

User Guide for Prepare CE Report for Provider



Office of Disability Determinations

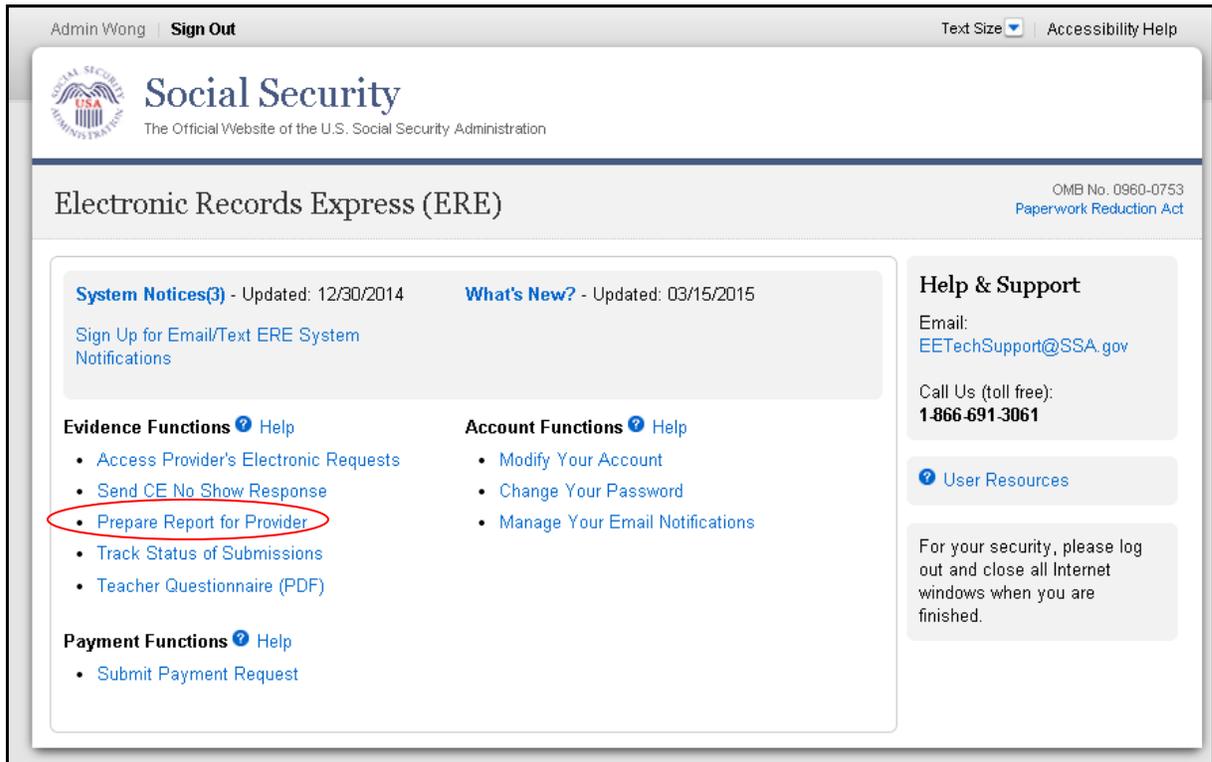
October 2015

Electronic Records Express (ERE): Prepare Report for Provider

Instructions for Prepare Report for Provider

The **Prepare Report for Provider** function allows a CE provider's administrative staff to prepare a CE report and send it to the appropriate CE provider. The CE provider then reviews and submits the report to the requesting office.

The **Prepare Report for Provider** link is available only for users registered to use this function of the website.



The screenshot shows the Social Security Administration's Electronic Records Express (ERE) website. The page header includes the user name "Admin Wong" and a "Sign Out" link. The main navigation menu is located on the left side of the page, with the following items:

- System Notices(3) - Updated: 12/30/2014
- What's New? - Updated: 03/15/2015
- Evidence Functions [Help](#)
 - Access Provider's Electronic Requests
 - Send CE No Show Response
 - Prepare Report for Provider** (circled in red)
 - Track Status of Submissions
 - Teacher Questionnaire (PDF)
- Account Functions [Help](#)
 - Modify Your Account
 - Change Your Password
 - Manage Your Email Notifications
- Payment Functions [Help](#)
 - Submit Payment Request

On the right side of the page, there is a "Help & Support" section with the following information:

- Email: EETechSupport@SSA.gov
- Call Us (toll free): **1-866-691-3061**
- [User Resources](#)

A security notice at the bottom right of the page reads: "For your security, please log out and close all Internet windows when you are finished."

If you did not receive an electronic CE request, you must have the SSA or DDS CE request letter available to complete your action. Your first step is to log into the Electronic Records Express website with your username and password.

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others.

Electronic Records Express (ERE): Prepare Report for Provider

Destination and Request Information (Step 1 of 3)

Admin Wong | [Sign Out](#) Text Size | [Accessibility Help](#)

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

ERE: Prepare Report for Provider

1 Destination Information 2 Review & Add Information 3 Confirmation

Enter Provider Information

Select the provider for whom this Consultative Exam is being prepared.

Reviewing Provider:
Wong, Doctor

[User Resources](#)

Enter Patient Information

Patient Name:
John Doe
First Middle Last

Patient Date of Birth:
 09/10/2000
mm/dd/yyyy

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: S02
State: AK-Alaska
Destination: AK - Alaska DDS [S02]

Social Security Number (SSN):
 123-45-6789

RQID (Request ID):
 abc123

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

DR:
 F
 S
 No DR or No Barcode

CS (only if applicable):
 123

Document Type:
 CE Psychiatry - 3174

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 3

Electronic Records Express (ERE): Prepare Report for Provider

Step 1: Prepare CE Report for Provider

- Select the Provider for whom you are preparing the CE Report from the dropdown box.
NOTE: If you are responding to an electronic request, you have already provided this information.
- Enter the First and Last Name of the patient (the Middle Name is not a required field).
- **NOTE:** If you are responding to an electronic request, this identifying information has been completed for you.
- Enter the Date of Birth (**DOB**) of the patient in mm/dd/yyyy format.
- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

or

- Select the **State** from the dropdown. After choosing the **State**, the **Destination** list updates with the offices in the State you selected. Select the **Destination** from the dropdown.
- Enter the Social Security Number (**SSN**). Only files for one SSN can be sent with this transaction.
- Enter the Request ID (**RQID**).
- Select the appropriate **RF** (Routing Field) option or No RF or No Barcode if not displayed on the request letter.
- Select the appropriate **DR** (Document Return Code) option or No DR or No Barcode if not displayed on the request letter.
- Enter the **CS** (Check Sum Digits) if available, or leave this field blank if not displayed on the request letter.
- Select the **Document Type** to be sent from the drop down box.
- Select “Next” to continue this transaction or the Cancel button to cancel the transaction

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 4

Electronic Records Express (ERE): Prepare Report for Provider

Review and Add Information (Step 2 of 3)

Admin Wong | Sign Out

Text Size | Accessibility Help



Social Security

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

ERE: Prepare Report for Provider

1 ✓ Destination Information 2 Review & Add Information 3 Confirmation

Review

User Resources

Edit Destination Information

Reviewing Provider: **Wong, Doctor** RF: **D or Blank**
Patient Name: **John Doe** DR: **F**
Patient DOB: **09/10/2000** CS: **123**
Destination: **AK - Alaska DDS [S02]** Document Type: **CE Psychiatry - 3174**
SSN: **123-45-6789**
RGID: **abc123**

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, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

File 1: No file chosen

Additional Comments:
(16,000 characters maximum)

Characters remaining: 16000

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 5

Electronic Records Express (ERE): Prepare Report for Provider

Step 2: Review and Add Information

- Review the **Destination and Request** information. Make any changes by selecting the **Edit** button.
- Select the button to identify a file to send. (Do not send files that are password protected.) The **Choose file** window appears on your screen.
- Locate the file you wish to send and highlight the file name. The document's file name moves into the **File name** box at the bottom of the **Choose file** window.
- Select the **Open** button. The **Choose file** window closes and the file name displays. If you have chosen the incorrect file, select the **Delete** button to clear the field.
- Select the **Add File** button to send additional files.

Note: A maximum of 10 files may be sent for one individual by selecting *the* **Add A File** button and repeating the previous steps.

SSA's Electronic Records Express website accepts the following file formats: **.wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, xlsx, .pdf, .tiff, .tif.**

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 re-submit your documents without macros.

- Type **Comments**, if needed. The Comment field is where you can provide additional information. (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- Verify the input information.
- Select the **Send to Provider** button to send the report. Your file is sent to the Provider's Electronic Records Express inbox and an email will alert them of the delivery.
- If you would like to return to the previous page, select **Previous**.
- Select the **Cancel** button if you wish to cancel the transaction and return to the Electronic Records Express Home page.

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 6

Electronic Records Express (ERE): Prepare Report for Provider

Confirmation (Step 3 of 3)

Admin Wong | Sign Out | TextSize | Accessibility Help

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

ERE: Prepare Report for Provider

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

✓ Thank you for your submission.

Prepared Submission - Tracking Information
Tracking Number: **14AD4FA46D4F47B9N**
Submitted on: 01/10/2015 at 12:52 PM EST

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

[Print this page](#)

[User Resources](#)

Submission Summary

Tracking Information

Reviewing Provider Information

Reviewing Provider: Wong, Doctor

Patient Information

Patient Name: John Doe
Patient DOB: 09/10/2000

Destination and Request Information

Destination: AK - Alaska DDS [S02]
SSN: 123-45-6789
RQID: abc123
RF: D or Blank
DR: F
CS: 123
Document Type: CE Psychiatry - 3174

Uploaded File(s)

File Name	File Size
eOR.doc	42 KB
Total File Size	42 KB

Comments: Comments were added

[Prepare Another CE Report](#) | [ERE Home](#)

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 7

Electronic Records Express (ERE): Prepare Report for Provider

Step 3: Confirmation

- Electronic Records Express generates a **Confirmation** page after you submit your transaction. This page contains a Tracking number that you can use to check the status of your submission. The **Confirmation** page indicates the specific files and/or comments that you transmitted.
- If you do not receive the **Confirmation** page, please resubmit the materials.
- If you continue to have transmitting problems, contact the Electronic Records Express Website Help Desk at EETechSupport@ssa.gov or 1-866-691-3061.
- If you have additional CE reports to prepare, select **Prepare Another CE Report** and repeat the steps outlined above.

NOTE: We **strongly recommended** that you print or take a screenshot of the **Confirmation** page for your documentation. To do this, simply select **Print this page** located at the bottom of the green box. This print link works the same as if you selected File and Print from your browser's menu. You cannot bookmark and save a **Confirmation** page, and you will not be able to retrieve it later once you exit the webpage.

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 8

Electronic Records Express (ERE): Prepare Report for Provider

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/Link	Access Key
Next	n
Submit	p
User Resources	u

Other keyboard commands, hotkeys or access keys will vary based upon browser and the version of the browser that you are using. A list of these commands can be found in the Help section of your browser. The Help feature can be located on the Menu bar of your browser or by using the F1 function key on the keyboard. Any assistive devices that you may be using will also have a list of these shortcut keys in their Help section.

Note: To use these keys select the “Alt” or “Ctrl” button on your keyboard and the access key simultaneously.

Electronic Records Express (ERE): Prepare Report for Provider

How to Get Important Information about Electronic Records Express Website Availability

You may subscribe to receive ERE website availability notifications through the GovDelivery services on the Social Security Administration's Electronic Records Express internet website: [Social Security Online: Electronic Records Express](#). Please see the following website for *GovDelivery* FAQs: <https://subscriberhelp.govdelivery.com/hc/en-us>

To subscribe to the ERE website availability notification, follow these instructions:

- Click “**Sign Up for Email/Text ERE System Notifications**” on the Electronic Records Express Home Page,
- Type your email address and select **Submit**
- Confirm your email address
- Select “Send updates immediately by email.”
- Choose an optional password
- Select **Submit**
You will receive a “Success” confirmation.
- Select **Close** to exit.

****Once you have subscribed, you will receive a Subscription Acknowledgement e-mail with instructions on how to update your user profile****

Please note that you are responsible for information submitted on the ERE website when using your ERE User ID and password. Never share your ERE User ID or password with others. 10