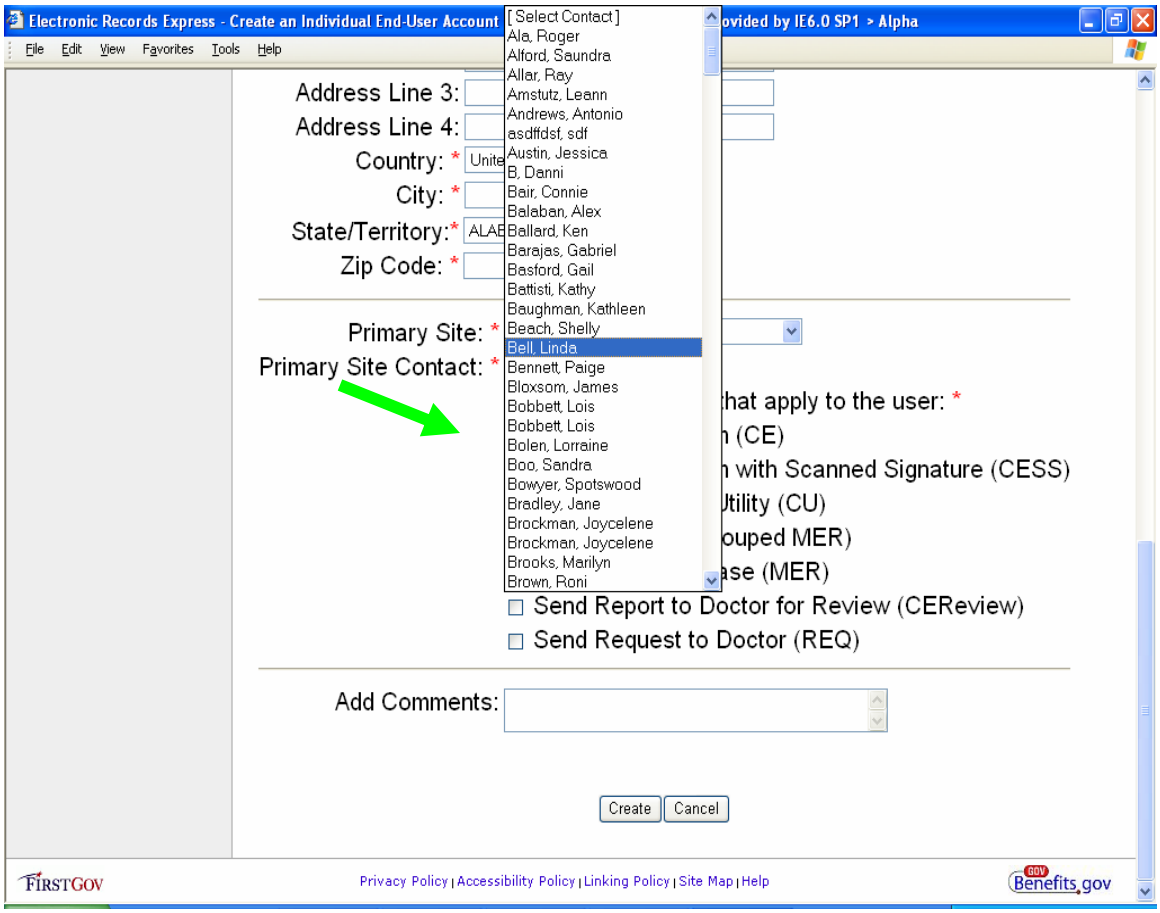


You will see a line separator in the web page. This signals you to enter sponsor information.



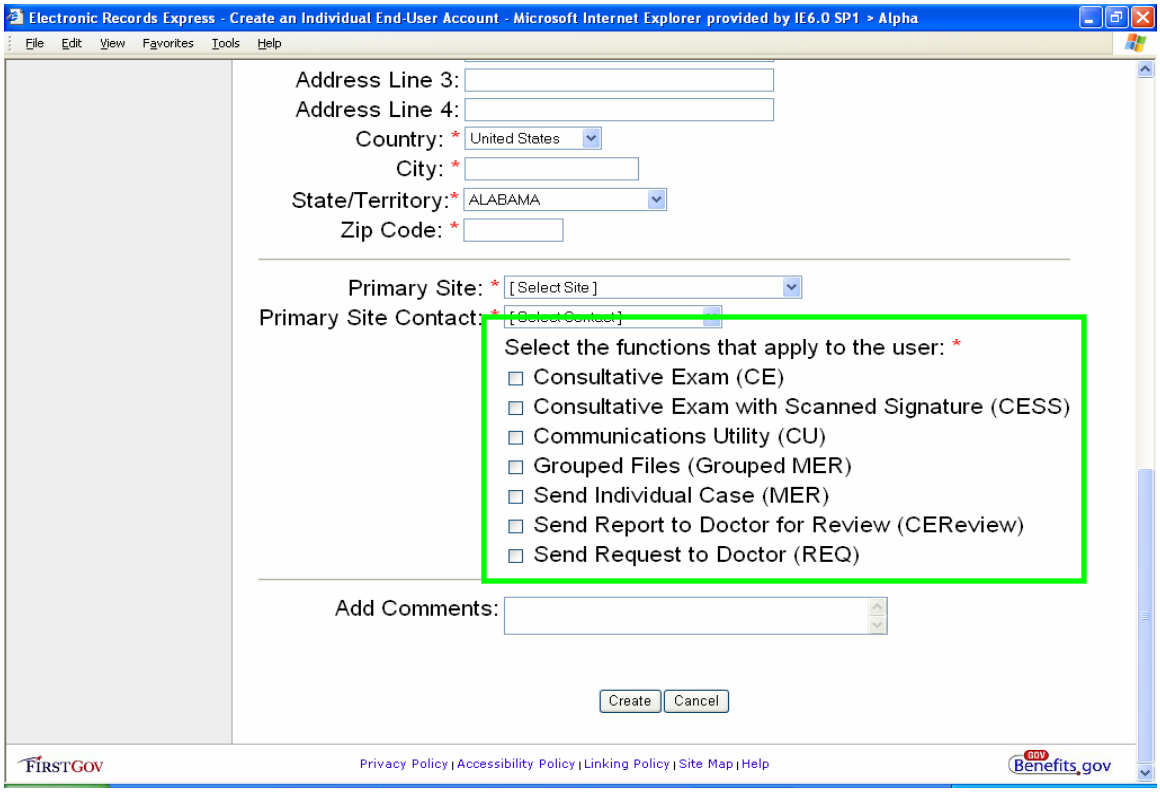
From the drop down list, select the primary DDS site the user will send evidence.

Select the sponsor from the drop down list.



The next step is extremely important. You will be selecting the website utilities that permit the user access. Please be sure to select all utilities the user needs.

Note: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.



You may type in any comments in the “Comments” text box.

Click the **Create** button to continue to create the account. Click the **Cancel** button to cancel this account setup.

You will now see a summary page for the account.

Electronic Records Express - Create an Individual End-User Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help

Social Security Online

Electronic Records Express

www.socialsecurity.gov | Home | Questions? | How to Contact Us | Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

Electronic Records Express
Create an Individual End-User Account

User Id: **newuser2**

First Name: **New**
Middle Name:
Last Name: **User**

Organization Type: **Hospital/Clinic Personnel (Excluding Contract Copy Services)**
Organization Name:
Department:
Position:

Primary Phone: **410-555-5555** Ext: Type: **WORK**
Alternate Phone: Ext: Type:
Alternate Phone: Ext: Type:

Electronic Records Express - Create an Individual End-User Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help

Address Line 2:
Address Line 3:
Address Line 4:
City: **Anytown**
State/Territory: **AL**
Zip Code: **21235**
Country: **United States**

Primary Site: **AL - BIRMINGHAM DDS [S01]**
Primary Site Contact: **Bell, Linda**
Function(s) selected: **Consultative Exam (CE)**
Communications Utility (CU)
Grouped Files (Grouped MER)
Send Individual Case (MER)
Send Report to Doctor for Review (CEReview)
Send Request to Doctor (REQ)

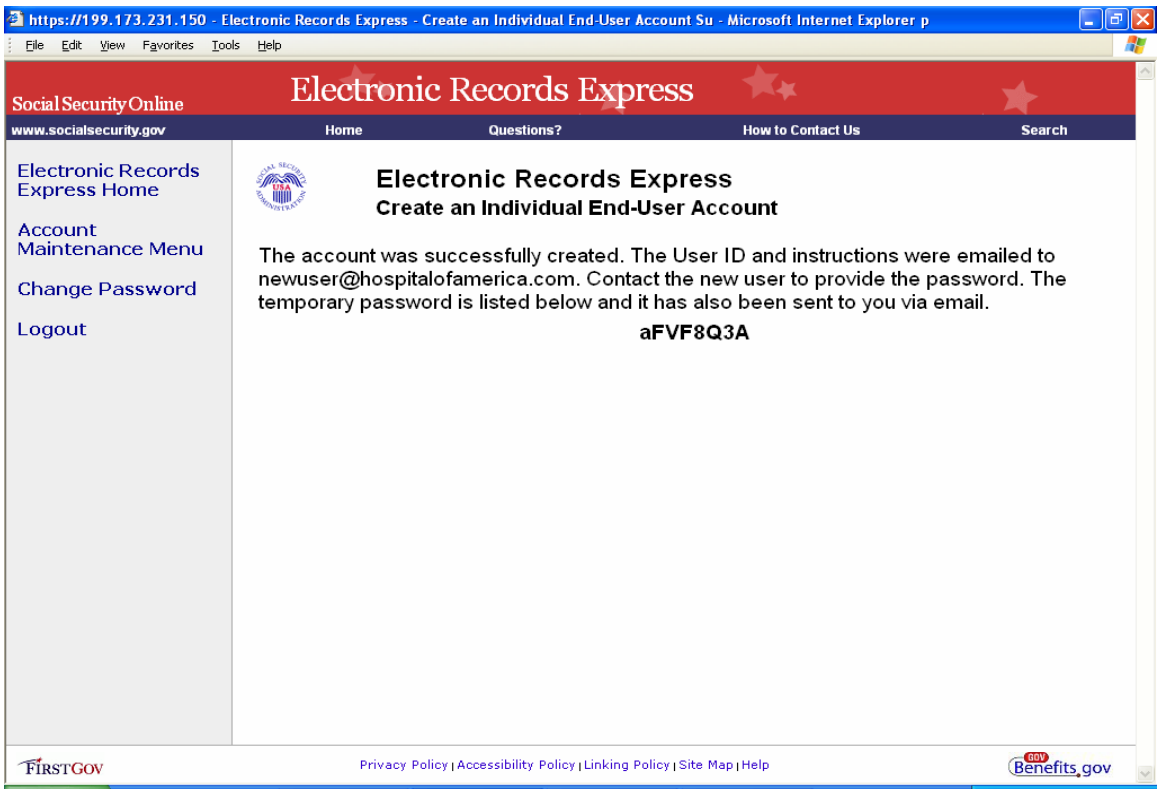
Added Comments:

Edit Submit Cancel

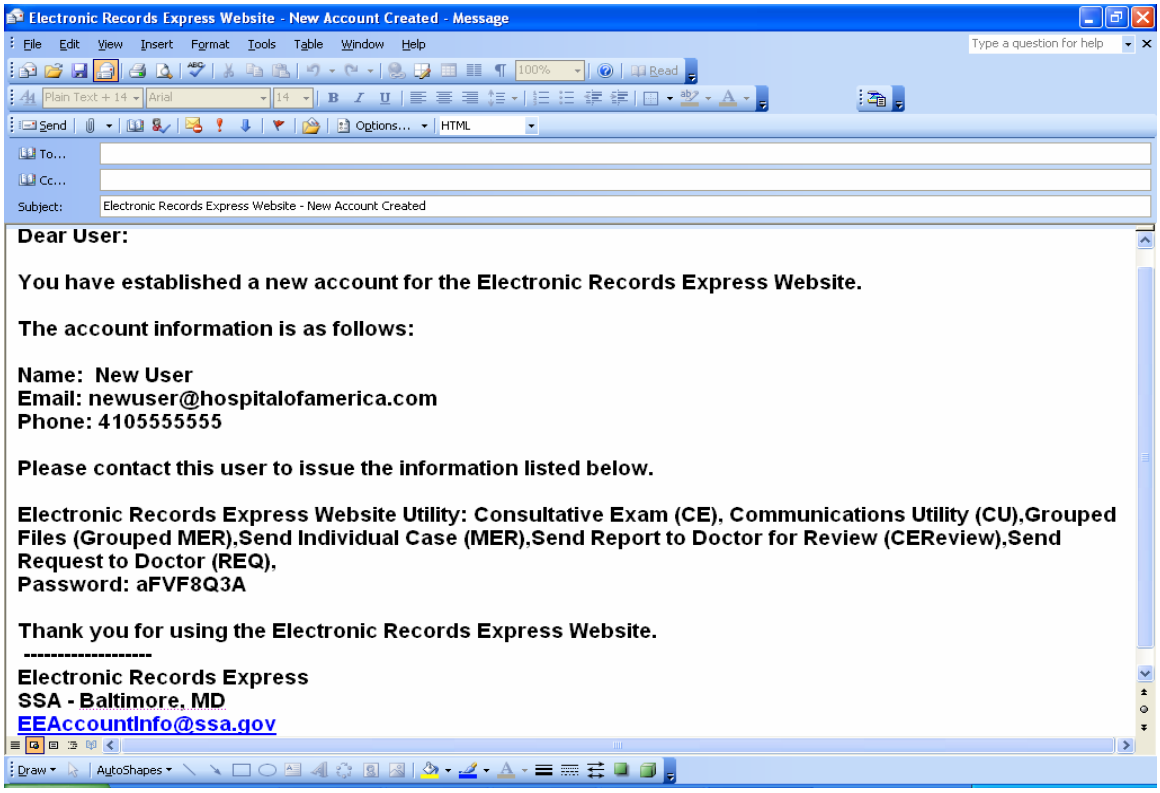
FIRSTGOV | Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help | Benefits.gov

Click the **Edit** button to return to the prior screen to change any information you have entered. Click the **Submit** button to create the account. Click the **Cancel** button to cancel the account setup.

Clicking **Submit** will activate the new account. You will receive a confirmation screen similar to the one shown below:



You, the sponsor, will receive a confirmation email similar to the one shown below:



Electronic Records Express Website - New Account Created - Message

Subject: Electronic Records Express Website - New Account Created

Dear User:

You have established a new account for the Electronic Records Express Website.

The account information is as follows:

Name: New User
Email: newuser@hospitalofamerica.com
Phone: 4105555555

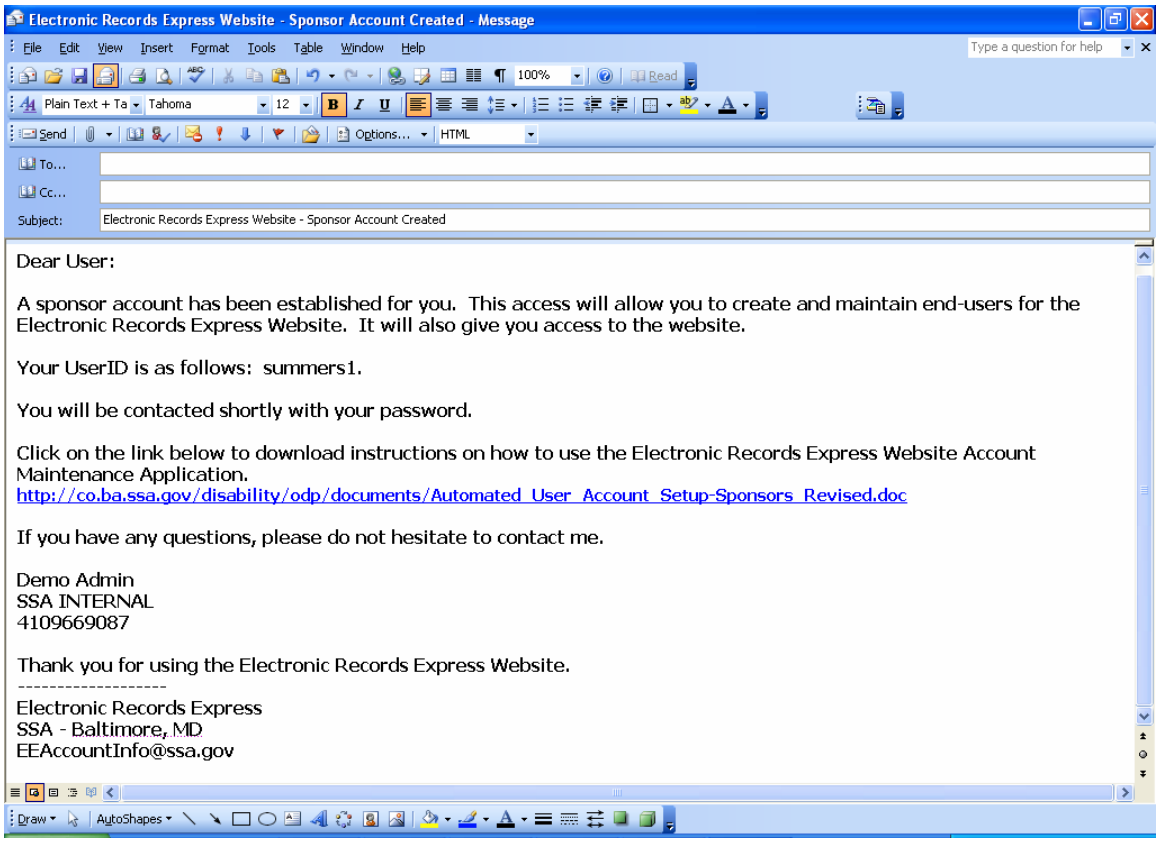
Please contact this user to issue the information listed below.

Electronic Records Express Website Utility: Consultative Exam (CE), Communications Utility (CU),Grouped Files (Grouped MER),Send Individual Case (MER),Send Report to Doctor for Review (CEReview),Send Request to Doctor (REQ),
Password: aFVF8Q3A

Thank you for using the Electronic Records Express Website.

Electronic Records Express
SSA - Baltimore, MD
EEAccountInfo@ssa.gov

Your provider will receive an email message similar to the one shown below:



Electronic Records Express Website - Sponsor Account Created - Message

Subject: Electronic Records Express Website - Sponsor Account Created

Dear User:

A sponsor account has been established for you. This access will allow you to create and maintain end-users for the Electronic Records Express Website. It will also give you access to the website.

Your UserID is as follows: summers1.

You will be contacted shortly with your password.

Click on the link below to download instructions on how to use the Electronic Records Express Website Account Maintenance Application.
http://co.ba.ssa.gov/disability/odp/documents/Automated_User_Account_Setup-Sponsors_Revised.doc

If you have any questions, please do not hesitate to contact me.

Demo Admin
SSA INTERNAL
4109669087

Thank you for using the Electronic Records Express Website.

Electronic Records Express
SSA - Baltimore, MD
EEAccountInfo@ssa.gov

What happens now?

The User ID and instructions have been emailed to the primary email address you provided for the new user.

The sponsor must contact the new user to provide the password. The temporary password is listed on the website confirmation screen and it has also been sent to you via your SSA email address.

Please be sure to explain to your new user that the password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change their password.

Your new user now has access to the Electronic Records Express website.

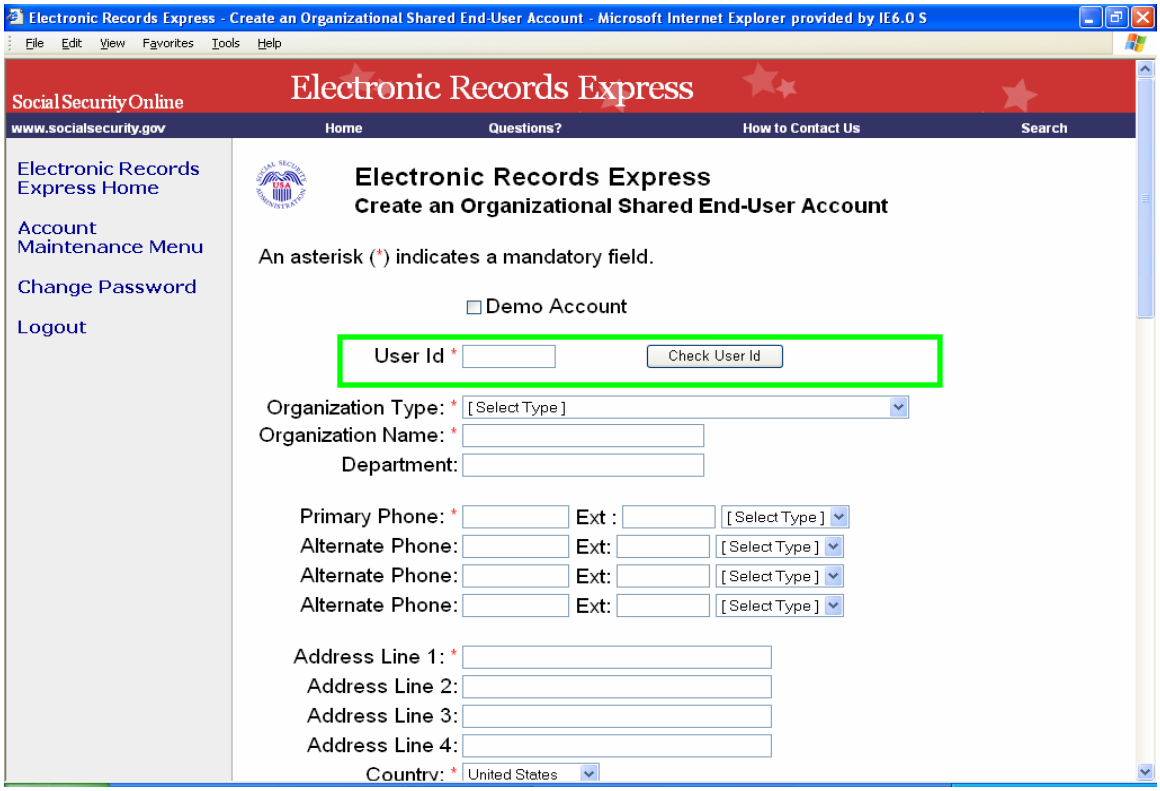
Create an Organizational Shared End-User Account

From the Account Maintenance Menu, select the "Create an Organizational Shared End User Account" hyperlink.

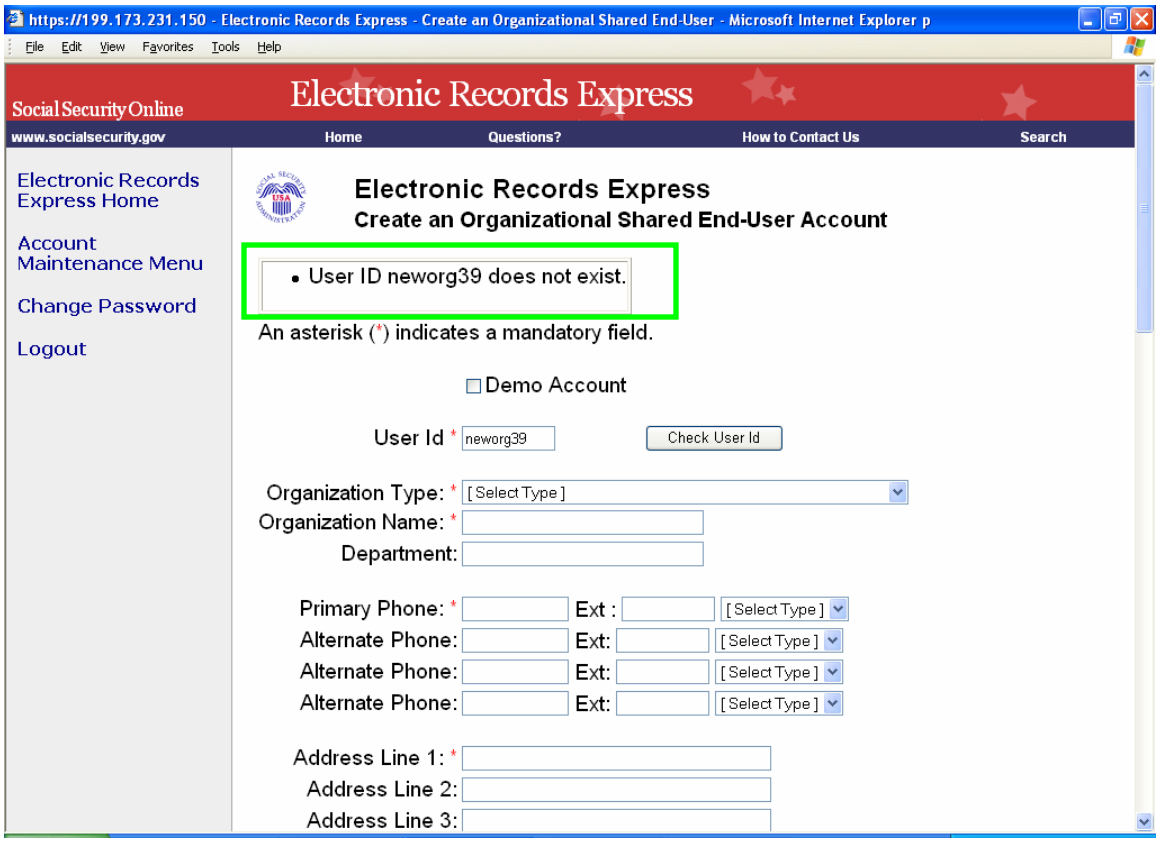
Note that mandatory fields on this webpage are marked with a red asterisk.

You may select the "Demo Account" checkbox at the top of the page. Doing so will set up a demo account. This is probably not an option you want to select for your providers as files submitted under a demo account login do not get received by DMA and routed into the electronic folder. Therefore, please be certain that you are not selecting this checkbox when you are setting up medical evidence providers to use the Electronic Records Express Services website to upload files to the DDS.

Enter a User ID in the text box shown below. SSA Policy requires that all User IDs be exactly 8 characters in length and they must contain at least 1 numeric and 1 alphabet character. Special characters (e.g., &, %, #, @, etc.) are not permitted. Once you have typed in the User ID, click the **Check User ID** button.



The screenshot below shows that the User ID "neworg39" does not exist. So, this may be used as a User ID for the account signup. If the User ID you entered had already existed, you would have to select a different User ID to signup the organizational shared end user account.



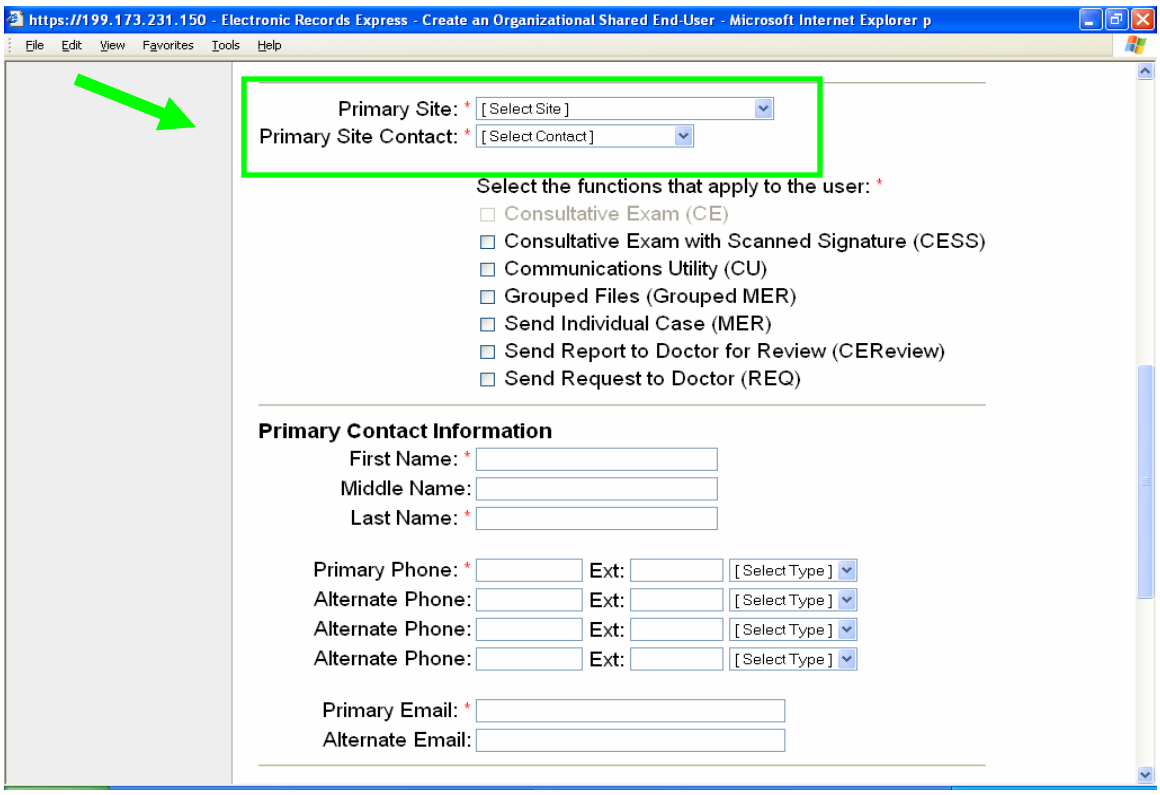
Next you'll continue to enter information into the web page:

- Select an organization type from the drop down menu
- Organization Name
- Department
- Primary telephone number
- Select type of phone number from the dropdown menu(work, fax, cell, pager, other)
- You may enter up to 3 additional alternate phone numbers for the organization
- Enter the organization's address

You will see a line separator and you should begin entering the sponsor's information.

From the drop down list, select the primary DDS site the user will send evidence.

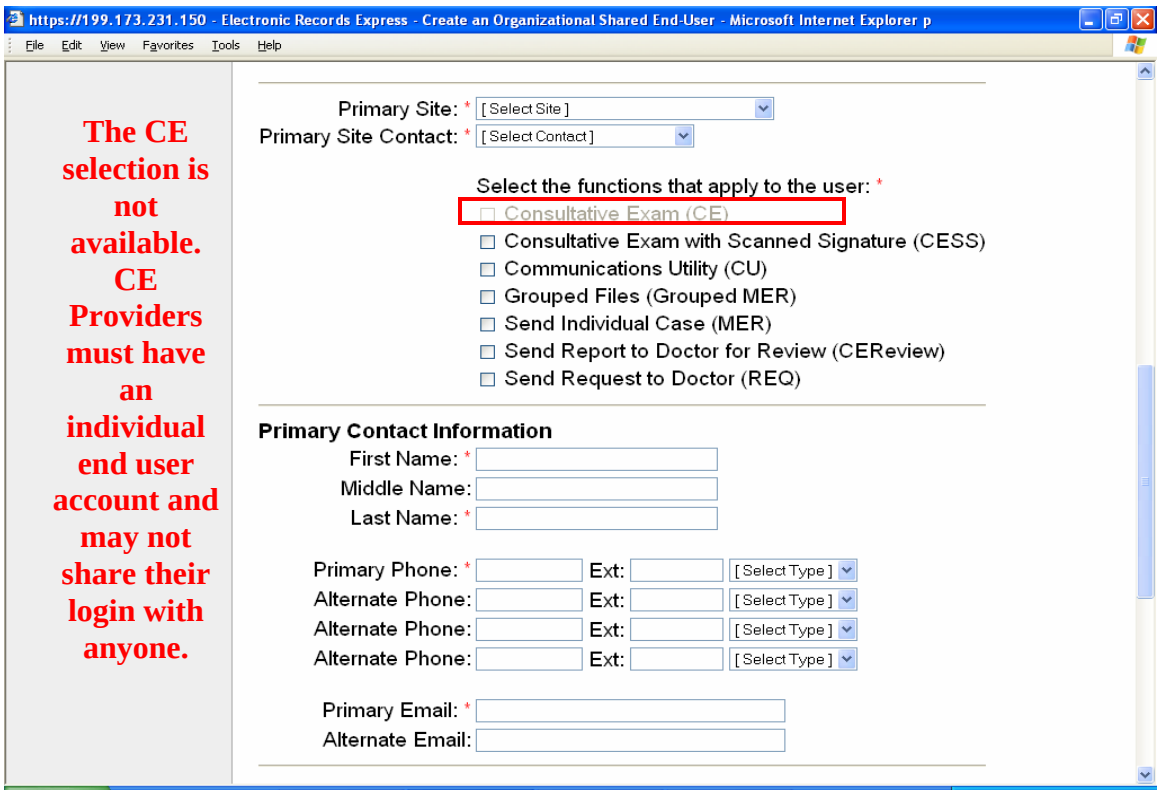
Select the sponsor from the drop down list.



The next step is extremely important. You will be selecting the website utilities that the users will have access to. Please be sure to select all utilities the users need.

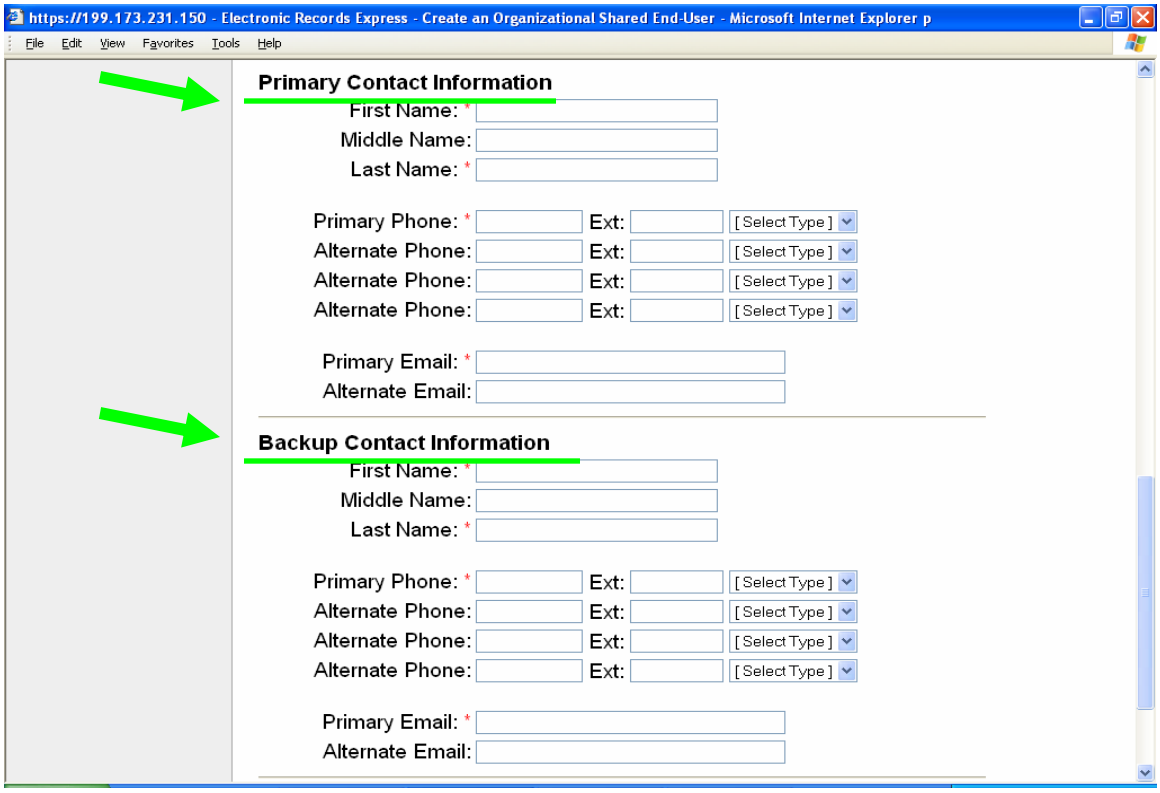
Note: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.

Note: the Consultative Exam (CE) utility cannot be selected for an Organizational Shared End User account.



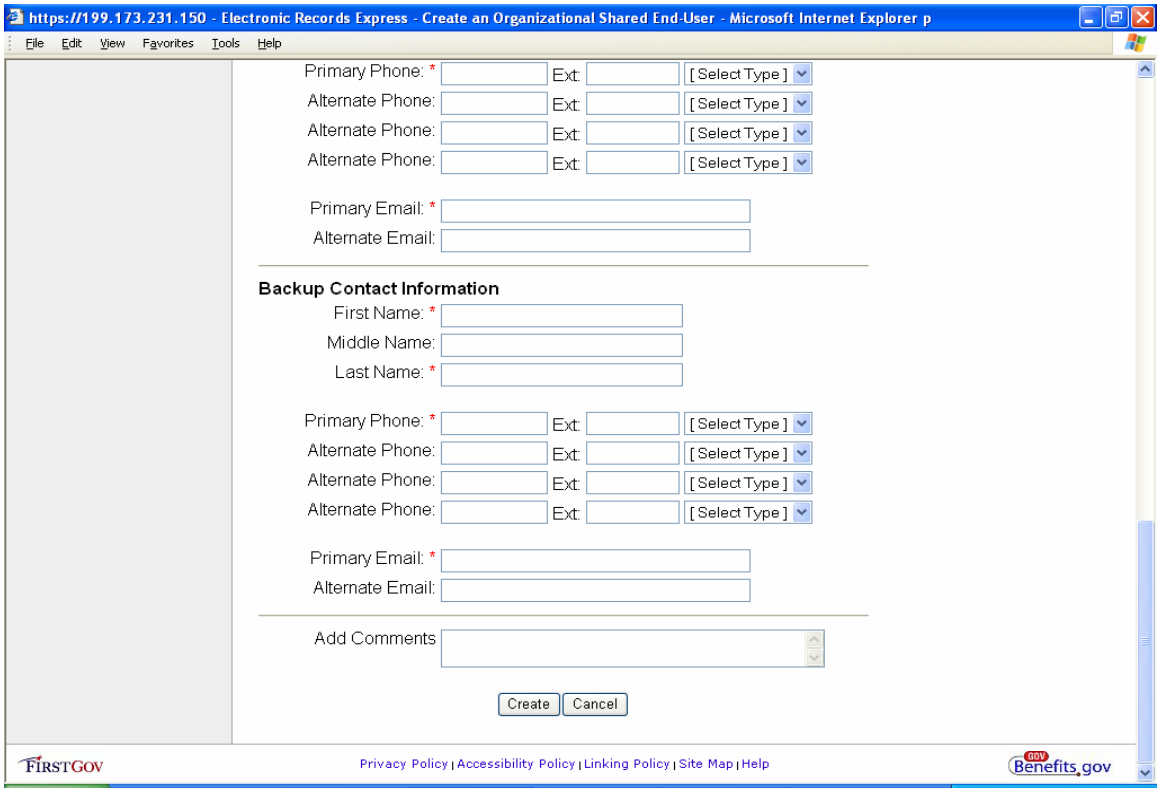
You'll see another line separator in the page. You will now enter information for the organizational shared end user account's primary contact (name, phone, and email).

You'll notice another line separator and then you will enter information for the organizational shared end user account's backup contact.

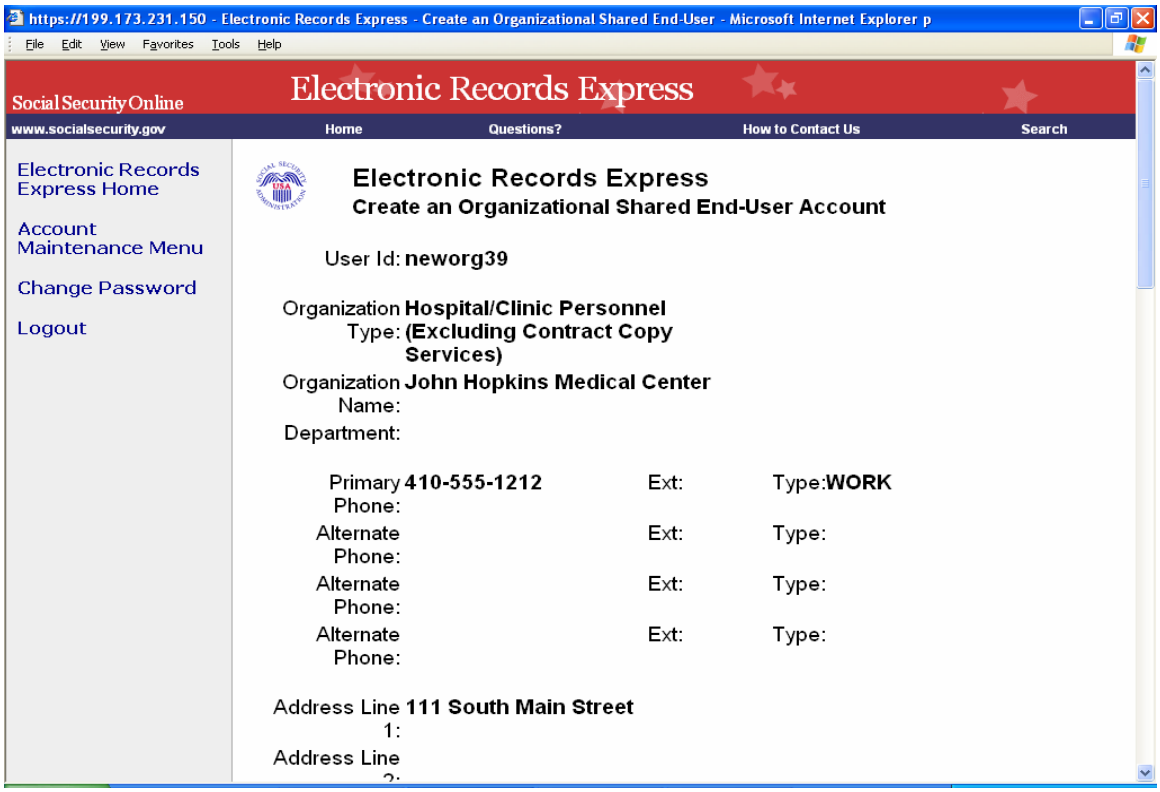


You may type in any comments in the “Comments” text box.

Click the **Create** button to continue to create the account. Click the **Cancel** button to cancel this account setup.



You will now see a summary page for the account.



https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Address Line 1: **111 South Main Street**
Address Line 2:
Address Line 3:
Address Line 4:
City: **Anytown**
State/Territory: **AL**
Zip Code: **21221**
Country: **United States**

Primary Site: **MD - BALTIMORE DDS [V40]**
Primary Site Contact: **Morgan, Roy**

Function(s) selected: **Consultative Exam with Scanned Signature (CESS)**
Communications Utility (CU)
Grouped Files (Grouped MER)
Send Individual Case (MER)
Send Report to Doctor for Review (CEReview)
Send Request to Doctor (REQ)

Primary Contact Information
First Name: **New**

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

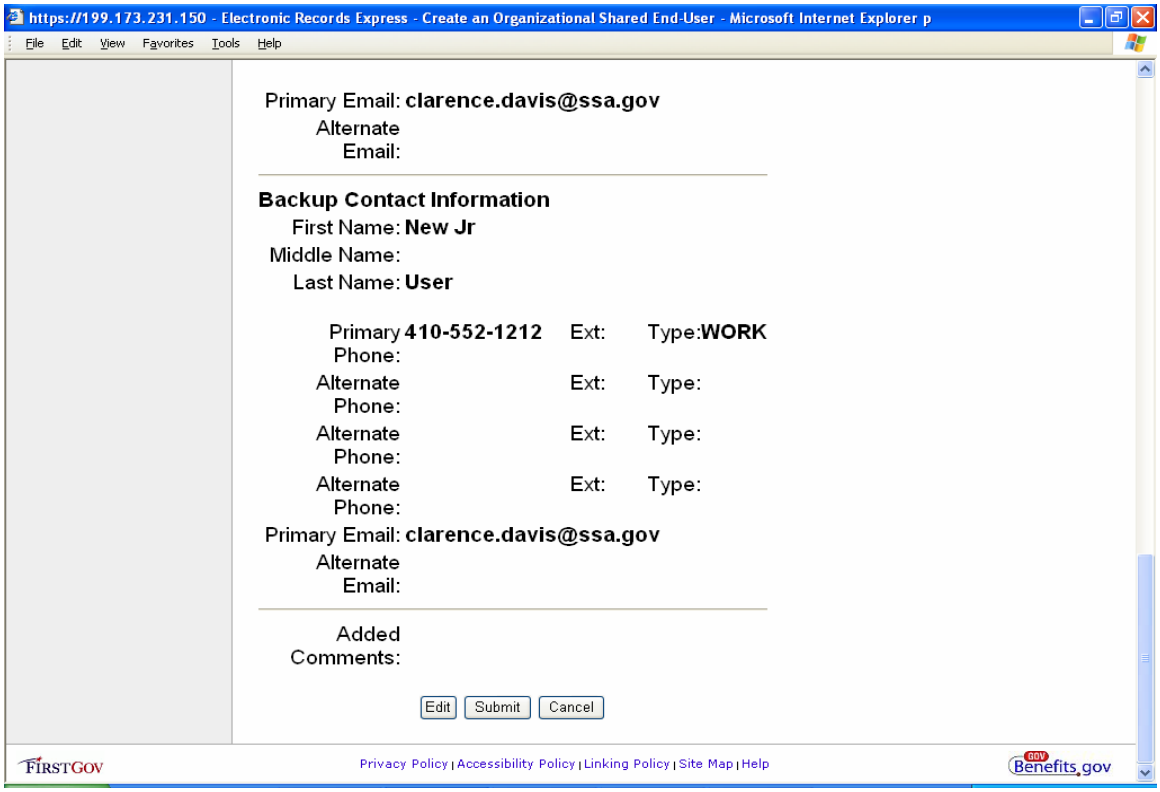
Primary Contact Information
First Name: **New**
Middle Name:
Last Name: **User**

Primary Phone: **410-555-1212** Ext: Type:**WORK**
Alternate Phone: Ext: Type:
Alternate Phone: Ext: Type:
Alternate Phone: Ext: Type:

Primary Email: **clarence.davis@ssa.gov**
Alternate Email:

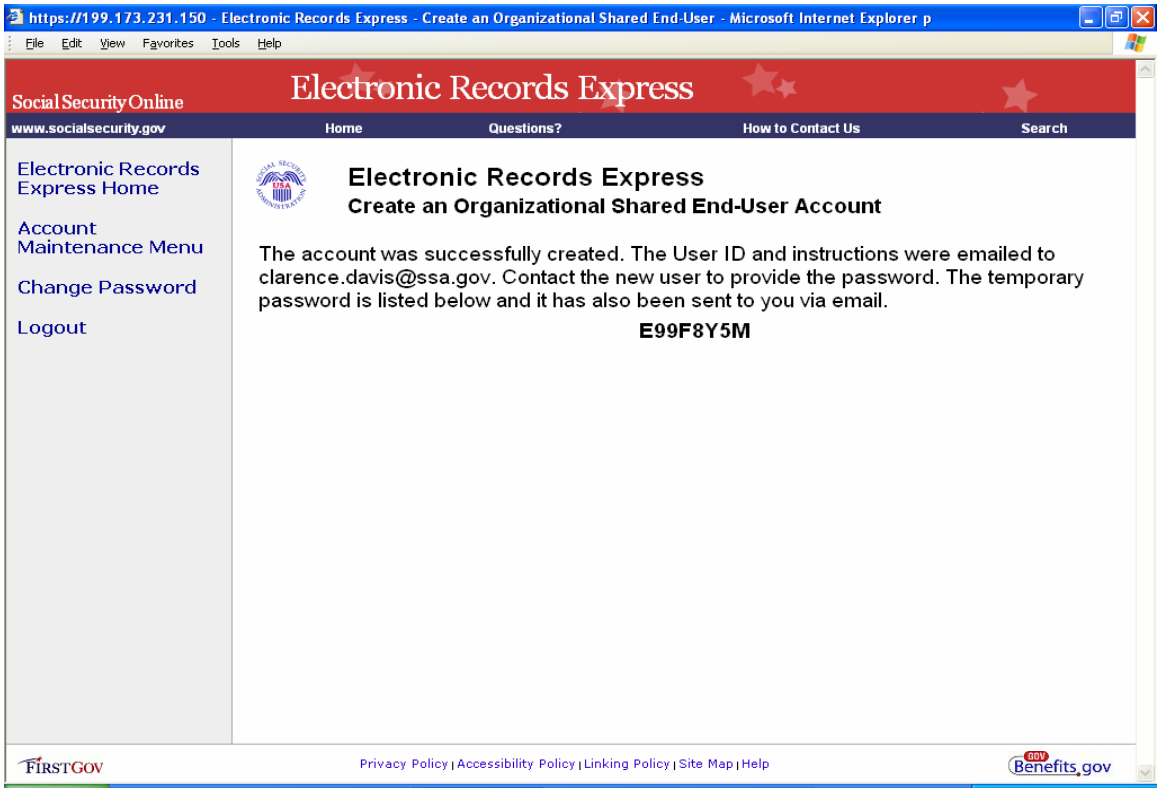
Backup Contact Information
First Name: **New Jr**
Middle Name:
Last Name: **User**

Primary Phone: **410-552-1212** Ext: Type:**WORK**
Alternate Phone: Ext: Type:
Alternate Ext: Type:

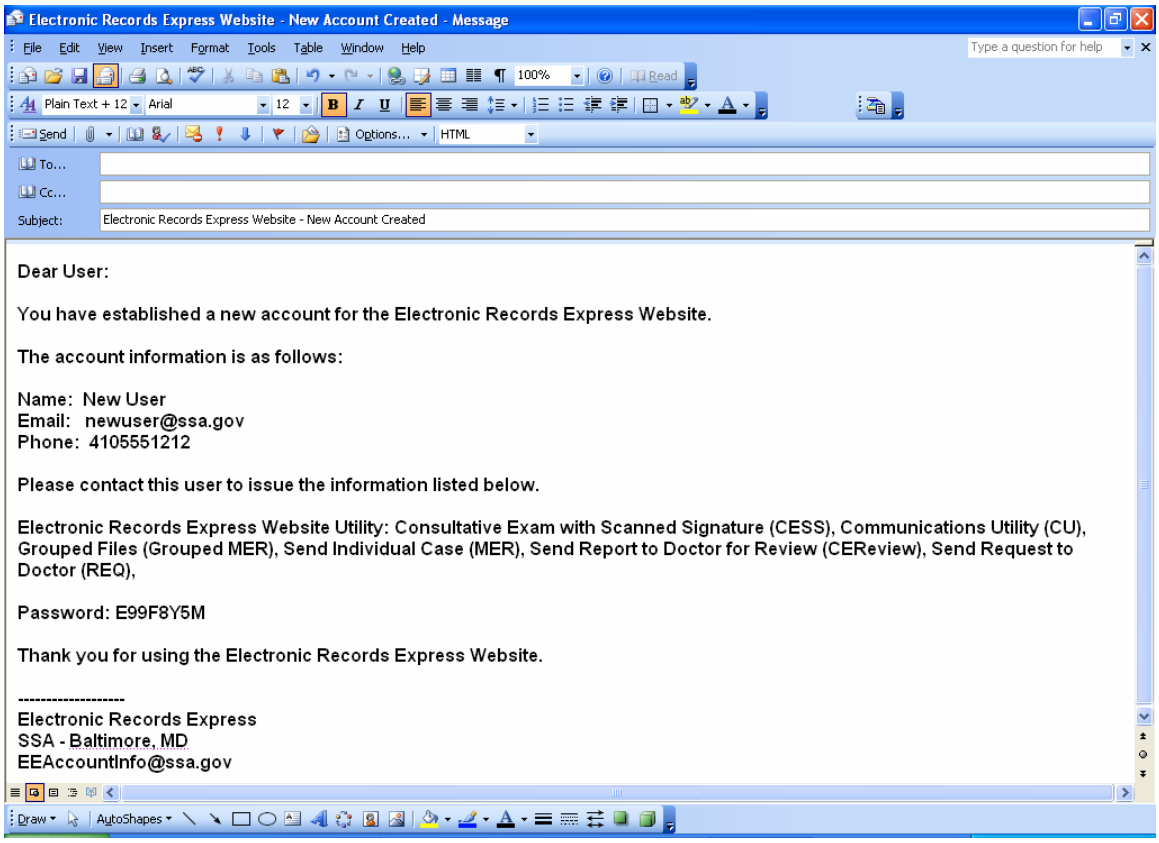


Click the **Edit** button to return to the prior screen to change any information you have entered. Click the **Submit** button to create the account. Click the **Cancel** button to cancel the account setup.

Clicking **Submit** will activate the new account. You will receive a confirmation screen similar to the one shown below:



You will receive a confirmation email similar to the one shown below:



What happens now?

The User ID and instructions have been emailed to the primary contact's email address that you provided.

The sponsor must contact the new user to provide the password. The temporary password is listed on the website confirmation screen and it has also been sent to you via your SSA email address.

Please be sure to explain to your new user that the password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change their password.

Your new user now has access to the Electronic Records Express website.

Search Accounts on Specified Criteria

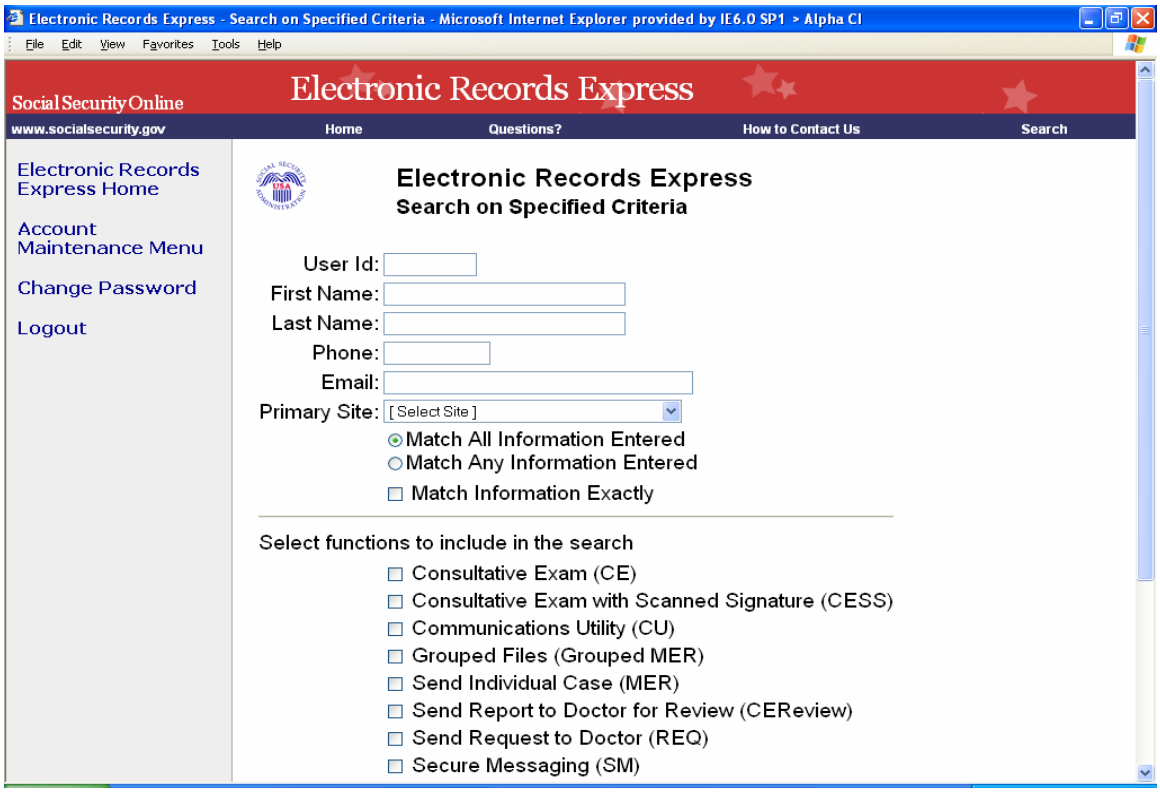
From the Account Maintenance Menu, select the "Search on Specified Criteria" link.

You may enter many different types of information to find accounts. Search criteria include:

- User ID
- First name
- Last name
- Phone
- Email
- Primary DDS Site

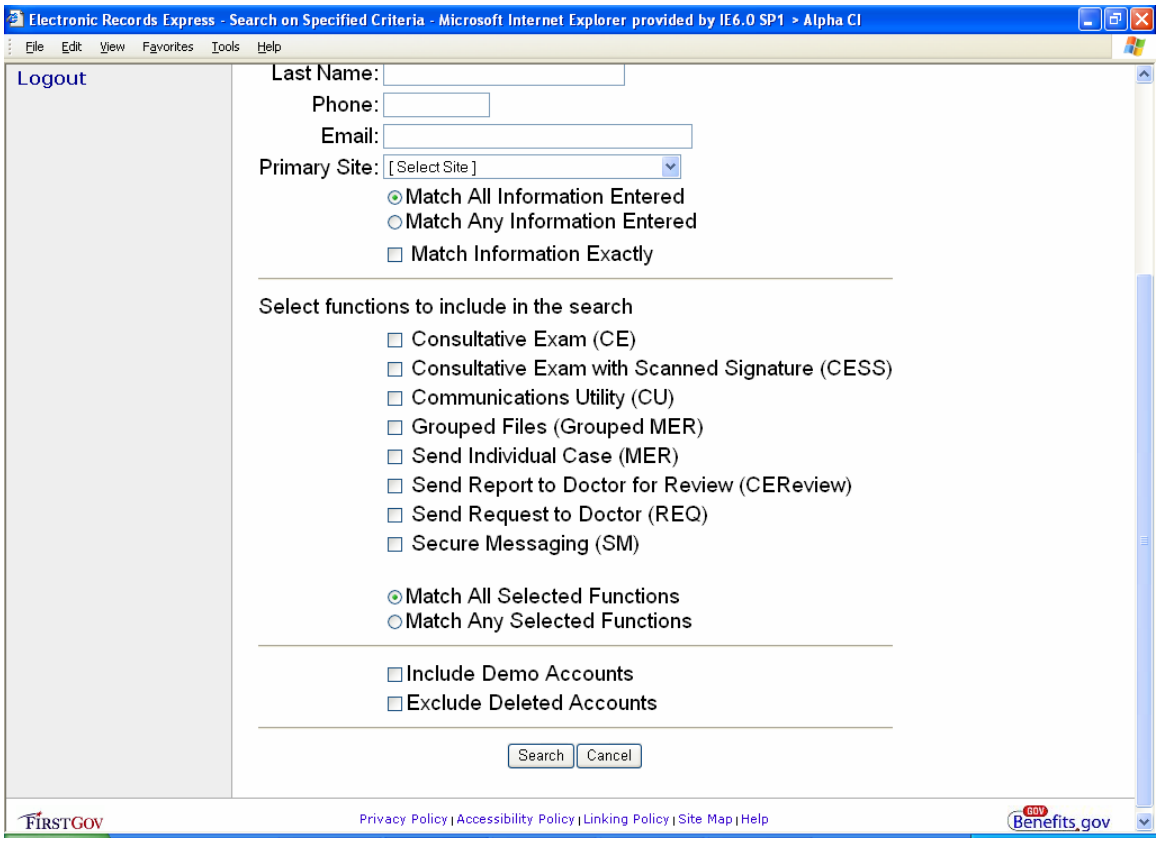
You may select one of the radio buttons to:

- Match **all** information entered
- Match **any** information entered
- Match information **exactly**



Next, you may check the boxes for the utility access the user(s) have. You may click a radio button to match either **all** or **any** of the selected functions.

You may also select the checkbox to include demo accounts in your search.



A search for users with Primary Site affiliation S34 yielded the results shown below. Please note that you may have to use the scroll bar at the bottom of your web browser to see the complete database.

https://199.173.231.150 - Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by I

File Edit View Favorites Tools Help

Social Security Online

Electronic Records Express

www.socialsecurity.gov | Home | Questions? | How to Contact Us | Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

Electronic Records Express
Search Results

Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

User Id	Account Type	First Name	Last Name	Organization	Phone	Email	Site
abrooks1	EndUser	J.	Brooks		505--345-6100	david.hsieh@ssa.gov	S34
aghaffa1	EndUser	Ali	Ghaffari		505-762-6492	david.hsieh@ssa.gov	S34
ajakins1	EndUser	Alan	jankins		505-687-6849	david.hsieh@ssa.gov	S34
apreeve1	EndUser	Anthony	Reeve	Industrial Rehabilitation Clinics	505-797-7691	david.hsieh@ssa.gov	S34
cadams12	EndUser	Carl	Adams		505-883-8984	david.hsieh@ssa.gov	S34
clmorga1	EndUser	Clifford	Morgan	Psychology & Counseling Services, Inc	505-8657100	david.hsieh@ssa.gov	S34
collins1	EndUser	Charles	Collins		505-532-0880	david.hsieh@ssa.gov	S34
crclift1	EndUser	C.R.	Clifton		352-336-	david.hsieh@ssa.gov	S34

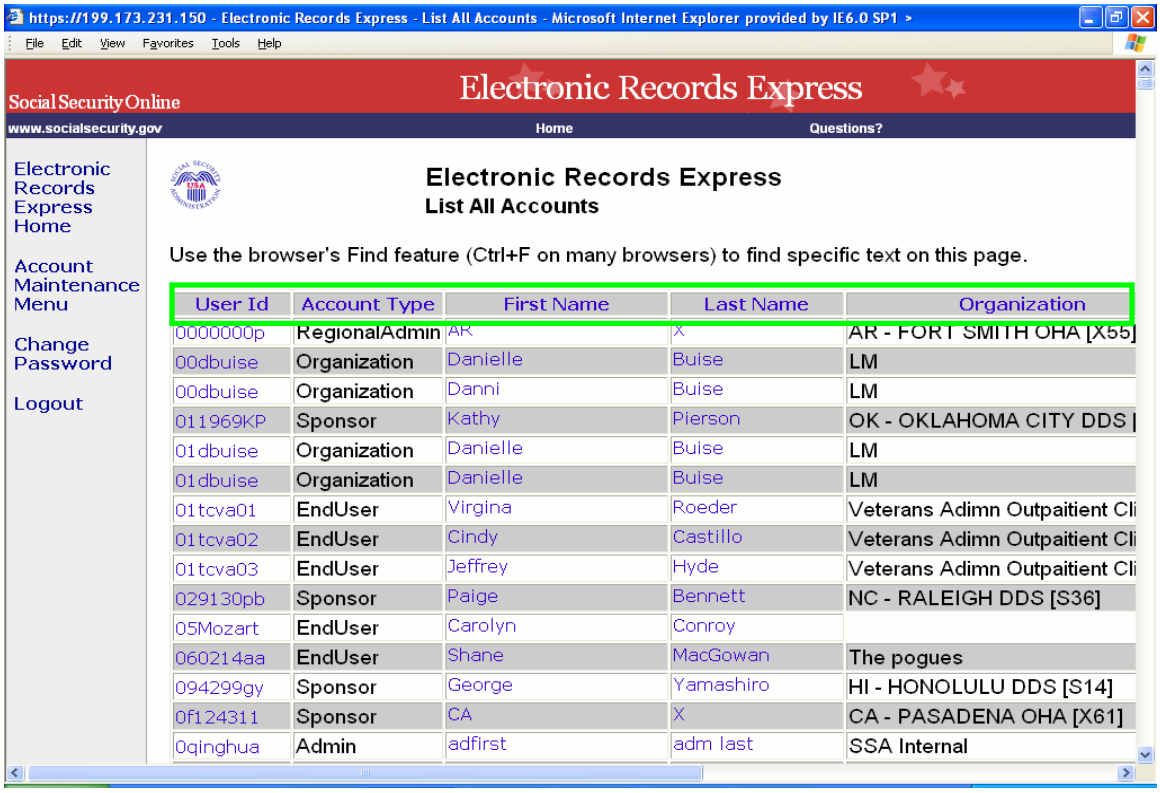
List All Accounts Alphabetically by User ID

From the Account Maintenance Menu, select the link “List all accounts alphabetically by User ID”. The next page shown below illustrates the result of this search. The database of users is organized with the following information categories:

It may be necessary for you to use the scroll bar at the bottom of your web browser window to see the entire database.

You can select a category to sort the database. To do this, simply click a column heading across the top of the database.

Sorting the database may be useful if you are looking for a user’s last name, user ID, or Site (if you wish to list all users your site has signed up).



User Id	Account Type	First Name	Last Name	Organization
0000000p	RegionalAdmin	AR	X	AR - FORT SMITH OHA [X55]
00dbuise	Organization	Danielle	Buise	LM
00dbuise	Organization	Danni	Buise	LM
011969KP	Sponsor	Kathy	Pierson	OK - OKLAHOMA CITY DDS [
01dbuise	Organization	Danielle	Buise	LM
01dbuise	Organization	Danielle	Buise	LM
01tcva01	EndUser	Virgina	Roeder	Veterans Adimn Outpaitient Cli
01tcva02	EndUser	Cindy	Castillo	Veterans Adimn Outpaitient Cli
01tcva03	EndUser	Jeffrey	Hyde	Veterans Adimn Outpaitient Cli
029130pb	Sponsor	Paige	Bennett	NC - RALEIGH DDS [S36]
05Mozart	EndUser	Carolyn	Conroy	
060214aa	EndUser	Shane	MacGowan	The pogues
094299gy	Sponsor	George	Yamashiro	HI - HONOLULU DDS [S14]
0f124311	Sponsor	CA	X	CA - PASADENA OHA [X61]
0qinghua	Admin	adfirst	adm last	SSA Internal

https://199.173.231.150 - Electronic Records Express - List All Accounts - Microsoft Internet Explorer provided by IE6.0 SP1 >

File Edit View Favorites Tools Help

rds Express

Questions? How to Contact Us Search

xpress

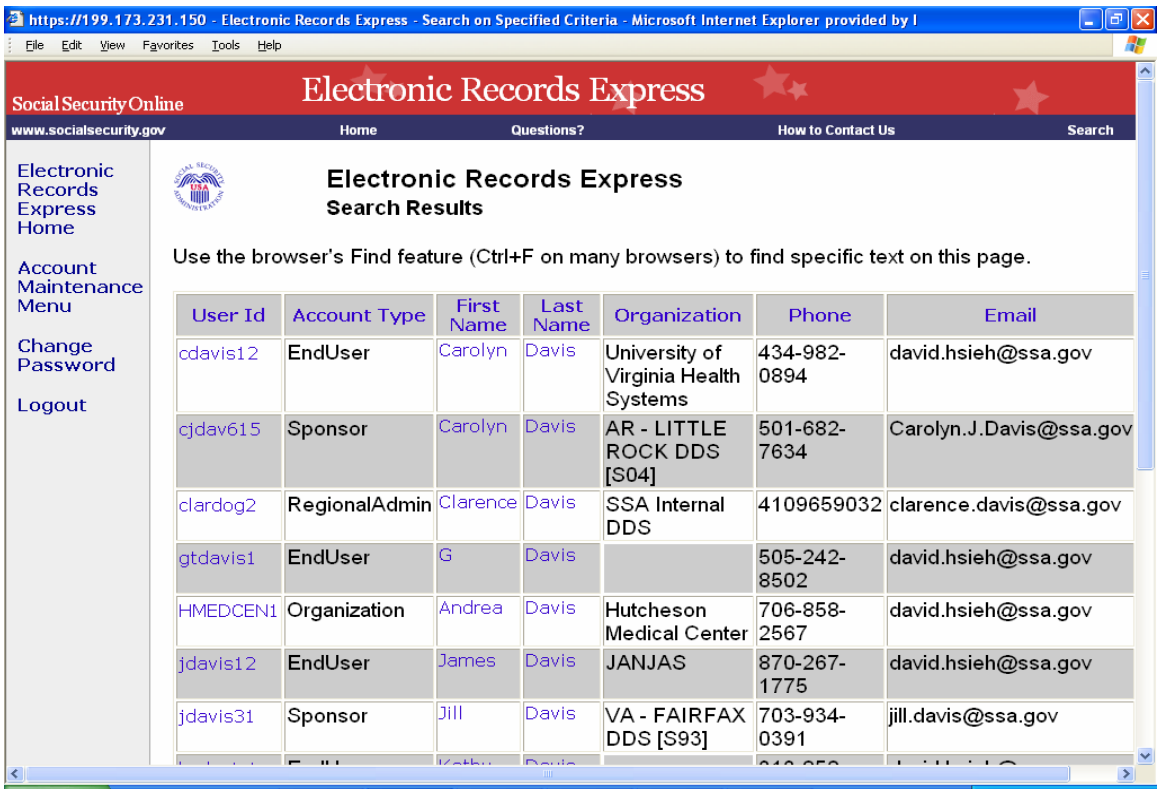
s) to find specific text on this page.

Last Name	Organization	Phone	Email	Site
	AR - FORT SMITH OHA [X55]	456	qinghua.liu@ssa.gov	
ise	LM	4105942565	danielle.c.buise@ssa.gov	S01
ise	LM	4102525252	danielle.c.buise@ssa.gov	S01
erson	OK - OKLAHOMA CITY DDS [S39]	4054192576	kathleen.pierson@ssa.gov	
ise	LM	4105942565	danielle.c.buise@ssa.gov	S01
ise	LM	4105945858	danielle.c.buise@ssa.gov	S01
eder	Veterans Adimn Outpaitient Clinic	231-932-9720	david.hsieh@ssa.gov	S94
stillo	Veterans Adimn Outpaitient Clinic	231-932-9720	david.hsieh@ssa.gov	S94
de	Veterans Adimn Outpaitient Clinic	231-932-9720	david.hsieh@ssa.gov	S94
nnett	NC - RALEIGH DDS [S36]	800-443-9360	Paige.Bennett@ssa.gov	
nroy		828-698-1779	david.hsieh@ssa.gov	S36
cGowan	The pogues	1	jeffrey.caplan@ssa.gov	V40
mashiro	HI - HONOLULU DDS [S14]	808-973-2244	George.Yamashiro@ssa.gov	
	CA - PASADENA OHA [X61]	123	qinghua.liu@ssa.gov	
m last	SSA Internal	44123	qinghua.liu@ssa.gov	

Modify an Account

To modify information in an existing account (individual end user or organizational shared end user), click on “Search on Specified Criteria” from the Account Maintenance Menu. Enter the information you know and search for the account.

A search performed with the last name “Davis” was entered and the following accounts were listed.



User Id	Account Type	First Name	Last Name	Organization	Phone	Email
cdavis12	EndUser	Carolyn	Davis	University of Virginia Health Systems	434-982-0894	david.hsieh@ssa.gov
cjdav615	Sponsor	Carolyn	Davis	AR - LITTLE ROCK DDS [S04]	501-682-7634	Carolyn.J.Davis@ssa.gov
clardog2	RegionalAdmin	Clarence	Davis	SSA Internal DDS	4109659032	clarence.davis@ssa.gov
gtdavis1	EndUser	G	Davis		505-242-8502	david.hsieh@ssa.gov
HMEDCEN1	Organization	Andrea	Davis	Hutcheson Medical Center	706-858-2567	david.hsieh@ssa.gov
jdavis12	EndUser	James	Davis	JANJAS	870-267-1775	david.hsieh@ssa.gov
jdavis31	Sponsor	Jill	Davis	VA - FAIRFAX DDS [S93]	703-934-0391	jill.davis@ssa.gov

Click on the hyperlinked information (User ID, First Name, or Last Name) fields for the desired account. This will take you to the Account Summary page for the account.

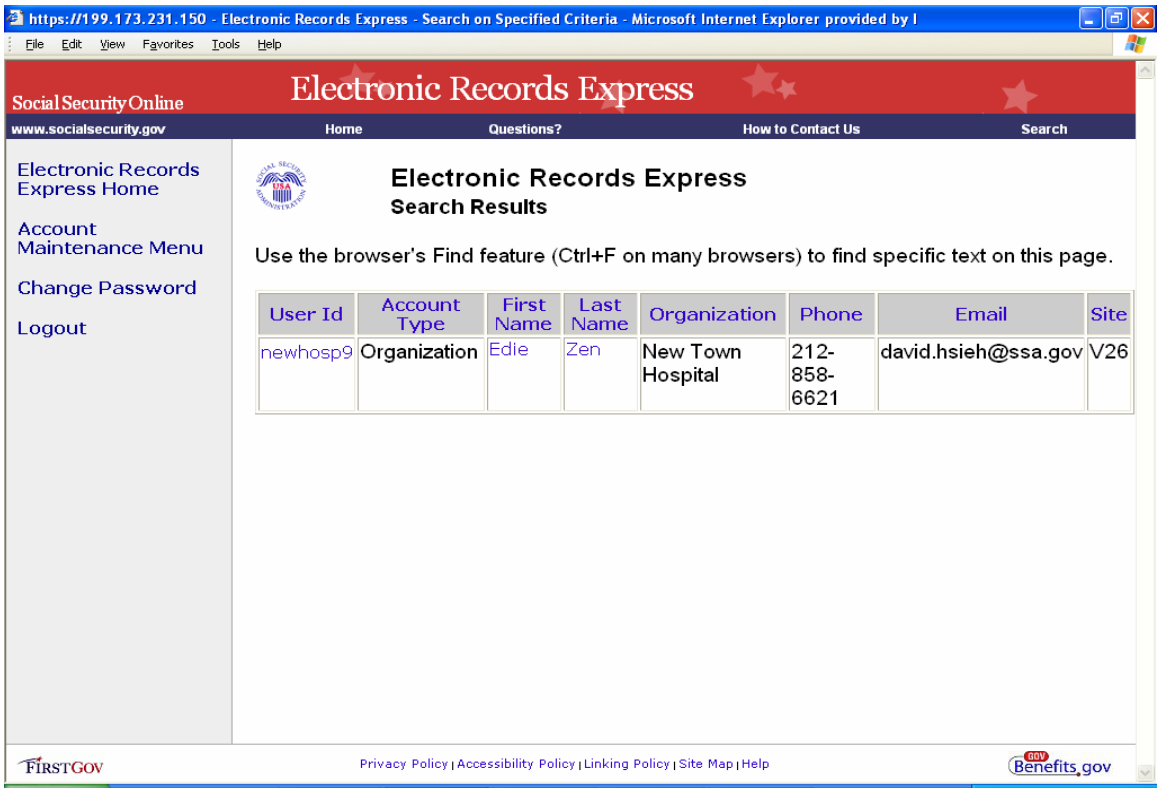
Scroll down to the bottom of the Account Summary page and click the **Modify** button. This brings up the Modify Account page which is laid out in the same format that was used to establish the account. You may find the information you want to modify and make changes.

Be sure to click the **Modify** button at the bottom of this page. You will then see a summary page for the account. After verifying the account information is accurate on the next screen, click the **Submit** button at the bottom of the page to activate your changes.

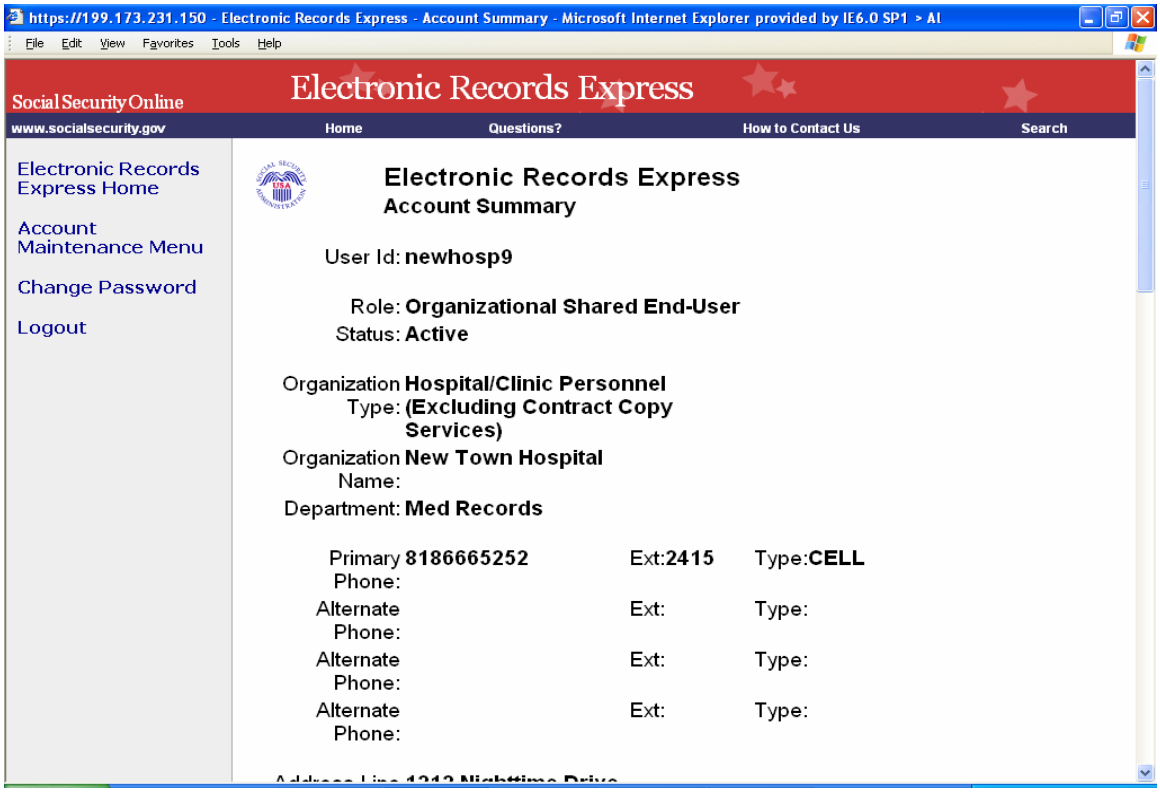
Suspend an Account

To suspend an existing account (individual end user or organizational shared end user), click on “Search on Specified Criteria” from the Account Maintenance Menu. Enter the information you know and search for the account.

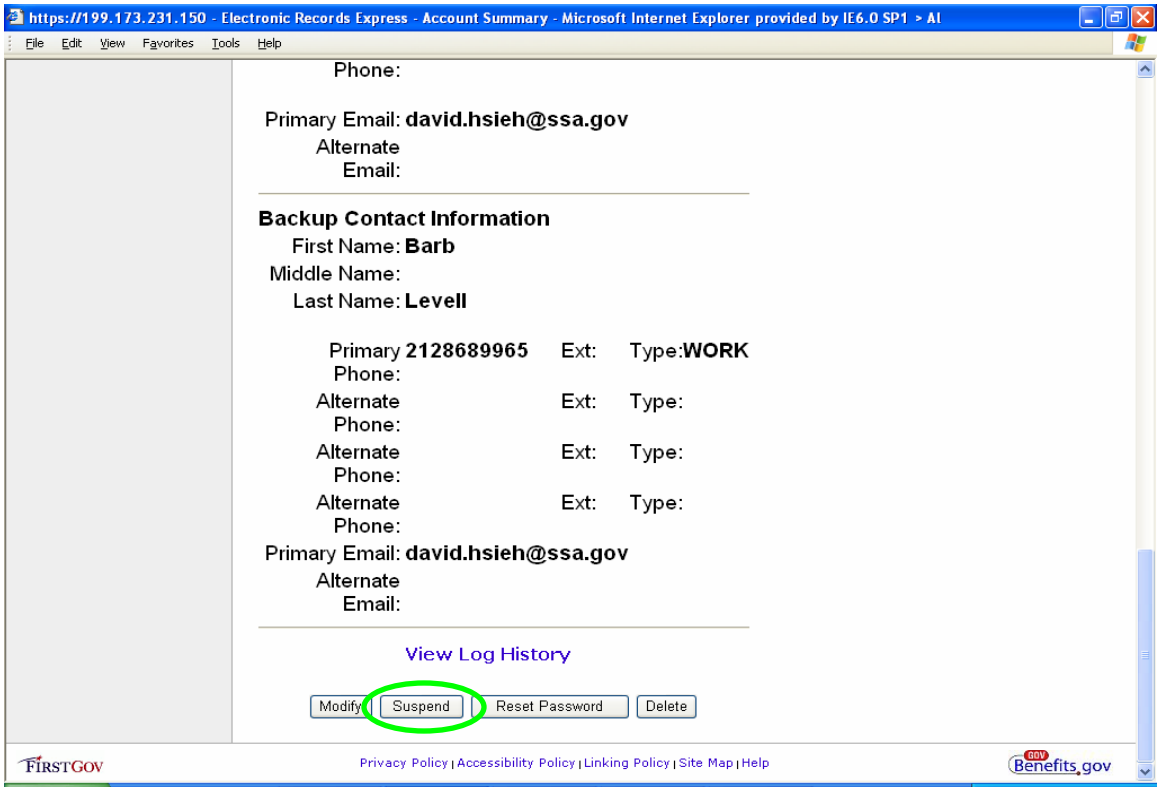
A search for “newhosp9” in the User ID field yielded the following results:



Clicking on the hyperlinked information (User ID, First Name, or Last Name) fields for this account takes you to the Account Summary page for the account.



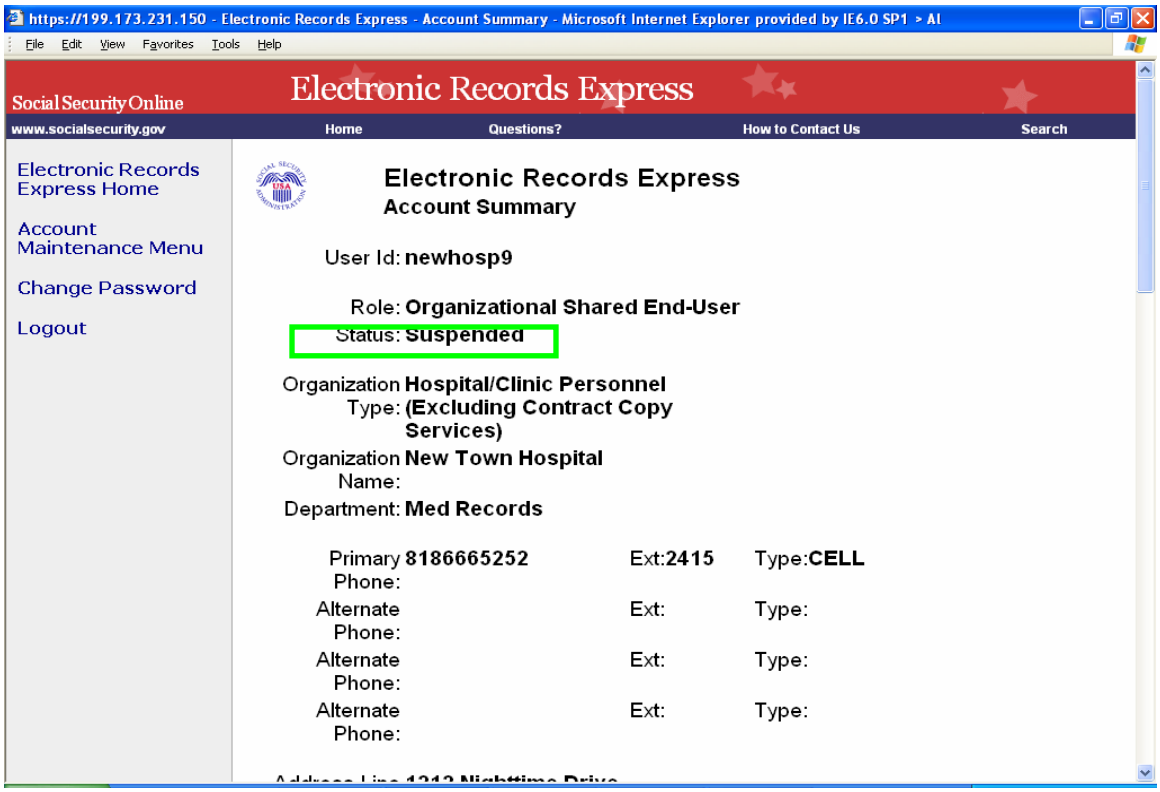
To suspend the account, scroll to the bottom of the Account Summary page and click the **Suspend** button.



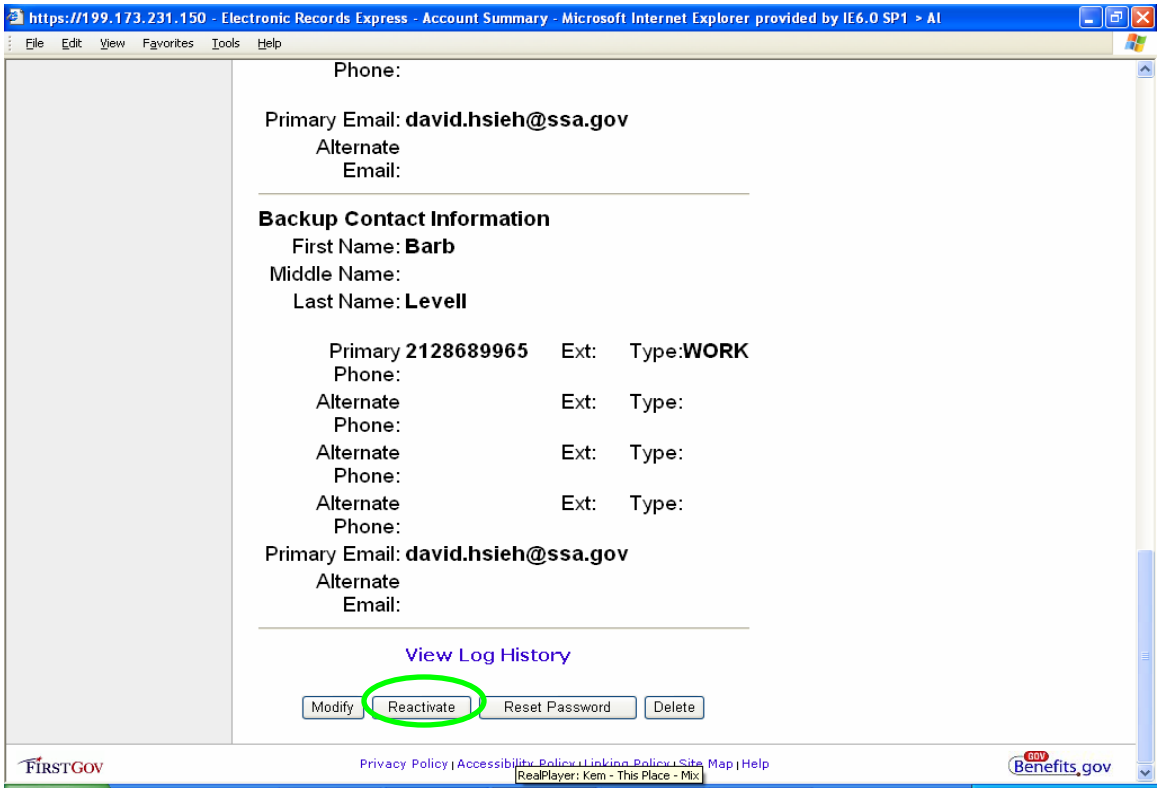
You will then receive confirmation that the account has been suspended.

Reactivating a Suspended Account

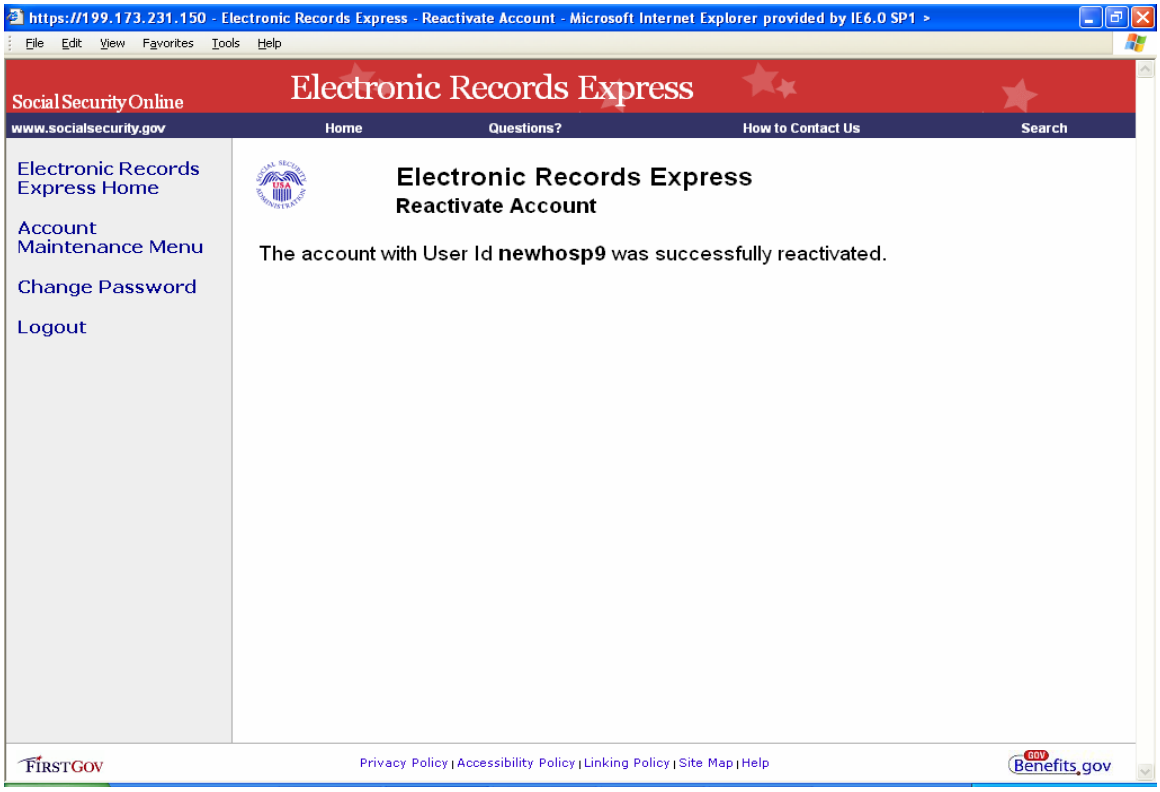
Access to the account can be restored at a later time if/when appropriate. To reactivate a suspended account, simply search for the account following the prior directions. The screen shot below of the Account Summary page shows that the account for "newhosp9" is suspended:



Scroll down to the bottom of the page and select the Reactivate button at the bottom of the Account Summary page.



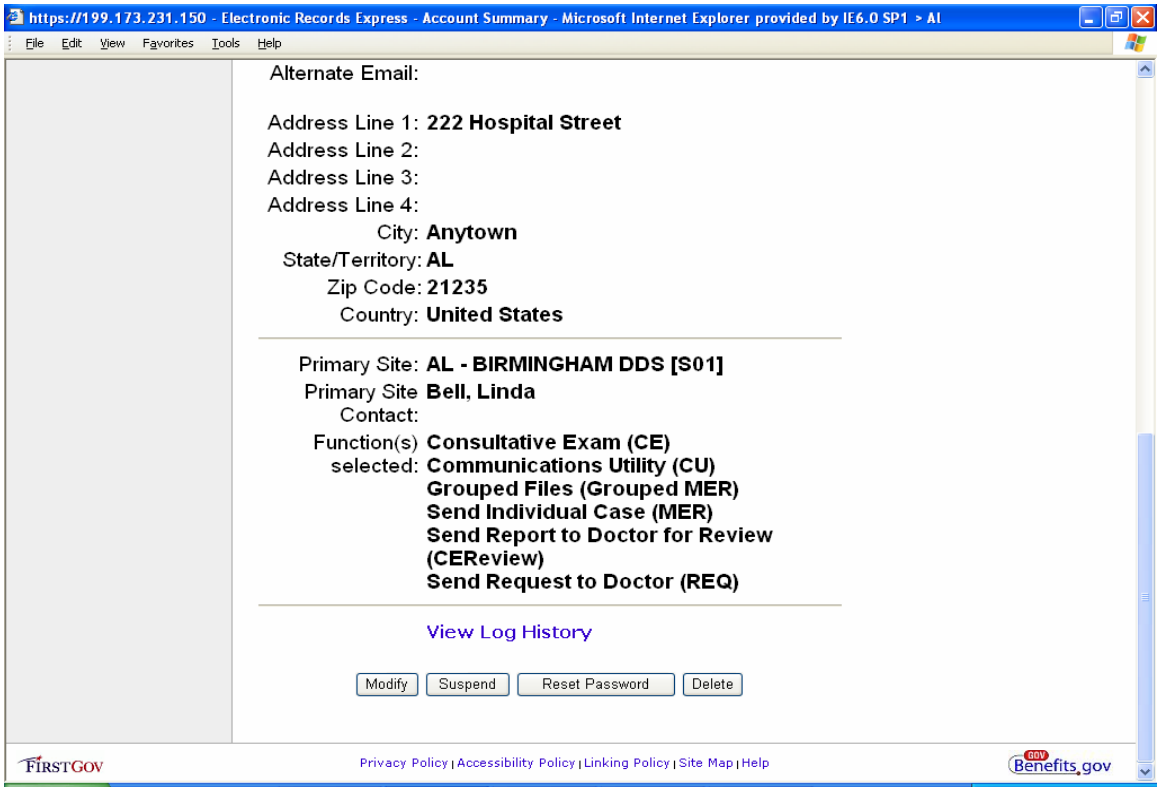
You will receive a confirmation page similar to the one shown below. The account may now be accessed once again by the user(s).



Resetting a Password

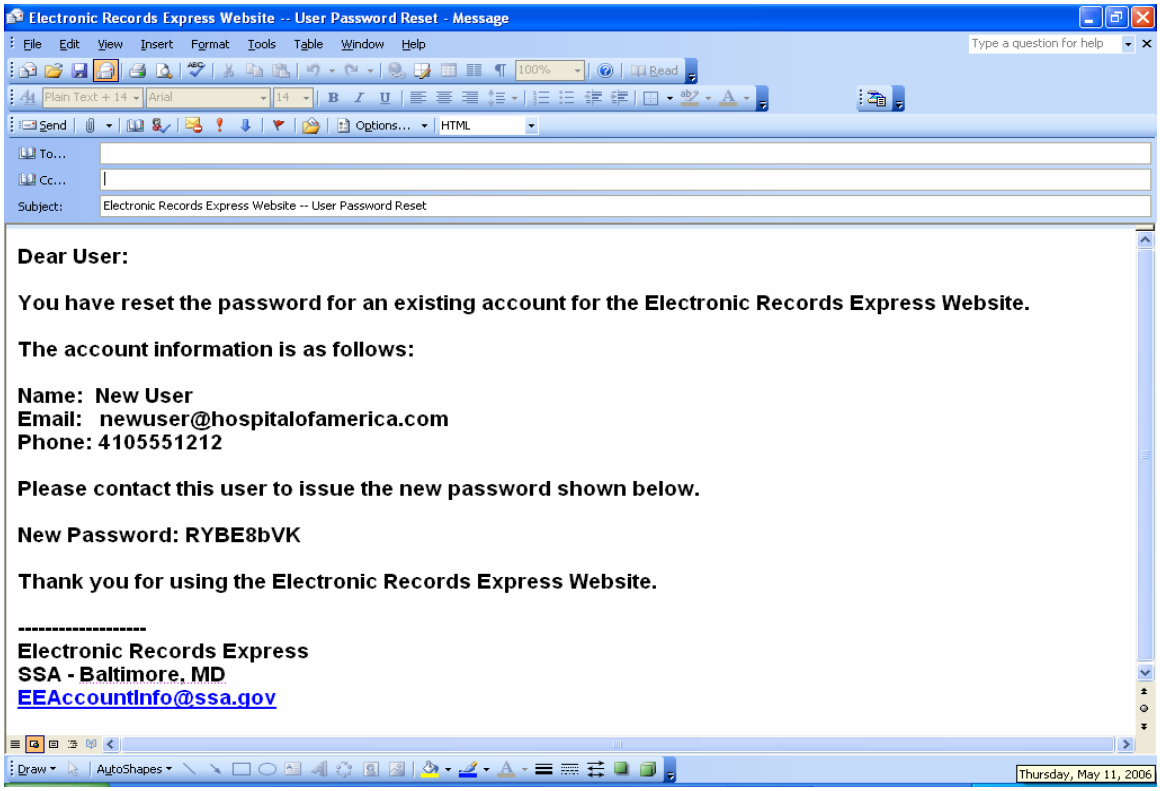
To reset an account's password, click on "Search on Specified Criteria" from the Account Maintenance Menu. Enter the information you know, search for the account, and then select the account that you wish to reset the password on.

This brings you to the Account Summary page. Scroll to the bottom of the page and select the **Reset Password** button.

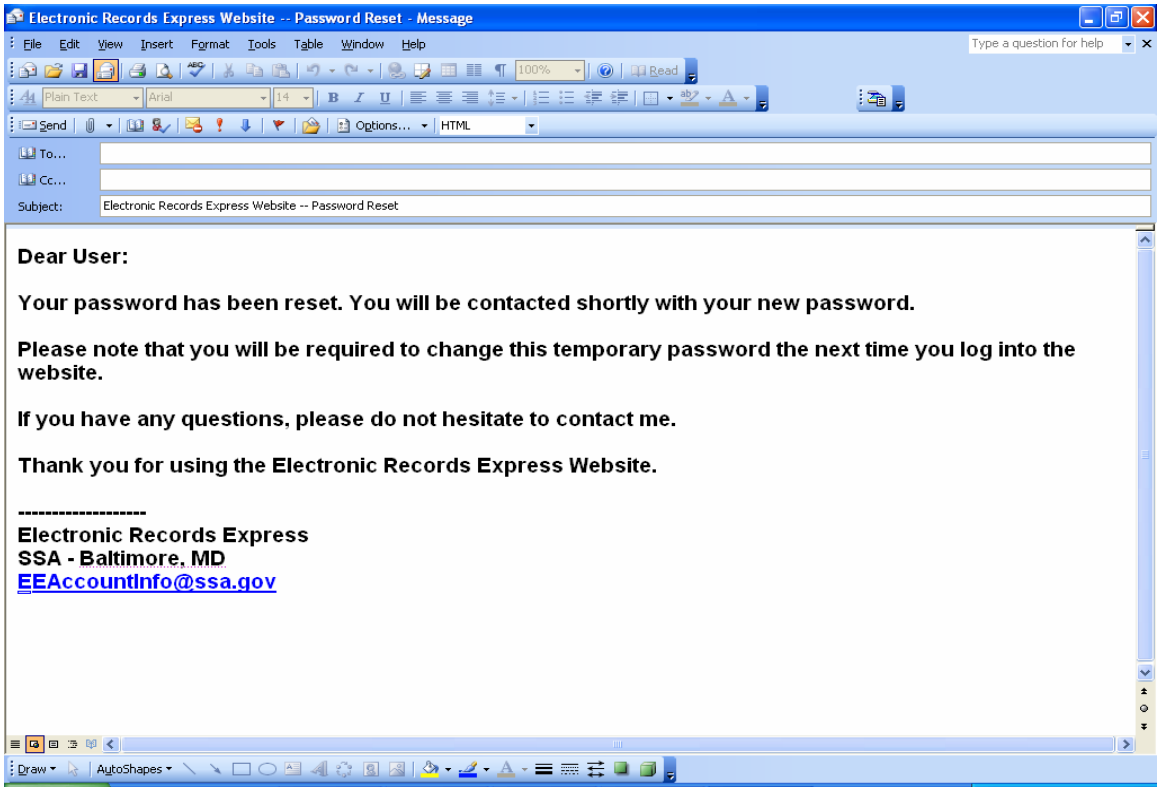


You will receive the new password after the web page refreshes.

You, the sponsor, receive the following email which also contains the new temporary (one time use) password:



The user receives the following email to confirm that the sponsor has reset the password and will contact the user shortly to provide the new password:

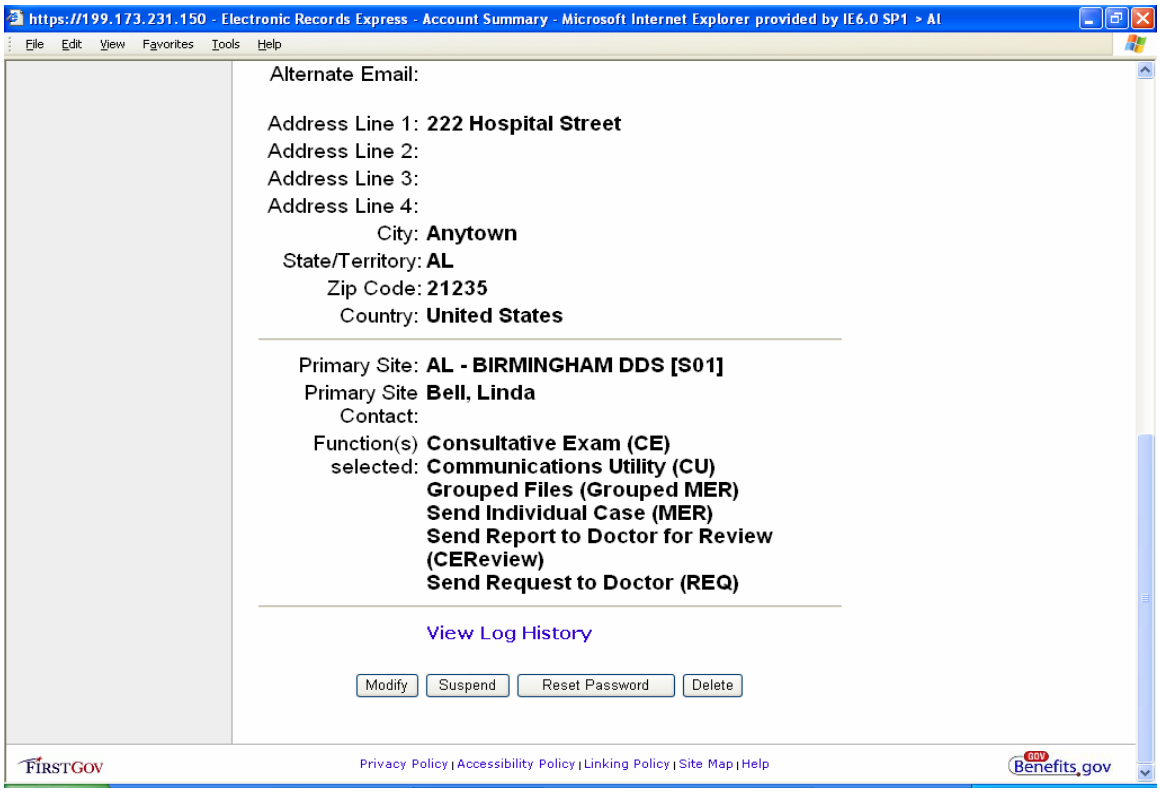


Deleting an Account

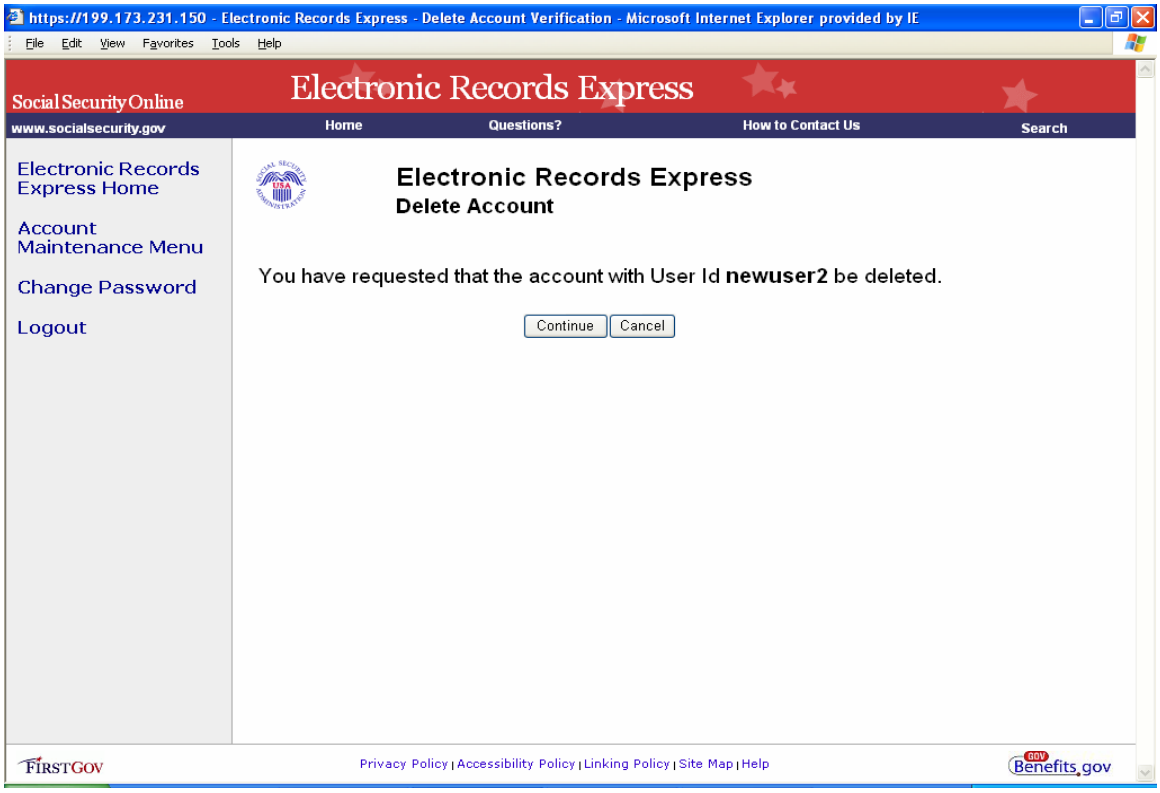
Please note that you should not be deleting accounts at this time.
Deleting accounts permanently deletes all information including audit trails
The example shown below is provided as a courtesy only.

Search accounts by desired criteria. This example shows the "newuser2" account being deleted.

Click the **Delete** button at the bottom of the page.



The next page asks you to confirm your request to delete the specified account. Click the **Continue** button to delete the account. Next you'll receive a confirmation that the account was deleted.


https://199.173.231.150 - Electronic Records Express - Delete Account Verification - Microsoft Internet Explorer provided by IE
File Edit View Favorites Tools Help
Social Security Online
Electronic Records Express
www.socialsecurity.gov
Home
Questions?
How to Contact Us
Search
Electronic Records Express Home
Account Maintenance Menu
Change Password
Logout
Electronic Records Express
Delete Account
You have requested that the account with User Id newuser2 be deleted.
Continue
Cancel
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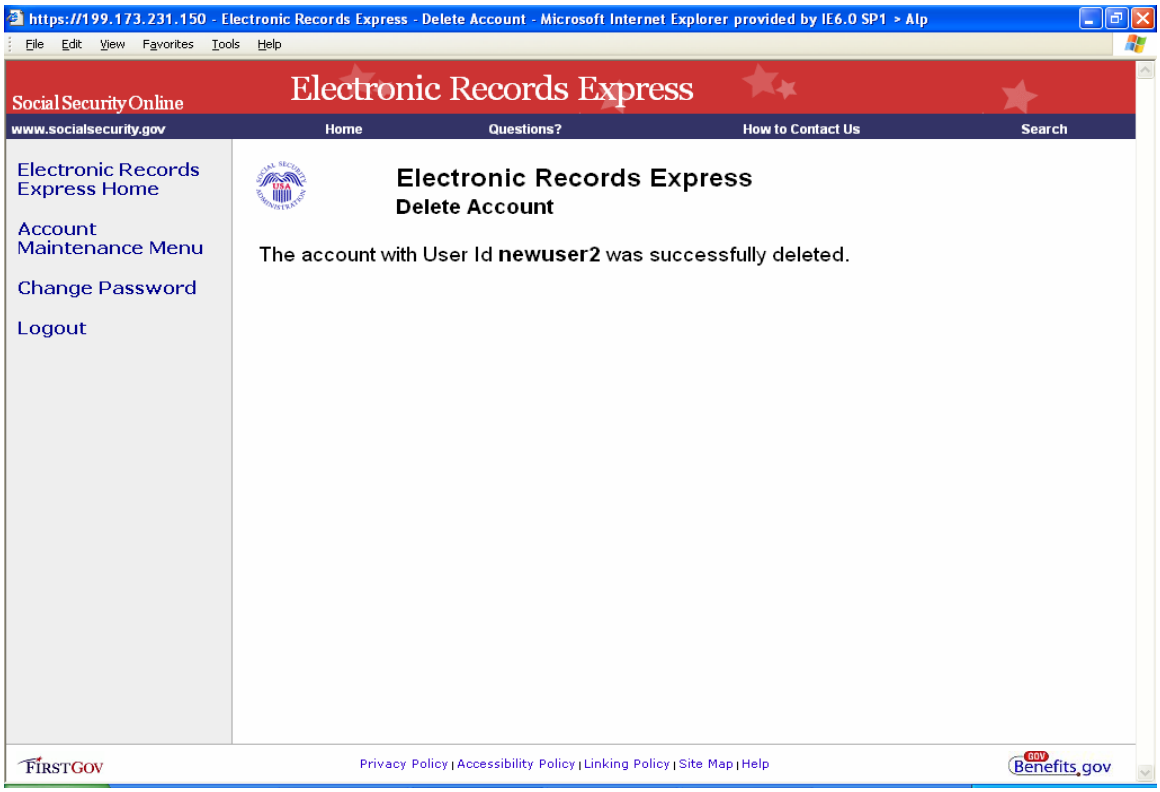
Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help
Benefits.gov


https://199.173.231.150 - Electronic Records Express - Delete Account - Microsoft Internet Explorer provided by IE6.0 SP1 > Alp
File Edit View Favorites Tools Help
Social Security Online
Electronic Records Express
www.socialsecurity.gov
Home
Questions?
How to Contact Us
Search
Electronic Records Express Home
Account Maintenance Menu
Change Password
Logout
Electronic Records Express
Delete Account
The account with User Id newuser2 was successfully deleted.
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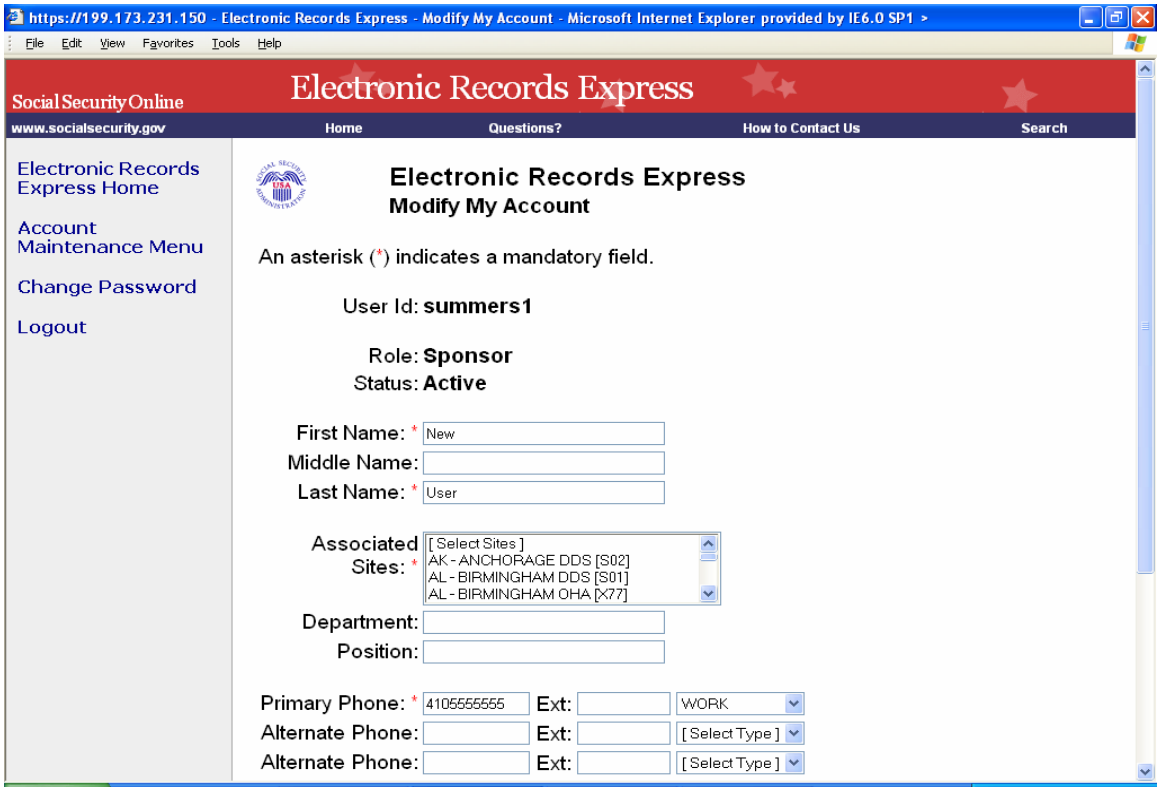
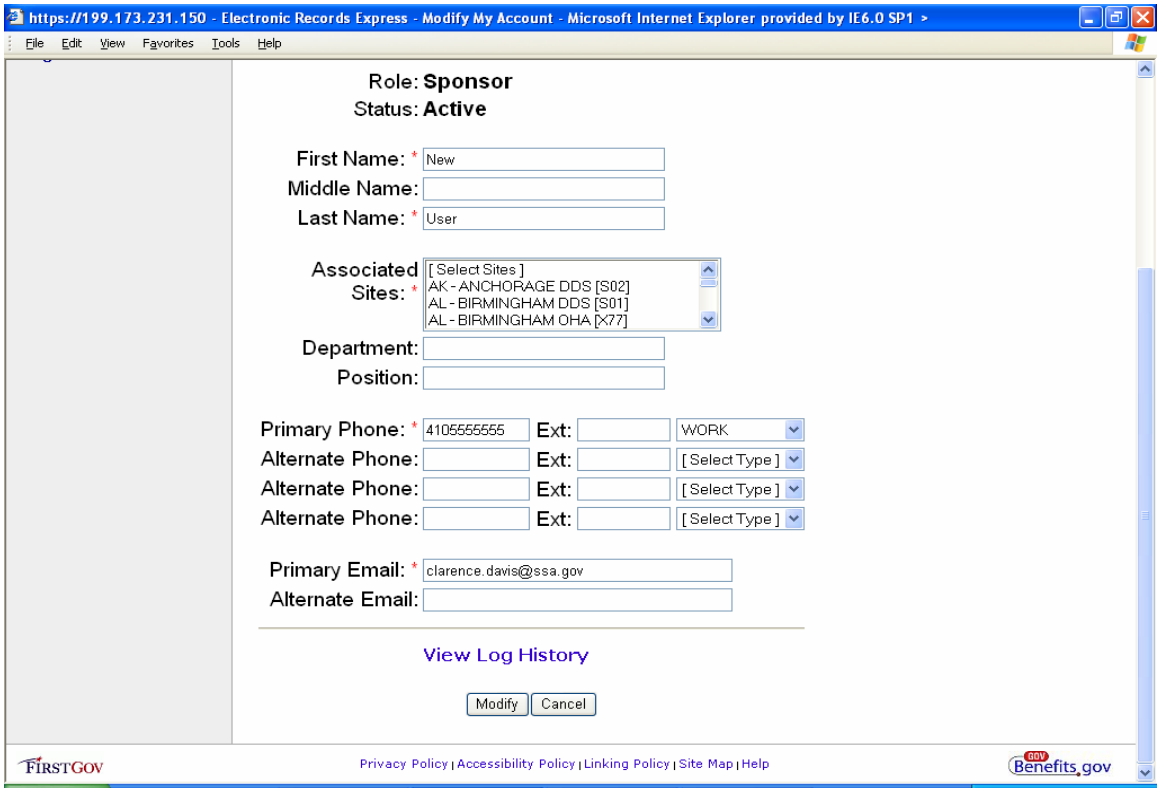
Benefits.gov

Modifying Your Account

From the Account Maintenance Menu, click on “Modify My Account Information”. The screen shots below show the information you can modify on your account. Be sure to click the **Modify** button to activate your changes.




https://199.173.231.150 - Electronic Records Express - Modify My Account - Microsoft Internet Explorer provided by IE6.0 SP1 >
File Edit View Favorites Tools Help
Role: Sponsor
Status: Active
First Name: * New
Middle Name:
Last Name: * User
Associated Sites: *
[Select Sites]
AK - ANCHORAGE DDS [S02]
AL - BIRMINGHAM DDS [S01]
AL - BIRMINGHAM OHA [X77]
Department:
Position:
Primary Phone: * 4105555555 Ext: WORK
Alternate Phone: Ext: [Select Type]
Alternate Phone: Ext: [Select Type]
Alternate Phone: Ext: [Select Type]
Primary Email: * clarence.davis@ssa.gov
Alternate Email:
View Log History
Modify Cancel
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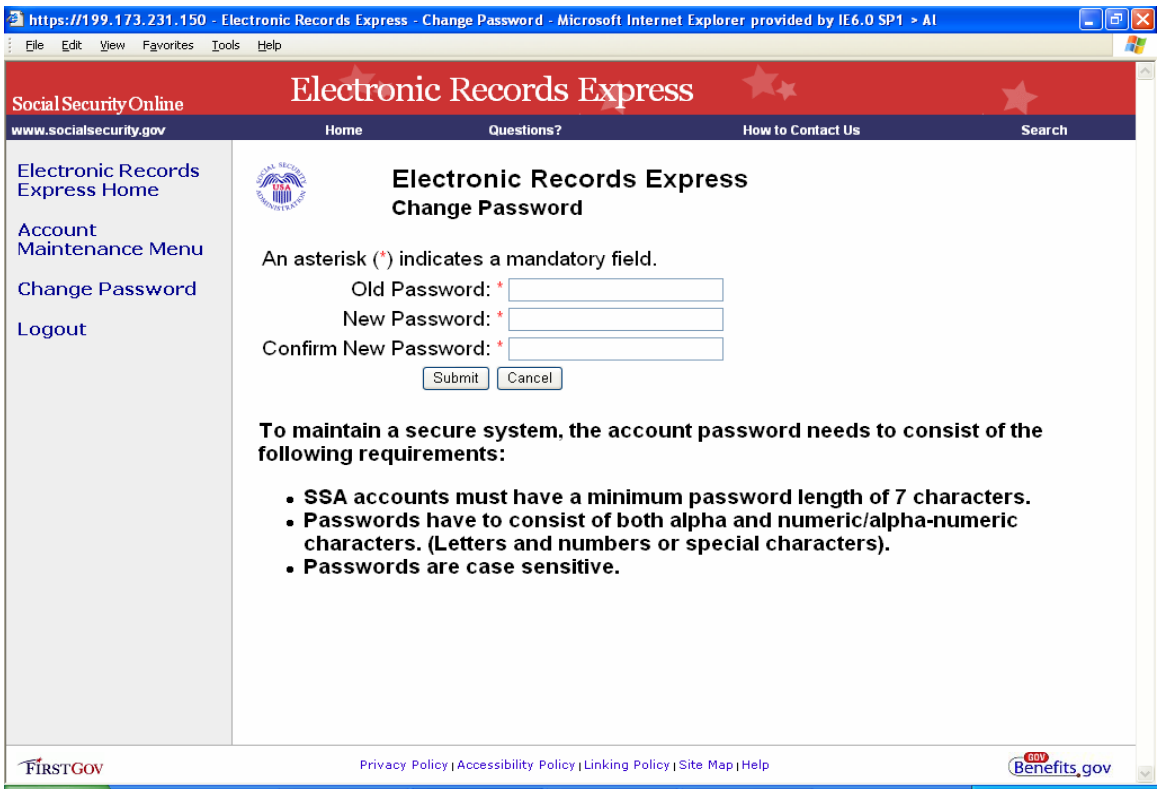
Changing Your Password

From the Account Maintenance Menu, click the “Change Password” hyperlink.

Enter the old password.

Enter the new password.

Enter the new password again to verify it was entered correctly.

Click the **Submit** button to submit your password change.