

# Consultative Examination (CE) Services

## Instructions for Prepare CE Report for Doctor

The **Prepare CE Report for Doctor** link allows a CE provider's administrative staff to prepare a CE report and send it to the appropriate CE provider for later review and submission by the CE provider to the requesting office.

The **Prepare CE Report for Doctor** link will appear once the CE administrative staff has been registered to use this function of the Electronic Records Express website.

If the CE request was not received electronically, the SSA/DDS CE request letter should be readily available to complete the processing steps. The CE provider's administrative staff will sign on to the Electronic Records Express website using his/her username and password. Click the link, **Prepare CE Report for Doctor** under the "Consultative Examination (CE) Services" heading.

If the CE request was received from the DDS electronically, you will be able to locate the request under **Access Doctor's Electronic request**. This will direct you to **Prepare CE Report for Doctor**.

### Electronic Records Express Home—Prepare CE Report for Doctor

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 "www.socialsecurity.gov". The main content area is titled "Electronic Records Express Home" and "Welcome to Electronic Records Express". It features several service categories: "Evidence Submission Services" with a link to "Send Response for Individual Case"; "Consultative Examination (CE) Services" with links for "Pickup Doctor's Prescription Reports", "Prepare CE Report for Doctor" (highlighted with a green arrow), and "Send CE No Show Response"; "Document Exchange Services" with a link to "Teacher Questionnaire"; and "Communication Services" with a link to "Send E-Mail". A "Bulletin Board" on the right indicates the page was updated on 01/08/2008 and provides contact information: "Email for more information" or call toll free: 1-866-691-3061. The bottom of the page shows a taskbar with various open applications and the system clock at 12:07 PM.

## Step 1—Prepare CE Report for Doctor

**Social Security Online**  
www.socialsecurity.gov

**Electronic Records Express Home**  
Prepare CE Report for Doctor  
Preparation (Step 1 of 3)

**Doctor Information:**  
Select the doctor for whom this CE Report is being prepared.

**Patient Information:**  
Enter the Patient's Information.

**Enter 3 character site code or select state and destination:**

**Enter the following information from the request letter or barcode:**

Doctor:

First Name:

Middle Name:

Last Name:

DOB:

Site code:  OR State:

Destination:

SSN:

RQID (Request ID):

RF (Routing Field):  P  D or blank  No RF or No Barcode

DR:  F   No DR or No Barcode

CS:

(enter only if applicable)

**Select the Doctor you are preparing reports for and enter information in all fields.**

## Step 1—Prepare CE Report for Doctor

- Select the Doctor for whom this CE Report is being prepared from the dropdown box.
- Enter the First, Middle and Last Name of the patient.
- Enter the Date of Birth 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

The screenshot shows the 'Electronic Records Express' interface. The main heading is 'Prepare CE Report for Doctor Attach and Upload Files (Step 2 of 3)'. The 'Attaching and uploading files' section contains a table with patient information:

Patient's Name:	John Patient	DOB:	17-00
Destination:	VA - Virginia Beach DDS [S92]	SSN:	-1111
RQID:	111111111	RF:	
DR:	S	CS:	

Below the table is an 'Edit' button. The 'Attach and upload files' section has a text box for 'File 1:' containing 'P\DDS Info.doc' and a 'Browse...' button. Other buttons include 'Clear File 1' and 'Add Another File'. A callout box points to the 'Browse...' button with the text: 'Select “Browse” to choose a file to send.'

## Step 2—Attach and Upload Files

- Select the “**Browse**” button to choose 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 file 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.

- Select the **“Add Another File”** button to send additional files. *Only files for the SSN entered in Step 3 can be sent with this transaction.*
- 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 three letter size pages, approximately 16,000 characters) directly into the box provided.
- Verify the information you have input.
- Select the **“Send to Doctor”** button to send the report to the Doctor. Your file will be delivered to the doctor’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 homepage.

### Step 3-Confirmation

**Confirmation Number**

**If you would like to prepare another CE report for the CE provider, choose the “Prepare Another CE” button.**

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

### Step 3—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. The confirmation page indicates the specific files that were transmitted.

- In the unlikely event that 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](mailto:EETechSupport@ssa.gov) or 1-866-691-3061.
- If you have additional CE reports to send, select “**Prepare Another CE**”. If you would like to return to the ERE homepage select the “**Home**” button.

You cannot bookmark and save a confirmation page, and you will not be able to retrieve a Confirmation Page at a later time from the SSA/DDS after exiting the Confirmation Page webpage.

To print the confirmation page, choose “**Print**” located under the banner in the right upper corner of the page.

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### **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.