

# **Electronic Records Express (ERE)**

## **User Guide for**

### **Send Individual Responses**



**August 2018**

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## Overview

This guide provides Social Security Administration (SSA) claimants' appointed representatives with detailed instructions for viewing and downloading documents in their claimant's electronic folder.

## Requirements for Access to the Electronic Folder

- You must have a User ID and a self-selected password;
- The claimant's file must be electronic at the Hearing or Appeals Council level; and
- The link **Send Individual Response** must be displayed on the **Electronic Records Express Home** page under the **Evidence Functions** heading.

## Logging into the Appointed Representative Services

Log into Business Services Online at <https://secure.ssa.gov/acu/LoginWeb/loginHandler.do?SUITE=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.

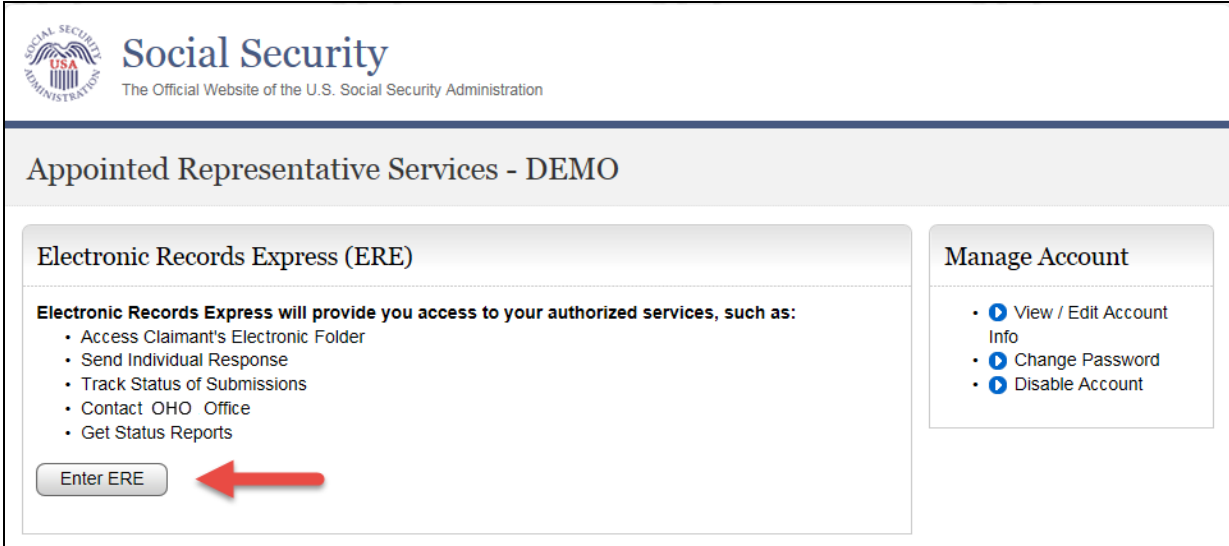
The User ID and password for the Appointed Representative Services cannot be used on other Social Security Administration website login pages. The login will fail and be considered an invalid attempt. After a certain number of invalid login attempts, your User ID may be suspended.

The screenshot shows the 'Business Services Online' login page. At the top, it says 'Social Security Online' and 'Business Services Online' with the URL 'www.socialsecurity.gov'. Below the header, there's a navigation bar with 'BSO Welcome | BSO Information | Keyboard Navigation' and a 'HELP' link. The main heading is 'Log In to Online Services'. A red warning message states: 'For your security, please log out of the application and close all Internet windows when you are finished.' On the left, there's a section for 'Online Services Availability' with a list of hours: Monday-Friday: 5 AM - 1 AM ET, Saturday: 5 AM - 11 PM ET, and Sunday: 8 AM - 11:30 PM ET. The main content area is divided into two columns. The left column is for 'New User?' and the right column is for 'Existing User?'. The 'Existing User?' section is highlighted with a red border and contains input fields for 'User ID' and 'Password', links for 'Forgot user ID?' and 'Forgot your password?', a 'User Certification' section with a scrollable text area and a checkbox for 'I have read & agree to these terms.', and a 'Log In' button. Below the 'New User?' section, there's a link for 'Create Log In Account' and a question: 'Did you register with SSA by phone or paper form and need to create a password?'.

## Appointed Representative Services Main Menu

The main menu displays information about ERE authorized services, Appointed Representative registration, and account management.

Select **Enter ERE**.



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### Appointed Representative Services - DEMO

#### Electronic Records Express (ERE)

**Electronic Records Express will provide you access to your authorized services, such as:**

- Access Claimant's Electronic Folder
- Send Individual Response
- Track Status of Submissions
- Contact OHO Office
- Get Status Reports

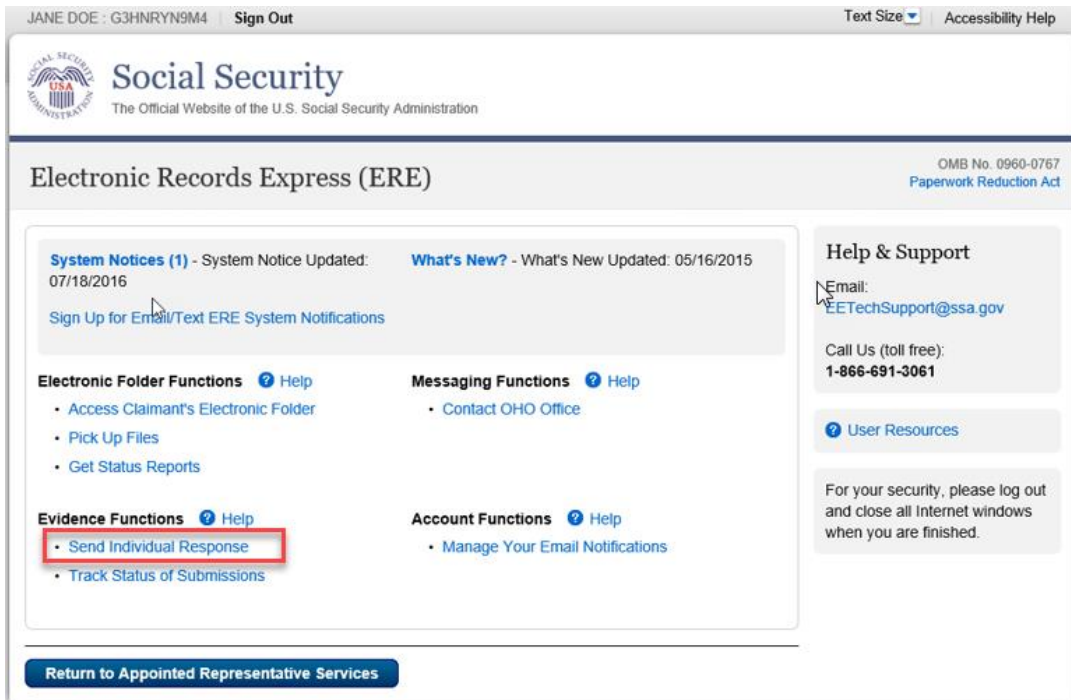
[Enter ERE](#)

#### Manage Account

- [View / Edit Account Info](#)
- [Change Password](#)
- [Disable Account](#)

## How to Use Send Individual Response

On the **ERE** home page under **Evidence Functions**, select **Send Individual Response**.



JANE DOE · G3HNRYN9M4 [Sign Out](#) [Text Size](#) [Accessibility Help](#)

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### Electronic Records Express (ERE)

OMB No. 0960-0767  
Paperwork Reduction Act

**System Notices (1)** - System Notice Updated: 07/18/2016 [What's New?](#) - What's New Updated: 05/16/2015  
[Sign Up for Email/Text ERE System Notifications](#)

**Electronic Folder Functions** [Help](#)

- Access Claimant's Electronic Folder
- Pick Up Files
- Get Status Reports

**Messaging Functions** [Help](#)

- Contact OHO Office

**Evidence Functions** [Help](#)

- [Send Individual Response](#)
- Track Status of Submissions

**Account Functions** [Help](#)

- Manage Your Email Notifications

**Help & Support**

Email: [EETechSupport@ssa.gov](mailto:EETechSupport@ssa.gov)

Call Us (toll free): **1-866-691-3061**

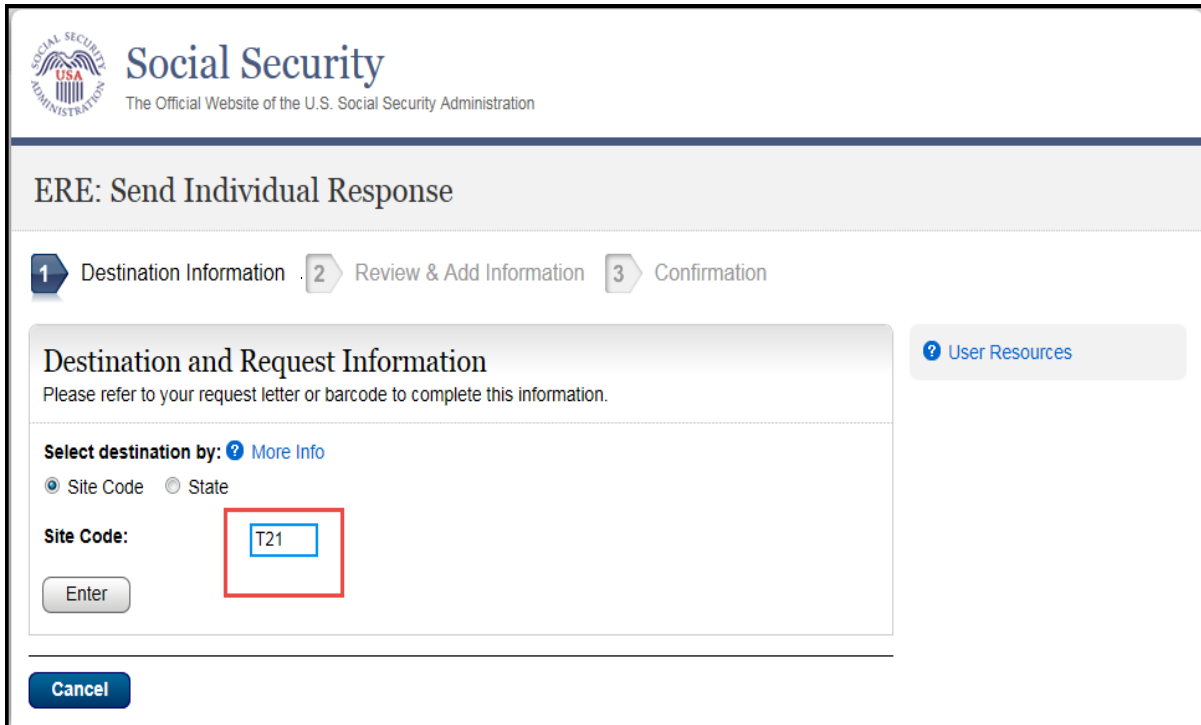
[User Resources](#)

For your security, please log out and close all Internet windows when you are finished.

[Return to Appointed Representative Services](#)

## Step 1: Destination and Request Information

- Enter the OHO site code in the **Site Code** field in the **Destination and Request Information** section.



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### ERE: Send Individual Response

1 Destination Information 2 Review & Add Information 3 Confirmation

#### Destination and Request Information

Please refer to your request letter or barcode to complete this information.

Select destination by: [More Info](#)

Site Code  State

Site Code:

[User Resources](#)


Select **Enter**

## Step 2: Barcode Information



From the barcode provided by OHO, enter the following information in the appropriate fields.

- Claimant's SSN
- RQID (Request ID): Enter the RQID beginning with the first non-zero number. For example, if the barcode shows RQID as 00000001102400, enter 1102400.
- RF (Routing Field)
- DR code
- DO NOT enter the CS code.

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## ERE: Send Individual Response

1 Destination Information 2 Review & Add Files 3 Confirmation

**Destination and Request Information**  
Please refer to your request letter or barcode to complete this information.

**Select destination by:** [More Info](#)  
 Site Code  State

**Site Code:** T21  
**State:** MD-Maryland  
**Destination:** MD - Baltimore OHO [T21]


**Social Security Number (SSN):**

**RQID (Request ID):**  
  
 (Do not enter leading zeroes)

**RF (Routing Field):**  
 P  
 D or Blank  
 No RF or No Barcode

**DR:**  
 F  
 S  
 No DR or No Barcode

**CS (only if applicable):**



**SSN** - Social Security Number of the claimant. Enter this value for the "SSN" field on the website.

**RQID** - Request ID is a unique identifier for this case. Enter the value for the "RQID" field on the website.

**RF** - Routing Field is one of two values used to determine the routing of submitted evidence. Select this value for the "RF" field on the website.

**DR** - Document Retention is one of the two values used to determine the routing of submitted evidence. Select this value for the "DR" field on the website.

**CS** - Checksum is a hash code used to validate user input. Enter this value for the "CS" field on the website.

**Site** - Identifies which DDS/OHO office should receive the evidence. Refer to this value when making your selection for the "Destination" field on the website.

[User Resources](#)

Select **Next**.

### **Step 3: Attach and Upload Files**

In the **Attach and Upload Files** section, you can send electronic files from your computer to OHO.



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## ERE: Send Individual Response

1 ✓ Destination Information   2 Review & Add Files   3 Confirmation

### Review

[User Resources](#)

Edit

#### Destination and Request Information

Destination: **MD - Baltimore OHO [T21]**

RF: **D or Blank**

SSN: **531-21-6106**

DR: **F**

RQID: **111111111**

CS:

### Attach and Upload Files

- A maximum of 10 files can be added and all files must total less than 50MB.
- File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

File 1:

Browse...

Document Type: --

Notes:

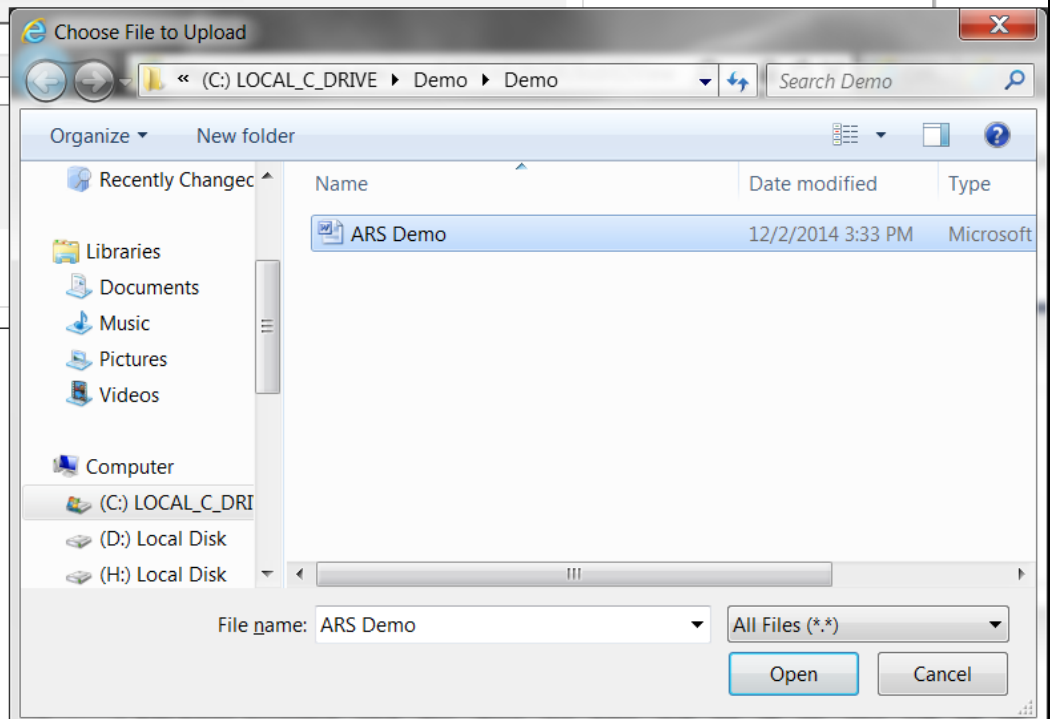
Remove File

Add Another File

Submit

Previous

Cancel



- Select the **Browse** button; this will launch the **Choose File to Upload** window.
- Using the **Choose File to Upload** window, select the file you wish to send to the electronic folder. The document's file name will insert into the **File name** field at the bottom of the window.
- Next, select the **Open** button.
- The **Choose File** window closes and the file name displays in the field to the left of the **Browse** button. You have successfully attached the file.
- **Document Type:** Select from the drop down list a document type for the document you are sending.
- Depending on the document type you select, additional fields may appear which require completion.
- Select **Submit** or add additional files by selecting **Add Another File**.

Sign Out Text Size Accessibility Help

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### ERE: Send Individual Response

1 ✓ Destination Information    2 Review & Add Files    3 Confirmation

**Review** [User Resources](#)

Destination and Request Information

Destination: <b>MD - Baltimore OHO [T21]</b>	RF: <b>D or Blank</b>
SSN: <b>531-21-6106</b>	DR: <b>F</b>
RQID: <b>111111111</b>	CS:

#### Attach and Upload Files

- A maximum of 10 files can be added and all files must total less than 50MB.
- File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

File 1:

Document Type:


Notes:



## Step 4: Tracking Information

You should receive a **Confirmation** screen acknowledging that SSA has received your transmission. The transmission must still go through an SSA systems check before being sent to the electronic folder. You will be notified by email if there are any errors or problems that prevent SSA from processing your submission. **NOTE:** We recommend that you print this page for documentation. You will not be able to retrieve this information from SSA (including OHO) after you exit this page.

Sign Out Text Size Accessibility Help

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### ERE: Send Individual Response

1 ✓ Destination Information   2 ✓ Review & Add Files   3 Confirmation

[User Resources](#)

**✓ Thank you for your submission**

Individual Response Submission - Tracking Information

Tracking Number: **164F74F071744254N**

Submitted on: **08/01/2018 at 05:05 PM EDT**

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 and Request Information

Destination: **MD - Baltimore OHO [T21]**  
SSN: **531-21-6106**  
RQID: **111111111**  
RF: **D or Blank**  
DR: **F**  
CS:

---

#### Uploaded File(s)

File Information	File Size
File Name: <b>ERETESTDOC.doc</b>	26 KB
Document Type: <b>Activities of Daily Living (ADL) - 0050</b>	
Document Date: <b>01/01/2018</b>	
Notes: <b>No notes added</b>	
<b>Total File Size</b>	26 KB

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[Send Another Response](#)   [ERE Home](#)


If you have evidence to send for another claimant, select the **Send Another Response** button.

## Logging Out of ERE

When you have completed your file uploads, select **Sign Out** on the top left of the page. Logging out ensures that others may not access the ERE website through your Username and Password.

Text Size ▾ | Accessibility Help

**Sign Out**

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### ERE: Send Individual Response

1 ✓ Destination Information   2 ✓ Review & Add Files   3 ➔ Confirmation

[? User Resources](#)

✓ **Thank you for your submission**

Individual Response Submission - Tracking Information

Tracking Number: **164F74F071744254N**

Submitted on: **08/01/2018 at 05:05 PM EDT**

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

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#### Submission Summary

Tracking Information

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##### Destination and Request Information

Destination: **MD - Baltimore OHO [T21]**  
SSN: **531-21-6106**  
RQID: **111111111**  
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DR: **F**  
CS:

---

##### Uploaded File(s)

File Information	File Size
File Name: <b>ERETESTDOC.doc</b>	26 KB
Document Type: <b>Activities of Daily Living (ADL) - 0050</b>	
Document Date: <b>01/01/2018</b>	
Notes: <b>No notes added</b>	
<b>Total File Size</b>	26 KB

[Send Another Response](#)   [ERE Home](#)

## Timing Out

The website will time out after 30 minutes of inactivity. After 2 hours, the website will log you out and you must re-enter your User ID and Password to continue.

## Avoiding User Errors

Errors can occur for many reasons. The following list briefly explains some common ERE website user errors:

- Bookmarking the **Confirmation** page – **Never** bookmark pages within the ERE website.
- Once you have submitted documents by selecting the **Submit** button, you should NOT use the **Back** button or close your Internet browser file until you receive the **Confirmation** page.

## ERE Electronic File Format Options:

The ERE website currently supports the following file formats:

<b>.wpd</b>	<b>.doc</b>	<b>.txt</b>
<b>.pdf</b>	<b>.xls</b>	<b>.jpg</b>
<b>.bmp</b>	<b>.tiff</b>	<b>.tif</b>
<b>.docx</b>	<b>.rtf</b>	<b>.mdi</b>
	<b>.xlsx</b>	

## Access Keys

ERE contains access keys to improve navigation and provide information. You will find a list of these keys in the table below:

<b>Button/Link</b>	<b>Access Key</b>
Next	n
Submit	P
User Resources	u

## 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 you will need to use the space bar if you are using keyboard access.