

# **Electronic Records Express (ERE)**

## **User Guide for**

### **Uploading Files Without a Barcode**



**December 2020**

## **Overview**

This guide provides Social Security Administration (SSA) appointed representatives (ARs) with instructions for uploading documents directly to their claimant's electronic folders (eFolders) without the need for the Request ID (RQID) found on the printed barcodes. *This functionality is available for cases pending at a Hearing Office, Appeals Council branch, or Disability Determination Services (DDS).*

## **Requirements for Uploading Documents Without a Barcode**

- You must be logged into Appointed Representative Services
- You must access the eFolder of a claimant and use the "Upload New File" button to upload documents without a barcode

For instructions on how to access eFolder documents, please refer to the user manual "Access Claimant's Electronic Folder/Pickup Files". User manuals are available at <https://www.ssa.gov/ar/>.

## **Step 1: Select "Upload New File"**

Once inside an electronic folder, upload new documents by selecting the **Upload New File** button.

The screenshot displays the SSA eFolder interface. At the top, there are tabs for "Case Documents (10)", "Exhibit List (4)", and "Multimedia Files (2)". Below these are buttons for "Show All", "Hide All", "Select All", and "Deselect All". The main area shows a list of document categories, each with a plus sign icon, a title, "Items" count, and "Page Count":

Category	Items	Page Count
A. Payment Documents / Decisions	0	0
B. Jurisdictional Documents / Notices	0	0
D. Non-Disability Development	1	1
E. Disability Related Development	6	32
F. Medical Records	2	14

At the bottom of the interface, there are buttons for "Download Selected to ZIP", "Download Selected to PDF", "Upload New File" (highlighted with a red box), and "New Case Search". A blue "ERE Home" button is located at the bottom left.

The RQID found on the barcode is no longer requested. The destination information is automatically generated.

## Step 2: Attach Files

You may submit up to 25 files. All files must total less than 200MB.

File types accepted: .wpd, .doc, .docx, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.

Please do not upload password-protected files because they cannot be processed.

- Select the **Browse** button; this will launch the **Choose File to Upload** window.
- Navigate to the file(s) you wish to upload to the electronic folder.
- Select the file(s) and select **Open**. You can select multiple files by holding down the Shift key.
- The **Choose File to Upload** window closes and the file names display on the page.

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

### ERE: Send Individual Response - DEMO

1 Add Files 2 Confirmation

Site Code: **Y32** RF: **D**  
State: **Louisiana** DR: **S**  
Destination: **LA - New Orleans ODAR [Y32]**  
Claimant SSN:

#### Attach Files to Response

- A maximum of 25 files can be added and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

Add Files:  **Browse...**

**Submit** **Cancel**

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Choose File to Upload

Temp > ARS Upload Demo

Name	Date modified	Type
ARS Upload Demo1.docx	11/19/2020 10:48 ...	Microsoft Word t
ARS Upload Demo2.pdf	11/19/2020 10:48 ...	Adobe Acrobat D

File name: "ARS Upload Demo2.pdf" "ARS Upload Dr" All Files (\*.\*)

**Open** Cancel

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## Attach Files to Response

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**File 1:** ARS Upload Demo1.docx 12 KB

**Document Type:** --

**Notes:**

**File 2:** ARS Upload Demo2.pdf 138 KB

**Document Type:** --

**Notes:**

Add Files:

### **Step 3: Select Document Type**

Select the appropriate document type from the dropdown list. The following document types can be submitted for cases pending at a Hearing Office or Appeals Council branch:

<b>Document Name</b>	<b>Doc Type/ Form Number</b>
Medical Evidence of Record	MER
Recent Medical Treatment	Form 4631
Medications	Form 4632
Work Background	Form 4633
Critical/Dire Need Request	CRTRQST
On the Record Request	OTRRQST
Representative Brief	REPBRIF
Amended Alleged Onset Date	AMNDAOD
Appointment of Representative	Form 1696
Disability Report-Appeals	Form 3441
Activities of Daily Living	ADL
Request for Change in Time/Place of Disability Hearing	Form 769
Response to Show Cause Notice	RSPSCN
Representative Fee Agreement	FEEAGRMT
Misc Disability Development and Documentation	MDF E
Claimant's Change of Address Notification	CHNGADD
Withdrawal/Revocation of Representation	WDREP
Education Records – Medical	EDREC
Education Records – Non Medical	EDRECND
Waive Advance Notice of Hearing	3020 Form 510
Request Medical Expert Attendance at Hearing	L9
Subpoena Requests	511
Withdrawal of Hearing Request	WDHEAR Form HA-85
Correspondence Regarding Efforts to Obtain Evidence	EALTR
Objections to the Issues in the Notice of Hearing	HRNTCOBJ
Third Party (Non-medical) Statements	3NMST
Representative Correspondence	REPLTR

Based on your document type selection, you will be asked to enter some additional information regarding the document.

<b>Document Type</b>	<b>Additional Fields</b>
Medical Evidence of Record Education Records – Medical	<ul style="list-style-type: none"> <li>• Treatment Source</li> <li>• From Date</li> <li>• To Date</li> <li>• Notes (Optional)</li> </ul>
All other document types	<ul style="list-style-type: none"> <li>• Document Date</li> <li>• Notes (Optional)</li> </ul>

Documents that are not listed in the dropdown menu should **NOT** be submitted electronically. This includes:

Request for Review – Submit via mail, fax, or in person at your local field office. Using any other method, including submitting electronically, can cause significant delays in processing because Appeals Council (AC) staff does not receive an alert that a request was filed. Please visit [https://mwww.ba.ssa.gov/appeals/best\\_practices.html](https://mwww.ba.ssa.gov/appeals/best_practices.html) for more information.

Objection to Video Hearing (HA-55) – Submit via mail or fax. Submitting electronically will bypass the automation that updates our case processing system to indicate that the claimant has declined a video hearing.

The following document types can be submitted for cases pending at a Disability Determination Services (DDS). Appointed Representatives should submit all evidence using doc type REPEVID/5032 for cases pending at the DDS.

<b>Document Name</b>	<b>Doc Type/ Form Number</b>
Attorney/Representative-Supplied Evidence	REPEVID/5032
Medical Evidence of Record	MER/0001
Education Records – Medical	EDREC/3157
Education Records – Non Medical	EDREC/NMD/3158
Representative Correspondence	REPLTR
Function Report - Adult	3373/0075

### **Important Note**

Prior to submitting evidence, the appointed representative should take the following actions:

1. Review the claimant's electronic folder and verify that the evidence to be submitted is not a duplicate. Duplicates should not be submitted to the electronic folder.
2. If a file contains multiple pieces of evidence, separate the evidence into individual documents (for cases pending at a Hearing Office or Appeals Council branch). Select the appropriate document type for each file.

#### **Step 4: Attach Additional Files**

Select **Browse** next to **Add Files** to attached additional files. Repeat Steps 2 and 3 for all files.

- You may submit up to 25 files. All files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

Add Files:  **Browse...**

**Submit**

#### **Step 5: Submit Files**

Select **Submit** to upload files to the claimant's eFolder.

**File 1:**  **Browse...**

**Document Type:** Medical Evidence of Record (MER) - 0001

**Treatment Source:** Dr. John Doe

**From Date:** 04/26/2014 **To Date:** 05/29/2015  
mm/dd/yyyy mm/dd/yyyy

**Notes:**

**File 2:**  **Browse...**

**Document Type:** Representative Fee Agreement (FEEAGRMT) - 5045

**Document Date:** 02/05/2017  
mm/dd/yyyy


**Notes:**

**Submit**

## Step 6: Confirmation

You will receive a **Confirmation** screen with a tracking number. You may wish to save this page for future reference. You can use the tracking number to track the status of your submission. You can also track the status using the claimant's SSN or by date/status/site.

For step-by-step instructions on how to track files submissions, please refer to the user manual "Track Status of Submissions". User manuals are available at <https://www.ssa.gov/ar/>.


 **Thank you for your submission**

Individual Response Submission - Tracking Information

Tracking Number: **147ABD0EE3A98337N**

Submitted on: **02/04/2015 at 05:30 PM EST**

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

 [Print this page](#)

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### Submission Summary

Tracking Information

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#### Destination Information

Site Code: **Y32**  
State: **Louisiana**  
Destination: **LA - New Orleans**  
Claimant SSN:  
RF: **D**  
DR: **S**

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#### Uploaded File(s)

File Name	File Size
<b>File:</b> individual_response.pdf <b>Document Type:</b> Medical Evidence of Record (MER) <b>Treatment Source:</b> Doctor Source <b>From Date to Date:</b> 02/02/2001 to 02/02/2002	<b>243 KB</b>
Notes: <b>Notes were added</b>	
<b>Total File Size</b> 243 KB	

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[Return to eFolder](#) [Submit Additional Files](#) [ERE Home](#)