



USER GUIDE

Electronic Records Express

Medical Evidence Providers

OFFICE OF DISABILITY DETERMINATION

Updated – June 2021

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ACCESSING THE ELECTRONIC RECORDS EXPRESS SYSTEM

In order to access the Electronic Records Express (ERE) application you must have a valid User ID and password. Contact your local state Disability Determination Services (DDS) office, or call the Social Security Electronic Records Express Help Desk at 1-866-691-3061 or send them an email at electronic-records-express@ssa.gov for additional information.

Sign In

The user logs into to the ERE application with a registered User ID and password. When logging on for the first time the user will be prompted to change their password.

NOTE: Open a single browser session to log into the ERE application. After login, do not open multiple browser tabs.

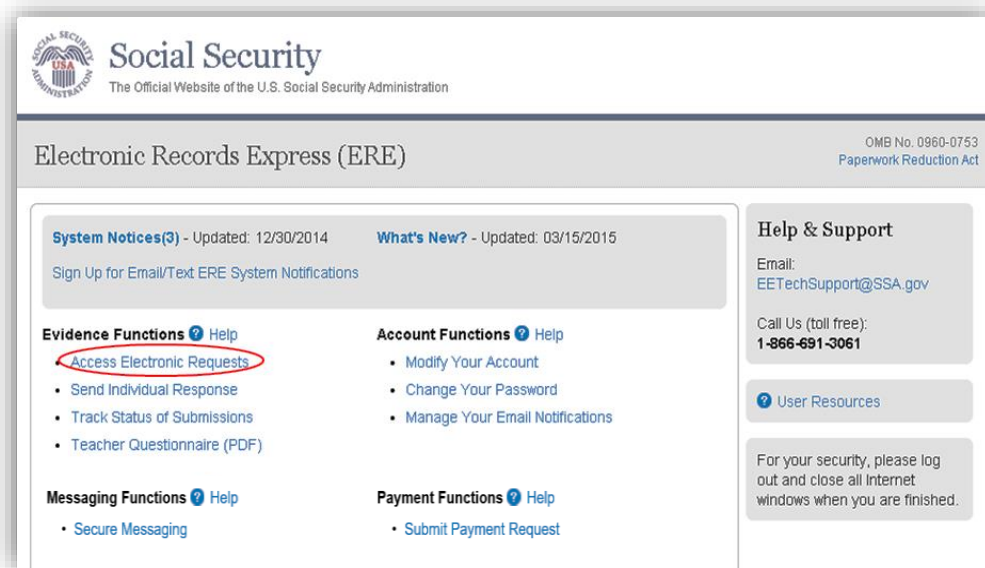
The screenshot shows the Social Security Electronic Records Express (ERE) Sign In page. At the top left is the Social Security logo and the text "Social Security". Below that is "Electronic Records Express (ERE)". The main content area is titled "Sign In" and includes an "Acknowledgement for Website Access" section with a paragraph of text and a list of four certification points. Below this is a "Username" field, a "Password" field, and "Sign In" and "Cancel" buttons. To the right, there is a "Help & Support" section with contact information (Email: EETechSupport@ssa.gov, Call Us (toll free): 1-866-691-3061) and a "Privacy Statement" section with a link to the Privacy Act Statement.

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

EVIDENCE FUNCTIONS

Access Electronic Requests and Send Medical Evidence

This function allows providers to respond to Medical Evidence request letters sent electronically to the ERE Website from the requesting DDS office. Using the Access Electronic Requests link ERE users will be able to view, download, respond, and submit documentation related to the electronic request sent by the DDS.



The provider will receive an email notifying them that they have received an electronic request. **Once the ERE user receives their first electronic request, the Access Electronic Requests link will display on the home page under the Evidence Functions.**

Electronic requests are accessed by directly logging into ERE with a valid username and password. Once on the ERE Home page, under the Evidence Functions heading, select Access Electronic Requests. Electronic requests can also be accessed by receiving an email notification when a request is sent to an associated ERE account from the DDS. The email will include a link that will direct a user to enter their ERE User ID and password. After logging in, the user is taken to the individual request associated with the email that was received.

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ERE: Access Electronic Requests

Provider: CEProvider, RaviKarnati

Request Type: Open Requests

[User Resources](#)

Show

Priority	Patient Name	SSN (Last 4)	Request Date	Appt Date	Appt Time	Location	Request Status	Payment Status	Payment Request
	Decker, Marrie	4377	09/18/2017	01/01/2015	03:30 PM	CSC	NEW	NEW	Need Report
	Jung, Park	5644	09/18/2019	02/01/2020	03:30 PM	SSA	NEW	NEW	Need Report

[ERE Home](#)

- This page allows a user to view the **Provider** list via a dropdown and sort the status of all requests received from the DDS. A user may also change the request type by clicking the arrow from the drop-down box under **Request Type** by selecting a different request type and clicking **Show**. The request types are:
 - Open Requests – Displays requests sent by the DDS,
 - Closed Requests – Displays requests cancelled by a DDS,
 - Submitted Requests – Displays requests that have been submitted,
 - Requests Open Over 90 Days – Displays requests sent by the DDS over 90 days ago,
 - For DDS sites that do Fiscal payments, a user will also have an Open Payments request type – Displays requests that were completed and a payment request needs to be sent to the DDS.

Request Status Definitions

- **New** – A new request that has not been opened.
- **Pending** – A request that has been opened/viewed.
- **Prepared**—A CE Admin staff has submitted a prepared report for the request.
- **Responded**—Response submitted by provider through ERE Website.
- **Accepted**—The DDS received the request response.
- **Cancelled**—The DDS cancelled the request.
- **Updated**- Updated initial request
- **Update Pending**-Updated initial request and awaiting documents.

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 1 – Open Requests

- A user may select a column header to sort the displayed information by that column in ascending or descending order. Sorted columns display a small arrow adjacent to the column header. The column headers are:
 - Patient Name,
 - SSN (Last 4)
 - Request Date,
 - Appt Date,
 - Appt Time,
 - Location,
 - Request Status,
 - Payment Status, and
 - Payment Request
- Select a name in the **Patient Name** column to view an individual request and proceed to Step 2.

Step 2—View / Submit Request Details and File Upload

- To view the files contained in the documentation section under the “Request Details” header simply left click on the file name. User will be prompted to either open or save the selected file. Open and view file.
- Review and verify the Patient Information, Request Information, and all documentation associated with the request.
- You will be asked if you have records to submit for this case. If user selected “yes,” then they will be required to attach and upload files associated with the claimant:

ERE: View / Submit Evidence Request

Priority Request
Immediate response needed.

Patient Name: TESTCASE2006 DOE Patient SSN: 2006
Patient DOB: 11/20/1979 Provider Name:
Request Type: Evidence Request Request Date: 03/30/2010
Request ID: 20140805172429_728058 Disability Examiner: testExaminer
Requesting Office: WI - Wisconsin DDS [S56]

Request Details

Special Instructions: ⓘ
MER REPORT Test for ERE Release

Documentation: ⓘ

File Name	Date Added
Request Letter	08/05/2014
Authorization To Disclose Information	08/05/2014
Supporting Documentation	08/05/2014

Request Response

Do you have records to submit for this case? ⓘ
 Yes No

Cancel Previous

NOTE: The Patient and Request information is automatically populated to this screen, and therefore cannot be edited.

- Select the Document Type of the file(s)
- 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.

Attach and Upload Files

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tif, .tiff
- Please do not upload password-protected files because they cannot be processed.

Document Type:
Medical Evidence of Record (MER) - 0001

Add Files: [Choose Files](#) No file chosen

Additional Information

Comments (Optional):
(4,000 characters maximum)

Characters remaining: 4000

Electronic Signature Agreement (Optional)

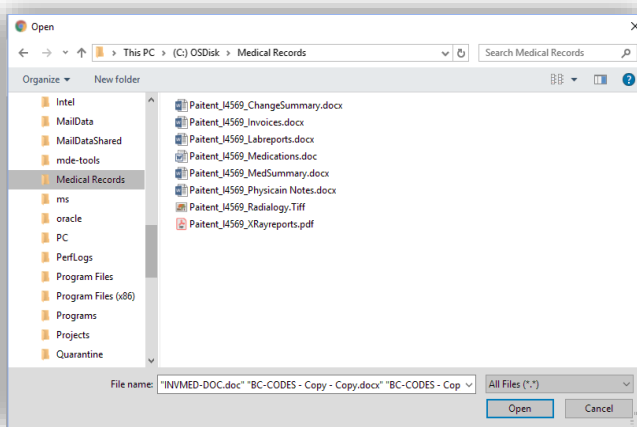
If you wish to generate an electronic signature, please read this statement and indicate your understanding by checking the "I have read and agree to the above" checkbox below. When you select "Submit", you will generate an electronic signature and submit your response.

By checking the "I have read and to the above" checkbox below, I am certifying that I am the author of the uploaded document(s). The information I have uploaded is accurate and I am certifying that I have electronically signed the document(s) contained within.

I have read and agree with the Agreement above.

[Submit](#) [Previous](#) [Cancel](#)

- 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.



- Click the **Add File** button to send up to a maximum of 25 additional files.

- If user selected “no”, then they will be required to select a reason for no evidence record to submit.

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.

- Comments can be typed into the Additional Information section, if needed. Type in and/or cut-and-paste your text (up to 16,000 characters, approximately three letter size pages) directly into the box provided. The count of remaining characters shows beneath the box.
- Select the **Submit** button to provide the electronic signature and the claimant information to the DDS office that sent the request.

Step 3 – Confirmation

ERE: View / Submit Evidence Request -

✓ Thank you for your submission.
Individual Response Submission - Tracking Information. ⓘ

Tracking Number: **147F996372DD52E4N**
Submitted on: 02/06/2015 at 04:10 PM EST

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

[Print this page](#)

Submission Summary

Tracking Information

Patient Information

Patient Name: TESTCASE2006 DOE
Patient SSN: XXX-XX-1234
Patient DOB: 11/20/1979
Request Type: Evidence Request
Request Date: 03/30/2010
Requesting Office: WI - Wisconsin DDS [S56]
Request ID: 20140805172429_728058
Disability Examiner: testExaminer
Document Type: Medical Evidence of Record (MER) - 0001

Uploaded File(s)

Attached Files

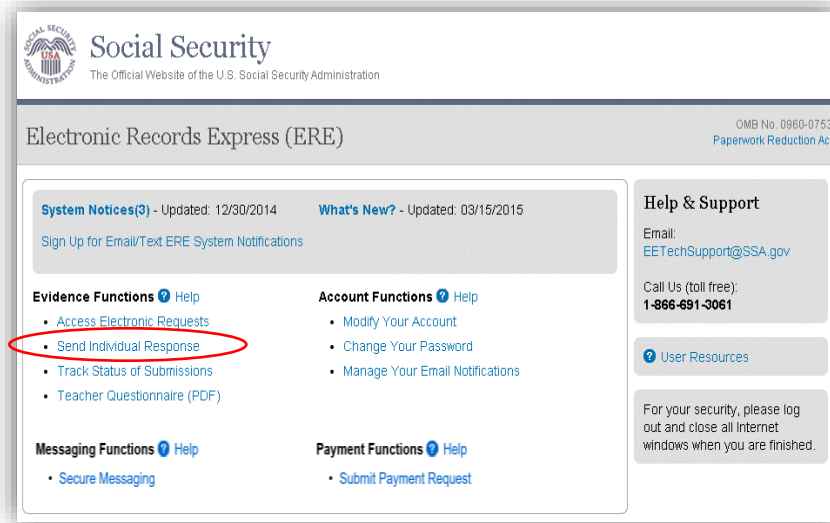
File Name	File Size
individual_response.pdf	243 KB
Total File Size:	243 KB

Comments: Comments were added
You have electronically signed.

[Review Another Request](#) [ERE Home](#)

Send Individual Response

If the provider receives a paper or faxed medical evidence request from the DDS versus an electronic request, the Send Individual Response function is used to send the requested medical evidence.



NOTE: You will need to have the request letter barcode to enter information in the next few steps. The illustration below will help you find the necessary information on the barcode.



Step 1 – Destination and Request Information

Enter the facility site code in the Site Code field in the Destination and Request Information section.

Select **Enter**.



Step 2 – Barcode Information

From the barcode on the request letter, enter the following information in the appropriate fields.

- **Claimant's SSN:** The Claimant's SSN can be found on the request letter or barcode. If there is no SSN listed on the request or barcode, please reference the SSA-827. Do not enter a partial or incorrect SSN.
- **RQID (Request ID):** Enter the RQID beginning with the first non-zero number. For example, if the barcode shows RQID as 00000001102400, enter 1102400.
- **RF (Routing Field)**
- DR code
- DO NOT enter the **CS code**.

Select **Next**.

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

ERE: Send Individual Response

1 Destination Information 2 Review & Add Information 3 Confirmation

Enter 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: T21
State: MD-Maryland
Destination: MD - Baltimore ODAR [T21]

SSN:

RQID (Request ID):

(Do not enter leading zeroes)

RF (Routing Field):

P
 D or Blank
 No RF or No Barcode

DR:

F
 S
 No DR or No Barcode

CS:

Social Security Number – A unique identifier for the claimant. Enter this value for the "SSN" field on the website.

Request ID – A unique identifier for this case. Enter this value for the "RQID (Request ID)" field on the website.

Site – Identifies which DDS/ODAR office/site should receive this evidence. Refer to this value when making your selection for the "Destination" field on the website. Each value in the dropdown contains the site description along with the respective site code.

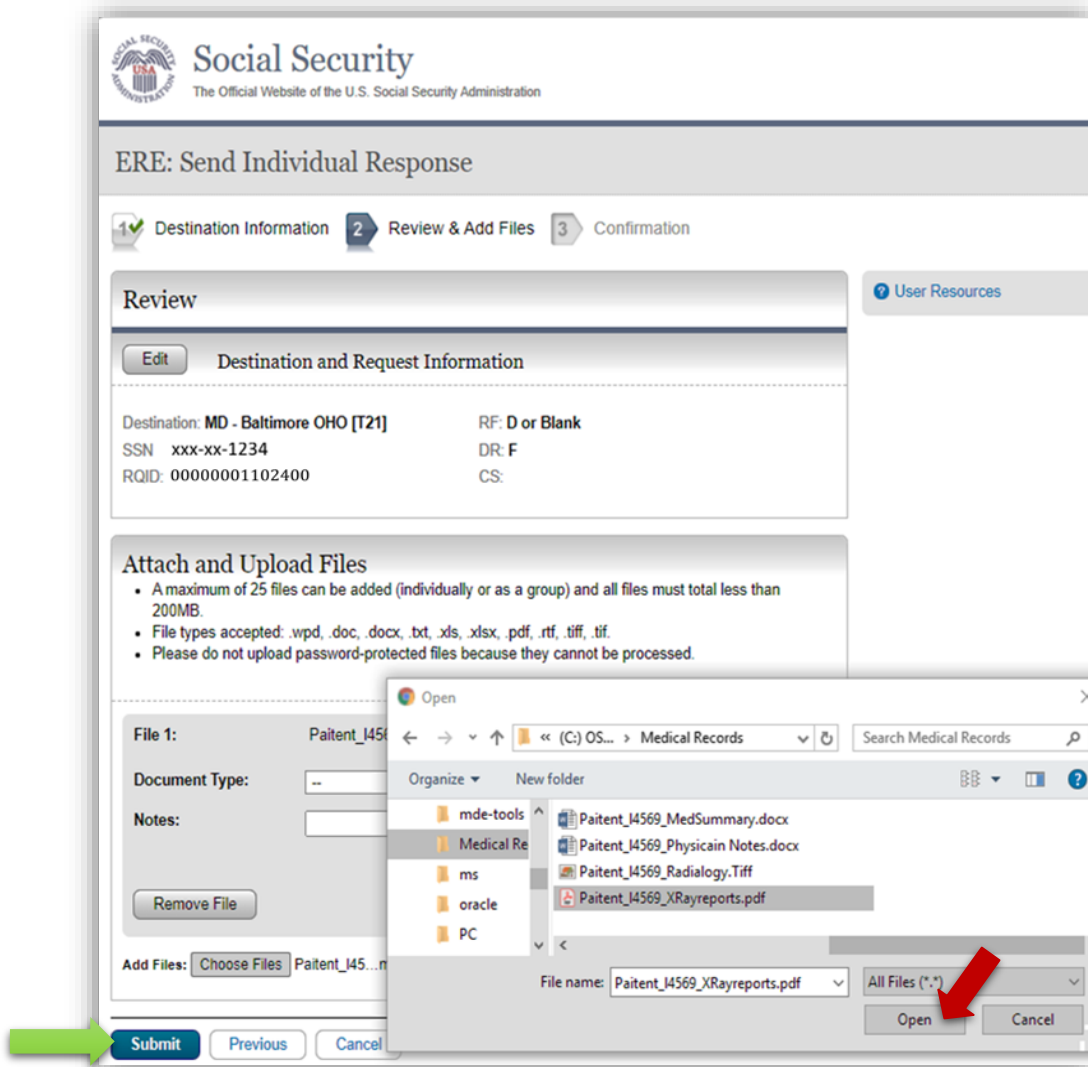
Checksum (CS) – A hash code used to validate user input. Enter this value for the "CS" field on the website.

Document Retention (DR) – One of two values used to determine the routing of submitted evidence. Select this value for the "DR" field on the website.

Routing Field (RF) – One of two values used to determine the routing of submitted evidence. Select this value for the "RF (Routing Field)" field on the website.

Step 3 – Attach and Upload Files

In the Attach and Upload Files section, you can send electronic files from your computer.



Select the **Browse** button; this will launch the Choose File to Upload window.

- Using the Choose File to Upload window, select the file you wish to send to the electronic folder. The document's file name will insert into the File name field at the bottom of the window.
- Next, select the **Open** button.

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User Guide for Medical Evidence Providers

- The Choose File window closes and the file name displays in the field to the left of the Browse button. You have successfully attached the file.
- Document Type: Select from the drop down list a document type for the document you are sending.
- Depending on the document type you select, additional fields may appear which require completion.
- Select **Submit** or add additional files by selecting **Add File**.

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ERE: Send Individual Response

1 ✓ Destination Information 2 ➔ Review & Add Files 3 ➔ Confirmation

Review

Destination and Request Information

Destination: **CO - Colorado DDS [S07]** RF: **D or Blank**
SSN: xxx-xx-1234 DR: **S**
RQID: 00000001102400 CS:
Document Type: **Medical Evidence of Record (MER) - 0001**

Attach and Upload Files

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- File types accepted: .wpd, .doc, .docx, .txt, .xls, .xlsx, .pdf, .rtf, .tif, .tiff
- Please do not upload password-protected files because they cannot be processed.

File 1:

Additional Comments:
(16,000 characters maximum)

Characters remaining: 16000

Send Grouped Response

Use the Send Grouped Response function on the Electronic Records Express website to send multiple files on a single upload. You can use this function by combining the multiple files into a single .zip file.

- You need the SSA/DDS evidence request letter that contains the barcode available to complete the processing steps of Send Grouped Response. **If you received the request electronically from the DDS, you cannot use "Send Grouped Response" function to respond.**
- The barcode sheet must be the topmost (first page) of the record set belonging to one individual. Similarly, a group of files containing the records of many individuals must always have a barcode sheet for each individual when transmitted together as a group of files combined in one file.
- Electronic Records Express **only accepts zipped files (.zip) that contain .tif, .tiff, or .pdf files.** You may use combinations of file types within a single transmission session on the Electronic Records Express website.
- Each individual's barcode sheet must be the topmost (first page) of the record. For example, a .zip file containing five record sets for five different individuals must have five barcode sheets. A barcode sheet must be the topmost (first page) of each individual's record.

Under the Evidence Functions heading, select Send Grouped Response.



Preparing Your Files

Group the records based on whether there is a 2-D/enhanced barcode on the request letter. The barcode should look like the barcode below:



You must separate records that have a 2-D barcode from records that do not have a 2-D barcode. Submit records with a 2-D barcode in one upload. The 2-D barcode must be the first page of the file.

NOTE: The Send Grouped Response function only accepts .zip files. You must follow the rules listed below or your upload will not process.

- The **.zip** file must not contain directories.
- The **.zip** file must be valid and cannot be empty.
- The **.zip** file must contain only **.tiff, .tif, and .pdf** files.
- The **.zip** file must not contain empty (zero-byte) files.
- The **.zip** file must contain one or more **.tiff, .tif, .pdf** files with either all enhanced barcodes or no enhanced barcodes. Each **.tiff** file within a **.zip** file should follow these specifications:
 - One **.tif** file per patient with the request letter on the first page
 - **.tiff** version 4, 5, or 6
 - Intel format (little-endian byte order)
 - CCITT Group 4 Compression
 - Black & White color (Bitonal)
 - 200x200 dots per inch (DPI) resolution

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.

CESS User | Sign Out

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ERE: Send Grouped Response

1 Destination Information 2 Review & Add Information 3 Confirmation

Destination and Request Information

Select destination by: More Info

Site Code State

Site Code: S02

State: AK-Alaska

Destination: AK - Alaska DDS [S02]

Does the first page of all the documents contain an enhanced 2-D barcode? [More Info](#)

Yes No

Step 1 – Destination and Request Information

- Select the DDS Destination by first selecting the appropriate radio button depending on your desire to search by either Site Code or State
- Select the destination by either entering the **Site Code** or selecting the **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.
- If the topmost (first page) of each record contains an enhanced 2-D barcode, select “Yes”. Otherwise, select “No”.
- Select the **Next** button to proceed to Step 2

Step 2 – Review and Add Information

- Review the Destination and Request Information and verify the accuracy of the information selected in Step 1. If any of the information is incorrect, make the corrections 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.

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ERE: Send Grouped Response

1 Destination Information 2 Review & Add Files 3 Confirmation

Review

Destination Information

Destination: **ME - Winthrop DDS [S22]**
Barcode Present? **Yes**

Attach and Upload Files

- A maximum of 25 files can be added (individually or as a group) and all files must total less than 200MB.
- ONLY zipped files can be uploaded.
- Those zipped files must only contain .tif, .tiff or .pdf files.
- You may not upload a zip within a zipped file.
- Please do not upload password-protected files because they cannot be processed.

Add Files: No file chosen

- 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 zipped files.
- Select the **Submit** button to forward the information to the Destination selected in Step 1.

Transmission Confirmation

After the submission uploads, Electronic Records Express provides a Confirmation page that includes a Submission Summary and a Tracking number that should be retained in case there are errors or problems that prevent the DDS from processing a submission or if a user wants to check on the status of a particular submission.

Social Security
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ERE: Send Grouped Response

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

✓ **Thank you for your submission**

Grouped Response Submission - Tracking Information

Tracking Number: **14AD11CC3E8A47C4N**

Submitted on: **01/09/2015 at 06:52 PM EST**

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

[Print this page](#)

Submission Summary
Tracking Information

Destination Information

Destination: **AK - Alaska DDS [S02]**
Barcode Present? **Yes**

Uploaded File(s)

File Name	File Size
ERE_AR_HomePage.zip	103 KB
Total File Size:	103 KB

[Send Another Response](#) [ERE Home](#)

- If 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 or 1-866-691-3061.
- To respond to another request, select the **Review Another Request** button.

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.

Track Status of Submissions

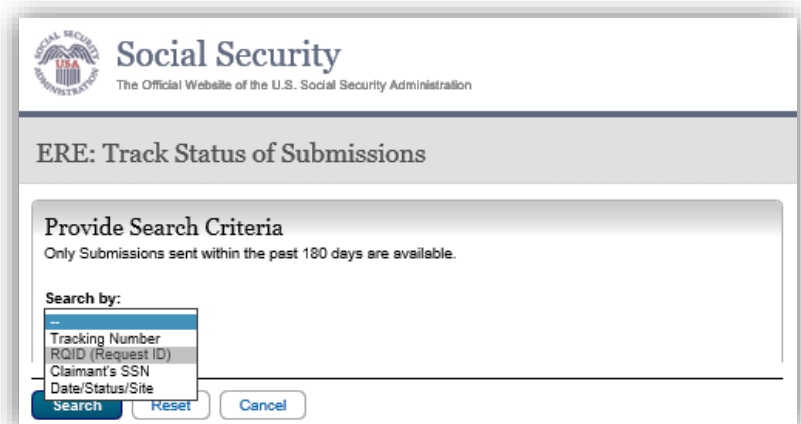
The Electronic Records Express (ERE) Track Status of Submissions application allows you to track the status of your submissions. You can select from multiple search criteria: Tracking Number, Request ID (RQID), Claimant's SSN, and Date of submission and Status of submission.

From the Electronic Records Express Home page, select **Track Status of Submissions** under the **Evidence Functions** heading.



Search Screen

You may search for information about files submitted within the past 180 calendar days after entering one or more of the following criteria on the Search Submissions page:

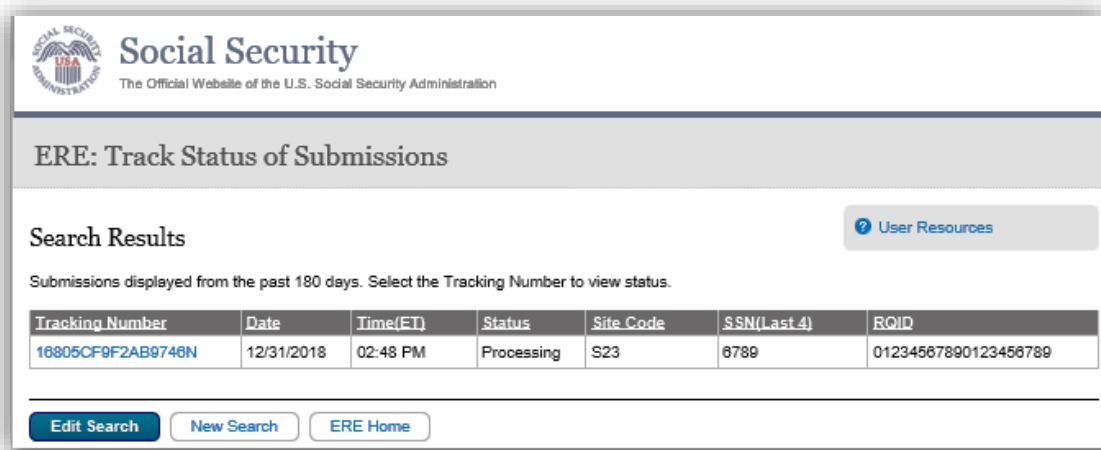


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1. **Tracking Number** – The Tracking Number is a unique number assigned to a submission. When searching by a Tracking Number, all other fields are disabled.
2. **RQID (Request ID)** - The RQID is a unique identifier located on the request letter near or on the barcode. When searching by RQID, all other fields are disabled. The RQID is case sensitive.
3. **Claimant's SSN** - You can search using the individual's Social Security Number (SSN).
4. **Date, Status or Site:**
 - **Date** - use the Date search and choose one of the following Date options:
 - **Last 45 days** - Searches submissions within the last 45 days
 - **Single day** (date must be within 180 calendar days from the current date)
 - Date of Submission
 - Start Time (Eastern Time)
 - End Time (Eastern Time)
 - **Date Range** (date must be within 180 calendar days from the current date)
 - From Date – The start date for your search
 - To Date – The end date for your search
 - **Status** - Search all your submissions within the past 180 calendar days or choose one of the following statuses:
 - Sent – Search your successful submissions within the past 180 days
 - Error – Search your failed submissions within the past 180 days
 - Contacted – Search your submissions that required ERE Tech Support to contact you to resolve a problem with the original submission
 - **Site** - Search all your submissions within the past 180 days by **Site** or narrow your search by choosing one of the following options:
 - State – searches your submissions for a specific State
 - Site Code – searches your submissions for a specific Site Code

NOTE: The radio buttons for Search by date - Last 45 Days, Search by status-All, and Search by site - All are automatically selected after choosing the Track Status of Submissions link from the Electronic Records Express Home page.



The Inquiry Results page displays a list of your submissions from the past 180 calendar days that met the criteria you selected on the Search Submissions page. The list contains the following information about your submissions:

- **Tracking Number** – a unique number generated by ERE to identify your submission.
- **Date and Eastern Time** – The Date and Eastern Time your submission was uploaded to the website.
- **Status** – The status displayed in this column will be one of the following:
 - Sent – Your submission was successful
 - Error – Your submission failed
 - Contacted – A problem occurred with the original submission and ERE Tech Support contacted you to resolve the issue
 - Processing – Your submission is processing
- **Site Code** – The Site Code for your submission
- **Last 4 of SSN** – The last four digits of the individual’s Social Security Number (SSN)
- **RQID** - Request ID

NOTE: Each column may be sorted in ascended or descending order by selecting the column heading.



The **Inquiry Results - Detail** screen displays the following submission information:

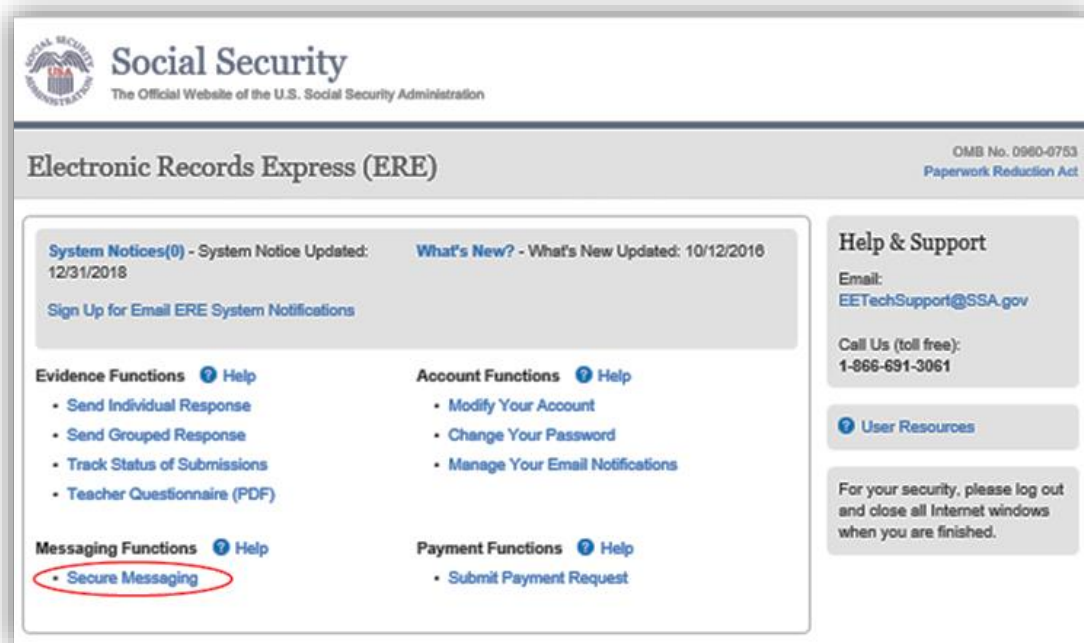
- **Tracking Number**
- **Submission Date and Eastern Time**
- **Submission Status**
- **Site Code**
- **Last 4 of SSN**
- **Number of Files Uploaded**
- **RQID (Request ID)**
- **Filename** – The name of your uploaded file, including the extension
- **File Status** - The status displayed in this column will be one of the following:
 - Sent – Your submission was successful
 - Error – Your submission failed
 - Contacted – You were contacted by ERE Tech Support to resolve a problem with the original submission
 - Processing – Your submission is processing
- **File Size** – The size of your file in byte

MESSAGING FUNCTIONS

Secure Messaging

The Secure Messaging function allows registered 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.**



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

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ERE: Secure Messaging

Compose

Folders

- Inbox (1)
- Pending
- Drafts (1)
- Sent (1)
- Blocked

[User Resources](#)

Inbox
Your messages are delivered here.

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

[Delete Selected](#) [ERE Home](#)

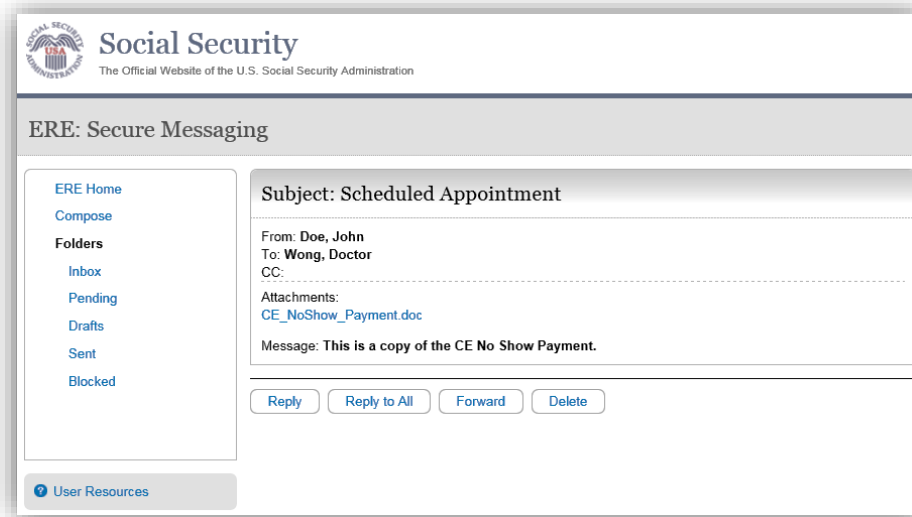
View an Individual Message

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

Reply to a Message

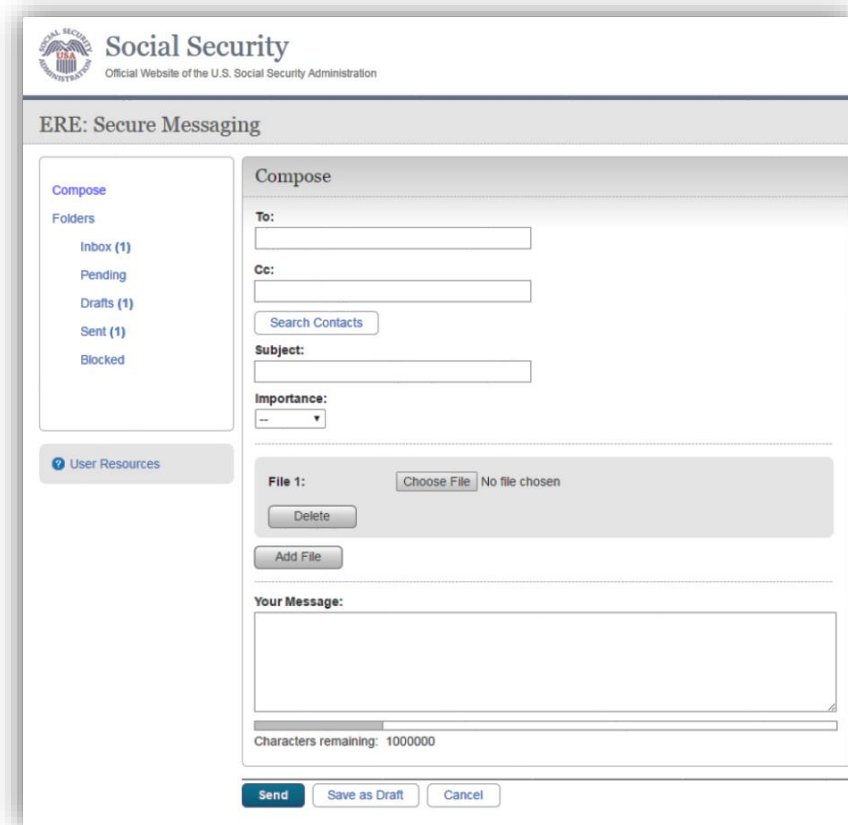
Use the **Reply**, **Reply to All**, or **Forward** button to respond to the message. Follow the instructions for Compose and Send a Message below to send the message; or

- 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.



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.



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- 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.)

Search Contacts

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.

Name:
Enter your contact's name.

First Last

Search Contacts

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.

Name:
Enter your contact's name.

First Last

<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, Alfie	Rockford	Illinois		SSA/State/DDS Site	IL-Rockford DDS [E21]	HJHGT5
<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...

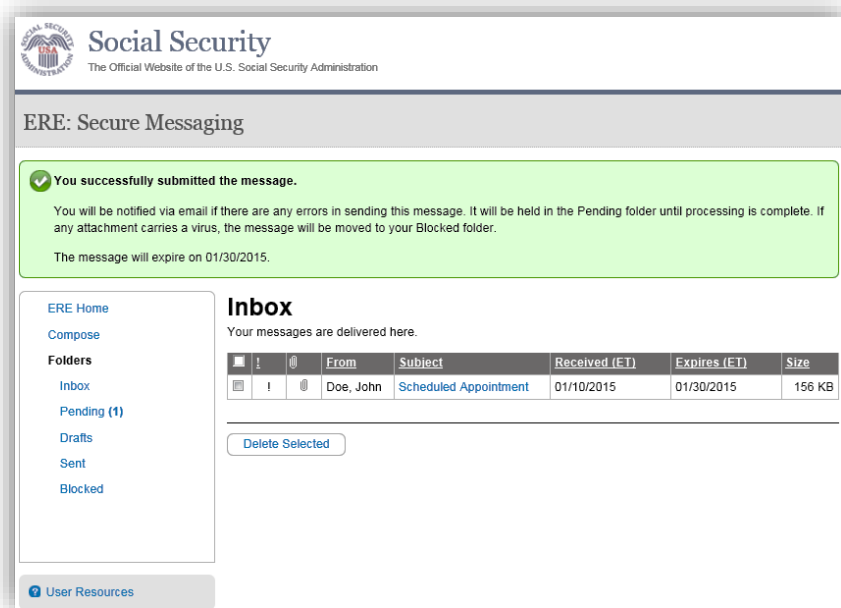
- Search for the name using the **Filter By** text box. As you type the name in the box, you advance to the corresponding location in the list.
- Highlight the name of the user you are sending a message to and insert it in either the **To:** box or the **Cc:** box by selecting the **To:** or **Cc:** 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.

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, .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 51MB (**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.



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.

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- 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.

PAYMENT FUNCTIONS

The screenshot shows the Social Security Administration's Electronic Records Express (ERE) homepage. The page includes a header with the Social Security logo and the text 'The Official Website of the U.S. Social Security Administration'. Below the header, there are sections for 'System Notices', 'What's New?', 'Help & Support', and 'Evidence Functions'. The 'Payment Functions' section is circled in red, with a red arrow pointing to the 'Submit Payment Request' link.

System Notices(0) - System Notice Updated: 12/31/2018
[Sign Up for Email ERE System Notifications](#)

What's New? - What's New Updated: 10/12/2016

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

Evidence Functions [Help](#)

- Send Individual Response
- Send Grouped Response
- Track Status of Submissions
- Teacher Questionnaire (PDF)

Account Functions [Help](#)

- Modify Your Account
- Change Your Password
- Manage Your Email Notifications

Messaging Functions [Help](#)

- Secure Messaging

Payment Functions [Help](#)

- Submit Payment Request

Submit Payment Request

The screenshot shows the 'ERE: Submit Medical Evidence Payment Request' form. The form has three steps: 1. Destination Information, 2. Review & Add Files, and 3. Confirmation. The 'Review' step is active, showing 'Destination and Request Information' and 'Invoice Type' sections. The 'Submit' button is highlighted with a green arrow pointing from the 'Submit Payment Request' link in the previous screenshot.

ERE: Submit Medical Evidence Payment Request

1 Destination Information 2 Review & Add Files 3 Confirmation

Review

[Edit](#) Destination and Request Information

Destination: MD - Timonium DDS [S23] RF: P
SSN: XXX-XX-1234 DR: F
ROID: xxx12347777 CS:

Invoice Type

Select the types of invoice(s) you want to upload.

Invoice from DDS
 Invoice from Provider
 Both

Upload Invoice(s)

- A maximum of 4 files can be added (individually or as a group) and all files must total less than 20MB.
- File types accepted: wpd, doc, docx, txt, rtf, xls, xlsx, pdf, tiff, .tif
- Please do not upload password-protected files because they cannot be processed.

Add Files: [Browse...](#)

Additional Comments:
(16,000 characters maximum)

Characters remaining: 16000

[Submit](#) [Previous](#) [Cancel](#)

The screenshot shows the 'ERE: Submit Medical Evidence Payment Request' confirmation page. The page has three steps: 1. Destination Information, 2. Review & Add Files, and 3. Confirmation. The 'Confirmation' step is active, showing a 'Thank you for your submission' message and a 'Submission Summary' section. A green arrow points from the 'Submit' button in the previous screenshot to the 'Thank you for your submission' message.

ERE: Submit Medical Evidence Payment Request

1 Destination Information 2 Review & Add Files 3 Confirmation

Thank you for your submission.

Payment Request Submission - Tracking Information.

Tracking Number: **168105EEEE2896DE1N**
Submitted on: 01/02/2019 at 04:01 PM EST

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

[Print this page](#)

Submission Summary

Tracking Information

Destination and Request Information

Destination: MD - Timonium DDS [S23]
SSN: XXX-XX-1234
ROID: 12345678901234567890
RF: P
DR: F
CS:
Invoice Type: Invoice from DDS

Uploaded Invoice(s)

Invoice Name	Invoice Size
Invoice Name: 18-638 ERE Flyer-Vertical.pdf	542 KB
Total Invoice Size	542 KB

Comments: No comments added

[Send Another Response](#) [ERE Home](#)

ERE ACCESS/SHORTCUT KEYS

This application contains access keys to improve navigation and provide information. To use these keys select the “Alt” or “Ctrl” button on your keyboard and the access key simultaneously. You will find a list of these keys in the table below:

Access/Shortcut Keys for Send Individual Response and Send Grouped Response Functions

Button/Link	Access Key
Next	n
Submit	p
User Resources	u

Access/Shortcut Keys for Secure Messaging Function

Button/Link	Access Key
Show	s
ERE Home	n
Submit	p
Review Another Request	n
Next	n
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.

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>

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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*****

Timing Out

The website will time out after 30 minutes of inactivity. After 2 hours, the website will log you out and you must re-enter your User ID and Password to continue.

Avoiding User Errors

Errors can occur for many reasons. The following list briefly explains some common ERE website user errors:

- Bookmarking the Confirmation page – **Never bookmark pages within the ERE website.**
- Once you have submitted documents by selecting the **Submit** button, you should NOT use the **Back** button or close your Internet browser file until you receive the Confirmation page.

ERE Electronic File Format Options

The ERE website currently supports the following file formats:

.wpd	.doc	.txt
.pdf	.xls	.docx
.tiff	.tif	.rtf
.xlsx		