

Document Exchange Services

Access Doctor's Electronic Request

This function is a part of the Electronic Outbound Request (eOR) feature in which Consultative Examination (CE) requests are sent by electronic means via the Electronic Records Express website from the DDS to the CE Doctor's administrative staff. Through this link, the CE administrative staff has the ability to view outstanding electronic requests, download request letters and other supporting documentation, and conveniently submit responses to the CE Doctor without having to enter any barcode index information.

The CE administrative staff will sign on to the Electronic Records Express Home Page using his/her username and password. Under the "Document Exchange Services" heading, select "**Access Doctor's Electronic Request**". This will take the user to the page that allows the CE administrative staff to access CE requests sent to the CE Doctor from the DDS.

Electronic Records Express Home—Access Doctor's Electronic Requests

Office Closure: SSA Ukiah CA (A85) - Update

Electronic Records Express - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha C1

Address: https://secureval.ssa.gov/app7/ERE/home.do

Social Security Online
www.socialsecurity.gov

Electronic Records Express Home
Welcome to Electronic Records Express

Doctor Staff
nuth.trent@ssa.gov
5555555555
Log Out

From here you can also:
[Modify your account information](#)
[Change your password](#)

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

Evidence Submission Services
[Send Response for Individual Case](#)

Consultative Examination (CE) Services
[Pickup Doctor's Transcription Reports](#)
[Prepare CE Report for Doctor](#)
[Send CE No Show Response](#)

Document Exchange Services
[Access Electronic Requests](#)
[Access Doctor's Electronic Requests](#)
[Teacher Questionnaire](#)

Communication Services
Communication Utility: [Send E-Mail](#)

Bulletin Board
Updated 01/08/2008
[What's New?](#)
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Shortcut to start.do (secure Web site)

start Deleted Items ... Provider_Instru... RE: ERE - Messa... Your Final CFC... Electronic Recor... Document1 - Mic... 2:38 PM

Step 1—Select Doctor

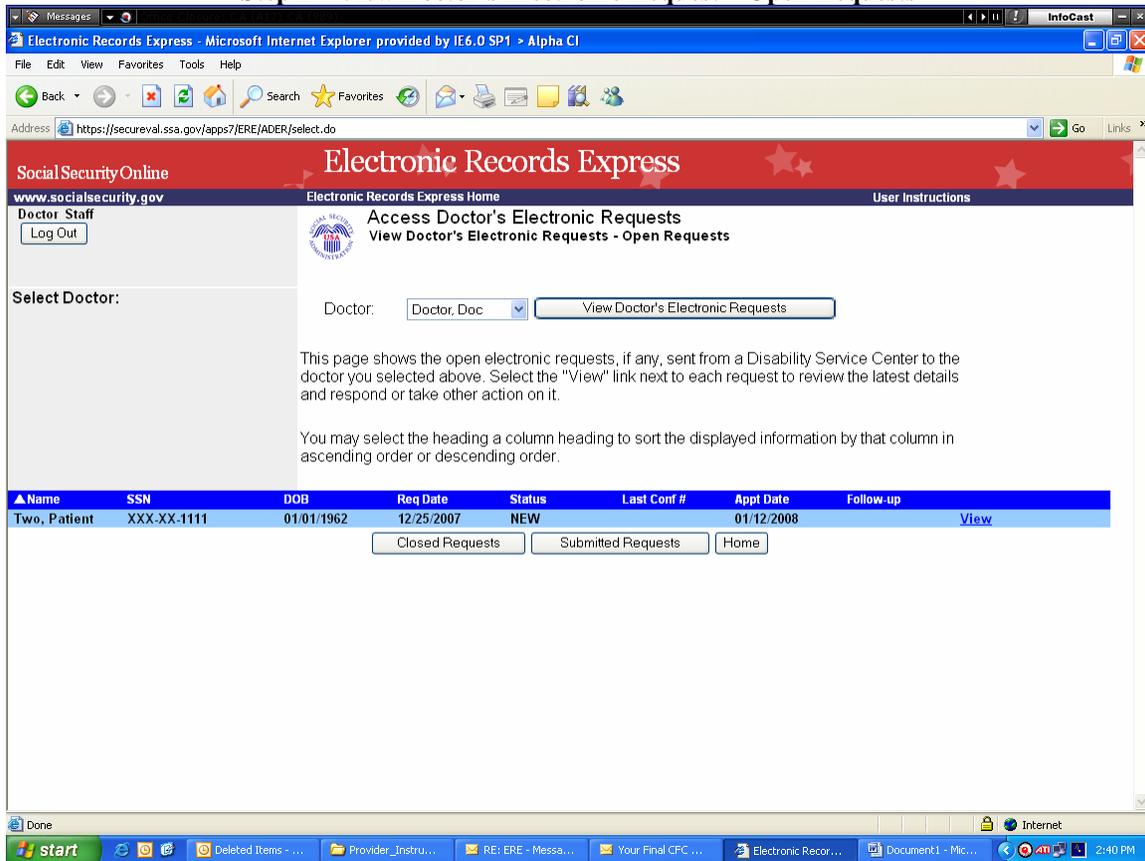
Select a Doctor from the dropdown box

Select “View Doctor’s Electronic Requests”

Step 1—Select Doctor

- Select a Doctor from the dropdown box. *Only CE Doctor’s associated with this account will display in the drop down list.*
- Select the **“View Doctor’s Electronic Requests”** button.
- If you do not wish to continue with the transaction and you want to return to the homepage, select the **“Home”** button.

Step 2—View Doctor’s Electronic Request—Open Requests



The screenshot shows the Electronic Records Express interface. At the top, there's a navigation bar with 'Social Security Online', 'Electronic Records Express Home', and 'User Instructions'. Below this, the main heading is 'Access Doctor's Electronic Requests' and 'View Doctor's Electronic Requests - Open Requests'. A 'Select Doctor:' section has a dropdown menu set to 'Doctor, Doc' and a 'View Doctor's Electronic Requests' button. A paragraph explains that the page shows open electronic requests from a Disability Service Center and that users can click 'View' to review details. Another paragraph notes that column headings can be used to sort information in ascending or descending order. Below this is a table with the following data:

| Name | SSN | DOB | Req Date | Status | Last Conf # | Appt Date | Follow-up |
|--------------|-------------|------------|------------|--------|-------------|------------|----------------------|
| Two, Patient | XXX-XX-1111 | 01/01/1962 | 12/25/2007 | NEW | | 01/12/2008 | View |

At the bottom of the table area, there are three buttons: 'Closed Requests', 'Submitted Requests', and 'Home'.

Step 2—View Doctor’s Electronic Request—Open Requests

- This page allows you to view and sort the status of all requests received from the DDS.
- You may click on the column heading to sort the displayed information by that column in ascending or descending order
 - Name
 - SSN
 - DOB
 - Request Date
 - Status
 - Last Conf #
 - Appt Date
 - Follow-up
- To view an individual request, select “**View**” beside the row of the request you would like to view.
- To cancel and return to the Electronic Records Express Homepage, select the “**Home**” button.

- To view Closed Requests, choose the “**Closed Requests**” button.
- To view Submitted Requests, choose the “**Submitted Requests**” button.

Status Meanings

- **New**—New request. Has not been opened.
- **Pending**—New request. Opened/viewed.
- **Prepared**—A CE Report has been prepared within the ERE Website for this request by the CE Admin staff.
- **Responded**—The provider has submitted a request response using the ERE Website.
- **Accepted**—The request response has been received by the DDS.
- **Cancelled**—The request has been cancelled. The cancellation came from the DDS.

Note: The Electronic Request will be removed from the list based on the retention days received with the request if less than 120 days. Otherwise, Electronic Requests will be removed from the list 120 days from the Request Date.

Step 3—Assess Doctor’s Electronic Request—Electronic Request Details

The screenshot shows the 'Electronic Records Express' interface. At the top, it says 'Social Security Online' and 'Electronic Records Express Home'. The main heading is 'Access Doctor's Electronic Requests' and 'Electronic Request Details'. A warning message reads '*** Immediate Response Needed ***'. The page is divided into three main sections:

- Patient Information:**
 - Name: Patient Two
 - SSN: XXX-XX-1111
 - DOB: 01/01/1962
- Request Information:**
 - Provider Name: Doctor, Doc
 - Request Type: Consultative Exam
 - Request Date: 12/25/2007
 - Requesting Office: OR - Salem DDS [S40]
 - Request ID: ruthientrentest0002 D
 - CE Appointment Date: 01/12/2008
- Request Documentation:**
 - [Request Letter](#)
 - [Authorization To Disclose Information](#)
 - [Background MER](#)

Two callout boxes provide additional information:

- A callout box points to the underlined headings in the 'Request Documentation' section, stating: "Click on an underlined heading to view Request Documentation".
- A callout box lists the items that supporting documentation may include:
 - Request Letter
 - Authorization to Disclose Information
 - Background MER
 - Supporting Documentation

Note: The Patient and Request information is automatically populated to this screen.

Step 3—Access Doctor’s Electronic Request—Electronic Request Details

- To view the request documentation, click on the underlined document heading in the “Request Documentation” section.

Step 3—Assess Doctor’s Electronic Request—Electronic Request Details

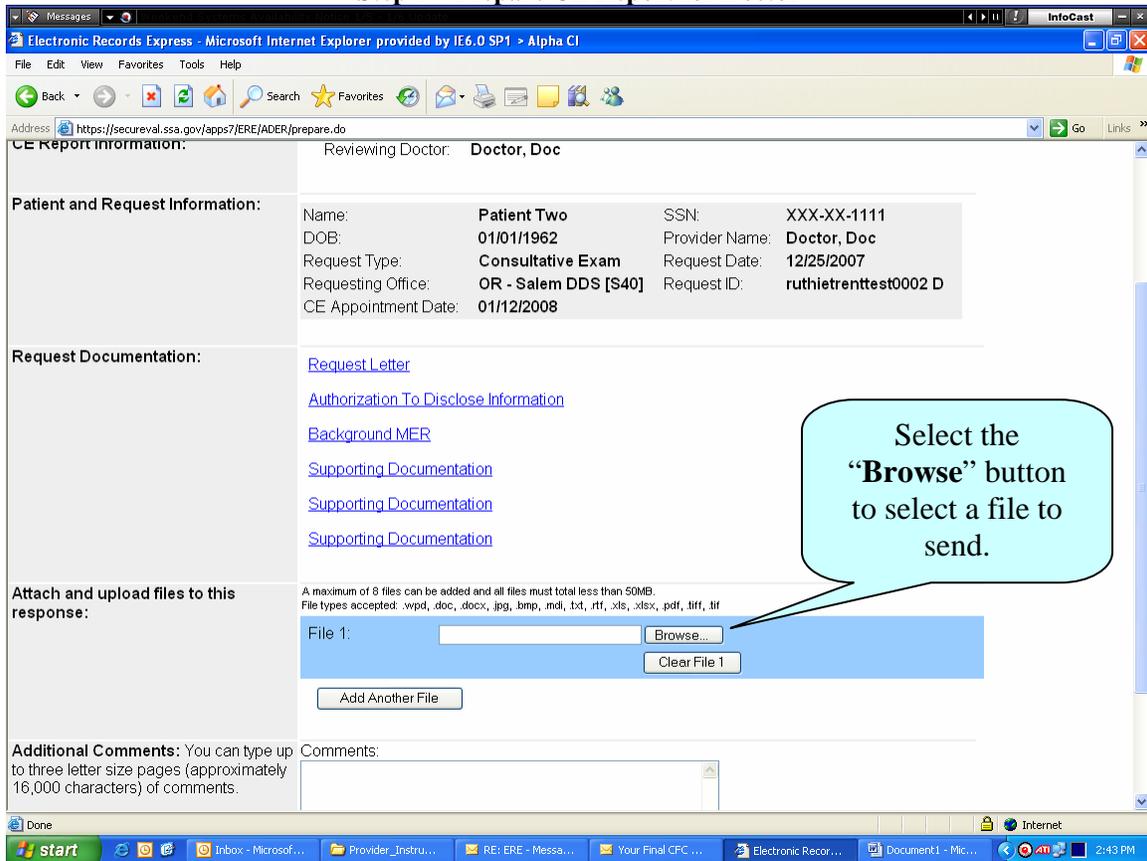
The screenshot shows a web browser window with the following content:

| | |
|-------------------------------|---|
| Patient Information: | Name: Patient Two SSN: XXX-XX-1111 DOB: 01/01/1962 |
| Request Information: | Provider Name: Doctor, Doc Request Type: Consultative Exam Request Date: 12/25/2007 Requesting Office: OR - Salem DDS [S40] Request ID: ruthientrest0002 D CE Appointment Date: 01/12/2008 |
| Request Documentation: | Request Letter Authorization To Disclose Information Background MER Supporting Documentation Supporting Documentation Supporting Documentation |

At the bottom of the page, there are four buttons: **Cancel**, **Prior Page**, **No Show Response**, and **Prepare CE Report for Doctor**. A callout box with a light blue background and black border points to the **Prepare CE Report for Doctor** button, containing the text: "Click the “Prepare CE Report for Doctor” button to respond to the DDS electronic request".

- To prepare the CE response for the CE Provider, select “**Prepare CE Report for Doctor**” and continue to **Step 4—Send CE Report**.
- To send a No Show Response to the DDS, choose the “**No Show Response**” button.
- Select a reason the exam was not performed. Based on the reason you select, comments may be required. Otherwise, comments are always optional.
- Type **Comments**, if needed. Provide an explanation of the reason the exam was not performed. Type-in and/or cut-and-paste your text (up to three letter size pages, approximately 16,000 characters) directly into the box provided.
- Select the “**Submit**” button to forward the information to the DDS.

Step 4—Prepare CE Report for Doctor



CE Report Information: Reviewing Doctor: Doctor, Doc

Patient and Request Information:

| | | | |
|----------------------|----------------------|----------------|-----------------------|
| Name: | Patient Two | SSN: | XXX-XX-1111 |
| DOB: | 01/01/1962 | Provider Name: | Doctor, Doc |
| Request Type: | Consultative Exam | Request Date: | 12/25/2007 |
| Requesting Office: | OR - Salem DDS [S40] | Request ID: | ruthientrestest0002 D |
| CE Appointment Date: | 01/12/2008 | | |

Request Documentation:

- [Request Letter](#)
- [Authorization To Disclose Information](#)
- [Background MER](#)
- [Supporting Documentation](#)
- [Supporting Documentation](#)
- [Supporting Documentation](#)

Attach and upload files to this response:

A maximum of 8 files can be added and all files must total less than 50MB.
File types accepted: .vpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tif, .tiff

File 1:

Additional Comments: You can type up to three letter size pages (approximately 16,000 characters) of comments.

Comments:

Step 4—Prepare CE Report for Doctor

- Review the Patient and Request Information and Request Documentation.
- Select the “**Browse**” button to select 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 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. If you have chosen the incorrect file, click the “**Clear File 1**” button to clear the “File 1” field.
- Select the “**Add Another File**” button to send additional files. *Only files for the SSN entered in the Patient and Request Information may be sent with this transaction.*

Note: A maximum of eight (8) additional files may be sent for one individual by clicking the “**Add Another File**” button and repeating the previous steps.

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

Step 4—Prepare CE Report for Doctor

CE Appointment Date: 01/12/2008

Request Documentation:

- [Request Letter](#)
- [Authorization To Disclose Information](#)
- [Background MER](#)
- [Supporting Documentation](#)
- [Supporting Documentation](#)
- [Supporting Documentation](#)

Attach and upload files to this response:

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

File 1:

Additional Comments: You can type up to three letter size pages (approximately 16,000 characters) of comments.

Comments:

Verify the above information before sending this CE Report to the doctor.

- Type **Comments**, if needed. Provide an explanation of why a CE is not being submitted and any additional details. Type-in and/or cut-and-paste your text (up to three letter size pages, approximately 16,000 characters) directly into the box provided.
- Select the “**Send to Doctor**” button to send the CE report to the CE Provider’s ERE account.

Step 4—Confirmation

The screenshot shows a web browser window displaying the 'Electronic Records Express' confirmation page. The page title is 'Access Doctor's Electronic Requests Confirmation'. The main content area contains the following information:

Your information has been submitted and will be processed.

Confirmation Number: 11746608860B60BF
Date and timestamp: 01-04-2008 at 14:56 EST
Reviewing Doctor: Doctor, Doc

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

| | | | |
|----------------------|----------------------|----------------|----------------------|
| Name: | Patient Two | SSN: | XXX-XX-1111 |
| DOB: | 01/01/1962 | Provider Name: | Doctor, Doc |
| Request Type: | Consultative Exam | Request Date: | 12/25/2007 |
| Requesting Office: | OR - Salem DDS [S40] | Request ID: | ruthitrenttest0002 D |
| CE Appointment Date: | 01/12/2008 | | |

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

Thank you for using Electronic Records Express.

Buttons: [Review Another Request](#), [Home](#)

Step 4—Confirmation

- After the website uploads, a confirmation page is displayed to notify you that the transaction has been submitted to the CE Provider. A confirmation number is generated for your reference.
- In the unlikely event that you do not receive the “Confirmation” page, you should resubmit the information.
- 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 submit, you may select "**Review Another Request**” button. This will take you back to the screen in Step 1.

NOTE: It is **strongly recommended** that you print or take a screenshot of the Confirmation page for documentation.

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 |
|-----------------------|--|
| 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.

01/2008