Medical and Vocational Expert User Guide

ERE for Experts: Registration Guide for Company Experts



September 2021

Background

The Office of Hearings Operations (OHO) contracts with Medical Experts (MEs) and Vocational Experts (VEs) to perform services such as providing testimony at ALJ hearings and responding to interrogatories. These services require reviewing case documentation stored in the electronic folder (eFolder).

ERE (Electronics Records Express) for Experts is a secure web service that provides registered experts with electronic access to the exhibited documents in eFolder sections A, E, and F of cases they are assigned in CPMS (OHO's Case Processing and Management System).

This registration guide is for a ME or VE working for a company that provides expert services to OHO. Individual Blanket Purchase Agreement (BPA) holders should refer to the "Registration Guide for Individual BPA Holders".

Registration

Experts that work for a company with an active contract or BPA to perform medical or vocational expert services for OHO are eligible to obtain an ERE for Experts account. Registration consists of:

- Creating a "my Social Security" account using LOGIN.GOV
- Adding extra security to your "my Social Security" account
- Adding extra security to your LOGIN.gov account
- Notifying SSA that your registration is complete

Each expert must create an individual Login.gov account with extra security.

Getting Help

If you are having issues creating a *my* Social Security account, or adding the extra security to your *MySocialSecurity* account, contact the helpdesk for assistance. The Helpdesk can provide assistance with issues that occur while trying register. Use this link to access the helpdesk information webpage: <u>https://www.ssa.gov/myaccount/help/</u>.

September 2021

There are three options available when requesting assistance on the *Need Help with* **my** Social Security webpage:

<u>Call Us</u>

• The helpdesk hours of operations is 7:00am to 12:00am Eastern Time, Monday through Friday.

🕝 Social Securit	У
Support Options Call Us	Call Us
Request a Call Back Visit Us	You can speak to a Social Security representative for help with a <i>my</i> Social Security account Monday through Friday.
	1-800-772-1213 8:00 a.m 7:00 p.m. local time. After you hear "Briefly tell me why you are calling," please say "Help Desk" for help with a
	 <i>my</i> Social Security account. TTY (for deaf or hard of hearing) 1-800-325-0778 8:00 a.m 7:00 p.m. local time.
	We are not open on federal holidays. You can also use our automated telephone services to get recorded information and conduct some business 24 hours a day.
	If you would like to receive your Social Security Statement by mail please follow these instructions.
	If you live outside the United States visit Service Around the World.
	Exit

<u>Request a Call Back – currently out of service</u>

• This option will send a message to the helpdesk and you will not have to place a phone call. Keep in mind, this option is only available during hours of operations, 7:00am to 12:00am Eastern Time, Monday through Friday.

<u>Visit Us</u>

• This option allows you to locate the closest social security field office in accordance to your zip code.

🕝 Social Securit	у
Support Options	
Call Us	Visit Us
Request a Call Back	We recommend that you call us before visiting an office. If you need in-person assistance, our
Visit Us	representatives are always happy to help.
	Office Closings and Emergencies
	Inside the United States or Puerto Rico Get location information, servicing hours, and directions to the Social Security office serving your ZIP code.
	Find a Local Office
	If you live outside the United States visit Service Around the World.
	Exit

If the helpdesk is unable assist with the particular issue, they will direct you to visit your local Social Security field office. By using the *Visit Us* in the 3rd option above, you can locate the closest office nearest to your location. It is recommended to first call the field office to make an appointment.

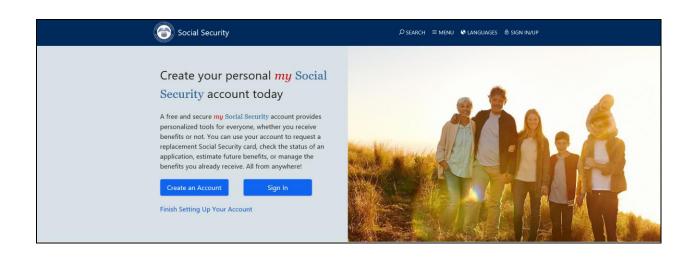
Create a "my Social Security" account

If you already have a "my Social Security" account, go page 26.

If you already have a "Login.gov" account, go to page, go to page 31.

If you already have a "my Social Security" account with extra security, go to page 35.

1. Go to https://www.ssa.gov/myaccount/ and click "Create an Account"



2. Click "Create a new account"

Social Security
Please tell us what you want to do
Create a new account Sign in to my account Use my activation code
Are you now, or have you ever been a victim of domestic violence? Identity theft? Do you have other concerns?
You can contact us to block electronic access to your information at any time, for any reason.
Privacy and Security OMB No. 0960-0789 Privacy Policy Privacy Act Statement Accessibility Help

3. Click "Sign in with LOGIN.GOV"

Social Security
Create your new account using Login.gov
Sign in with IDGIN.GOV The public's one account for government.
Or, use a partner account you already have
Sign in with D.me
About External Websites
Sign in to my account Use my activation code

4. Click on "Create an account"

Ū	
	Login.gov to allow you to
sign in to y	our account safely and securely.
	cecarery.
Email address	
Password	Show password
	Sign in
	Create an account
Sign in with your govern	ment employee ID
<u>« Back to SSA</u>	
Forgot your password?	

5. Enter email address and select your email language preference, then check box to accept login.gov "Rules of Use" and submit.

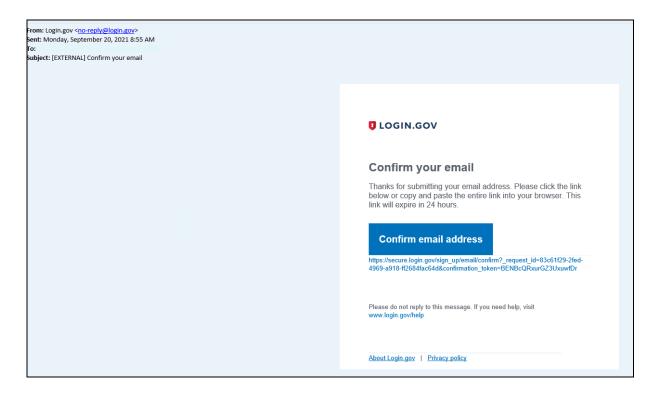
Create your account	
Enter your email address	
Select your email language preference	
Login.gov allows you to receive your email communication English, Spanish or French.	ו in
• English (default)	
 Español 	
O Français	
Check this box to accept the Login.gov Rules of Use 🗹	
Submit	
Cancel	
Security Practices and Privacy Act Statement 12	
Privacy Act Statement	

6. An email will be sent to your account for verification.

Note: If you already have a *my* Social Security account, the email will state "This email address is already associated with and Account", so continue to page 28 on how to add the extra security.

🔁 Check your er	nail
We sent an email to email address. Follow the link	with a link to confirm your to continue creating your account.
Didn't receive an email? <u>Rese</u>	nd
Or, <u>use a different email addre</u>	255
You can close this window if yo	ou're done.

7. Receive email to confirm email address, select "Confirm email address".



8. Once you confirmed email address, you will be asked to Create strong password, then select "Continue".

NOTE: PLEASE REMEMBER this password it will be critical for access to case information.

Create a strong pass	word
It must be at least 12 characters long password. That's it!	and not be a commonly used
Password	Show password
*****	<u></u>
Password strength: Great!	
Password strength: Great!	
	+

September 2021

9. Now you will be required to select "Authentication method setup", then select continue.

acco	a second layer of security so only you can sign in to your unt.
0	Keep this information safe. You will be locked out and have t create a new account if you lose your authentication method
Sele	ct an option to secure your account:
0	Security key Use a security key that you have. It's a physical device that you plug in or that is built in to your computer or phone lit often looks like a USB flash drivej. Recommended because is more phishing resistant.
0	Government employee ID Insert your government or military PIV or CAC card and enter your PIN.
0	Authentication application Get codes from an app on your phone, computer, or tablet. Recommended because it is harder to intercept than texts or phone calls.
0	Phone Get security codes by text message (SMS) or phone call. Please do not use web-based (VOIP) phone services. LESS SECURE
0	Backup codes We'll give you 10 codes. You can use backup codes as your only authentication method, but it is the least recommended method since notes can get lost. Keep them in a safe place.
	Continue

10. Whichever method you have chosen will reflect on this screen.

Example of phone method: Enter the cell phone number, then select text message or phone call, then send code.

*** ***	
Send your securi	
message (SMS) (or phone call
We'll send you a security code	each time you sign in.
Message and data rates may a (VOIP) phone services.	pply. Please do not use web-based
Phone number	
example: (201) 555-0123	
How should we send you a c	ode?
You can change this selection a landline, please select "Phot	the next time you sign in. If you entered no call " below.
• Text message (SMS)	O Phone call
Mobile terms of service	
Send code	
STERIO COLLE	-

11. Enter the security code that was provided by the method you selected.

	security code de to *1 301-455-7829. This code will expire in
One-time security of	
2 Get another d	ode Remember this browser
Entered the wrong pl	none number? <u>Use another phone number</u>
Choose another opt	ion

12. Confirm your email address, then select "Agree and continue".

A phone was added to your account.
You are now signing in for the first time We'll share this information with SSA:
Email address Updated on Not yet verified
SSA will only use this information to connect to your account.

September 2021

13. Agree to the terms of by checking the box, then select "Next".

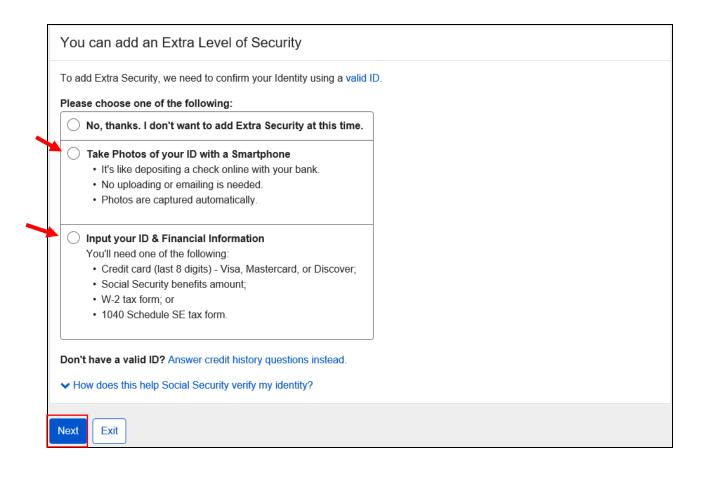
however, receive ar	my Social Security account, you will no longer receive a paper Social Security Statement in the mail. You will, n email reminder — which contains no personal information — approximately three months before your birthday, w your Statement online.
If you need a State	ment by mail, please follow these instructions
the most up-to-date	I Security account, you can immediately view, download, or print your Statement. Your online Statement contain information in our records about your earnings and benefit.
I agree to the	Terms of Service.

14. Enter the requested information, then select" Next".

 Next, we need to verify 	y your identity to give you access to online services.
Please tell us who	you are
Your Name As shown on your Social : First M	Security card. .I. Last Suffix
Social Security Number	(SSN)
Month Day 	/ Year
We cannot accept a busin information we have on fil	less address unless it is also the place where you live. The information you provide here will not update any
Street Address	e. Apartment, Suite, Building, Etc.
City/Town	State/Territory ZIP Code
Phone Number Tell n 10-digit Number	ne more.
Next Exit	

September 2021

15. Select from one of the two verification methods, enter the requested information, and click "Next".



Option 1: Take Photos of your ID with a Smartphone

1. Select Take Photos of your ID with a Smartphone.

Take Photos of your ID with a Smartphone

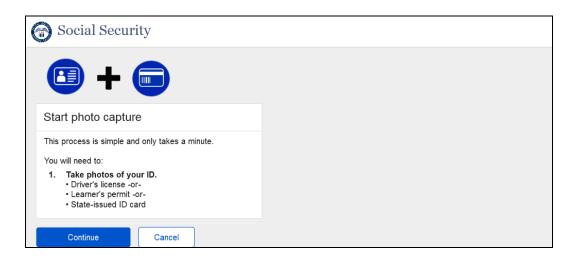
- · It's like depositing a check online with your bank.
- No uploading or emailing is needed.
- Photos are captured automatically.
- 2. Please review steps, then select Requesting Text Message".

Please review these steps carefully
 Step 1. Select the Request Text Message button below. (Rates still apply.) Step 2. Select the link in the text message to capture photos. Step 3. Return to this window to finish setting up your account. How we protect your information
Request Text Message Previous

3. You will receive a text message, the next few steps will be using your cell phone.

📶 Verizon 🗢	10:23 AM	🕏 98% 🔳
Messages	221-020	Details
	Text Message Today 10:23 AM	
From Social S select the link photos: https:// verification.equ token=820611 56-4ed3fb912	to start taking /ssa.doc- iifax.com/? 1b-19a1-4d44-88	
ō A		6

4. You will now need your photo ID, click on "Continue."



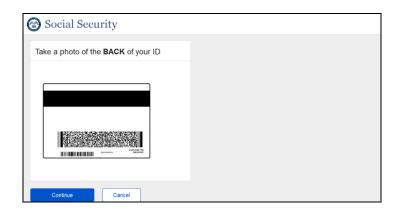
5. Capture Front of the ID, then select "Continue". NOTE: Must be a clear picture captured for a successful scanning process.

G Social Security	
Take a photo of the FRONT of your ID	
Continue	

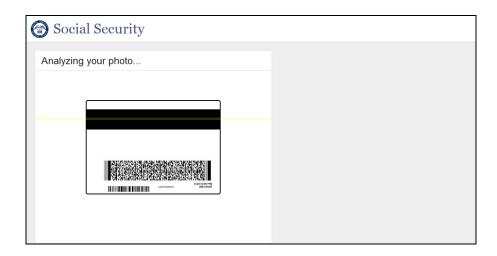
6. System analyzes picture, if the picture passes the analyzation it will continue to the next step. If the picture was not accepted, you will be directed to take another picture.

Social Security	
Analyzing your photo	

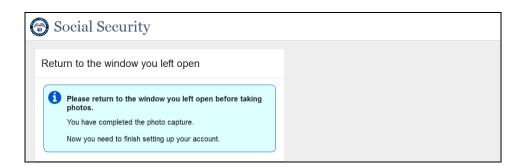
7. Take a photo of the BACK of your ID, then select "Continue".



8. System analyzes picture of the back of the ID, if the picture passes the analyzation it will continue to the next step. If the picture was not excepted, you will be directed to take another picture.



9. If successful, you will receive the message below and you are now finished with your cell phone, return to your computer to complete the process.

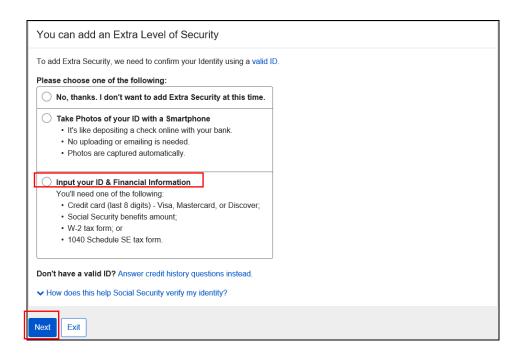


10. Select "Yes, I finished taking photos" and click "Continue". If the photo was not accepted, select "No, I need to type my information instead", continue to Option 2 to input your fininacial Information to complete the process.

	You need to finish setting up your account after taking photos.	
0	We sent a text message to () -	
	Please allow up to 2 minutes for the text to arrive.	
	The link in the text message will expire after 15 minutes from the time of your request.	
	ase tell us when you have finished taking photos	
~	ase tell us when you have finished taking photos	
► Hav	ase tell us when you have finished taking photos	
Hav	ase tell us when you have finished taking photos taving trouble? you taken photos of your ID?	

Option 2: Input your ID & Financial Information

1. Select Input your ID & Financial Information, select "Next".



2. Select the type of ID you have, enter the "State/Territory, the ID number then, "Next".

Drivers License	
C Learners Permit	
O State-Issued ID Card	
I do not have any of these. I need to answer credit history questions.	
State/Territory Where your driver's license was issued, even if y	bu don't live there now.
Maryland	~

Note: You can see credit history questions at any point in the process of creating your account. You will need anwser the questions in order to continue, see example below.

ELITE PROPERTIES, INC OF USA	
PHH US MORTGAGE	
TRANS FINANCIAL MTG	
WELLS FARGO & COMPANY	
O NONE OF THE ABOVE	
our credit file indicates you may have ha rovider for this account?	d an auto loan/lease, closed on or around July 2020. Who was the credit
KOREAN CATHOLIC FOUT UNION	
UNITED NATIONS CU	
VISIONS FEDERAL CU	
NONE OF THE ABOVE	
hich of the following is either your curro	nt or your previous telephone number?
240-770-6867	
240-782-6489	
301-782-9710	
NONE OF THE ABOVE	

September 2021

3. Choose one of the following financial options to verify your Identity.

Please choose how to provide financial information	
erif	y your identity with one of the following:
0	Credit card (last 8 digits) - Visa, Mastercard, or Discover We will not charge your card.
0	Social Security benefits amount
0	W-2 tax form
0	1040 Schedule SE tax form

3.1. Verifying with Credit card, enter the last 4 numbers on the credit card, then click "Next".

Please verify your identity with one of the following:
o the last 8 digits from your Visa, MasterCard or Discover Card
O information from a W-2 tax form
O information from a 1040 Schedule SE (self-employment) tax form
Enter the last 8 digits from your Credit Card: Tell me more. We can only accept Visa, MasterCard or Discover credit cards. We do not verify debit cards. This information is only used once to verify your identity. XXXX - XXXX -
Next

September 2021

3.2. Verifying with Social Security benefits Amount, Enter the amount of your last Social Security direct deposit, then click "Next".

Please choose how to provide final	ncial information
verify your identity with one of the following	:
Credit card (last 8 digits) - Visa, Mastercar We will not charge your card.	d, or Discover
Social Security benefits amount	
O W-2 tax form	
O 1040 Schedule SE tax form	
Enter the amount of your last Social Security We only need the whole dollar amount. \$	[,] direct deposit. � ⊺e

3.3. Verifying with W-2 tax form, enter the amount in Box 5 from your W-2 form and Employer Identification (EIN), then click "Next".

O the last 8 digits from your Visa, MasterCard or Discover Card
o information from a W-2 tax form
O information from a 1040 Schedule SE (self-employment) tax form
Enter the amount in Box 5 from your W-2: ⁽²⁾ Tell me more. We can better verify your identity if you use an older W-2 (within the last 5 years, excluding last S Enter the Employer Identification Number (EIN) from your W-2:
You can find the EIN in Box B on your W-2.

September 2021

3.4. Enter the amount in Box 4 from Sectin A or Box 6 from Section B, then click on "Next".

erify your identity with one of the following:		
) Credit card (last 8 digits) - Visa, Mastercard, or Discover We will not charge your card.		
) Social Security benefits amount		
W-2 tax form		
1040 Schedule SE tax form		
nter the amount in Box 4 from Section A or Box 6 from Sec possible, use a form from the last 5 years.	ion B. 🛛 Tell me more.	

4. Choose how you wish to receive your activation code, below is an example of using an SMS cell phone. Once you request the code a box will become available to input the code, then select "Next".

Even if you already received a code t	by phone, please do this again for your security. Why another code?
Get your activation code	
We will send an activation code to	to verify your identity.
Text message and call rates still apply.	
How do you want to receive your active	ation code?
◯ Text Message	
O Phone Call	

5. Enter the Activation Code SMS, then click "Submit Activation Code".

	sent a text message to (111) 111 - 1111. se allow up to 2 minutes for the activation code	to arrive	
	activation code will expire after 10 minutes from		
Please	enter your activation code		
✓ Havi	g trouble?		
Enter th	e activation code you just received.		-
		Feedb	ack
Submit	Activation Code Previous Exit		
Privacy and	Security		
OMB No. 09	60-0789 Privacy Policy Privacy Act Statement	Accessibility Help	

6. Now you have completed the process of creating an account with extra security, click "Next.



NOTE: if you see the message below, that means that you were unable to get extra security at this time. Proceed with the process to create a standard account. Upon completion of creating the standard account, go to page 32 to add the extra security and try a different method to upgrade your account.

Social Security	
We could not add Extra Security to your account at this time. Please continue creating your account.	
Get your activation code	
We will send an activation code to (123) 456 - 7890 to verify your identity. Text message and call rates still apply.	
How do you want to receive your activation code?	Feedback
 Mail my activation code. 	
Next Exit	
Privacy and Security OMB No. 0960-0789 Privacy Policy Privacy Act Statement Accessibility Help	

September 2021

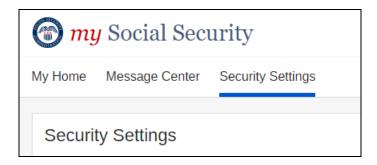
6. Agree to the terms of service by checking the box, then select "Next".

If you need a Statement by mail, please follow these instructions	
With your <i>my</i> Social Security account, you can immediately view, download, or print your Stat the most up-to-date information in our records about your earnings and benefit.	atement. Your online Statement contains
I agree to the Terms of Service.	

September 2021

If you already have a my Social Security account, you need to request extra security:

- 1. Log into https://www.ssa.gov/myaccount/ account.
- 2. Click on the Security Settings tab, then click "Add Extra Security"



3. Read and agree to the Terms of Service and click "Next"

agree to the Terms of Service.	
Next Exit	

4. Enter the requested information and click "Add Extra Security".

Provide Inform	ation		
	the letter containing your upgrad		
Must be a mailing a	ddress in the United States or a U.	S. Territory.	
Line 1	Line 2		
City/Town	State/Territory	ZIP Code	
Drimony Dhono Mur	nber 🕑 I don't have a phone numb	or	
-	verify your identity.		
-	verify your identity.		
10-digit Number			
	J		

September 2021

Option 1: The last 8 digits of a credit card

Please verify your identity with one of the following:	
o the last 8 digits from your Visa, MasterCard or Discover Card	
O information from a W-2 tax form	
O information from a 1040 Schedule SE (self-employment) tax form	
Enter the last 8 digits from your Credit Card: O Tell me more. We can only accept Visa, MasterCard or Discover credit cards. We do not verify your identity. XXXX - XXXX -	t verify debit cards. This information is only used once to
Next Exit	

Option 2: Information from a W-2 tax form

O the last 8 digits f	om your Visa, MasterCard or Discover Card	
 information from 	a W-2 tax form	
O information from	a 1040 Schedule SE (self-employment) tax form	
5		
nter the Employer Ic ou can find the EIN in	entification Number (EIN) from your W-2: Box B on your W-2.	

September 2021

Option 3: Information from a 1040 Schedule SE

O the last 8	digits from your Visa, MasterCard or Discover Card	
O information	n from a W-2 tax form	
 information 	n from a 1040 Schedule SE (self-employment) tax form	
nter the amou	nt in Box 4 (or Box 6 on the long form) 1040 Schedule SE	Tell me mor
	nt in Box 4 (or Box 6 on the long form) 1040 Schedule SE erify your identity if you use an older 1040 Schedule SE from	

You have successfully requested extra security. You will receive a letter in the mail with an upgrade code, which can take up to 10 business days to arrive. When you receive the mailing, you are ready for Step 2.

Complete the security upgrade to your *my* Social Security

Once you have received a letter in the mail with an upgrade code, you are ready to complete the security upgrade.

- 1. Log into your *my* Social Security account: <u>https://www.ssa.gov/myaccount/</u>
- 2. Select the option "Yes, enable my extra security" and click "Next"

Do you have your extra security letter and your phone?
 Do you have: the letter containing your step-by-step instructions, and a cell phone with text messaging? Yes, enable my extra security. No, skip this for now. I changed my mind, cancel my request for extra security.
Next Exit

3. Enter your cell phone number and click "Get Text Message"

Please add your cell phone To enable your extra security features, you need a cell phone that is able to receive text messages.			
Enter your Cell Phone Number: What if I lose or change my phone number? We'll send a text message to this phone each time you sign in. (Your text message rates still apply.) Image: Comparison of the send			
Get Text Message Previous Exit			

4. Enter the security code sent to your phone via text and select "Submit Security Code"

Please enter your security code	Having trouble?	
We sent a text message to: (123) 456-7890 Please allow up to 2 minutes for the text message to arrive. The security code will expire 10 minutes from the time of your request. Enter the security code you just received:	Make sure that your cell phone number is correct. If not, please go back and <u>correct your number</u> . Check your reception and text messaging (SMS) You may need to move to a location where your phone can receive a text message. Please check that your phone can receive text messages. Still having trouble? We can send a new text message.	

5. Enter the upgrade code found on the letter mailed to you and select "Submit Upgrade Code"

Thank you for your security code! Please enter the upgrade code from your letter to enable your account's extra security features.		
Enter the Upgrade Code:		
Submit Upgrade Code Exit		

You have successfully added extra security to your account. Notify SSA, go to page 35 for instructions.

Adding extra security to a "login.gov" account using the ling below:

(https://secure.ssa.gov/acu/FIS/ap?idp=logingov&app=riradvanced&target=/ERECA/MEVE01View)

U LC	OGIN.GOV	9
	-0-(
SSA is using L sign in to yo		
Email address		
Password		Show passwo
	Sign in	
C	reate an account	
Sign in with your governm	ent employee ID	
< Back to SSA		
Forgot your password?		

1. Enter your email address and your password, then select "sign in".

September 2021

16. Enter the one time passcode that was sent your SMS cell phone.

	urity code *1 301-455-7829. This code will expire in
One-time security code	
<i>6</i> 1	
Submit	
C Get another code	Remember this browser
]
	sumber? Use another phone number

17. Enter address and 10-digit phone number, then select "Next".

,	nome address and phone number
Home Address	
We cannot accept a busine information we have on file	ess address unless it is also the place where you live. The information you provide here will not update any e.
Street Address	Apartment, Suite, Building, Etc.
City/Town	State/Territory ZIP Code
Phone Number	
10-digit Number	
Next Exit	

18. You can add an extra level of security by choosing one of the options below. For step by step instructions go to page 16.

Social Security		
You can add an Extra Level of Security		
To add Extra Security, we need to confirm your Identity using a valid ID.		
Please choose one of the following:		
 Take Photos of your ID with a Smartphone It's like depositing a check online with your bank. No uploading or emailing is needed. Photos are captured automatically. 		
 Input your ID & Financial Information You'll need one of the following: Credit card (last 8 digits) - Visa, Mastercard, or Discover; Social Security benefits amount; W-2 tax form; or 1040 Schedule SE tax form. 		
 Don't have a valid ID? Answer credit history questions instead. ✓ How does this help Social Security verify my identity? 		
Next Exit		
Privacy and Security		
IB No. 0960-0789 Privacy Policy Privacy Act Statement Accessibility Help		

19. Agree to the terms of by checking the box, then select "Next".

Social Security is Goi	ng "Green"
	Security account, you will no longer receive a paper <i>Social Security Statement</i> in the mail. You will, ninder — which contains no personal information — approximately three months before your birthday, to <i>atement</i> online.
If you need a Statement by m	ail, please follow these instructions
and the second	account, you can immediately view, download, or print your <i>Statement</i> . Your online <i>Statement</i> contains on in our records about your earnings and benefit.
I agree to the Terms of	f Service.
Next	

Now you are on the ERE for Experts home page, sign out and follow the instructions to notify SSA you have completed the process of adding extra security, see page 36.

Access ERE for Experts

This is the URL you will use to access ERE for Experts: <u>https://secure.ssa.gov/ERECA/MEVE01View</u>

You will only use this link to access claimant eFolder documents. You will continue to use *my* Social Security to access your personal information. You cannot access eFolder documents using any URL except for the one listed above.

NOTE: Do not auto save your password or bookmark the link or save the link as a favorite.

If you are unable to access files, please contact your company. Your company must provide SSA with your full name and SSN. SSA will associate you to the company in our case processing system. You will not have access to any eFolder documents until this action has been taken.