



Monterey County Behavioral Health Policy and Procedure

Policy Number	316
Policy Title	Using Electronic Records Express Website to Submit Medical Records to Department of Social Security.
References	Representative Guide for Electronic Records Express Sending Individual Case Responses by Secure Website WELFARE AND INSTITUTIONS CODE SECTION 5328, 5350 ET SEQ.; HEALTH AND SAFETY CODE SECTIONS 1795-1795.26; CIVIL CODE SECTION 25.9 AND 2436; PROBATE CODE SECTIONS 2354; 2355
Form	SSA-827 (6-2007) Authorization to Disclose Information to the Social Security Administration (SSA)
Effective	September 12, 2011

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Policy

Requests for confidential medical information regarding consumers of Monterey County Behavioral Health (MCBH) services will be reviewed by designated staff to assure proper and timely response. Release of medical records information will be consistent with appropriate medical records regulations to insure confidentiality of the consumer’s records.

The Electronic Records Express Website is a secure, efficient and cost saving method of disclosing Protected Health information. All requests must include specific information requested, appropriate signatures and dates, including the consumers unless the consumer is a minor in which case the signature of the legal guardian is required on **Form SSA – 827** (Authorization to Disclose Information to the Social Security Administration must be completed).

Information to be disclosed: Annual Plan, psychological assessment, Doctors notes, clinical notes for specific period requested or for last 6 months.

The Administration fee of \$15.00 will apply to all requests.

Monterey County Behavioral Health Quality Improvement team is responsible for responding to requests for information from the Department of Social Security.

Procedure

1. Open an Internet browser
2. In the address window type in: <http://eme.ssa.gov> (do not type the “www.”)
3. Once you have this page up, select “Favorites”

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- Select “Add to Favorites”
- Where it says name, type in “Electronic Records Express” and select the OK button

4. Enter your case-sensitive Username and Password

NOTE: The Office of Disability Adjudication and Review will assist you in obtaining a Username and Password.

5. Select the LOGIN button.

NOTE: Users should be aware that after 3 failed attempts to sign in, their account will be locked. If this occurs, additional assistance may be obtained online by reporting problems to EEAccountInfo@ssa.gov or calling 1-866-691-3061. You may also report problems to the Office of Disability Adjudication and Review at odar.hq.rep.mail@ssa.gov.

By entering your User ID, Password and clicking on the "Login" button, you certify that you have read, understand and agree to the above statements.

User ID

Password

Note. -Password is case sensitive
-System will time-out after a half-hour of inactivity.

If you need assistance with the Electronic Records Express Website, please contact us via email at EEAccountInfo@ssa.gov or you can call us at 1-866-691-3061.

Information about Social Security's Online Policies

The privacy of our customers has always been of utmost importance to the Social Security Administration. Our first regulation, published in 1937, was written and published to ensure your privacy. Our concern for your privacy is no different in the electronic age.

[Details of Social Security's Online Privacy Policy](#)



Electronic Records Express Login

Acknowledgement for Website Access

I understand that the Social Security Administration will validate the information I provide against the information in Social Security Administration's systems.

I certify that:

- I understand that I may be subject to penalties if I submit fraudulent information.
- I agree that I am responsible for all actions taken with my User ID.
- I am aware that any person who knowingly and willfully makes any representation to falsely obtain information from Social Security records and/or intends to deceive the Social Security Administration as to the true identity of an individual could be punished by a fine or imprisonment, or both.
- I am authorized to do business under this User ID.

By entering your User ID, Password and clicking on the "Login" button, you certify that you have read, understand and agree to the above statements.

User ID

Password

Note -Password is case sensitive
-System will time-out after a half-hour of inactivity

If you need assistance with the Electronic Records Express Website, please contact us via email at EEAccountInfo@ssa.gov or you can call us at 1-866-691-3061.

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The privacy of our customers has always been of utmost importance to the Social Security Administration. Our first regulation, published in 1937, was written and published to ensure your privacy. Our concern for your privacy is no different in the electronic age.

- [Details of Social Security's Online Privacy Policy](#)
- [Details of Social Security's Online Security Policy](#)
- [The Privacy Act and The Freedom of Information Act](#)

Paperwork Reduction Act

U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. The OMB control number for Electronic Records Express is 0960-0753; expiration date __/__/__. We estimate that it will take about 5 minutes to read the instructions, gather the necessary facts, and answer the questions. You may send comments to our time estimate above to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401. Send only comments on our time estimate to this address.

47 Entering a correct Username and Password will bring you to the ERE Home page.



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49 Note: Although the ERE Home page lists a number of electronic transmission features, at
50 this time the only features available to ODAR users are Send Responses for Individual Case
51 listed under the Evidence Submission Services box, Track Status of Submissions listed under
52 the Document Exchange Services, and Communication Utility listed under the
53 Communication Services box, above. Guidance for using the Track Status of Submissions
54 and Communication Utility is provided in separate ODAR instructions available in the User
55 Instructions link in the upper right corner of the screen.

56
57 If this is the first time you are logging into ERE, you will be required to change your password
58 (this is a security feature).

- 59 • The Change Password page should automatically appear. You can also access
60 the Change Password option from the ERE Home page (scroll down and the
61 Change Password option is on the left side of your screen).



Social Security Online
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express
Change Password

An asterisk (*) indicates a mandatory field

* Current Password:

* New Password:

* Confirm New Password:

To maintain a secure system, the account password needs to consist of the following requirements:

- SSA accounts must have a minimum password length of 7 characters.
- Passwords have to consist of both alpha and numeric/alpha-numeric characters. (Letters and numbers or special characters).
- Passwords are case sensitive.

USA.gov | Privacy Policy | Accessibility Policy | License Policy | Site Map | Contact Us | Benefits.gov

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- Enter the password you were provided by ODAR in the old password window
 - Enter new password that is at least 7 characters long and includes both letters and numbers. Confirm your new password by entering it again in the last box. Remember that 31 your Username and Password are case sensitive
 - Your password will expire every 90 days and you will be prompted to change your password 33 (the page above will appear after you login). 34
 - NOTE: You are given three attempts to enter your password. After the third attempt you will be 35 locked out. If you are locked out of the website, you will need to send an email to 36 EEAccountInfo@ssa.gov or call 866-691-3061.
6. When you have changed your password after your first login, you may proceed with sending evidence to ODAR.

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75 **How to Use Send Response for Individual Case**

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77 On the ERE Home Page, under Evidence Submission Services, select Send Response for
78 Individual Case.



79 NOTE: You will need to have the ODAR barcode to enter information in the next few steps.
80 The following illustration will help you find the necessary information on the ODAR barcode.



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82 Step 1: Enter the Site Code in the SITE CODE field. It is important that you select the SITE
83 code from the
84 barcode sheet provided by ODAR. DO NOT USE A BARCODE PROVIDED FROM
85 ANOTHER SOURCE WHEN YOU ARE SENDING INFORMATION TO AN ODAR OFFICE
86 (i.e. Disability Determination Services).

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88 NOTE: When the SITE code is entered the appropriate ODAR office and state will be shown
89 in the
90 DESTINATION and STATE field. The DESTINATION field has both ODAR and Disability
91 Determination Service offices listed. Be sure that an ODAR office is shown in the Destination
92 field.

Social Security Online
www.socialsecurity.gov

Electronic Records Express Home User Instructions

John Doe
Log Out

Help Desk: 1-866-601-3061

Enter 3 character site code or select state and destination:

Site code: OR State: [Select] *

Destination: [Select Destination] *

Enter the following information from the request letter or barcode:

SSN:

RQID (Request ID):

RF (Routing Field) P D or blank No RF or No Barcode

DR: F S No DR or No Barcode

CS:
(enter only 4 characters)

Cancel Continue

- 93 Step 2: From the barcode provided by ODAR, enter the following information in the
- 94 appropriate fields. (See the figure shown below).
- 95 • Enter the claimant's Social Security Number.
 - 96 • Enter the Request ID information. The Request ID is the document number or
 - 97 serial number which is usually located on the barcode. Be sure to enter the Request
 - 98 ID beginning with the first non-zero number. For example, if the request letter shows
 - 99 RQID as 00000001102400, enter 1102400.
 - 100 • Enter the RF (Routing Field) information shown on the barcode.
 - 101 • Enter the DR code information shown on the barcode.
 - 102 • Do NOT enter the CS code.
 - 103 • Select Continue to go to the next page.

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Social Security Online
www.socialsecurity.gov

Electronic Records Express Home

Send Response for Individual Case
Destination and Request Information (Step 1 of 3)

Enter 3 character site code or select state and destination:
Site code: X39 OR State: VA
Destination: VA - Charlottesville ODAR [X39]

Enter the following information from the request letter or barcode:
SSN:
RQID (Request ID):
RF (Routing Field): P D or blank No RF or No Barcode
DR: F S No DR or No Barcode
CS:
(enter not applicable)

Do not Enter the CS code



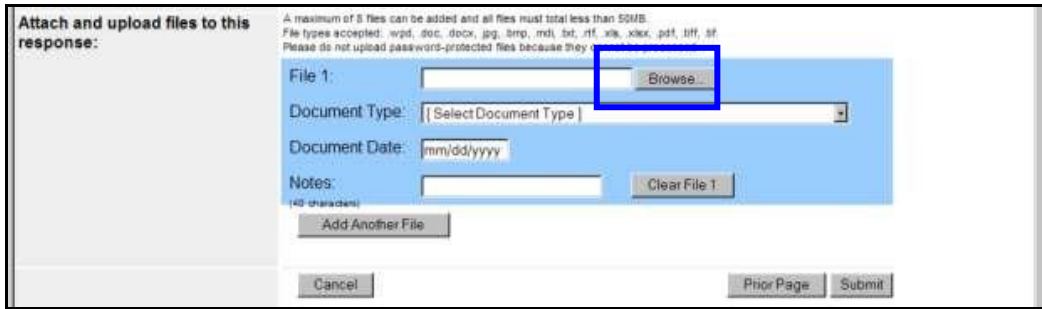
RQID: 00000000000000000000000013385 SITE: T23 DR: F
SSN: DOCTYPE: 0001 RF: D CS: 5b83

114 Step 3: Send Files from your computer

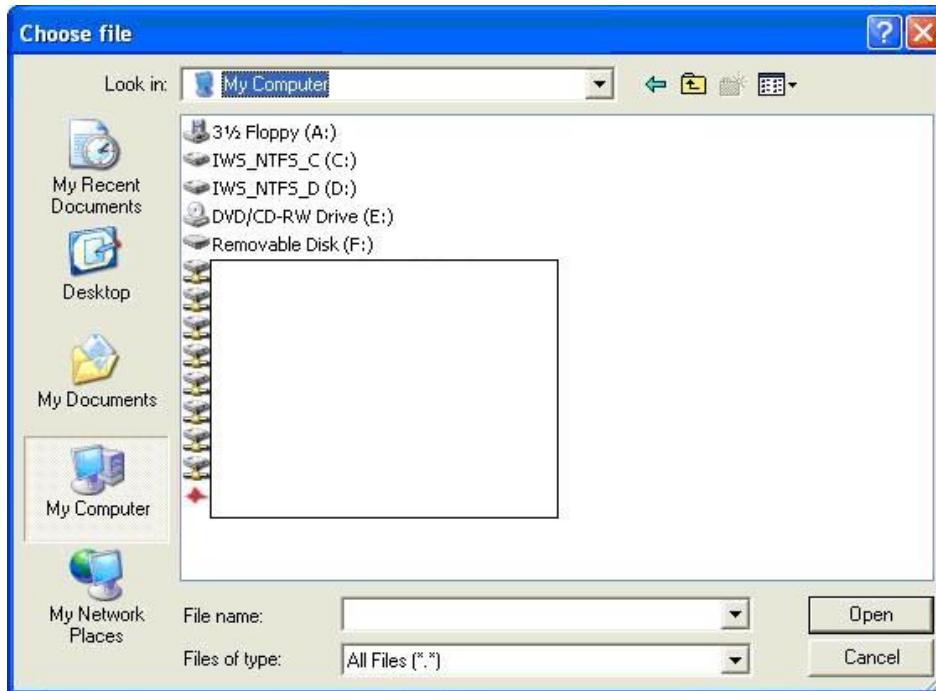
115 If you have records for the requested claimant in an electronic format, you can send
116 existing files from your computer to ODAR.

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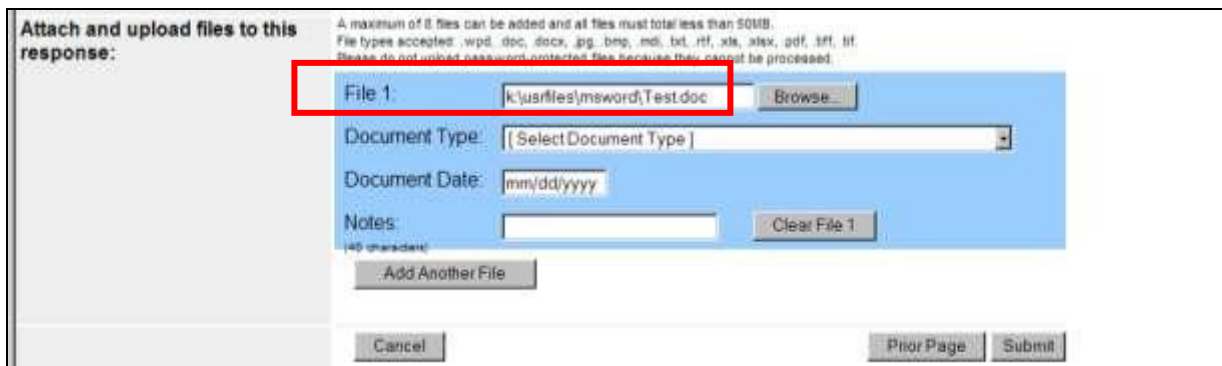
118 NOTE: File types accepted are: .wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx,
119 .pdf, .tiff, and .tif. Please refer to the section entitled Naming Your Electronic Claimant
120 Records on page 18, for more information on acceptable file names.



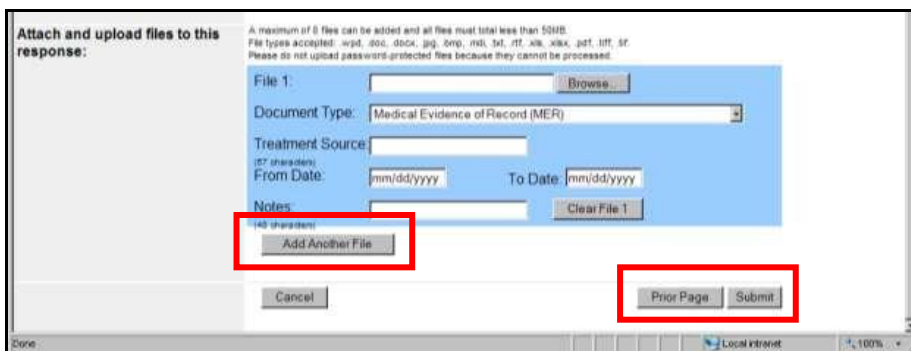
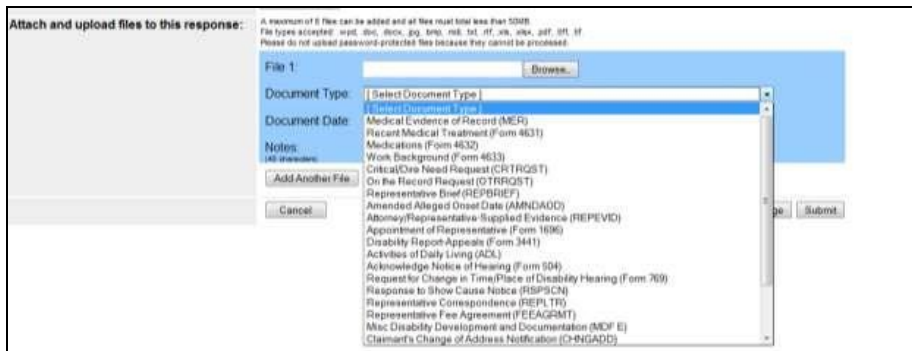
- Select the Browse button to find the file you wish to send to the
- The Choose file window



- Locate the file you wish to send and select the file name. This inserts the document's file the File name box at the bottom of the Choose file
- Next, select the Open button. The Choose File window will close and the ERE website will show the file name displayed in the box to the left of the Browser button. You have successfully attached the name file to the website.



Document Type: Select from the drop down list a document type for the document



Depending on the document type you select, additional fields may appear which require completion.

- You may send additional files (maximum of 8 files for one claimant) by selecting the Add Another File 116 button and repeating the previous steps. 117
 - If you select Prior Page, you will return to the Destination page. 118
- NOTE: You will lose all information entered on the page and any file selected.

- 120 Step 4: Verify the Destination and information.
 121 Compare the information in the Destination and request summary box to the ODAR
 122 barcode before submitting a response. If the information does not match, then re-
 123 enter the correct information at Step 1. If the information matches, select the Submit
 124 button.
 125

- 126 If an invalid document was attached you will receive an alert message similar to the
 127 message shown below. Select Try Again to re-enter the correct information.

File Name	Document Type	File Size
temp.txt	Medical Evidence of Record (MER)	0.0 KB
Total file size:		0.0 KB



128 You should receive a Tracking Information page acknowledging that SSA has received
 129 your transmission. The Tracking Information page indicates the specific filename and
 130 document type of each file that was transmitted.

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 132 The Tracking Information page only acknowledges that the transmission has been
 133 received. The transmission must still go through a SSA systems check before being
 134 sent to the electronic folder. You will be notified by email if there are any errors or
 135 problems that prevent SSA from processing your submission.

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 137 NOTE: In the unlikely event that you do not receive the Tracking Information page,
 138 you should resubmit the materials.



139 NOTE: It is recommended that you print or take a screenshot of the Tracking Information
 140 page for documentation. You will not be able to retrieve this information from SSA (including
 141 ODAR) after you exit this page.

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 143 Please print screen and import this image into the client's medical records as proof of
 144 transaction. **Document the release in Account of Disclosure.**

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 146 If you have evidence to send for another individual, you can select the Send Another
 147 Response link toward the bottom of the Tracking Information page. This will bring you to the

148 webpage to enter information to send medical records for another claimant. Please be sure
149 to have the ODAR request letter available.
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Logging Out of the ERE Website

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165 When you have completed your file uploads, select Log Out on the left navigation bar of the ERE website.

166 Logging out ensures that others may not access the ERE website through your Username and Password.

170 Special Considerations When Using the ERE Website

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174 Logging Into the ERE Website

175 The Username and Password are case sensitive.

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176 NOTE: Your ODAR contact will assist you in obtaining a Username and Password.

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178 Be aware that after 3 failed attempts to sign in, your account will be locked. If this occurs, you may obtain additional online assistance by selecting the ERE email address link. You may also report problems to your ODAR contact.

181 Updating Your Email Address

182 Your email address currently on file with SSA will be displayed on the Home page in the top left corner.

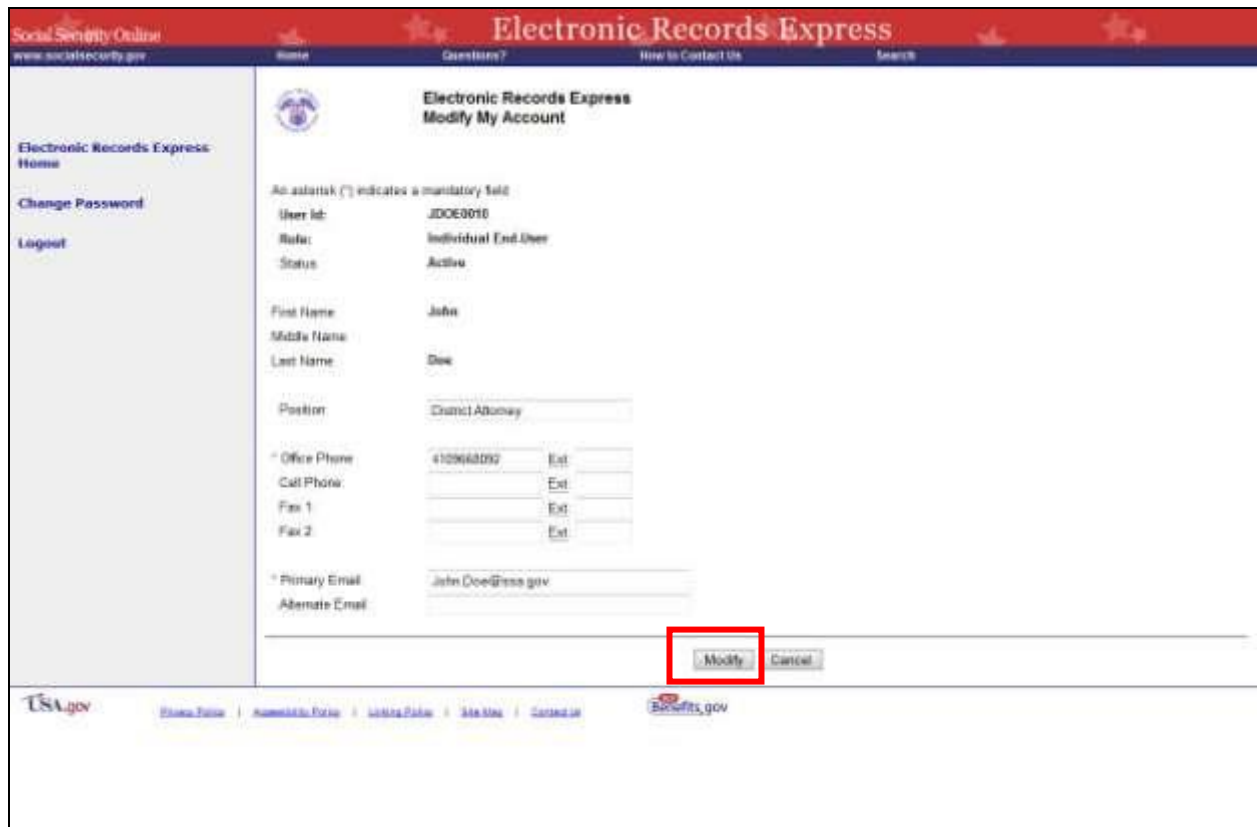
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274 If the email address or phone number shown is incorrect, you may change your email
 275 address by performing the following steps:

- 276 1. Select the Modify your account information link.
 277 2. Enter your new or correct information in the appropriate field.
 278 3. Select the Modify button.



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280 A page is displayed verifying that the account information was successfully modified.



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In addition to a confirmation page, ERE will send a confirmation email to your email address once your change(s) are processed.



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Changing Your Password

Users are required to change their password upon their very first login to the ERE website. Afterward, users will be prompted to change their password every 90 days.

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Naming Your Electronic Claimant Records The ERE website will accept electronic filenames that contain the following characters:

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- ⇒ Numbers
- ⇒ Letters (uppercase and lowercase)
- ⇒ Backslashes “\”
- ⇒ Underscores “_”
- ⇒ Hyphens or Dashes “-”
- ⇒ Spaces

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Other special characters may make your electronic filename invalid, such as:

- ⇒ Certain Punctuation Marks (commas, semicolons, parentheses, etc.)
- ⇒ Symbols (*, %, <, >, |, etc.)

Please be sure that your electronic records include the acceptable character types shown above.

NOTE: Please be sure to upload **only** non-password protected documents.

Timing Out

The website will time out after 30 minutes of inactivity, so you should be ready to enter information from the records request letter and have files ready to upload. After 2 hours, the website will log you out and you must reenter 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 **Tracking Information** page – **Never** bookmark pages within the ERE website. The **only** bookmark you should use for the ERE website is the Home page at <http://eme.ssa.gov>. Please note you cannot bookmark and save a **Tracking Information** page.
- ⇒ Leaving the ERE session unattended for 30 minutes will cause a session timeout. If you need to do something else please log out and exit your ERE session.
- ⇒ Once you have submitted documents by selecting the **Submit** button, you should not use the **Back** button, **Stop** button, or close your Internet browser file until you receive the **Tracking Information** page.
- ⇒ Typing in an incorrect file path for a file saved on your local system. This can occur if you type in a file name rather than using the **Browse** button to navigate to where files are stored on your system and then selecting the files you wish to attach. You may not receive notification if this type of error occurs. The best way to avoid this type of error is to use the **Browse** button to attach your files and then wait for the **Tracking Information** page to appear after you have successfully transmitted your electronic files.

Bookmarking the ERE Website

- ⇒ Please be sure to bookmark the ERE Home Page only. You should never bookmark intermediate WebPages within the ERE website. Doing so can cause problems the next time you try to send files.

338 **Saving ERE Tracking Information Pages**

339 ⇒ You cannot bookmark and save a **Tracking Information** page. You cannot retrieve
340 tracking information after exiting the page. If you wish to have a record of the ERE
341 transaction, we suggest you save your **Tracking Information** page.
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343 **How SSA Communicates Information to ERE Users**

344 SSA will use the **Bulletin Board** section of the ERE website to alert registered users of
345 new information, such as any scheduled maintenance or new functionality. You can also
346 be notified by email prior to any scheduled maintenance by selecting the red envelope
347 link, **Get important information about Electronic Records Express availability**.
348 Select the link and follow the instructions.
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351 **ERE Electronic File Format Options:**

352 SSA's ERE website currently supports the following file formats:

- 353
- 354
- 355 **.wpd** **.doc** **.txt**
- 356 **.pdf** **.xls** **.jpg**
- 357 **.bmp** **.tiff** **.tif**
- 358 **.docx** **.rtf** **.mdi**
- 359 **.xlsx**

360 **Access Keys:**

361 This application contains access keys to improve navigation and provide
362 information. You will find a list of these keys in the table below:
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365
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Button	Access Key
Add Another File	2 – 9 (number corresponds to the file to be added)
Cancel	n
Continue	c
Edit Summary	w
Home	h
Log Out	l
Print	p
Prior Page	p
Send Another Response	r
Submit	s
Submit Additional Files	s

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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

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of your browser. The Help feature can be located on the Menu bar of your browser. Any

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assistive devices that you may be using 270 will also have a list of these shortcut keys in their Help section.

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Note:

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1. To use these keys on Windows-based browsers select the **Alt** button on your keyboard and the access key simultaneously. On the Mac, use the **Ctrl** key.

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2. **Internet Explorer Browser Users Only:** In order to trigger the **Browse** button on the Electronic Records Express Submission pages you will need to use the space bar if you are using keyboard access.

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Contacts for Additional Assistance

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If you need additional assistance, you should contact:

386

Email: odar.hq.rep.mail@ssa.gov

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Glossary

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Acceptable File Type Types of files that are compatible with a given computer program or website. The ERE website currently supports the following type of files:

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394 .bmp, .doc, .docx, .jpg, .mdi, .pdf, .tif, .tiff, .txt, .rtf, .wpd,
395 .xls, and .xlsx.

396
397 **Barcode** A 2-D barcode determines the ultimate destination (paper folder
398 and/or electronic folder) for the evidence submitted
399 (uploaded). The 2-D barcode acts as a portable
400 database to store the following information: SSN, request
401 ID number, site number (Disability Determination Service
402 or ODAR), and document type (e.g., MER, CE). The
403 request ID number (also known as the turnaround
404 document number or contract number) is SSA's/ODAR's
405 unique transaction tracking number, and when received,
406 can be used to generate a follow-up in the case
407 processing system. If a Representative fails to submit
408 the bar-coded information, the document must be
409 manually indexed at the ODAR.

410
411 **.bmp** The filename extension for a bitmap file. Bitmap is a common
412 graphic format used by computers. A graphic or picture
413 is made up of a number of individual dots (bits) to form
414 an image. A bitmap is essentially a map of bits (hence
415 the name). Bitmap files can get very large in size and if
416 storage space is a factor then it is best to convert the
417 image into a more compressed format such as .jpg.

418
419 **.doc** The filename extension for a Microsoft Word document file.

420
421 **Download** The process of transferring a file from a remote
422 computer, server, or webpage to your own computer.
423 Download is the opposite of upload.

424
425 **ERE** Electronic Records Express, SSA's secure website to be used
426 primarily for uploading (sending) electronic medical and
427 other evidence to be considered in determining disability
428 eligibility.

429 **eDib** Electronic Disability (eDib) is SSA's endeavor for enhancing the
430 disability claims process. It is a major Agency initiative
431 comprised of interdependent projects that are designed to
432 move all components involved in claims
433 adjudication/review to an electronic business process
434 through the use of an electronic disability folder. It
435 expands

Internet use, it automates disability intake, provides electronic access to disability-related information, and will improve overall efficiency of the disability claims process.

e-folder

The electronic disability folder (e-folder or EF) is SSA's electronic disability repository of data that will, when eDib is fully implemented, be accessible by all components involved in the processing of disability claims. Data that is housed in the e-folder will come from many different SSA and ODAR systems as well as from external sources (e.g., medical Representatives). The e-folder is not a case processing system. The e-folder will allow components to share disability case information without having to move a paper folder between components.

Extract

To obtain selected information from a source; an excerpt of a record.

.jpg

.jpg or .jpeg (pronounced "jay-peg") is a standardized image compression format named after its developers (the Joint Photographic Experts Group) that can compress images to very small file sizes, commonly used on the Internet due to faster image transfer rates. JPEG images can contain thousands of colors which make for the format ideal for compressing images such as photographs. The JPEG format can compress images up to around 10% of their original file size without losing too much quality (depending on the image used) although the image will lose its sharpness. JPEG files use both the .jpg and .jpeg file extensions and can be created in most popular graphics applications.

MER

Medical evidence of record (MER) is collected from sources identified by the claimant.

.pdf

The filename extension for a Portable Document Format (PDF) file. PDF is a universal file format developed by Adobe® that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it. PDF is a reliable format for electronic document exchange. To view PDF files

you need Adobe Reader® which you can download free at <http://www.adobe.com/products/acrobat/readstep2.html>.

Secure Website

A website that uses encryption and access controls so that personal information sent via the website is not susceptible to interception, loss, or alteration.

.tif or .tiff

TIF or TIFF is short for “Tagged Image File Format” and refers to a type of image format developed by Aldus and Microsoft that is commonly used within computing. It was designed primarily for faster data interchange. TIFF files are basically Bitmap images; they are not restricted in resolution and can be black and white, grey scale or full color. Most (if not all) image editing software can support the TIFF format and TIFF files typically have the .tif or .tiff file extension.

.txt

The filename extension for a text file.

Upload

The process of transferring a file from a personal computer to a server. This process makes the file available to others. Upload is the opposite of download.

.wpd

The filename extension for a Word Perfect Document.

.xls

The filename extension for a Microsoft Excel file.