

# Consultative Examination (CE) Services

## Instructions for Review/Submit CE Reports

This link allows CE providers to review and submit CE reports that have been prepared by their administrative staff.

The **Review/Submit CE Reports** link will display on the ERE homepage when the CE provider has been registered to use this function.

The provider will sign on to the Electronic Records Express website using his/her username and password. Click the link, **Review/Submit CE Reports** under the “Consultative Examination (CE) Services” heading.

### Electronic Records Express Home—Review/Submit CE Reports

The screenshot shows a Microsoft Internet Explorer browser window displaying the Electronic Records Express homepage. The address bar shows the URL: <https://secureval.ssa.gov/apps7/ERE/home.do>. The page header includes "Social Security Online" and "www.socialsecurity.gov". The main content area is titled "Electronic Records Express Home" and "Welcome to Electronic Records Express". It features several service categories:

- Evidence Submission Services**
  - [Send Response for Individual Case](#)
  - [Send Grouped Files](#)
- Consultative Examination (CE) Services**
  - [Review / Submit CE Reports](#) (highlighted with a green arrow)
  - [Send CE Report](#)
  - [Send CE No Show Respor](#) [Review / Submit CE Reports]
- Document Exchange Services**
  - [Pickup Transcription Reports](#)
  - [Teacher Questionnaire](#)
- Communication Services**
  - Communication Utility: [Send E-Mail](#)

On the left side, there is a user profile for "Doc Doctor" with email "ruth.trent@ssa.gov" and phone "5555555555", and a "Log Out" button. Below this, it says "From here you can also:" with links for "Modify your account information" and "Change your password". A security notice at the bottom left states: "For your security, please log out and close all Internet windows when you are finished." On the right side, there is a "Bulletin Board" section with the text "Updated 01/08/2008", "What's New?", and "Email for more information or call toll free: 1-866-691-3061". The browser's taskbar at the bottom shows several open windows, including "Deleted It...", "Trent ruth o...", "ERE - Messa...", "RE: ERE - M...", "Electronic R...", "Review\_Sub...", and "Electronic R...". The system clock shows "12:14 PM".

The page that will be displayed after clicking on **Review/Submit CE Reports** will show all CE reports prepared for you by your staff. None of the CE reports will have been or will be submitted to the DDS until you review and explicitly submit each one.

### Step 1—Review/Submit CE Reports

The screenshot shows the 'Electronic Records Express' interface. The page title is 'Review/ Submit CE Reports' and 'Review CE Reports'. A table lists reports with columns: Name, SSN, DOB, Date/Time Prepared, Prepared By, Status, and Review. A callout points to the 'Reports Prepared by CE Administrative staff' column. Another callout points to the 'Status of CE Report: New, Viewed, or Pending' column. A third callout points to the 'Review' button, stating 'Choose "Review" to review the information input by the CE Administrative Staff'.

Name	SSN	DOB	Date/Time Prepared	Prepared By	Status	Review
John Patient	XXX-XX-1111	12/12/2000	01/04/2008 12:10:32	Doctor Staff	NEW	<a href="#">Review</a>

The status of each prepared response will be one of the following:

- **NEW**—A response that has not yet been viewed. These responses are also shown in bold in the list.
- **VIEWED**—A response that has been viewed or possibly reviewed, but has not yet been submitted to the requesting office.
- **PENDING**—A response that has been reviewed and submitted to the requested office, but has not yet been fully processed by the website. Once the website completely processes a response and sends it to the requesting office, that response will be removed from this list.

### Step 1—Review/Submit CE Reports

- You may click on the heading of each column to sort the displayed information by that column in ascending or descending order.
- Click on “**Review**” next to the CE report you want to review for CE report preparation, patient and destination information.
- If the information is correct, select “**Continue**” and proceed to **Step 2**.

- If the information input by the CE administrative staff is not correct, make the corrections in the appropriate fields and select “**Continue**” (see screenshot below).
- If you would like to return to the previous page, select “**Prior Page**”.
- If you would like to cancel the transaction, choose “**Cancel**”. You will be directed back to the homepage.
- If you would like to delete the transaction, choose “**Delete**”.

**Note:** A CE report will be removed from the system once you have successfully submitted it or 30 days from the date of preparation, regardless of whether you have taken action on it.

### Step 1—Review/Submit CE Report—Edit

The screenshot shows a web browser window displaying the 'Electronic Records Express' application. The page title is 'Review/ Submit CE Reports Preparation (Step 1 of 3)'. The user is logged in as 'Doc Doctor'. The form contains the following sections:

- CE Report Information:** Prepared By: Doctor Staff; Date Prepared: 01/04/2008; Reviewing Doctor: Doc Doctor.
- Patient Information:** Enter the Patient's Information. Fields include First Name (John), Middle Name, Last Name (Patient), and DOB (12/12/2000).
- Enter 3 character site code or select state and destination:** Site code: S92 OR State: VA - Virginia; Destination: VA - Virginia Beach DDS [S92].
- Enter the following information from the request letter or barcode:** SSN: 111-11-1111; RQID (Request ID): 111111111; RF (Routing Field): P (selected), D or blank, No RF or No Barcode; DR: F, S (selected), No DR or No Barcode.

A callout box on the right side of the form states: "Edits may be made by the CE provider by typing in the appropriate fields." with an arrow pointing to the First Name field.

## Step 2—Attachments and Additional Information

The screenshot shows the ERE website interface. At the top, it says "Review/ Submit CE Reports Attachments and Additional Information (Step 2 of 3)". The patient information is as follows:

Patient's Name:	John Patient	DOB:	12/12/2000
Destination:	VA - Virginia Beach DDS [S92]	SSN:	XXX-XX-1111
RQID:	111111111	RF:	P
DR:	S		

Below the patient information is an "Edit" button. A callout box points to this button with the text: "Select 'Edit' to make changes to the destination and request information." Below that, there is a section "Select file(s) to be deleted from this patient's information." with a checkbox next to "DDS Info.doc" and a "Review" link. At the bottom, there is a section "Attach and upload files to this response:" with a "File 1:" input field, a "Browse..." button, and a "Clear File 1" button. There is also an "Add Another File" button.

## Step 2—Attachments and Additional Information

- Review the destination and request summary information. If the information is not correct select “**Edit**” and make the appropriate changes.
- To review a file already loaded by the preparer check the box next to the file and click “Review”.

**Note:** If you make any change to the document you must save the revised file on your computer. Then you will need to upload the document using the “Browse...” button, and click the “Delete” link next to the file name of the file being corrected.

- To delete a file loaded by the CE administrative staff select the checkbox next to the file to be deleted.
- To attach and upload additional files for this claimant, select the “**Browse...**” button to choose a file to send. (Do not send files that are password protected.) The “Choose file” window will appear on your screen.
- Locate the file you wish to send and click the file name with your mouse to highlight the file name. The document’s file name will be inserted into the “File name” box at the bottom of the “Choose file” window.
- Next click the “**Open**” button. The “Choose file” window will close and the Electronic Records Express website will show the file name displayed in the box to the left of the “**Browse...**” button.

- Select the **“Add Another File”** button to send additional files. *Only files for the SSN entered by the administrative staff or edited by the provider in Step 1 can be sent with this transaction.*
- Type **Comments**, if needed. The Comment field is where you can provide additional information. Type-in and/or cut-and-paste your text (up to three letter size pages, approximately 16,000 characters) directly into the box provided.

## Step 2—Attachments and Additional Information

Address: https://secureval.ssa.gov/apps7/ERE/CERSR/submit.do

File 1: P:\DDS Info.doc

Comments:

I have read and agree with the above.

Check this box to  
“Click and Sign” the  
CE report.

Choose “Browse...”  
to add additional  
files.

Provide  
Comments in  
the text box  
if needed.

- If the information is correct and there are no other documents to attach, the next process is your **“Electronic Signature”**. This process allows you to certify that the claimant has been examined, a report has been prepared, and the report is accurate. Read the certification statement at the bottom of the screen and indicate your understanding by checking the box beside **“I have read and agree with the above.”** By checking the box, you affirm your intent to sign the report. This process eliminates the need for you to physically sign and send the paper report to the DDS.
- Select the **“Submit”** button to forward this information to the selected DDS and continue to **Step 3**.
- To return to the previous page select **“Prior Page”**.
- To cancel the transaction and return to the homepage select **“Cancel”**

### Step 3—Confirmation

Your information has been submitted and will be processed.

Confirmation Number: 1174613F7699B5B5

Date and timestamp: 01-04-2008 at 13:33 EST

Reviewing Doctor: Doc Doctor

You will be notified by email if there are any errors or problems that prevent us from processing your submission.

Patient's Name:	John Patient	DOB:	12/12/2000
Destination:	VA - Virginia Beach DDS [S92]	SSN:	XXX-XX-1111
RQID:	111111111	RF:	P
DR:	S	CS:	

File Name	File Size
DDS Info.doc	24.0 KB
Total file size: 24.0 KB	

Files already loaded by your preparer:

DDS Info.doc
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Document was electronically signed.  
Thank you for using Electronic Records Express.

**To review another CE select the "Review Another CE" button.**

**The Confirmation Number is located here.**

### Step 3—Confirmation

- After the website uploads, a confirmation page is displayed to notify you that the transaction has been submitted. A confirmation number is generated for your reference. The confirmation page indicates the specific files that were transmitted.
- In the unlikely event that you do not receive the "Confirmation" page, you should resubmit the materials.
- If you continue to have transmitting problems, contact the Electronic Records Express Website Help Desk at [EEtechSupport@ssa.gov](mailto:EEtechSupport@ssa.gov) or 1-866-691-3061.
- If you have additional CEs to review, select the "**Review Another CE**".
- Select "**Home**" to return to the homepage.

#### 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:

<b>Button</b>	<b>Access Key</b>
Add Another File	2 – 8 (number corresponds to the file to be added)
Cancel	n
Continue	c
Edit	w
Home	m
Prior	p
Send Another Report	r
Send Another Response	r
Submit	b
Try Again	g

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 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.