User Guide for Send CE Report

Office of Disability Determinations

October 2015

Instructions for Send CE Report

The **Send CE Report** feature of the website allows the CE provider to submit and electronically sign one individual CE report and send it to the DDS. To submit a CE report using this feature of the ERE website, select the link, **Send CE Report** under the **Evidence Functions** heading. You need the CE request letter with the barcode available to complete the processing steps, unless you receive your request electronically from the DDS.

You can only use the Send CE Report function if you are the CE Provider. The CE administrative staff cannot use this function.

NOTE: If you received the CE request from the DDS electronically, you can find the request under **Access Electronic Requests**. After accessing the request, you can view the request and respond using the Send CE Report function.

Electronic Records Express (ERE): Send CE Report

Destination and Request Information (Step 1 of

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

- Enter the three-character **Site** code from the barcode. The **Site** code begins with a letter, followed by two digits.

<div align="center">

or

</div>

- 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.

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- Obtain the following information from the CE request letter if you did not receive the request electronically (this information populates for you if you received an electronic CE request):

  - Enter the Social Security Number (**SSN**). *Only files for one SSN can be sent with this transaction.*

  - Enter the Request ID (**RQID**). The Request ID is the document number or serial number that is usually located on the request letter near the barcode.

  - Select the appropriate **RF** (Routing Field) option, or **No RF or No Barcode** if not displayed on the request letter.

  - Select the appropriate **DR** (Document Return Code) option, or *No DR or No Barcode* if not displayed on the request letter.

  - Enter the **CS** (Check Sum Digits) if available, or leave this field blank if not displayed on the request letter.

  - Select the **Document Type** from the drop down box.

  - Select **Next** to go to the next step or select **Cancel** to return to the **Home** page.

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Review and Add Information (Step 2 of 3)

Social Security
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ERE: Send CE Report

1 ✔ Destination Information   **2** Review & Add Information   3 Confirmation

Review

❓ User Resources

Edit   **Destination and Request Information**

Destination: **WA - Spokane DDS [V14]**   RF: **P**
SSN: **123-45-6789**   DR: **F**
RQID: **adfadf**   CS: **adfa**
Document Type: **Consultative Examination Report (CE) - 0002**

Attach and Upload Files

- A maximum of 10 files can be added and all files must total less than 50MB.
- File types accepted: .wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .xls, .xlsx, .pdf, .rtf, .tiff, .tif.
- Please do not upload password-protected files because they cannot be processed.

File 1:   Choose File   No file chosen

Delete

Add File

Additional Comments:
(16,000 characters maximum)

Characters remaining: 16000

Consultative Examination Authorization Agreement

Please read this statement and indicate your understanding by checking the "I have read..." box below. When you select "Submit", you will generate an electronic signature and submit your response.

I am certifying, under penalty of perjury, that I have been authorized or contracted by the Disability Determination Services to examine the claimant named in the attached, and produced a consultative examination report for that claimant. The report is accurate. By checking the "Ihave read and agree to the above" checkbox below, I am certifying that I personally conducted, or personally participated in conducting, the consultative examination and have electronically signed the report contained within.

☐ I have read and agree with the Agreement above.

Submit   Previous   Cancel

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Step 2—Review and Add Information

- Review the **Destination and Request summary 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. **NOTE:** If you respond to an electronic request, you will not be able to edit this information. Your screen will not look exactly like the screen shown above.

- 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.

- 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 files.

> Note: A maximum of 10 files may be sent <u>for one individual</u> 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.

- Type **Comments**, 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.

- The next step is your "Electronic Signature". This step asks you to certify that you examined the claimant, prepared or reviewed the report, and the report is accurate. Read the certification statement located at the bottom of the screen and indicate your understanding by checking the box beside **I have read and agree with the Agreement above**. By checking the box, you affirm your intent to sign the report. You do not need to physically sign and send the paper report to the DDS.

- Select the **Submit** button to provide electronic signature and forward the signed report to the selected DDS office.

The website creates a text file and adds it to the files and information you submit. This document contains the following information:

- Index information you entered from the request letter
- The signature attestation statement to which you agreed
- Your name, as it is registered in Electronic Records Express—serving as your electronic signature.

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Confirmation (Step 3 of 3) - no fiscal

John Doe | **Sign Out**　　　　　　　　　　　　　　　　Text Size ▼ | Accessibility Help

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ERE: Send CE Report

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

✅ **Thank you for your submission**

CE Report Submission - Tracking Information

Tracking Number:　**14ACF48F3BEDEF2CN**

Submitted on: **01/09/2015 at 10:21 AM EST**

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

🖨 Print this page

❓ User Resources

Submission Summary
Tracking Information

Destination and Request Information

Destination: **WA - Spokane DDS [V14]**
SSN: **123-45-6789**
RQID: **adfadf**
RF: **P**
DR: **F**
CS: **adfa**
Document Type: **Consultative Examination Report (CE) - 0002**

Uploaded File(s)

File Name	File Size
LCR-Contact ODAR Office Email.docx	29 KB
Total File Size	**29 KB**

Comments: **Comments were added**

Your response was electronically signed.

Send Another Response　　ERE Home

Electronic Records Express (ERE): Send CE Report

Confirmation (Step 3 of 3) - with fiscal

Step 3—Confirmation

- After your submission, Electronic Records Express provides a **Confirmation** page. The **Confirmation** page provides a tracking number for you to keep and use if you want to check on

the status of your submission. The **Confirmation** page indicates the specific files and/or comments that you transmitted.

- If you do not receive the **Confirmation** page, please 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.

- If you have additional CEs to send, you can select **Send Another Response.**

- To Submit Payment Request, after reviewing the summary select the **Request Payment** button at the bottom of your screen as shown in the image above (*Confirmation with fiscal*.

> 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.

Important Note

It is against SSA policy for a user to delegate the uploading of their Consultative Examination reports, via the **Send CE Report** website function, to staff members. Users interested in delegating this responsibility should consider using the **Send CE with Scanned Signature** website function or CE Administrative Staff Upload (**Review/Submit Prepared Requests, and Prepare Report for Provider**).

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Electronic Records Express (ERE): Send CE Report

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/Link	Access Key
Next	n
Submit	p
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.

Note: To use these keys select the "Alt" or "Ctrl" button on your keyboard and the access key simultaneously.

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:

- 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