

User Guide for Access to the Electronic Folder



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Appointed Representative Access to the Electronic Folder

Overview

This guide provides Social Security Administration (SSA) claimants' appointed representatives with detailed instructions for viewing and downloading documents, as well as downloading multimedia files, in their claimant's electronic folder. It also provides guidance on submitting evidence in electronic format (e.g., briefs and additional disability-related evidence) using the upload feature inside the claimant's electronic file. The goal is to provide cost effective eGovernment services to appointed representatives that will give them the ability to transact securely and easily most of their business with SSA electronically.

Appointed Representatives Requirements for Access to the Electronic Folder

- You must have a User ID, a Rep ID and a self-selected password;
- The claimant's file must be electronic at the Hearing or Appeals Council level; and
- The link **Access Claimant's Electronic Folder** must be displayed on the **Electronic Records Express Home** page under the **Appointed Representative Services** heading.

Logging into the Appointed Representative Services:

Log into Business Services Online at www.socialsecurity.gov/ar

NOTE: You must open a *single* browser session to log into the Appointed Representative Services to access electronic folders. After login, do not open multiple browser sessions to open electronic folders and review or download files.

The User ID and password for the Appointed Representative Services cannot be used on other Social Security Administration website login pages. The login will fail and be considered an invalid attempt. After a certain number of invalid login attempts, your User ID may be suspended.

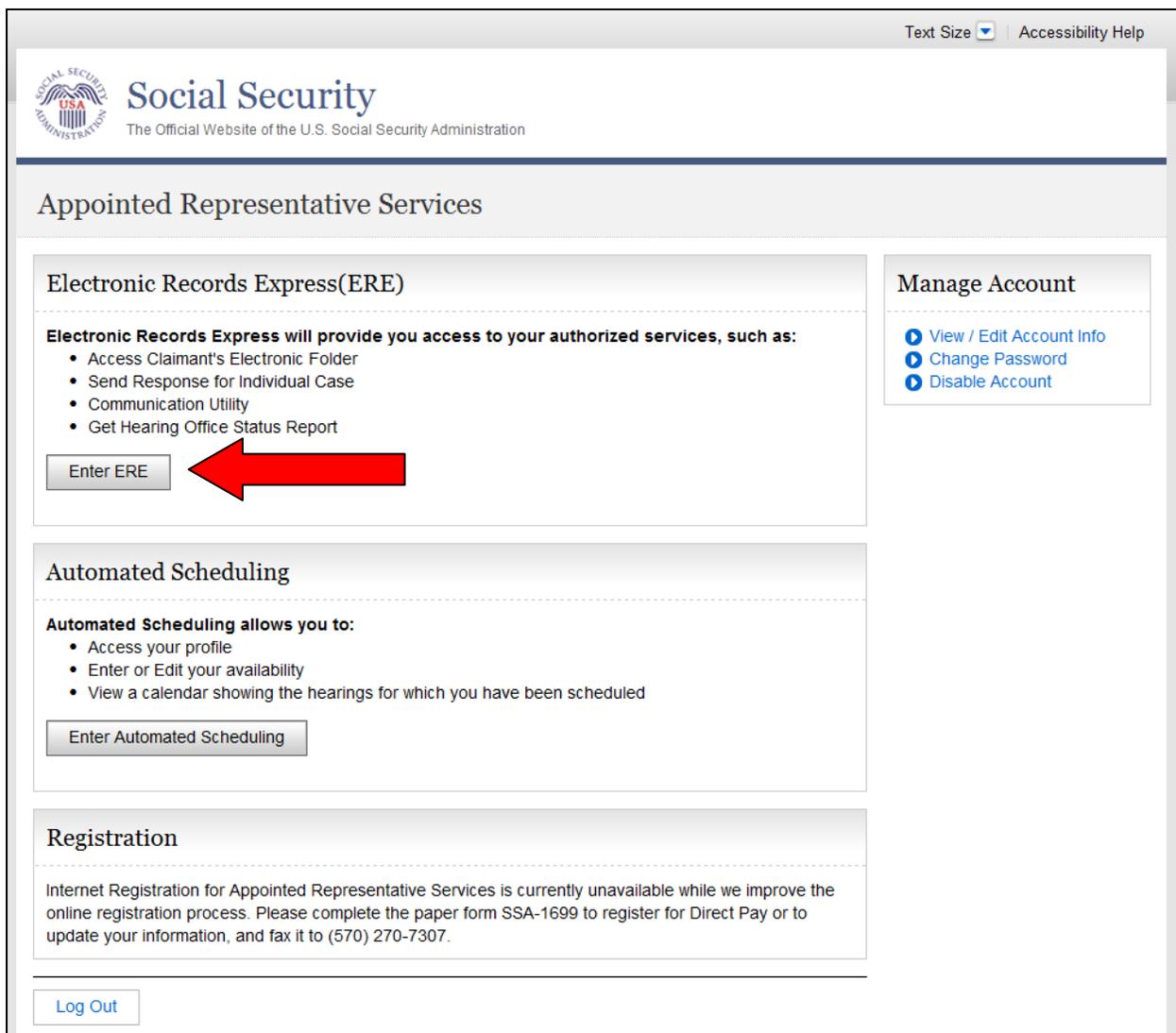
Appointed Representative Services – Main Menu

The **Main Menu** page (Figure 1) displays the following application links:

- **Electronic Records Express (ERE)** - Provides access to eFolder services.
- **Automated Scheduling** - SSA is currently piloting the Automated Scheduling Application (ASA). The pilot is limited to invited participants only. Representatives enrolled with ARS will be notified when the ASA application is available for all representatives for use.

Select **Enter ERE** button.

Figure 1



The screenshot shows the Social Security Administration's website for Appointed Representative Services. At the top, there is a header with the SSA logo and the text "Social Security The Official Website of the U.S. Social Security Administration". To the right of the header are links for "Text Size" and "Accessibility Help". Below the header is a main title "Appointed Representative Services". The page is divided into three main sections: "Electronic Records Express(ERE)", "Automated Scheduling", and "Registration". The "Electronic Records Express(ERE)" section contains a list of services and a button labeled "Enter ERE", which is highlighted with a red arrow. The "Automated Scheduling" section contains a list of services and a button labeled "Enter Automated Scheduling". The "Registration" section contains a message about the current status of online registration and a "Log Out" button.

NOTE: The names and other identifying information contained in this document were created for test scenarios and do not represent actual individuals.

Instructions for Accessing the Electronic Folder

Electronic Records Express Home Page

- To access the folder, select the **Access Claimant's Electronic Folder** (Figure 2) application link on the **Electronic Records Express Home** page.

Figure 2



- After selecting the **Access Claimant's Electronic Folder** link, you will receive a one-time password (SMS text message) at the text-enabled cell phone number you provided.
- Enter the one-time password (Figure 3). It is a temporary, single-use code that is only valid for 10 minutes.

NOTE: Delete the text message after it is used. Undeleted text messages may be repeated in a future text message.

Figure 3



Read the **Acknowledgement for Online Services** page (Figure 4) **before** entering the claimant's social security number.

- Scroll to the bottom and enter the claimant's social security number; and
- Select **I agree** button.

Figure 4

Social Security Online		Electronic Records Express	
www.socialsecurity.gov		Electronic Records Express Home	User Instructions
CHRISTOPHER THOMPSON ReplID:4QLYLLR8DC eme.dev.test@ssa.gov <input type="button" value="Log Out"/>			Acknowledgement for Online Services OMB Number: 0960-0767 Expires: 09/30/2015
< Back to Appointed Representative Services Main Menu		By entering this United States Government Website, I agree to the following terms and conditions:	
		<ul style="list-style-type: none">• I will not disclose any information or data about a claimant that I access on this website without the claimant's written, signed consent unless there is a Federal law or regulation authorizing me to disclose this information or data;• I will not knowingly furnish, or participate in furnishing, false or misleading information to the Social Security Administration;• I will not enter this website unless I have installed anti-virus software, anti-spyware software, and personal firewalls on my computer;• I will update my operating system, application software, and security software regularly to maintain the latest data protection;• I will not store User-IDs and passwords on my computer.	
		WARNING <ul style="list-style-type: none">• If you improperly disclose any information or data that you access on this website or fail to take proper measures to protect that information or data from improper disclosure, and your actions result in an improper disclosure, you may be suspended for 1-5 years from representing anyone before the Social Security Administration, or you may be disqualified from representing anyone before the Social Security Administration for an indefinite period of time.• If you improperly disclose any information or data that you access on this website or fail to take proper measures to protect that information or data from improper disclosure, and your actions result in an improper disclosure, you may be found guilty of a felony and subject to a fine of not more than \$10,000 or imprisonment of not more than 5 years, or both.• If you knowingly furnish, or participate in furnishing, false or misleading information to the Social Security Administration, you may be subject to civil and/or criminal prosecution.• Use of the Certified Electronic Folder may be monitored, recorded, and audited. We may disclose unauthorized or improper use to law enforcement personnel investigating or prosecuting a violation of civil or criminal law and to officials of domestic and foreign agencies.	
		By providing the Claimant's Social Security Number to access his or her Electronic Folder and selecting the "I Agree" button, you certify that you have read, understand and agree to the above statements.	
Claimant's Social Security Number:		<input type="text"/>	
		View Privacy Act Information View Paperwork Reduction Act	
		<input type="button" value="Cancel"/>	<input type="button" value="I Agree"/>

Access to Electronic Folder Pages

The **Access to Electronic Folder** page is comprised of a **Header** Section and up to three tabs: the **Case Documents** Tabs, the **Exhibit List** Tab (Figure 5a) and the **Multimedia Files** Tab (Figure 5b). If the case has not been exhibited, the default is the **Case Documents** tab. If the case is exhibited, the default is the **Exhibit List** tab. If there is no audio hearing record, then the **Multimedia File** Tab will not be displayed (Figure 5a). The folder displays initially with all the sections collapsed. Individual documents Names within the sections display after the sections are expanded (Figure 6).

Figure 5a

The screenshot shows the 'Electronic Records Express Access to Electronic Folder' page for claimant Katherine Ann Becker. The header includes the claimant's name, SSN (779-01-0404), claim type (T2), level (Hearing), last change date (08/17/2010), application date (10/16/2008), alleged onset date (05/15/2006), and last insured date (12/31/2020). The 'Exhibit List' tab is active, showing a table of sections with their respective item counts and page counts.

Section	Items	Page Count
A. Payment Documents/Decisions	3	0
B. Jurisdictional Documents/Notices	2	0
D. Non-Disability Development	3	0
E. Disability Related Development	4	0
F. Medical Records	56	0

Buttons at the bottom include: Download Selected to Zip, Download Selected to PDF, Upload New File, New Case Search, Log Out, and Cancel.

Figure 5b

The screenshot shows the 'Electronic Records Express Access to Electronic Folder' page for claimant Kyle Andrew Bellows. The header includes the claimant's name, SSN (111-11-1111), claim type (T2), level (Hearing), last change date (06/27/2010), application date (04/15/2008), alleged onset date (09/27/2007), and last insured date (12/31/2008). The 'Multimedia Files' tab is active, showing a table with one item: an Audio Hearing Record (AUDIOHR) by Judge Judy, with a hearing date of 03/07/2010 and a receipt date of 06/12/2010.

File Name (ID)	Judge/Owner	Hearing Date	Receipt Date
Audio Hearing Record(AUDIOHR)	Judge Judy	03/07/2010	06/12/2010

Buttons at the bottom include: Download Selected Multimedia, Upload New File, New Case Search, Log Out, and Cancel.

Header Information

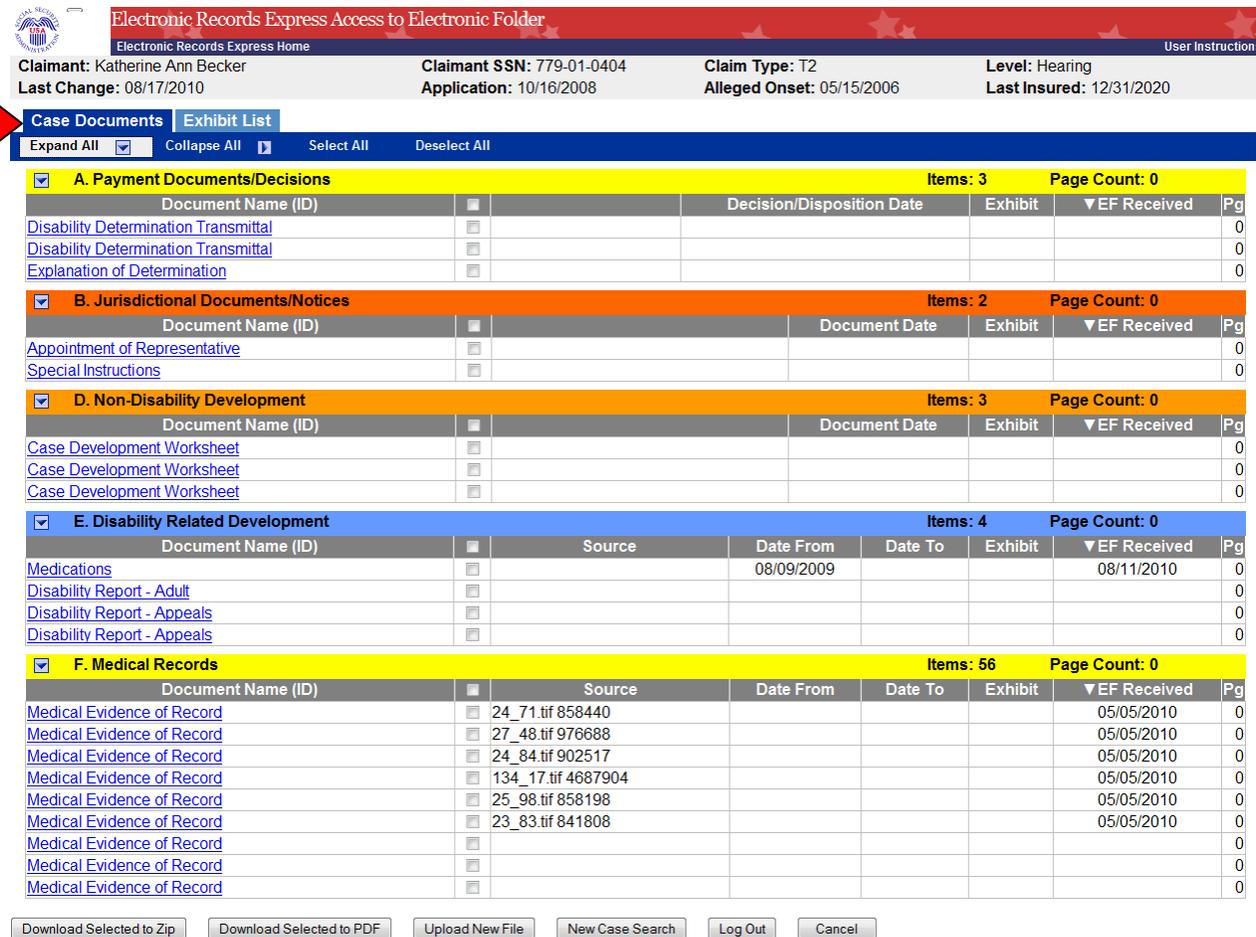
- Claimant (name)
- Claimant SSN (social security number)
- Claim Type (Indicates T2 for Title 2 or T16 for Title 16)
- Level (Hearing or Appeals Council)
- Last Change (date the record was last changed or new evidence added)
- Last Insured (date)
- Alleged Onset (date)
- Application date (protective filing date)

Case Documents Tab

Case Documents tab (Figure 6) provides the ability to view all documents in the case. These sections are available:

- Section A - Payment Documents/Decisions (Yellow)
- Section B - Jurisdictional Documents and Notices (Red)
- Section D - Non-Disability Development (Orange)
- Section E - Disability Related Development (Blue)
- Section F - Medical Records (Yellow)

Figure 6



Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Katherine Ann Becker Claimant SSN: 779-01-0404 Claim Type: T2 Level: Hearing
 Last Change: 08/17/2010 Application: 10/16/2008 Alleged Onset: 05/15/2006 Last Insured: 12/31/2020

Case Documents | Exhibit List

Expand All Collapse All Select All Deselect All

A. Payment Documents/Decisions		Items: 3		Page Count: 0	
Document Name (ID)	Decision/Disposition Date	Exhibit	EF Received	Pg	
Disability Determination Transmittal				0	
Disability Determination Transmittal				0	
Explanation of Determination				0	

B. Jurisdictional Documents/Notices		Items: 2		Page Count: 0	
Document Name (ID)	Document Date	Exhibit	EF Received	Pg	
Appointment of Representative				0	
Special Instructions				0	

D. Non-Disability Development		Items: 3		Page Count: 0	
Document Name (ID)	Document Date	Exhibit	EF Received	Pg	
Case Development Worksheet				0	
Case Development Worksheet				0	
Case Development Worksheet				0	

E. Disability Related Development		Items: 4		Page Count: 0	
Document Name (ID)	Source	Date From	Date To	Exhibit	EF Received
Medications		08/09/2009			08/11/2010
Disability Report - Adult					0
Disability Report - Appeals					0
Disability Report - Appeals					0

F. Medical Records		Items: 56		Page Count: 0	
Document Name (ID)	Source	Date From	Date To	Exhibit	EF Received
Medical Evidence of Record	24_71.tif 858440				05/05/2010
Medical Evidence of Record	27_48.tif 976688				05/05/2010
Medical Evidence of Record	24_84.tif 902517				05/05/2010
Medical Evidence of Record	134_17.tif 4687904				05/05/2010
Medical Evidence of Record	25_98.tif 858198				05/05/2010
Medical Evidence of Record	23_83.tif 841808				05/05/2010
Medical Evidence of Record					0
Medical Evidence of Record					0
Medical Evidence of Record					0

Download Selected to Zip | Download Selected to PDF | Upload New File | New Case Search | Log Out | Cancel

Exhibit List Tab

The **Exhibit List** tab (Figure 7a) provides the ability to view all the exhibited documents. The sections are the same as those in the **Case Documents** tab above but all sections have a gray background.

Figure 7a

Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Ryan Joseph Theunissen Claimant SSN: 115-28-0081 Claim Type: T2 Level: Appeals Council
Last Change: 06/27/2010 Application: 04/15/2008 Alleged Onset: 09/27/2007 Last Insured: 12/31/2008

Exhibit List

Expand All Collapse All Select All Deselect All

<input type="checkbox"/> A. Payment Documents/Decisions	Items: 2	Page Count: 0
<input type="checkbox"/> B. Jurisdictional Documents/Notices	Items: 0	Page Count: 0
<input type="checkbox"/> D. Non-Disability Development	Items: 1	Page Count: 0
<input type="checkbox"/> E. Disability Related Development	Items: 5	Page Count: 0
<input type="checkbox"/> F. Medical Records	Items: 1	Page Count: 0

Download Selected to Zip Download Selected to PDF Upload New File New Case Search Log Out Cancel

Multimedia Files Tab

The **Multimedia Files** tab (Figure 7b) provides the ability to view all the multimedia files. This tab only displays when a claimant's eFolder contains multimedia content. One section displays (Multimedia Files) with a gray background.

Figure 7b

Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Kyle Andrew Bellows Claimant SSN: 111-11-1111 Claim Type: T2 Level: Hearing
Last Change: 06/27/2010 Application: 04/15/2008 Alleged Onset: 09/27/2007 Last Insured: 12/31/2008

Multimedia Files

File Name (ID)	Judge/Owner	Hearing Date	Receipt Date
<input type="checkbox"/> Audio Hearing Record(AUDIOHR)	Judge Judy	03/07/2010	06/12/2010

Download Selected Multimedia Upload New File New Case Search Log Out Cancel

Display Options

Expand/Collapse All (Figure 8) - Select the **Expand All** link, all sections are opened and expanded to show all documents in the file. Select the **Collapse All** link and all sections are closed.

Expand/Collapse by Section (Figure 8) – On the far left of each section header is an arrow. Selecting an arrow causes that section to open or expand and displays the list of documents in the section. Select the arrow again to collapse the list of documents in each displayed section.

Figure 8

Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Ryan Joseph Theunissen Claimant SSN: 115-28-0081 Claim Type: T2 Level: Hearing
 Last Change: 06/27/2010 Application: 04/15/2008 Alleged Onset: 09/27/2007 Last Insured: 12/31/2008

Case Documents | Exhibit List

Expand All Collapse All Select All Deselect All

A. Payment Documents/Decisions		Items: 2		Page Count: 0	
▲ No.	Description	Decision Date	Received	Marked	Pg
1A	Disability Determination Transmittal		Prior to Hearing	No	0
2A	Disability Determination Transmittal		Prior to Hearing	No	0

B. Jurisdictional Documents/Notices		Items: 0		Page Count: 0	
-------------------------------------	--	----------	--	---------------	--

D. Non-Disability Development		Items: 1		Page Count: 0	
▲ No.	Description	Document Date	Received	Marked	Pg
1D	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records		Prior to Hearing	No	0

E. Disability Related Development		Items: 5		Page Count: 0			
▲ No.	Description	Source	Date From	Date To	Received	Marked	Pg
1E	Disability Report - Field Office				Prior to Hearing	No	0
2E	Disability Report - Adult				Prior to Hearing	No	0
3E	Disability Report - Field Office				Prior to Hearing	No	0
4E	Disability Report - Appeals				Prior to Hearing	No	0
5E	Authorization for SSA to Obtain Personal Information	Source of PI			Prior to Hearing	No	0

F. Medical Records		Items: 1		Page Count: 0			
▲ No.	Description	Source	Date From	Date To	Received	Marked	Pg
1F	Copy of Evidence Request	Source of ER			Prior to Hearing	No	0

Download Selected to Zip Download Selected to PDF Upload New File New Case Search Log Out Cancel

Selecting Documents

Select All (Figure 9) - Selecting this link marks all documents for downloading. The checkmark next to the document indicates a selected document. The documents are now ready to download.

Select individual documents (Figure 9) – Select an individual document by checking the box next to the document description.

Figure 9

The screenshot displays the 'Electronic Records Express Access to Electronic Folder' interface. At the top, it shows the claimant's name (Ryan Joseph Theunissen), SSN (115-28-0081), claim type (T2), level (Hearing), and application date (04/15/2008). Below this, there are tabs for 'Case Documents' and 'Exhibit List'. A red box highlights the 'Select All' button in the 'Case Documents' tab. The main area contains several sections of documents, each with a table of details. A red arrow points to the checkmark in the 'Description' column of the first document in section E.

Electronic Records Express Access to Electronic Folder									
Electronic Records Express Home		User Instructions							
Claimant: Ryan Joseph Theunissen		Claimant SSN: 115-28-0081		Claim Type: T2		Level: Hearing			
Last Change: 06/27/2010		Application: 04/15/2008		Alleged Onset: 09/27/2007		Last Insured: 12/31/2008			
Case Documents				Exhibit List		Expand All		Collapse All	
Select All				Deselect All					
A. Payment Documents/Decisions				Items: 2		Page Count: 0			
▲ No.	Description	✓	Decision Date	Received	Marked	Pg			
1A	Disability Determination Transmittal	✓		Prior to Hearing	No	0			
2A	Disability Determination Transmittal	✓		Prior to Hearing	No	0			
B. Jurisdictional Documents/Notices				Items: 0		Page Count: 0			
D. Non-Disability Development				Items: 1		Page Count: 0			
▲ No.	Description	✓	Document Date	Received	Marked	Pg			
1D	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records	✓		Prior to Hearing	No	0			
E. Disability Related Development				Items: 5		Page Count: 0			
▲ No.	Description	✓	Source	Date From	Date To	Received	Marked	Pg	
1E	Disability Report - Field Office	✓				Prior to Hearing	No	0	
2E	Disability Report - Adult	✓				Prior to Hearing	No	0	
3E	Disability Report - Field Office	✓				Prior to Hearing	No	0	
4E	Disability Report - Appeals	✓				Prior to Hearing	No	0	
5E	Authorization for SSA to Obtain Personal Information	✓	Source of PI			Prior to Hearing	No	0	
F. Medical Records				Items: 1		Page Count: 0			
▲ No.	Description	✓	Source	Date From	Date To	Received	Marked	Pg	
1F	Copy of Evidence Request	✓	Source of ER			Prior to Hearing	No	0	

Download Selected to Zip Download Selected to PDF Upload New File New Case Search Log Out Cancel

Deselect All (Figure 10) - Selecting this link un-checks all documents at one time.

Deselect individual documents (Figure 10) – “uncheck” the box next to the document description.

Figure 10

Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Ryan Joseph Theunissen Claimant SSN: 115-28-0081 Claim Type: T2 Level: Appeals Council
Last Change: 06/27/2010 Application: 04/15/2008 Alleged Onset: 09/27/2007 Last Insured: 12/31/2008

Case Documents | Exhibit List

Expand All Collapse All Select All **Deselect All**

A. Payment Documents/Decisions		Items: 2		Page Count: 0		
▲ No.	Description	<input type="checkbox"/>	Decision Date	Received	Marked	Pg
1A	Disability Determination Transmittal	<input type="checkbox"/>		Prior to Hearing	No	0
2A	Disability Determination Transmittal	<input type="checkbox"/>		Prior to Hearing	No	0

B. Jurisdictional Documents/Notices Items: 0 Page Count: 0

D. Non-Disability Development		Items: 1		Page Count: 0		
▲ No.	Description	<input type="checkbox"/>	Document Date	Received	Marked	Pg
1D	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records	<input type="checkbox"/>		Prior to Hearing	No	0

E. Disability Related Development Items: 5 Page Count: 0

F. Medical Records		Items: 1		Page Count: 0				
▲ No.	Description	<input type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg
1F	Copy of Evidence Request	<input type="checkbox"/>	Source of ER			Prior to Hearing	No	0

Download Selected to Zip Download Selected to PDF Upload New File New Case Search Log Out Cancel

Downloading or Uploading Documents while in the Electronic Folder

Access to the Electronic Folder application provides the ability to download information from the folder as well as upload new documents to the folder using the following links:

- **Download Selected to Zip** link (Figures 11 and 12)
- **Download Selected to PDF** link (Figures 11 and 12)
- **Upload New File** link (Figures 11 and 12)

Downloading Documents

Documents can be opened immediately or selected for download. The first option is to select a document link from the **Case Documents** or **Exhibit List** tabs (Figure 11). The document is immediately provided and can be saved or closed.

Figure 11

Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Ryan Joseph Theunissen **Claimant SSN:** 115-28-0081 **Claim Type:** T2 **Level:** Appeals Council
Last Change: 06/27/2010 **Application:** 04/15/2008 **Alleged Onset:** 09/27/2007 **Last Insured:** 12/31/2008

Case Documents | **Exhibit List**

Expand All Collapse All Select All Deselect All

A. Payment Documents/Decisions				Items: 2	Page Count: 0	
▲ No.	Description	<input type="checkbox"/>	Decision Date	Received	Marked	Pg
1A	Disability Determination Transmittal	<input type="checkbox"/>		Prior to Hearing	No	0
2A	Disability Determination Transmittal	<input type="checkbox"/>		Prior to Hearing	No	0

B. Jurisdictional Documents/Notices				Items: 0	Page Count: 0
-------------------------------------	--	--	--	----------	---------------

D. Non-Disability Development				Items: 1	Page Count: 0	
	Description	<input type="checkbox"/>	Document Date	Received	Marked	Pg
	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records	<input type="checkbox"/>		Prior to Hearing	No	0

E. Disability Related Development				Items: 5	Page Count: 0
-----------------------------------	--	--	--	----------	---------------

F. Medical Records				Items: 1	Page Count: 0			
▲ No.	Description	<input type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg
1F	Copy of Evidence Request	<input type="checkbox"/>	Source of ER			Prior to Hearing	No	0

Download Selected to Zip Download Selected to PDF Upload New File New Case Search Log Out Cancel

Download Documents to Zip or PDF

- You can choose to download documents to either a Zip or PDF file.
- First, select the document(s) you want to download by using the selection methods noted above.
- Then choose either **Download Selected to Zip** or **Download Selected to PDF** (Figure 12).

NOTES:

- If a single document size is more than 400 pages, Download Selected as Zip should be used.

- PDF download requests may be converted to a Zip download if any requested documents are corrupted. The Zip download allows all uncorrupted documents to be opened. The email notification for the download will indicate that a Zip download was provided even though a PDF was requested.

Figure 12

Electronic Records Express Access to Electronic Folder

Electronic Records Express Home User Instructions

Claimant: Ryan Joseph Theunissen Claimant SSN: 115-28-0081 Claim Type: T2 Level: Hearing
 Last Change: 06/27/2010 Application: 04/15/2008 Alleged Onset: 09/27/2007 Last Insured: 12/31/2008

Case Documents | Exhibit List

Expand All Collapse All Select All Deselect All

A. Payment Documents/Decisions				Items: 2	Page Count: 0	
▲ No.	Description	<input checked="" type="checkbox"/>	Decision Date	Received	Marked	Pg
1A	Disability Determination Transmittal	<input checked="" type="checkbox"/>		Prior to Hearing	No	0
2A	Disability Determination Transmittal	<input checked="" type="checkbox"/>		Prior to Hearing	No	0

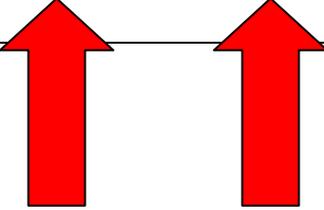
B. Jurisdictional Documents/Notices				Items: 0	Page Count: 0

D. Non-Disability Development				Items: 1	Page Count: 0	
▲ No.	Description	<input checked="" type="checkbox"/>	Document Date	Received	Marked	Pg
1D	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records	<input checked="" type="checkbox"/>		Prior to Hearing	No	0

E. Disability Related Development				Items: 5	Page Count: 0			
▲ No.	Description	<input checked="" type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg
1E	Disability Report - Field Office	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
2E	Disability Report - Adult	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
3E	Disability Report - Field Office	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
4E	Disability Report - Appeals	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
5E	Authorization for SSA to Obtain Personal Information	<input checked="" type="checkbox"/>	Source of PI			Prior to Hearing	No	0

F. Medical Records				Items: 1	Page Count: 0			
▲ No.	Description	<input checked="" type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg
1F	Copy of Evidence Request	<input checked="" type="checkbox"/>	Source of ER			Prior to Hearing	No	0

Download Selected to Zip Download Selected to PDF Upload New File New Case Search Log Out Cancel



Downloading Multimedia File(s) while in the Electronic Folder

Access to the Electronic Folder application provides the ability to download multimedia file(s) from the folder using the following process:

Download Selected Multimedia

- Select the file(s) you want to download by checking the box next to the File Name.
- Then choose **Download Selected Multimedia** (Figure 12a).

Figure 12a



- After you have invoked the download, you will see this page (Figure 13). Select the **Close** button.

Figure 13



Pickup Files

- Within approximately 48 hours, the files are available for pickup. An e-mail will be sent to you when the files requested are ready to pick up.
 - The email message displayed below (Figure 14a) is sent when “Download Selected to Zip” or “Download Selected in to PDF” is selected from the Case Documents tab or the Exhibit List tab.
 - The email message displayed on the next page (Figure 14b) is sent when “Download Selected Multimedia” is selected from the Multimedia Files tab.
- The link in the email will take you to the login page.
- Follow the instructions on the page to login then enter the one time password that is generated to your cell phone.

Figure 14a

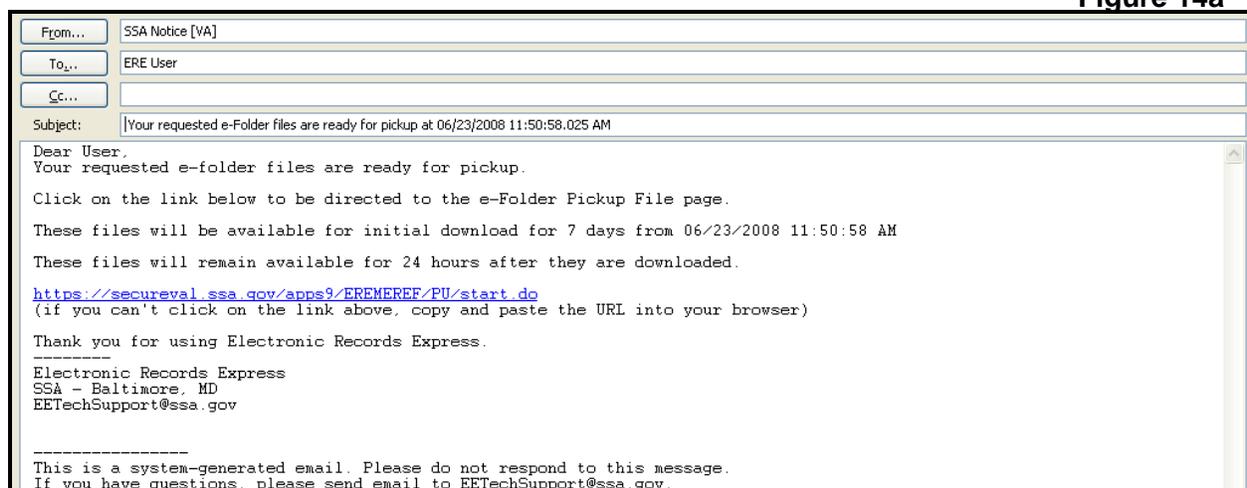
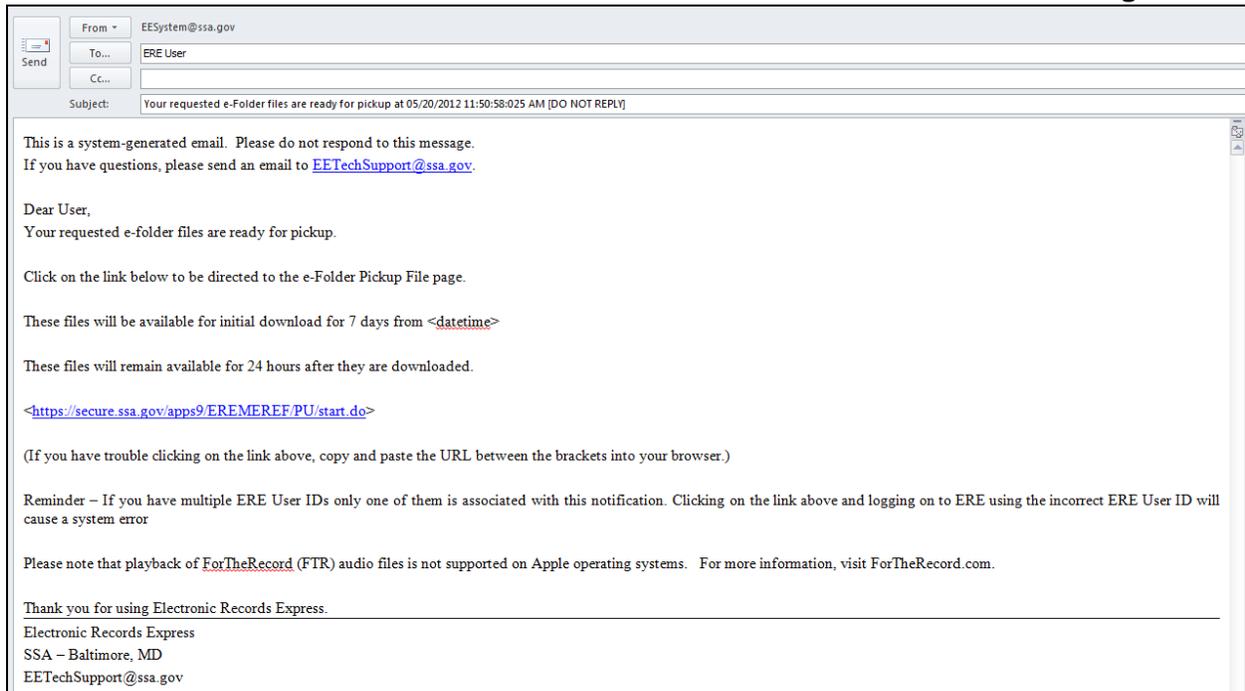
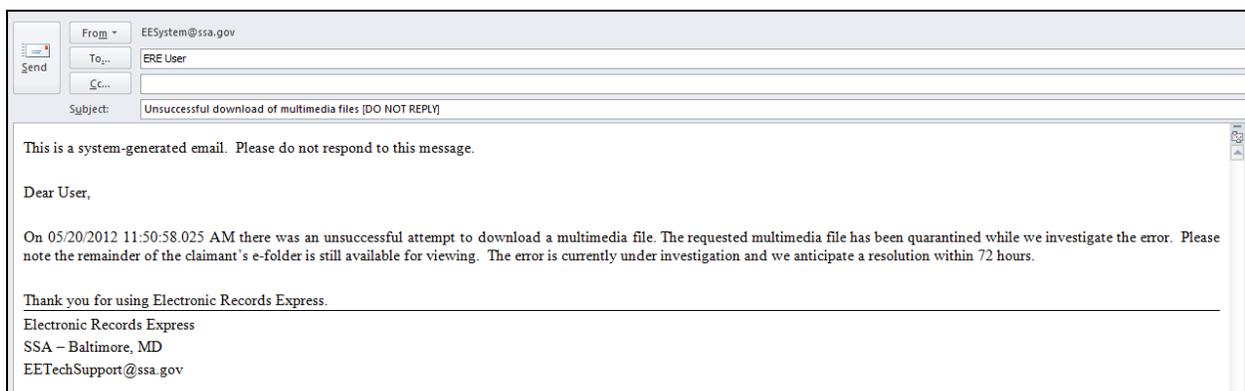


Figure 14b



- This notice (Figure 14c) will be sent when an unsuccessful attempt to download a multimedia file occurs.

Figure 14c



- To retrieve documents for download, select the folder name (Figure 15).

Figure 15

Files will be retained for 7 days from the date of receipt. All files older than 7 days are automatically deleted regardless of whether they have been downloaded.

Select the Social Security Number associated with the Claimant's folder you wish to download. You will have **24 hours** to complete the download process before the file will be deleted.

Instructions are available in the User Instructions section which detail how to download and view your files.

Folder Name	Name	File Type	Date & Time	Download Started
XXX-XX-5106	Belows	ZIP/Tif	06/17/2008 10:00 AM	
XXX-XX-4606	Doe	PDF	06/11/2008 10:20 AM	✓
XXX-XX-5101	Smith	ZIP/Multimedia	06/17/2008 11:00 AM	

Cancel

Helpful hint when opening a Zip file:

- Save the Zip file you requested from the **Pickup Files** (Figure 15) page.
- Go to the location where you saved the Zip file and open it by double-clicking.

NOTE: If you have difficulty opening the file you may not have associated Zip software to open the files. Some operating systems, such as Mac OS X, Windows XP and Vista, come with Zip capability. Other systems may have add-on software. If you have difficulty opening the Zip file, you may need to add Zip software to your system, or you may re-download the file to PDF.

- Extract all the files/folders in the Zip file package into one folder to the desired location
- Go to the location where you extracted the files.
- To view the documents, select the index.html file which will open to the **Case Documents Index** or **Exhibit List Index** page.
- To play a multimedia file, see instructions below.

Helpful hints when using the PDF download:

- Save the document(s) first before opening.
- Adobe 8 or higher may be useful if manipulating documents.

Helpful hints when opening and playing a Multimedia file:

- Extracting Zip File Contents:**
 - Save the Multimedia file you requested from the **Pickup Files** (Figure 15) page.
 - Go to "Helpful hint when opening a Zip file" above and follow instructions from step 2 to 4 to extract (unzip) the file.

2. Setup “TheRecord Player” Search Folders:

Once you extracted the Zip file, follow instructions below to specify locations on your computer for “TheRecord Player” to search for audio.

1. Click **Start**, point to **All Programs**, then **ForTheRecord** and click **TheRecord Player**.
2. When **TheRecord Player License Agreement** appears, select “Don’t show this screen again” checkbox on the bottom left, and then click “I Agree” button.
3. From **TheRecord Player**, click **Open** icon (first icon on the bottom).
4. From the **Open** dialog box, click **Manage Search Folders** icon (second icon in the top left).
5. From the **Manage Search Folders** dialog box, click **Add Search Folder** (first icon on the right).
6. In the **New Search Folder** dialog box, click **Browse**.
7. In the **Browse For Folder** dialog box, go to the folder that contains the audio file, and then select the audio file (which contains .trm file extension) you wish to add and click **OK**.
8. Click **Next**.
9. In the **Search Folder Name** dialog box, enter a user friendly name (ex. Archive Recordings).
10. Click **Next**.
11. In the **Search Priority** dialog box, set the priority by clicking **Priority Up** and **Priority Down**.
12. Click **Finish**.
13. If a **Manage Search Folder** dialog box appears, click **Close**.

Note: Having multiple search folders can be helpful when attempting to download and play previously downloaded audio. Adding the same audio file, that has been previously downloaded to the same folder, could potentially compromise audio quality.

3. Playing Audio Files:

Once you extracted the Zip file and setup the Search Folders, follow instructions below to play the audio file:

1. Click **Start**, point to **All Programs**, **ForTheRecord** and click **TheRecord Player**.
2. From **TheRecord Player**, click **Open** icon (first icon on the bottom).
3. From the **Open** dialog box, expand the desired Search Folder, date folder and label folder by clicking the plus sign.
4. Once the multimedia file is revealed (where media type contains .trm file), select it and click **Open** button.
5. Click **Play** on “TheRecord Player”.

For more information, please visit [FTR “TheRecord Player”](#).

Uploading Documents

Once inside the electronic file, upload new documents by selecting the **Upload New File** (Figure 16) button.

Figure 16

Electronic Records Express Access to Electronic Folder
User Instructions

Electronic Records Express Home

Claimant: Ryan Joseph Theunissen Claimant SSN: 115-28-0081 Claim Type: T2 Level: Hearing
Last Change: 06/27/2010 Application: 04/15/2008 Alleged Onset: 09/27/2007 Last Insured: 12/31/2008

Case Documents | Exhibit List

Expand All Collapse All Select All Deselect All

A. Payment Documents/Decisions		Items: 2		Page Count: 0		
▲ No.	Description	<input checked="" type="checkbox"/>	Decision Date	Received	Marked	Pg
1A	Disability Determination Transmittal	<input checked="" type="checkbox"/>		Prior to Hearing	No	0
2A	Disability Determination Transmittal	<input checked="" type="checkbox"/>		Prior to Hearing	No	0

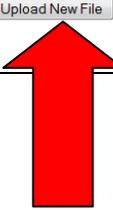
B. Jurisdictional Documents/Notices		Items: 0		Page Count: 0	

D. Non-Disability Development		Items: 1		Page Count: 0		
▲ No.	Description	<input checked="" type="checkbox"/>	Document Date	Received	Marked	Pg
1D	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records	<input checked="" type="checkbox"/>		Prior to Hearing	No	0

E. Disability Related Development		Items: 5		Page Count: 0				
▲ No.	Description	<input checked="" type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg
1E	Disability Report - Field Office	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
2E	Disability Report - Adult	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
3E	Disability Report - Field Office	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
4E	Disability Report - Appeals	<input checked="" type="checkbox"/>				Prior to Hearing	No	0
5E	Authorization for SSA to Obtain Personal Information	<input checked="" type="checkbox"/>	Source of PI			Prior to Hearing	No	0

F. Medical Records		Items: 1		Page Count: 0				
▲ No.	Description	<input checked="" type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg
1F	Copy of Evidence Request	<input checked="" type="checkbox"/>	Source of ER			Prior to Hearing	No	0

Download Selected to Zip
Download Selected to PDF
Upload New File
New Case Search
Log Out
Cancel



Attach and Upload Files

Figure 19

The screenshot shows the 'Electronic Records Express' interface. At the top, it says 'Social Security Online' and 'Electronic Records Express Home'. The user is identified as 'BILL APPERSAND' with email 'Bill.Appersand@ssa.gov'. The main heading is 'Send Response for Individual Case' and 'Attach and Upload Files (Step 2 of 3)'. A summary table shows: Destination: MD - Baltimore ODAR [T21], SSN: 078-06-1201, RQID: 13385, RF: D, DR: F, CS: . Below this is an 'Edit Summary' button. The 'Attach and upload files to this response:' section includes instructions: 'A maximum of 8 files can be added and all files must total less than 50MB. File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif. Please do not upload password-protected files because they cannot be processed.' The form has fields for 'File 1:', 'Document Type:', and 'Document Date:'. A 'Browse...' button is next to the 'File 1:' field. Below these is a 'Notes:' field (40 characters) and a 'Clear File 1' button. At the bottom of the form are 'Cancel', 'Add Another File', 'Prior Page', and 'Submit' buttons. Two red arrows point to the 'Browse...' and 'Add Another File' buttons.

- Attach your file by selecting the **Browse** button and locating the document.

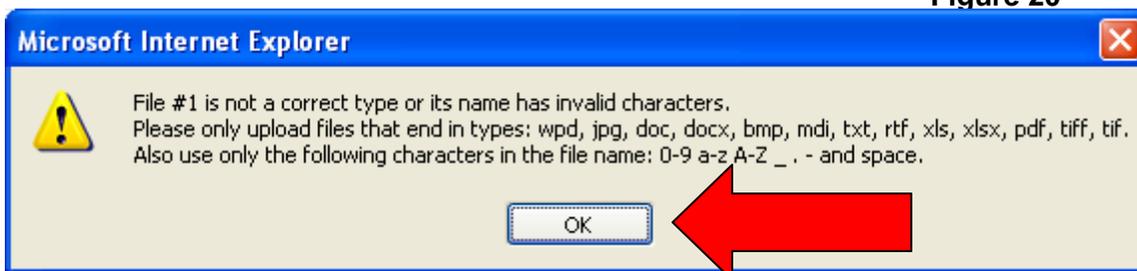
NOTES:

- File types accepted are: **.wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, and .tif.**
- Please refer to the section entitled “Reminders and Helpful Tips” on page 25 for more information on acceptable file names.
- **ONLY** upload non-password protected documents.
- Do not upload documents containing macros (i.e., a set of instructions or scripts that automates tasks). They may cause system problems, which will require you to resubmit your documents without macros.
- You can send up to eight files for one claimant using ERE. To add additional files, select the **Add Another File** button and repeat the previous steps.
- When finished, select the **Submit** button. You will receive a tracking number when your documents are sent.

NOTE: If you select **Prior Page**, you will return to the previous page and all information previously entered will be lost.

If an invalid document was attached an alert message (Figure 20) similar to the message shown below is displayed. Select **OK** to re-enter the correct information.

Figure 20



Tracking Information Page

Figure 21

Social Security Online
Electronic Records Express

www.socialsecurity.gov
User Instructions

BILL APPERSAND
 RepID: 7TXSSH8JTV
 Bill.Appersand@ssa.gov
[Log Out](#)
[< Back to Appointed Representative Services Main Menu](#)

Send Response for Individual Case
Tracking Information (Step 3 of 3)

Thank you for your submission.

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

Response Information:

Tracking Number:	13147F438AB83C38	
Date and Timestamp:	07/20/2011 at 10:30 AM EDT	
Destination:	MD - Baltimore ODAR [T21]	SSN: 779010404
RQID:	22222222	RF: D or blank
DR:	s	CS:

File Name	Document Type	File Size
Test.doc	Medical Evidence of Record (MER)	26.0 KB
Total file size:		26.0 KB

ERE Print	Submit Additional Files	ERE Home	Return to the eFolder
---------------------------	---	--------------------------	---------------------------------------

This **Tracking Information** page (Figure 21) acknowledges that SSA has received the uploaded document(s). This page indicates the specific filename and document type of each uploaded file.

The **Tracking Information** page only acknowledges that the transmission has been sent. A notification will be sent by email if there are any errors or problems that prevent SSA from processing the submission.

NOTE:

- You cannot “bookmark” this page.
- You cannot retrieve tracking information after exiting the page so you need to print or save this vital information.

Uploaded Document is Not in eFolder

Documents are added to the eFolder **Case Documents** tab automatically. Once added to the **Case Documents** section, the Hearing or Appeals Council Office must take a manual action to copy a document from the **Case Documents** tab into the **Exhibit List** tab.

Steps to verify document has been added to eFolder

1. Check the **Case Documents** tab (Figure 21) to see if the document has been added.

Figure 21

Electronic Records Express Access to Electronic Folder

Claimant: Katherine Ann Becker Claimant SSN: 779-01-0404 Claim Type: T2 Level: Hearing
Last Change: 08/17/2010 Application: 10/16/2008 Alleged Onset: 05/15/2006 Last Insured: 12/31/2020

Case Documents | Exhibit List

Expand All | Collapse All | Select All | Deselect All

A. Payment Documents/Decisions						Items: 3	Page Count: 0
Document Name (ID)		Decision/Disposition Date	Exhibit	EF Received	Pg		
Disability Determination Transmittal	<input type="checkbox"/>						0
Disability Determination Transmittal	<input type="checkbox"/>						0
Explanation of Determination	<input type="checkbox"/>						0

B. Jurisdictional Documents/Notices						Items: 2	Page Count: 0
Document Name (ID)		Document Date	Exhibit	EF Received	Pg		
Appointment of Representative	<input type="checkbox"/>						0
Special Instructions	<input type="checkbox"/>						0

D. Non-Disability Development						Items: 3	Page Count: 0
Document Name (ID)		Document Date	Exhibit	EF Received	Pg		
Case Development Worksheet	<input type="checkbox"/>						0
Case Development Worksheet	<input type="checkbox"/>						0
Case Development Worksheet	<input type="checkbox"/>						0

E. Disability Related Development						Items: 4	Page Count: 0
Document Name (ID)		Source	Date From	Date To	Exhibit	EF Received	Pg
Medications	<input type="checkbox"/>		08/09/2009			08/11/2010	0
Disability Report - Adult	<input type="checkbox"/>						0
Disability Report - Appeals	<input type="checkbox"/>						0
Disability Report - Appeals	<input type="checkbox"/>						0

F. Medical Records						Items: 56	Page Count: 0
Document Name (ID)		Source	Date From	Date To	Exhibit	EF Received	Pg
Medical Evidence of Record	<input type="checkbox"/>	24_71.tif 858440				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_31.tif 834118				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_85.tif 865132				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_96.tif 783208				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	154_27.tif 5478443				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	152_26.tif 5339729				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_06.tif 829604				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	150_25.tif 5191090				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	140_20.tif 4801488				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	132_16.tif 4465860				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_57.tif 787057				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_32.tif 862538				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_97.tif 878478				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_46.tif 888684				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	144_22.tif 5034336				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_45.tif 837972				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	27_35.tif 963380				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_60.tif 892444				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_58.tif 820450				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	27_09.tif 948363				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	27_61.tif 882098				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_20.tif 851729				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	148_24.tif 5020598				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_86.tif 912302				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_73.tif 919200				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_18.tif 793372				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_33.tif 860448				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	162_31.tif 5659513				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_34.tif 894786				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_44.tif 807526				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	130_15.tif 4428627				06/06/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_47.tif 901853				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_08.tif 898720				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_07.tif 863676				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_72.tif 916584				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	158_29.tif 5427398				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	142_21.tif 5049415				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	160_30.tif 5726002				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	146_23.tif 5112470				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_19.tif 819938				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	138_19.tif 4877614				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_59.tif 852814				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_70.tif 806408				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	156_28.tif 5401942				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_21.tif 926140				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	27_22.tif 991724				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	26_99.tif 927100				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	136_18.tif 4678210				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	27_48.tif 978688				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	24_84.tif 902517				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	134_17.tif 4687904				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	25_98.tif 858198				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>	23_83.tif 841808				05/05/2010	0
Medical Evidence of Record	<input type="checkbox"/>						0
Medical Evidence of Record	<input type="checkbox"/>						0

Download Selected to Zip | Download Selected to PDF | Upload New File | New Case Search | Log Out | Cancel

2. The user that uploaded the document can check on the status of documents he or she submitted using the **Upload New File** or **Send Response for Individual Case** function by selecting the **Track Status of Submissions** link on the **Electronic Records Express Home** page (Figure 22). (More information on using this function is available in the User Instructions for **Track Status of Submissions**.)

Figure 22



If the document is not added within 48 hours, the document should be resubmitted. Verify that the RQID submitted is the exact duplicate of the RQID displayed in the barcode.

Reminders and Helpful Tips:

- **Naming Your Electronic Claimant Records**
The ERE website will accept electronic filenames that contain the following characters:
 - ✓ Numbers
 - ✓ Letters (uppercase and lowercase)
 - ✓ Backslashes “\”
 - ✓ Underscores “_”
 - ✓ Hyphens or Dashes “-”

The following characters will make your electronic file name **invalid**:

- ✗ Punctuation Marks (commas, semicolons, parentheses, etc.)
- ✗ Symbols (*, %, <, >, |, etc.)

IMPORTANT NOTE: ONLY upload non-password protected documents.

- **The wrong RQID was used while submitting a document.** The document goes to a queue that requires manual intervention by Social Security Administration staff. If the document is not added to the electronic folder within 48 hours, resubmit the document using the correct RQID.
- **The wrong document was submitted.** Immediately contact the office that is working on the file. Social Security Administration staff will remove the incorrect document.

- **Receive SSA Communications about ERE outages.** SSA's Office of Systems uses the **Bulletin Board** section of the ERE website to alert registered users of new information, such as any scheduled maintenance or new functionality. You can also be notified by email prior to any scheduled maintenance by selecting the red envelope link, **Get important information about Electronic Records Express availability** (Figure 23). Select the link and follow the instructions.

Figure 23

The screenshot displays the 'Electronic Records Express' website interface. At the top, there is a red header with the text 'Electronic Records Express' and 'Social Security Online'. Below the header, the page is divided into several sections. On the left, a user profile for 'KENNETH MOORE' is visible, along with a 'Log Out' button and a security warning. The main content area is titled 'Electronic Records Express Home' and 'Welcome to Electronic Records Express'. It features a list of 'Appointed Representative Services' including 'Access Claimant's Electronic Folder', 'Send Response for Individual Case', 'Track Status of Submissions', 'Communication Utility', and 'Get Hearing Office Status Report'. A red arrow points from the 'Access Claimant's Electronic Folder' link to a 'Bulletin Board' section on the right. The 'Bulletin Board' section is titled 'Bulletin Board' and 'Updated 07/07/2011'. It contains a link for 'What's New?' and a prominent red envelope icon next to the text 'Get important information about Electronic Records Express availability'. Below this, there is a link for 'Email for more information' and a toll-free number: '1-866-691-3061'.

New Case Search

To search for a new case, select the **New Case Search** button (Figure 24).

Figure 24

The screenshot shows the 'Electronic Records Express Access to Electronic Folder' interface. At the top, there is a navigation bar with 'Electronic Records Express Home' and 'User Instructions'. Below this, user information is displayed: Claimant: Ryan Joseph Theunissen, Claimant SSN: 115-28-0081, Claim Type: T2, Level: Appeals Council, Last Change: 06/27/2010, Application: 04/15/2008, Alleged Onset: 09/27/2007, Last Insured: 12/31/2008. There are two tabs: 'Case Documents' and 'Exhibit List'. Below the tabs, there are buttons for 'Expand All', 'Collapse All', 'Select All', and 'Deselect All'. A table lists document categories with their respective item counts and page counts:

Category	Items	Page Count
A. Payment Documents/Decisions	2	0
B. Jurisdictional Documents/Notices	0	0
D. Non-Disability Development	1	0
E. Disability Related Development	5	0
F. Medical Records	1	0

At the bottom, there are buttons for 'Download Selected to Zip', 'Download Selected to PDF', 'Upload New File', 'New Case Search', 'Log Out', and 'Cancel'. A large red arrow points to the 'New Case Search' button.

This will bring you back to the **Acknowledgement for Online Services** (Figure 25) page and you may enter a client's Social Security number.

Figure 25

The screenshot shows the 'Social Security Online' interface for 'Electronic Records Express'. The page title is 'Acknowledgement for Online Services'. It includes the following information:

- OMB Number: 0960-0767
- Expires: 10/31/2012

By entering this United States Government Website, I agree to the following terms and conditions:

- I will not disclose any information or data about a claimant that I access on this website without the claimant's written, signed consent unless there is a Federal law or regulation authorizing me to disclose this information or data;
- I will not knowingly furnish, or participate in furnishing, false or misleading information to the Social Security Administration;
- I will not enter this website unless I have installed anti-virus software, anti-spyware software, and personal firewalls on my computer;
- I will update my operating system, application software, and security software regularly to maintain the latest data protection;
- I will not store User-IDs and passwords on my computer.

WARNING

- If you improperly disclose any information or data that you access on this website or fail to take proper measures to protect that information or data from improper disclosure, and your actions result in an improper disclosure, you may be suspended for 1-5 years from representing anyone before the Social Security Administration, or you may be disqualified from representing anyone before the Social Security Administration for an indefinite period of time.
- If you improperly disclose any information or data that you access on this website or fail to take proper measures to protect that information or data from improper disclosure, and your actions result in an improper disclosure, you may be found guilty of a felony and subject to a fine of not more than \$10,000 or imprisonment of not more than 5 years, or both.
- If you knowingly furnish, or participate in furnishing, false or misleading information to the Social Security Administration, you may be subject to civil and/or criminal prosecution.
- Use of the Certified Electronic Folder may be monitored, recorded, and audited. We may disclose unauthorized or improper use to law enforcement personnel investigating or prosecuting a violation of civil or criminal law and to officials of domestic and foreign agencies.

By providing the Claimant's Social Security Number to access his or her Electronic Folder and selecting the "I Agree" button, you certify that you have read, understand and agree to the above statements.

Claimant's Social Security Number:

[View Privacy Act Information](#)
[View Paperwork Reduction Act](#)

Buttons: Cancel, I Agree. A large red arrow points to the input field for the Social Security Number.

Return to Electronic Records Express Home Page

To return to the **Electronic Records Express Home** page select the **Cancel** button (Figure 26) or use the **Electronic Records Express Home** link in the header section.

Figure 26

The screenshot displays the 'Electronic Records Express' interface. At the top, there is a navigation bar with a logo on the left and the text 'Electronic Records Express Access to Electronic Folder' on the right. Below this, a header section contains the following information: 'Claimant: Katherine Ann Becker', 'Claimant SSN: 779-01-0404', 'Claim Type: T2', and 'Level: Hearing'. Below the header, there is a section for 'Case Documents' and 'Exhibit List'. The 'Case Documents' section includes buttons for 'Expand All', 'Collapse All', 'Select All', and 'Deselect All'. Below this, there is a table of document categories:

Category	Items	Page Count
A. Payment Documents/Decisions	3	0
B. Jurisdictional Documents/Notices	2	0
D. Non-Disability Development	3	0
E. Disability Related Development	4	0
F. Medical Records	56	0

At the bottom of the interface, there is a row of buttons: 'Download Selected to Zip', 'Download Selected to PDF', 'Upload New File', 'New Case Search', 'Log Out', and 'Cancel'. A large red arrow points to the 'Cancel' button.

Unable to Access an Electronic Folder

Overview

There may be occasions when you request access to an Electronic Folder and the request cannot be processed. If your request cannot be processed, you will be presented with the **Access Denied** page (Figures 27 and 28) or **Unable to Process Your Request** (Figure 29).

Access Denied

Figure 27

Social Security Online
www.socialsecurity.gov
Electronic Records Express Home
User Instructions

VIVIANNE HIRSHEY
RepID:6ZBX9R8SM
Dhaval.K.Shah@ssa.gov
Log Out
< Back to Appointed Representative Services Main Menu

 **Access Denied**

Our system cannot accept the Social Security Number you entered: 078074606 -
If you typed the wrong number, you will need to correct it before continuing. - If you have entered the correct Social Security Number, contact the Social Security Office working on this case to determine why you cannot access it from the website.

 **Your ability to use the Access Claimant's Electronic Folder service will be suspended after 10 unsuccessful attempts within a 24 hour period.**

[Return to Acknowledgement Screen](#)

This message may be received for a number of reasons:

- You may have entered the wrong social security number. Double check the number before you request access a second time.
- The case may not be at the Hearing or Appeals Council Level (you can only view cases at the Hearing or Appeals Council Level).
- The case may have closed at the Hearing or Appeals Council Level. Access is only available for a limited time (90 days) after a decision is issued.
- You may not be shown as the appointed representative for that person.

If you have entered the correct social security number, please contact the Social Security office working on this case to determine why you cannot access it from the website.

Ability to Access Claimant's Electronic Folder Service Suspended

Figure 28

The screenshot shows the 'Electronic Records Express' interface. At the top, it says 'Social Security Online' and 'www.socialsecurity.gov'. The main header is 'Electronic Records Express' with a 'User Instructions' link. The user is identified as 'VIVIENNE HIRSHEY' with a 'Log Out' button. The central message is 'Access Denied' with the Social Security Administration logo. The text reads: 'Your ability to use the Access Claimant's Electronic Folder service has been suspended. Please contact the Social Security Administration at 1-866-691-3061 to reactivate your access to this service.' There is another 'Log Out' button at the bottom.

You will receive the page above (Figure 28) if you attempted to view 10 social security numbers that were denied access within a 24-hour period. Once you receive this message, if you wish to continue accessing social security numbers, you must call 1-866-691-3061 and ask to be reactivated.

Unable to Process Your Request

Figure 29

The screenshot shows the 'Electronic Records Express' interface. At the top, it says 'Social Security Online' and 'www.socialsecurity.gov'. The main header is 'Electronic Records Express' with a 'User Instructions' link. The user is identified as 'CAROL KIME' with 'RepID: ZBR7HYRDQ6' and 'j@s.com', and a 'Log Out' button. There are links for '< Back to Appointed Representative Services' and 'Main Menu'. The central message is 'Unable to Process Your Request' with the Social Security Administration logo. The text reads: 'We are sorry for the inconvenience, but the information you are attempting to obtain is not available through this process. Please contact the local Social Security office to obtain the information.' There are 'New Case Search' and 'Cancel' buttons at the bottom.

You may receive this page for the following reasons:

- The case may not be electronic,
- The case may have closed at the Hearing or Appeals Council Level. Access is only available for a limited time (90 days) after a decision is issued.
- The case may have been remanded, or
- There are multiple cases pending or closed within the past 90 days at SSA and the system cannot determine which one to display.

You must contact the Social Security office handling the case for additional help.

Logout

To end your session and logout of Appointed Representative Services, select the **Logout** button. This button is located on the upper left side of most pages (Figure 30). On the **Case Documents** or **Exhibit List** page, this button is located at the bottom of the page (Figure 31).

Figure 30

The screenshot shows the 'Electronic Records Express Home' page. In the top left corner, under the user name 'KENNETH MOORE' and RepID 'PC7438RVB9', there is a 'Log Out' button. A large red arrow points to this button. Other elements include a 'Bulletin Board' on the right, a list of 'Appointed Representative Services' in the center, and a security notice at the bottom left.

Figure 31

The screenshot shows the 'Case Documents' page for claimant Ryan Joseph Theunissen. It features a table with document categories and individual items. At the bottom of the page, there is a 'Log Out' button, which is highlighted by a large red arrow.

Electronic Records Express Access to Electronic Folder									
Electronic Records Express Home									
Claimant: Ryan Joseph Theunissen		Claimant SSN: 115-28-0081		Claim Type: T2		Level: Hearing		User Instructions	
Last Change: 06/27/2010		Application: 04/15/2008		Alleged Onset: 09/27/2007		Last Insured: 12/31/2008			
<input checked="" type="checkbox"/> A. Payment Documents/Decisions Items: 2 Page Count: 0									
▲ No.	Description	<input checked="" type="checkbox"/>	Decision Date	Received	Marked	Pg			
1A	Disability Determination Transmittal	<input checked="" type="checkbox"/>		Prior to Hearing	No	0			
2A	Disability Determination Transmittal	<input checked="" type="checkbox"/>		Prior to Hearing	No	0			
<input checked="" type="checkbox"/> B. Jurisdictional Documents/Notices Items: 0 Page Count: 0									
<input checked="" type="checkbox"/> D. Non-Disability Development Items: 1 Page Count: 0									
▲ No.	Description	<input checked="" type="checkbox"/>	Document Date	Received	Marked	Pg			
1D	Authorization For SSA To Obtain Account Records From A Financial Institution And Request For Records	<input checked="" type="checkbox"/>		Prior to Hearing	No	0			
<input checked="" type="checkbox"/> E. Disability Related Development Items: 5 Page Count: 0									
▲ No.	Description	<input checked="" type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg	
1E	Disability Report - Field Office	<input checked="" type="checkbox"/>				Prior to Hearing	No	0	
2E	Disability Report - Adult	<input checked="" type="checkbox"/>				Prior to Hearing	No	0	
3E	Disability Report - Field Office	<input checked="" type="checkbox"/>				Prior to Hearing	No	0	
4E	Disability Report - Appeals	<input checked="" type="checkbox"/>				Prior to Hearing	No	0	
5E	Authorization for SSA to Obtain Personal Information	<input checked="" type="checkbox"/>	Source of PI			Prior to Hearing	No	0	
<input checked="" type="checkbox"/> F. Medical Records Items: 1 Page Count: 0									
▲ No.	Description	<input checked="" type="checkbox"/>	Source	Date From	Date To	Received	Marked	Pg	
1F	Copy of Evidence Request	<input checked="" type="checkbox"/>	Source of ER			Prior to Hearing	No	0	

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:

Button	Access Key
Cancel	n
Download Selected to PDF	p
Download Selected to Zip	z
ERE Print	p
ERE Home	h
I Agree	i
Log Out	l
New Case Search	s
Upload New File	u

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. Any assistive devices that you may be using will also have a list of these shortcut keys in their Help section.

Note:

1. To use these keys on Windows-based browsers select the **Alt** button on your keyboard and the access key simultaneously. On the Mac, use the **Ctrl** key.
2. **Internet Explorer Browser Users Only:** In order to trigger the **Browse** button on the Electronic Records Express Submission pages you will need to use the space bar if you are using keyboard access.

Glossary

Acceptable File Type	<p>Types of files that are compatible with a given computer program or website. The ERE website currently supports the following type of files:</p> <p>wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, and .tif.</p>
Barcode	<p>Data is coded in a series of bars and spaces of varying width. This symbol can be read with hand held moving beam scanners by sweeping a horizontal beam down the symbol. To date, industry has utilized a “3 of 9” barcode with varying width vertical bars. Technology is now shifting to a more stable and versatile barcode (2-Dimensional or 2-D), where a checkerboard pattern varies in both width and height.</p> <p>A 2-D barcode determines the ultimate destination (paper folder and/or electronic folder) for the evidence submitted (uploaded). The 2-D barcode acts as a portable database to store the following information: Social Security Number, request ID number, site number (Disability Determination Service or ODAR), and document type (e.g., Medical Evidence of Record, Activities of Daily Living). The request ID number (also known as the turnaround document number or contract number) is SSA’s/ODAR’s unique transaction tracking number, and when received, can be used to generate a tickle in the case processing system. If a Representative fails to submit the bar-coded information, the document must be manually indexed at the ODAR.</p>
.bmp	<p>The filename extension for a bitmap file. Bitmap is a common graphic format used by computers. A graphic or picture is made up of a number of individual dots (bits) to form an image. A bitmap is essentially a map of bits (hence the name). Bitmap files can get very large and if storage space is a factor then it is best to convert the image into a more compressed format such as .jpg.</p>
.doc or .docx	<p>The filename extension for a Microsoft Word document file. “.Docx” is the extension of files created in Microsoft Word 2007 or higher.</p>
Download	<p>The process of transferring a file from a remote computer, server, or webpage to your own computer. Download is the opposite of upload.</p>
ERE	<p>Electronic Records Express. SSA’s secure website used primarily for uploading (sending) electronic medical and other evidence considered in determining disability eligibility.</p>

e-folder	The electronic disability folder (e-folder or EF) is SSA's electronic disability repository of data that is accessible by all components involved in the processing of disability claims. Data housed in the e-folder comes from many different SSA and ODAR systems as well as from external sources (e.g., medical Representatives). The e-folder is not a case processing system. The e-folder allows components to share disability case information without having to move a paper folder between components.
Extract	To obtain selected information from a source; an excerpt of a record.
.jpg	.jpg or .jpeg (pronounced "jay-peg") is a standardized image compression format named after its developers (the Joint Photographic Experts Group) that can compress images to very small file sizes, commonly used on the Internet due to faster image transfer rates. JPEG images can contain thousands of colors that make the format ideal for compressing images such as photographs. The JPEG format can compress images up to around 10% of their original file size without losing too much quality (depending on the image used) although the image will lose its sharpness. JPEG files use both the .jpg and .jpeg file extensions and can be created in most popular graphics applications.
MER	Medical evidence of record (MER) is collected from sources identified by the claimant.
.pdf	The filename extension for a Portable Document Format (PDF) file. PDF is a universal file format developed by Adobe® that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it. PDF is a reliable format for electronic document exchange. To view PDF files you need Adobe Reader® that you can download free at http://www.adobe.com/products/acrobat/readstep2.html .
Secure Website	A website that uses encryption and access controls so that personal information sent via the website is not susceptible to interception, loss, or alteration.
.rtf	"Rich Text Format" is a text format developed by Microsoft.
.tif or .tiff	TIF or TIFF is short for "Tagged Image File Format" and refers to a type of image format developed by Aldus and Microsoft that is commonly used within computing. It was designed primarily for faster data interchange. TIFF files are basically Bitmap images; they are not restricted in resolution and can be black and white, grey scale or full color. Most (if not all) image editing software can support the TIFF format and TIFF files typically have the .tif or .tiff file extension.

.txt	The filename extension for a text file.
Upload	The process of transferring a file from a personal computer to a server. This process makes the file available to others. Upload is the opposite of download.
.wpd	The filename extension for a Word Perfect Document.
.xls or .xlsx	The filename extension for a Microsoft Excel file. Microsoft Excel 2007 or later use the extension of “.xlsx.”
.zip	A zipped file is a file that has been compressed making it a smaller file. Compressed files travel faster, therefore taking less time to download to your hard drive or upload to another computer. To return the file to its original size, decompression software is used so that you can view the file. Compression/decompression software is common and may be downloaded from the Internet if it is not already available on your computer.