

# **Appointed Representative**

## **User Guide**

**for**

## **Get Status Reports**



**January 2024**

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## 1.0 Overview


This guide provides Social Security Administration (SSA) claimants' appointed representatives (ARs) with detailed instructions for viewing and downloading status reports for their cases pending at the Hearings and Appeals levels. It also provides instructions for accessing a list of cases pending at the Initial and Reconsideration levels.

## 2.0 Navigating to Get Status Reports

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

**Business Services Online**

BSO Welcome | BSO Information | Keyboard Navigation HELP

 **Log In to Online Services**

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

**New User?**  
You must create an account to use this website. Once you do, you will be provided a User ID to log in to our online services.

**To create new account you will need to:**

- Provide personal information
- Provide contact information
- Create your password and security questions

[Create Log In Account](#)

Did you register with SSA by [phone or paper form](#) and need to create a password?

**Existing User?**  
Please log in below:

**User ID:**

**Password:**

[Forgot user ID?](#)

[Forgot your password?](#)

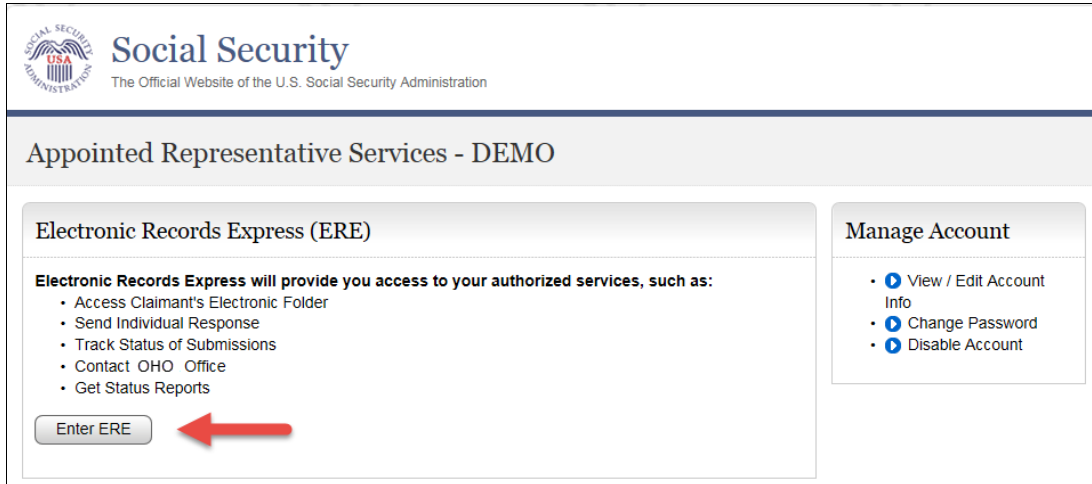
**User Certification:**

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files

I have read & agree to these terms.

**NOTE:** You must open a *single* browser session. After login, DO NOT open multiple browser sessions to open electronic folders and review or download files.

## 2.2. 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:**

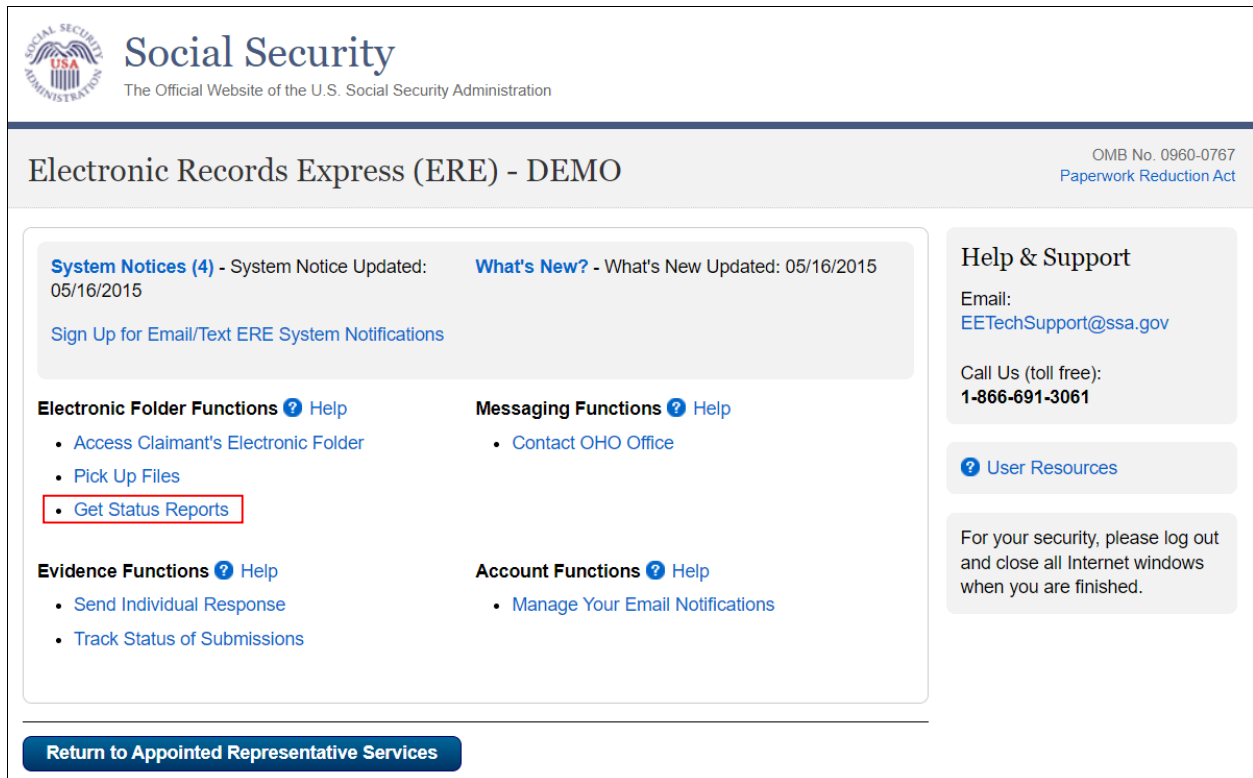
- Access Claimant's Electronic Folder
- Send Individual Response
- Track Status of Submissions
- Contact OHO Office
- Get Status Reports

[Enter ERE](#)

**Manage Account**

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

## 2.3. Select the **Get Status Reports** link in the Electronic Folder Functions section.



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### Electronic Records Express (ERE) - DEMO

OMB No. 0960-0767  
Paperwork Reduction Act

**System Notices (4)** - System Notice Updated: 05/16/2015  
[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](#)

### 3.0 **Hearing Office Status Report**

3.1. Select **Get Hearing Office Status Report** and select **Submit**.



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## ERE: Status Reports

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### Get Status Report

Please select a status report type:

- Get Hearing Office Status Report
- Get Appeals Council Status Report
- Get List of Initial and Reconsideration Cases

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**Submit** [ERE Home](#)

### Option 1: View limited status information for a single SSN

3.2. Select **Search for individual case** and select **Submit**.



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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

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### View Status Report

Please select one:

- Search for individual case.
- View your list of cases for all hearing offices. (Only your oldest 100 cases by Hearing Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all hearing offices in a spreadsheet file including additional data.  
[? How do I use this spreadsheet file?](#)

---

**Submit**

3.3. Enter the **Claimant's SSN** and select **Submit**.



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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report

**Please select one:**

Search for individual case.  
**Claimant's Social Security Number (SSN):**

View your list of cases for all hearing offices. (Only your oldest 100 cases by Hearing Request Date will be shown in this quick view. This quick view contains limited data.)

Download all your cases for all hearing offices in a spreadsheet file including additional data.  
[? How do I use this spreadsheet file?](#)

**Submit**

3.4. View the limited status information for the claimant.



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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#) > [Status Report Search](#)

[User Resources](#)

Representative Status Report for JOHN DOE

Below is a quick view of all your cases pending at Hearing Offices in order of Hearing Request Date.

To see additional information about these cases, download the spreadsheet file from the [Status Report Search](#) page.

Claimant Name Last, First	Last 4 of SSN	Hearing Office with Jurisdiction	Case Status / Status Date	Hearing Request Date	Expedited	Hearing Date	ALJ Name
Doe, Jane	1300	BALTIMORE MD	MASTER DOCKET 05/07/2013	05/01/2009	Yes		

**NOTE:** If no results display for the SSN you entered, then the Hearing Office likely does not show that you are the appointed representative for the SSN you entered. Please contact the Hearing Office with jurisdiction of the case.

**Option 2: View limited status information for up to 100 cases.**

3.5. Select **View your list of cases for all hearing offices** and select **Submit**.

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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report

**Please select one:**

- Search for individual case.
- View your list of cases for all hearing offices. (Only your oldest 100 cases by Hearing Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all hearing offices in a spreadsheet file including additional data.
  - [? How do I use this spreadsheet file?](#)

**Submit**

3.6. View the limited status information for up to 100 cases.

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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#) > [Status Report Search](#)

[User Resources](#)

### Representative Status Report for JOHN DOE

Below is a quick view of all your cases pending at Hearing Offices in order of Hearing Request Date.

To see additional information about these cases, download the spreadsheet file from the [Status Report Search page](#).

Claimant Name Last, First	Last 4 of SSN	Hearing Office with Jurisdiction	Case Status / Status Date	Hearing Request Date	Expedited	Hearing Date	ALJ Name
Doe, Jane	0404	BALTIMORE MD	MASTER DOCKET 05/05/2010	10/06/2008	No		
Doe, John	1300	BALTIMORE MD	MASTER DOCKET 05/07/2013	05/01/2009	Yes		
Smith, Tom	2010	BALTIMORE MD	READY TO SCHEDULE 06/13/2013	01/01/2010	Yes		

**Option 3: Download a .csv file with all status information for all cases pending at the Hearings level**

3.7. Select **Download all your cases...** and select **Submit**.

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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report

**Please select one:**

- Search for individual case.
- View your list of cases for all hearing offices. (Only your oldest 100 cases by Hearing Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all hearing offices in a spreadsheet file including additional data.

[How do I use this spreadsheet file?](#)

**Submit**

3.8. From the Downloads popup box, select **Open File** to open the file in Excel or another spreadsheet application.

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## Hearing Office Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report

**Please select one:**

- Search for individual case.
- View your list of cases for all hearing offices. (Only your oldest 100 cases by Hearing Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all hearing offices in a spreadsheet file including additional data.

[How do I use this spreadsheet file?](#)

**Submit**

**Downloads**

HearingsStatusReport (14).csv

**Open file**



## 4.0 Appeals Council Status Report

4.1. Select **Get Appeals Council Status Report** and select **Submit**.



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### ERE: Status Reports

#### Get Status Report

Please select a status report type:

- Get Hearing Office Status Report
- Get Appeals Council Status Report
- Get List of Initial and Reconsideration Cases

[Submit](#) [ERE Home](#)

### Option 1: View limited status information for a single SSN

4.2. Select **Search for individual case** and select **Submit**.



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## Appeals Council Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report

Please select one:

- Search for individual case.
- View your list of cases for all appeals offices. (Only your oldest 100 cases by Appeals Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all appeals offices in a spreadsheet file including additional data.  
[? How do I use this spreadsheet file?](#)

[Submit](#)

4.3. Enter the **claimant's SSN** and select **Submit**.

4.4. View the limited status information for the SSN.

Claimant Name Last, First	Last 4 of SSN	Appeals Office with Jurisdiction	Case Status / Status Date	Transfer Information	Electronic Case	Request Date	Expedited
Doe, Jane	1800	FALLS CHURCH VA	NEW CASE 09/20/2012		Yes	09/19/2012	No

**NOTE:** If no results display for the SSN you entered, then the Appeals Council likely does not show that you are the appointed representative for the SSN you entered, or the case remains pending with the Federal Courts. Please contact the Appeals Council with jurisdiction of the case.

**Option 2: View limited status information for up to 100 cases.**

4.5. Select **View your list of cases for all appeals offices** and select **Submit**.

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## Appeals Council Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report

**Please select one:**

- [Search for individual case.](#)
- View your list of cases for all appeals offices. (Only your oldest 100 cases by Appeals Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all appeals offices in a spreadsheet file including additional data.
  - [? How do I use this spreadsheet file?](#)

**Submit**

4.6. View the limited status information for up to 100 cases.

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## Appeals Council Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#) > [Status Report Search](#) [User Resources](#)

### Representative Status Report for JOHN DOE

Below is a quick view of all your cases pending at Appeals Offices in order of Appeals Request Date.

To see additional information about these cases, download the spreadsheet file from the [Status Report Search](#) page.

Claimant Name Last, First	Last 4 of SSN	Appeals Office with Jurisdiction	Case Status / Status Date	Transfer Information	Electronic Case	Request Date	Expedited
Doe, Jane	1527	FALLS CHURCH VA	ASSIGNED TO ANALYST 04/16/2013		Yes	06/16/2010	No
Doe, John	1800	FALLS CHURCH VA	NEW CASE 09/20/2012		Yes	09/19/2012	No
Smith, Tom	5305	FALLS CHURCH VA	NEW CASE 02/12/2013		Yes	02/12/2013	No

**Option 3: Download a .csv file with all status information for all cases pending at the Appeals level.**

4.7. Select **Download all your cases...** and select **Submit**.

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## Appeals Council Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report


**Please select one:**

- Search for individual case.
- View your list of cases for all appeals offices. (Only your oldest 100 cases by Appeals Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all appeals offices in a spreadsheet file including additional data.

[? How do I use this spreadsheet file?](#)

**Submit**

4.8. From the Downloads popup box, select **Open File** to open the file in Excel or another spreadsheet application.

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## Appeals Council Status Report

[Appointed Representative Home](#) > [ERE Home](#) > [Status Report Home](#)

### View Status Report


**Please select one:**

- Search for individual case.
- View your list of cases for all appeals offices. (Only your oldest 100 cases by Appeals Request Date will be shown in this quick view. This quick view contains limited data.)
- Download all your cases for all appeals offices in a spreadsheet file including additional data.

[? How do I use this spreadsheet file?](#)

**Submit**

Downloads

 AppealsStatusReport (1).csv

[Open file](#)

## 5.0 List of Initial and Reconsideration Cases

5.1. Select **Get List of Initial and Reconsideration Cases** and select **Submit**.



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### ERE: Status Reports

#### Get Status Report

Please select a status report type:

- Get Hearing Office Status Report
- Get Appeals Council Status Report
- Get List of Initial and Reconsideration Cases

[Submit](#) [ERE Home](#)

5.2. A list of up to 100 cases will be displayed. These are cases pending at the initial and reconsideration levels where your 1696 has been processed.



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### ERE: Initial and Reconsiderations Status Report

#### Appointed Representative Status Report for JANE DOE

Below is a quick view of up to 100 of your cases pending at the Initial and Reconsideration levels. To see a list of all your cases pending at the Initial and Reconsideration levels, please select the download button below.

Claimant Name Last, First	Last 4 of SSN
Doe, Jane	0000
Doe, John	0001

[Download Spreadsheet](#) [ERE Home](#) [Previous](#)

5.3. Select the **Download Spreadsheet** button to get a complete list of all cases pending at the initial and reconsideration levels where your 1696 has been processed.

	A	B	C	D
1	Last Name	First Name	Middle Name	Last 4 SSN
2	Smith	John	Lee	XXX-XX-0001
3	Jones	Jim	John	XXX-XX-0002
4	Doe	Jane	Ann	XXX-XX-0003
5	Roberts	Bob	Roy	XXX-XX-0004
6	Anderson	Joe	Ray	XXX-XX-0005
7				

A case may be missing from your case listing for the following reasons:

1. Your 1696 has not yet been processed by the Field Office. Please follow the guidance found in the [Tips and Best Practices for Appointed Representatives](#).
  - Wait 30 days before inquiring about the status of a 1696. (Reminder: You will receive a notification via mail to confirm that your SSA-1696 was processed.)
  - To inquire about the status of a 1696, contact your client's servicing SSA field office or workload support unit (WSU). You can find the servicing field office's telephone number using the [Social Security Office Locator](#).
  - If it has been over 30 days and you experience difficulty with contacting the servicing office or have not received any response, please contact the respective [Regional Communications Director](#).
2. The case listing will only display pending cases. If a case is closed, it will not display on the case listing.

If a new initial claim is on your case listing but you cannot access the electronic folder, the Field Office may not have transferred the case to the DDS yet to create the electronic folder. If it has been more than 30 days and you received the confirmation notice that your SSA-1696 was processed, contact the Field Office to determine what information is still needed to successfully transfer the initial claim to DDS.

If a case is missing from your report and you have confirmed with the Field Office that an electronic folder exists, your 1696 has been processed and you are listed as the Appointed Representative in eView, and the case is pending, please send the following information to the [Regional Communications Director](#):

- Representative name and RepID
- Claimant name and the last 4 digits of the claimant's SSN

Please follow the same escalation process if you identify a case on your status report that you do not recognize.