

# **User Guide for Secure Messaging**



**Office of Disability Determinations**

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# Electronic Records Express (ERE): Secure Messaging

## Instructions for Secure Messaging

The Secure Messaging function allows registered **Electronic Records Express (ERE)** users to exchange confidential messages and sensitive documents. Only registered users can send and receive secure messages, and messages can only be sent to other registered users (no forwarding to external email addresses). Messages and documents are stored in a central repository on a protected system within the SSA network. All messages and documents are scanned for virus infection before processing.

Electronic Records Express sends email notices to users via a Secure Message. The email notification contains a link to the **Electronic Records Express** website. You must log into the ERE to retrieve the message. **Messages have a limited lifetime of 20 days from creation date.**

The screenshot displays the Electronic Records Express (ERE) homepage. At the top, the user 'Tamira Jameson' is logged in with a 'Sign Out' option. The page features the Social Security Administration logo and the title 'Electronic Records Express (ERE)'. Key sections include: 'System Notices (2)' with a 'Sign Up for Email ERE System Notifications' link; 'Whats New?' with a 'What's New Updated:' date of 02/01/2016; 'Evidence Services' with links for 'Access Electronic Requests', 'Send Individual Response', 'Send Grouped Response', 'Send CE Report', 'Send CE No Show Response', 'Review/Submit Prepared Requests', 'Track Status of Submissions', and 'Teacher Questionnaire (PDF)'; 'Account Functions' with links for 'Modify Your Account', 'Change Your Password', and 'Manage Your Email Notifications'; and 'Messaging Services' where the 'Secure Messaging' link is highlighted with a red circle. A 'Help & Support' sidebar on the right provides contact information: Email: EETechSupport@SSA.gov and Call Us (toll free): 1-866-691-3061. The page also includes 'Text Size' and 'Accessibility Help' options.

Select the **Secure Messaging** link from the **Electronic Records Express Home** page to view the **Secure Messaging Inbox**.

# Electronic Records Express (ERE): Secure Messaging

## Secure Messaging – Inbox

The screenshot shows the Social Security Administration's ERE Secure Messaging inbox. At the top left is the Social Security Administration logo and the text "Social Security Official Website of the U.S. Social Security Administration". Below this is the heading "ERE: Secure Messaging". On the left side, there is a sidebar with "Compose" and "Folders" sections. The "Folders" section lists "Inbox (1)", "Pending", "Drafts (1)", "Sent (1)", and "Blocked". Below the folders is a "User Resources" button. The main area is titled "Inbox" and contains the text "Your messages are delivered here." followed by a table of messages. The table has columns for selection, status, attachments, from, subject, received time, expires time, and size. At the bottom of the table are "Delete Selected" and "ERE Home" buttons.

<input type="checkbox"/>	!		From	Subject	Received (ET)	Expires (ET)	Size
<input type="checkbox"/>			User, A	<a href="#">test</a>	01/27/2016 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Ames, Tom	<a href="#">test</a>	01/27/2016 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Lisel, Laura	<a href="#">test</a>	01/15/2016 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Downs, Ann	<a href="#">test</a>	01/12/2016 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Smith, Marie	<a href="#">test</a>	01/10/2016 11:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Jones, James	<a href="#">test</a>	01/03/2016 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Baylor, Glen	<a href="#">test</a>	12/28/2015 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Miller, Ben	<a href="#">test</a>	12/28/2015 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Ames, Tom	<a href="#">test</a>	12/21/2015 10:44	10/16/2014 00:00	1 KB
<input type="checkbox"/>			Smart, Max	<a href="#">test</a>	12/18/2015 10:44	10/16/2014 00:00	1 KB

### View an Individual Message:

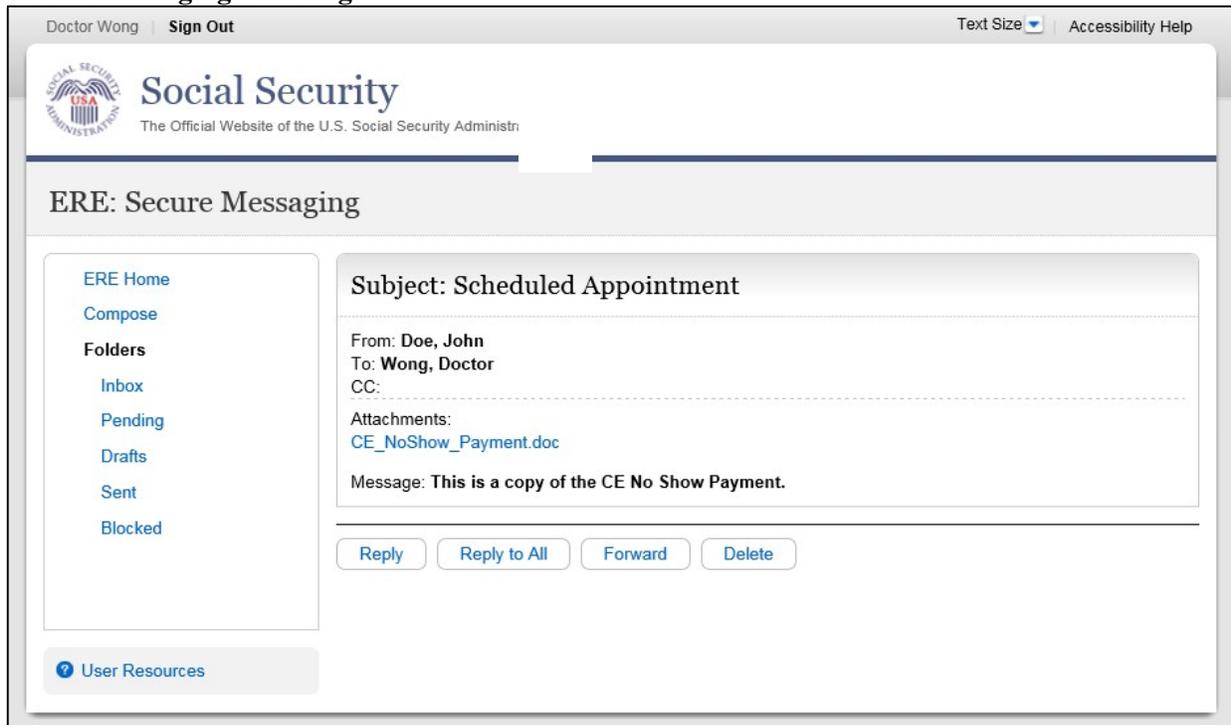
To view an individual message, select the hyperlink of the message you would like to view in the **Subject** column.

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## Reply to a Message:

- Use the **Reply**, **Reply to All**, or **Forward** button to respond to the message. Follow the instructions for **Compose and Send a Message** below to send the message; or
- Choose the **Delete** button to delete the message; or
- To view another message, select **Check Mail** or **Mailbox Home**. **Viewed messages remain in the Inbox until they are automatically deleted (20 days from creation date) or manually deleted.**

## Secure Messaging – Message



The screenshot displays the Social Security Administration's Electronic Records Express (ERE) Secure Messaging interface. At the top, it shows the user's name "Doctor Wong" and a "Sign Out" link. The Social Security logo and "The Official Website of the U.S. Social Security Administration" are visible. The page title is "ERE: Secure Messaging". On the left, there is a navigation menu with links for "ERE Home", "Compose", "Folders" (including "Inbox", "Pending", "Drafts", "Sent", "Blocked"), and "User Resources". The main content area shows a message with the subject "Subject: Scheduled Appointment". The message details are: "From: Doe, John", "To: Wong, Doctor", "CC:", and "Attachments: CE\_NoShow\_Payment.doc". The message body states: "Message: This is a copy of the CE No Show Payment." Below the message, there are four buttons: "Reply", "Reply to All", "Forward", and "Delete".

## Compose and Send a Message:

- You may respond directly to a received message by choosing the **Reply**, **Reply to All** or **Forward** button.
- If composing a new message, select the **Compose** link. The form for creating a new message displays.

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

# Electronic Records Express (ERE): Secure Messaging

## Compose Message

The screenshot displays the 'Compose Message' interface on the Social Security Administration's ERE: Secure Messaging website. The page header includes the Social Security Administration logo and the text 'Social Security Official Website of the U.S. Social Security Administration'. The main content area is titled 'ERE: Secure Messaging' and contains a 'Compose' section. On the left, there is a sidebar with 'Compose' and 'Folders' (Inbox (1), Pending, Drafts (1), Sent (1), Blocked). The 'Compose' section includes fields for 'To:', 'Cc:', 'Subject:', and 'Importance:'. The 'Subject:' field is circled in red. Below these fields is a file upload section with 'File 1:', 'Choose File', 'No file chosen', 'Delete', and 'Add File' buttons. At the bottom is a large text area for 'Your Message:' with a character count of 1000000. Navigation buttons 'Send', 'Save as Draft', and 'Cancel' are at the bottom right.

- Enter the destination recipient(s) in the **To:** and/or **Cc:** fields. (You can only send Messages to registered users of Secure Messaging.)
  - The easiest way to enter a recipient is by selecting the **Search Contacts** button. This opens up to a light box and it allows you to filter by a user's first or last name. (You can only send Messages to registered users displayed in this list.)

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# Electronic Records Express (ERE): Secure Messaging

**Search Contacts** X

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**Instructions:**

1. Enter your contact's name and click the Search button.
2. Select your contact and click the To or Cc button to include them in your message.
3. Lastly, click Add to return to your message.

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**Name:**  
Enter your contact's name.

First
Last

**Search Contacts** X

---

**Instructions:**

1. Enter your contact's name and click the Search button.
2. Select your contact and click the To or Cc button to include them in your message.
3. Lastly, click Add to return to your message.

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**Name:**  
Enter your contact's name.

First
Last

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<input type="checkbox"/>	Name	City	State	Organization	Organization Type ▲	Site Name	User ID ▲
<input type="checkbox"/>	Smith, Aaron	Baltimore	Maryland		SSA/State/DDS Site	MD-Baltimore DDS [S23]	HG612
<input type="checkbox"/>	Smith, Aaron	Baltimore	Maryland	Law Office 45	Attorney's Office		SA5453
<input type="checkbox"/>	Smith, Adela	Las Vegas	Nevada		SSA/State/DDS Site	NV-Vegas DDS [R24]	GWDF5
<input type="checkbox"/>	Smith, Alfe	Rockford	Illinois		SSA/State/DDS Site	IL-Rockford DDS [E21]	HJHJGT5
<input type="checkbox"/>	Smith, Anton	Rockford	Illinois	Hospital 567	Hospital/Clinic		WR43
<input type="checkbox"/>	Smith, Arcus	Rockford	Illinois		SSA/State/DDS Site	IL-Rockford DDS [E21]	JHT5
<input type="checkbox"/>	Smith, Becca	Rockville	Maryland		SSA/State/DDS Site	MD-Rockville DDS [E43]	ERT324
<input type="checkbox"/>	Smith, Brennan	New York	New York		SSA/State/DDS Site	NY-New York DDS [F54]	BNGHG6
<input type="checkbox"/>	Smith, Carl	Auburn	Alabama	Law Office 234	Attorney's Office		ER312
<input type="checkbox"/>	Smith, Carla	Yamhill	Louisiana		SSA/State/DDS Site	LA-Yamhill DDS [E32]	GFA2

**To...**

**Cc...**

- Search for the name using the **Filter By** text box. As you type the name in the box, you advance to the corresponding location in the list.
  - Highlight the name of the user you are sending a message to and insert it in either the **To:** box or the **Cc:** box by selecting the **To:** or **Cc:** button on the search window.
  - Repeat this step until you have entered all desired destination recipients
  - Select **Add** to include the selected recipients in your message.
- Enter a **Subject**, and then select the level of **Importance** from the drop-down list.
  - Attach files as necessary.

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

## Electronic Records Express (ERE): Secure Messaging

Note: A maximum of 10 files may be sent by selecting the **Add 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.

- Enter any text message that needs to be included in the large text box.
- The overall size of the message cannot exceed 51 MB (50MB total for file attachments and 1MB for message text).
- Send the message by selecting the **Send** button. Or, you can save an unfinished message for later by selecting the **Save as Draft** button. (Creating a draft message starts the 20-day lifespan of the message.)
- A copy of the sent message is saved in the **Sent** folder.

# Electronic Records Express (ERE): Secure Messaging

## Compose Message – Confirmation

The screenshot shows the Social Security Administration's ERE Secure Messaging interface. At the top, it displays the user's name "Doctor Wong" and a "Sign Out" link. The Social Security logo and "The Official Website of the U.S. Social Security Administration" are visible. The main heading is "ERE: Secure Messaging". A green confirmation box states: "You successfully submitted the message. You will be notified via email if there are any errors in sending this message. It will be held in the Pending folder until processing is complete. If any attachment carries a virus, the message will be moved to your Blocked folder. The message will expire on 01/30/2015." Below this is a navigation menu with links for "ERE Home", "Compose", "Folders" (Inbox, Pending (1), Drafts, Sent, Blocked), and "User Resources". The "Inbox" section shows a table of messages:

			From	Subject	Received (ET)	Expires (ET)	Size
<input type="checkbox"/>	!		Doe, John	Scheduled Appointment	01/10/2015	01/30/2015	156 KB

A "Delete Selected" button is located below the table.

## View Blocked Messages:

Blocked messages are messages the user attempted to upload with an attachment in which the **Electronic Records Express** virus scan found a suspected virus. Quarantined messages are blocked from transmission and the suspected file is deleted. In addition to the benefit of knowing about the suspected file, users need to know that the message has been blocked.

- Select the **Blocked** link. The blocked messages list displays.
- To take action on the message:
  - To delete the message, select the checkbox next to the message and select the **Delete** button.

**NOTE:** 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.

## 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:

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## Electronic Records Express (ERE): Secure Messaging

Button	Access Key
Delete	l
Send	s
Save as Draft	r
Reply	r
Replay All	y
Forward	w
Apply	y
To	t
Cc	c
Add	a

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” button on your keyboard and the access key simultaneously.

# Electronic Records Express (ERE): Secure Messaging

## 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:

1. Click “**Sign Up for Email/Text ERE System Notifications**” on the Electronic Records Express Home Page,
2. Type your email address and select **Submit**
3. Confirm your email address
4. Select “Send updates immediately by email.”
5. Choose an optional password
6. Select **Submit**
  - a. You will receive a “Success” confirmation.
7. 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\*\***