Medical and Vocational Expert User Guide

ERE for Experts: Access Claimant's Electronic Folder

January 2024

Table of Contents

Overview

This guide provides Medical and Vocational Experts (ME/ VEs) with detailed instructions for viewing, downloading, and uploading documents in claimant's electronic folders (eFolders).

Requirements for ERE eFolder Access

You meet the criteria for ERE eFolder access if you are a Medical or Vocational Expert (ME/VE) who has:
- Been awarded a Blanket Purchase Agreements (BPA) with the Social Security Administration (SSA) or work for a company with a BPA.
- Received a favorable letter from the SSA Personnel Security & Suitability office.
- Successfully registered for a LOGIN.GOV account online through the ssa.gov official website with Advance Security.
- Been assigned an Interrogatory and/or been scheduled to testify at a Hearing for a disability case.

ERE Hours of Operations

ERE for Experts is available during the following hours:

> Online Hours of Operation
> Monday - Friday 5 AM - 1 AM ET
> Saturday 5 AM - 11 PM ET
> Sunday 8 AM - 11:30 PM ET
> **Federal Holidays** - Same hours as the day of the week the holiday occurs

Signing into ERE for Experts

Sign into your ERE for Experts account using this link - https://secure.ssa.gov/ERECA/MEVE01View.

You will sign in with LOGIN.GOV, use the email account and password you created when you created your account. During sign-in, you must have access to the text-enabled cell phone you provided during your LOGIN.GOV registration.
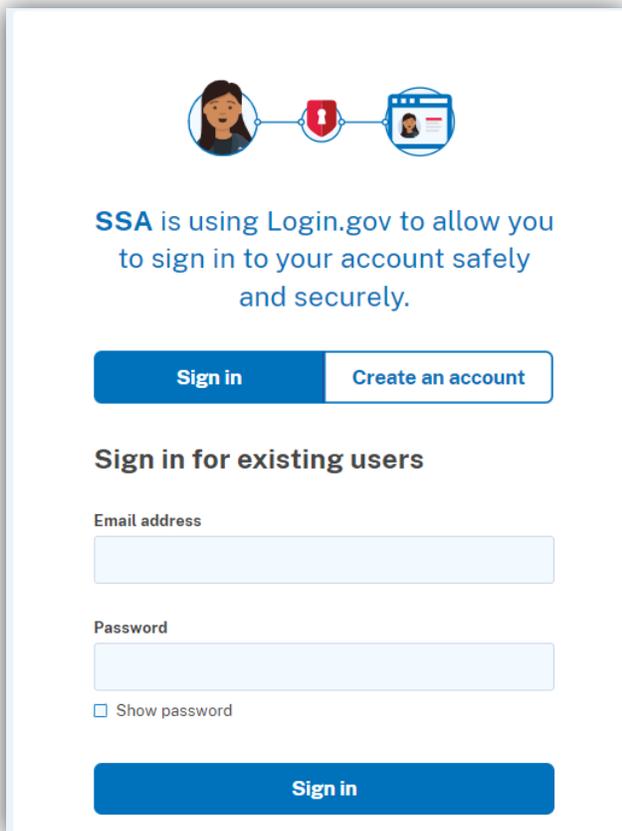
Forgot Username or Password

If you have forgotten your Password, select the *Forgot your Password* link on the **Sign In** screen, and follow the instructions.

Advanced Security Sign In

One-time passcode is sent you your selected device, enter then click submit.

NOTE: Delete the text message after it is used. It is a one-time code and is valid for only 10 minutes.

Terms of Service

You must read and agree to the **Terms of Service,** then select **Next**.

NOTE: These **Terms of Service** apply to all *my* Social Security customers with personal accounts. However, you cannot access your personal *my* Social Security services (like Online Statement) when you sign in using the specialized ME/ VE link https://secure.ssa.gov/ERECA/MEVE01View.

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

Signing in...

Terms of Service

- I am using this service with the account that I created myself using my own personal information and identity. I am not using an account created by another person or created using another person's information or identity, even if I have that person's written permission.

  I will never share the use of my account with anyone else under any circumstances. I will never use another person's account.

- I understand that this computer program contains U.S. Government information.
- I consent to the monitoring and recording of my use of this program to ensure its appropriate use.
- I understand that it is a federal crime to:
  - Give false or misleading statements to obtain information in Social Security records; or
  - Deceive the Social Security Administration of an individual's identity.

- I understand that unauthorized use of this service is a misrepresentation of my identity to the federal government and could subject me to criminal or civil penalties, or both.
- I understand that Social Security may stop me from using these services online if it finds or suspects misuse.
- I accept that the responsibility to properly protect any information provided to me by Social Security is mine and that I am the responsible party should any information on or from my computer or other device be improperly disclosed. I agree that Social Security is not responsible for the improper disclosure of any information that Social Security has provided to me, whether due to my negligence or the wrongful acts of others.

Social Security is Going "Green"

With your *my* Social Security account, you can immediately view, download, or print your Social Security Statement. Your online *Statement* contains the most up-to-date information in our records about your earnings and benefit.

Remember, now that you have a *my* Social Security account, you will no longer receive a paper *Statement* in the mail. If you need a *Statement* by mail, please follow these instructions.

☐ **I agree to the Terms of Service.**

Next   Exit

Navigating Electronic Records Express (ERE) for Experts

Electronic Records Express (ERE) Home

General ERE information is available to you on the ERE home page:
- **ERE System Alerts** notifies you of technical difficulties that may affect ERE performance.
- **What's New** informs you of the latest changes and updates to ERE.
- **Receive ERE System Alerts via Email** allows you to receive automated ERE updates via email, such as system unavailability.

The following **Electronic Folder Services** features are available to you:
- **Access Claimant's Electronic Folder**: select this link to view or download exhibited documents in the claimant's eFolder.
- **Pick Up Files**: select this link to retrieve downloads requested from the eFolder. Refer to the *Pick Up Files User Guide* for more information.
- **Track Status of Submissions**: select this link to view the status of uploaded file submissions.
- **Get Status Reports**: select this link to view or download status information for all your cases. Refer to the *Status Report User Guide* for more information.

Customer support tools are available:
- **Help & Support**: select the link to send an email to the help desk. Include your contact information, a description of the issue or question, and an applicable screen shot. DO NOT include Social Security Numbers in your email.

- *User Resources*: select this link for Frequently Answered Questions (FAQs), User Guides, and tips for users with disabilities.
- *SSA Helpdesk*: 800-772-1213 for issues with the My Social Security website. Operations hours are 7:00am to 12:00am eastern time, Monday through Friday.

Access Claimant's Electronic Folder

On the ERE home page, select the **Access Claimant's Electronic Folder** link under **Electronic Folder Services**.

Electronic Folder Agreement

You must read the terms and conditions about ERE access, enter the claimant's Social Security Number (SSN), and then select the **I Agree** button. You will find the claimant's SSN on the notice we mailed to you.

ERE: Electronic Folder Agreement

Acknowledgement for Online Services

By entering this United States Government website, I agree to the following terms and conditions:

- I agree to use this service only to access the records that are necessary to complete my work on the cases that the Social Security Administration (SSA) has assigned me. I will not disclose any of the information or data that I access through this service unless Federal law or regulations authorize me to do so.

- I agree that I will not enter this service unless I have installed anti-virus software, anti-spyware software, and personal firewalls on the computer or device I am using. I will regularly update the operating system, application software, and security software of the computer or device that I am using to maintain the latest data protection.

- I will not store my Username and Password for this service on my computer or device and will take precautions to avoid dissemination of my Username and Password for this service.

- I understand that there could be criminal and civil penalties if I: misuse this system, improperly access information or data, improperly disclose information or data I access, fail to take proper measures to protect information or data from improper disclosure, or furnish false or misleading information to SSA.

- I understand that use of the certified electronic folder may be monitored, recorded, and audited.

By providing the claimant's Social Security Number (SSN) to access his or her electronic folder and selecting the "I Agree" button, I certify that I have read, understand, and agree to the above statements.

Claimant's Social Security Number (SSN):

[ ]

[I Agree] [Cancel]

Claimant eFolder

The **Electronic Folder** contains a header that lists case-specific information: the claimant's name and SSN, claim type and level, Hearing Office site code with jurisdiction of the case, and several pertinent dates.

The eFolder initially displays with all exhibits hidden. Medical and Vocational Experts have access to three sections of the eFolder:

- **Section A. Payment Documents/ Decisions**: Contains disability determination notices.
- **Section E. Disability Related Development**: Contains the Disability Reports, Vocational Reports, Medical Release forms, and Activities of Daily Living (ADL) forms.
- **Section F. Medical Records**: Contains all exhibited medical evidence from all levels of the disability claim (initial, reconsideration, and hearing).

Exhibit List Options

View an Individual Document - You can open and view individual documents immediately by clicking on the description link.

Show All / Hide All - Select the **Show All** button to open all sections and display all documents. Select the **Hide All** button to close all sections.

Show/ Hide by Section – To the left of each section name is a blue square. Select the plus sign to open that section and display the documents. Select the minus sign to close that section.

Select All / Deselect All - Select these buttons to mark or unmark all documents in all sections. A selected document will be marked with a checkmark in the first column.

Select / Deselect Individual Documents – You can select / deselect individual documents by checking / unchecking the box in the first column.

Downloading Documents

You can select documents from the eFolder to download and save to your personal or work computer.

Select documents to download by checking the box beside each individual document or by clicking the *Select All* button. You can choose to download the documents to either a ZIP or PDF. There is no difference in download times between PDF and ZIP files.
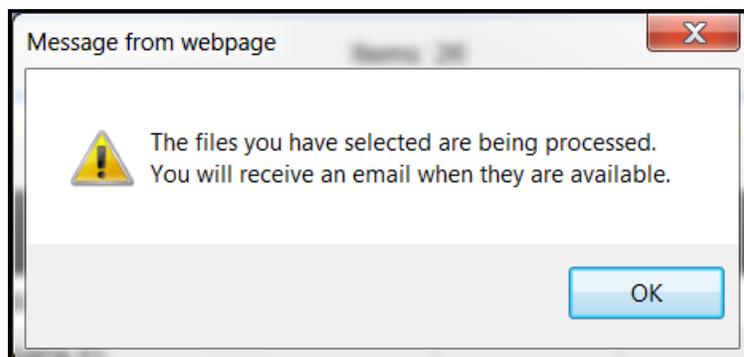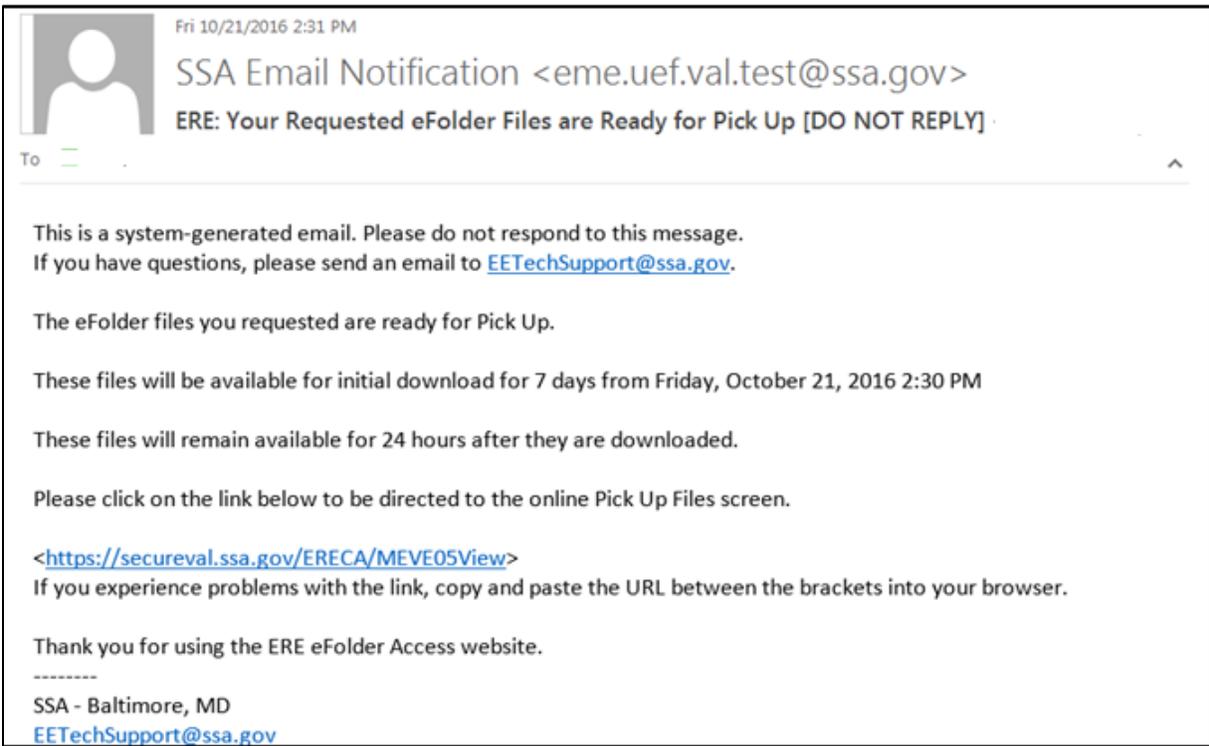
You will receive the following message after you request a download:

Pickup Files

You will receive an email message telling you that the files you requested are ready for pick up (DO NOT REPLY), keep in mind for larger files it can take up to 72 business hours. The link will take you to the ERE for Experts login.

Follow the *Pickup Files User Guide* available under **User Resources.**

Fri 10/21/2016 2:31 PM

SSA Email Notification <eme.uef.val.test@ssa.gov>

ERE: Your Requested eFolder Files are Ready for Pick Up [DO NOT REPLY]

To

This is a system-generated email. Please do not respond to this message.
If you have questions, please send an email to EETechSupport@ssa.gov.

The eFolder files you requested are ready for Pick Up.

These files will be available for initial download for 7 days from Friday, October 21, 2016 2:30 PM

These files will remain available for 24 hours after they are downloaded.

Please click on the link below to be directed to the online Pick Up Files screen.

<https://secureval.ssa.gov/ERECA/MEVE05View>
If you experience problems with the link, copy and paste the URL between the brackets into your browser.

Thank you for using the ERE eFolder Access website.

SSA - Baltimore, MD
EETechSupport@ssa.gov

Uploading Documents

Once inside the electronic folder, upload new documents by selecting the Upload New File button.

The **Upload New File** button transfers you to the **Upload New File** screen**.**

Step 1: Attach files by selecting the **Browse** button. You will be prompted to choose a file from your computer.

Step 2: Browse to location of the document you wish to upload and select **Open.**
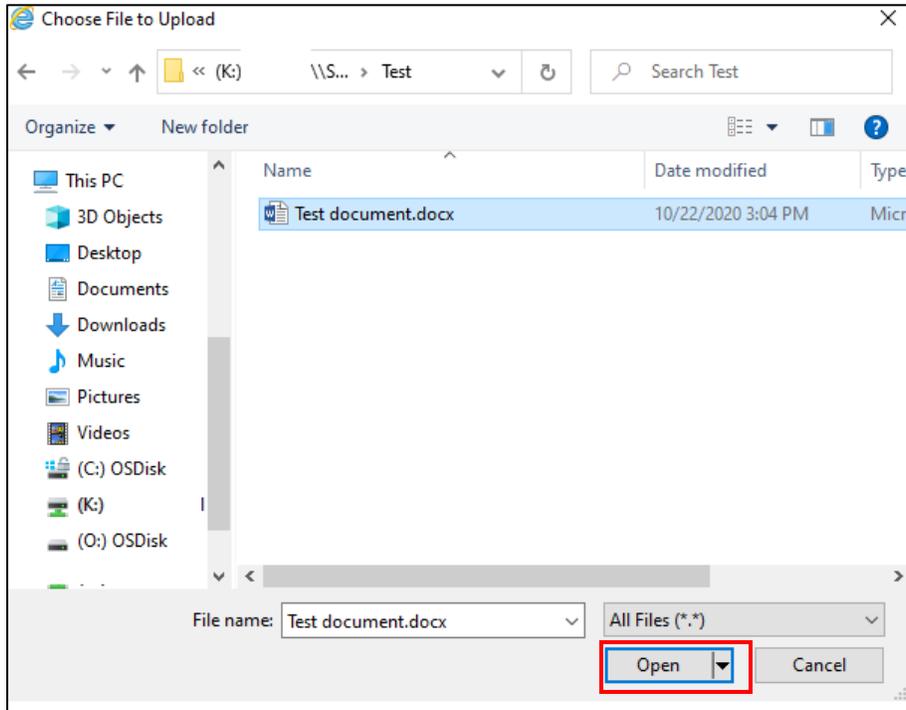
You will be directed to the attach files to Response screen.

Step 3: Select a document type from the drop-down list.

- Response to Medical or Vocational Interrogatory
- Resume of Medical or Vocational Expert

- Additional fields (not mandatory for submission)

  - Document Date
  - Notes

- Other options:

  - Select **Remove File** if you wish to cancel.
  - Select **Add File** if you have an additional document to upload to the same claimant's eFolder.
  - Select **Upload** to submit your documents to the claimant's eFolder.

Step 4: The **Confirmation** screen acknowledges that SSA has received your submission. The submission must still go through an SSA systems check before being sent to the electronic folder. We will send you an email if there are any errors or problems that prevent SSA from processing your submission.

NOTE: We recommend that you print this confirmation page for your records. You will not be able to retrieve this information from OHO after you exit this page.

Additional options:

- To upload additional documents select **Submit Additional Files** button.
- To return to ERE home page, select **ERE Home**.
- To return to the current file, select Return to eFolder.

Track Status of Submissions

This feature allows you to view the status of the documents you uploaded to a claimant's eFolder. You can select from multiple search criteria. However, ERE can only supply information about submissions within the past 180 days.

New Case Search

To access another claimant's eFolder, select the **New Case Search** button on the ERE: Electronic Folder screen. You will return to the **Electronic Folder Agreement** screen where you can enter another claimant SSN.

Pick Up Files

Return to **ERE Home** and select the *Pick Up Files* link to check the status of your download requests. Follow the **Pick** *Up Files User Guide* in the *User Resources*.

Open, will open PDF that contains all the documents requested

Save popup at bottom of screen with options to open, open folder or view documents

The 9216_157E8818D9FD952AN.pdf download has completed.   Open ▾ | Open folder | View downloads | ×

Open – opens up PDF that contains all documents requested

Open folder – takes you to download temp file and highlights the PDF folder. Double click on the PDF file and all documents requested open up in a PDF format

View Downloads opens up all downloaded files
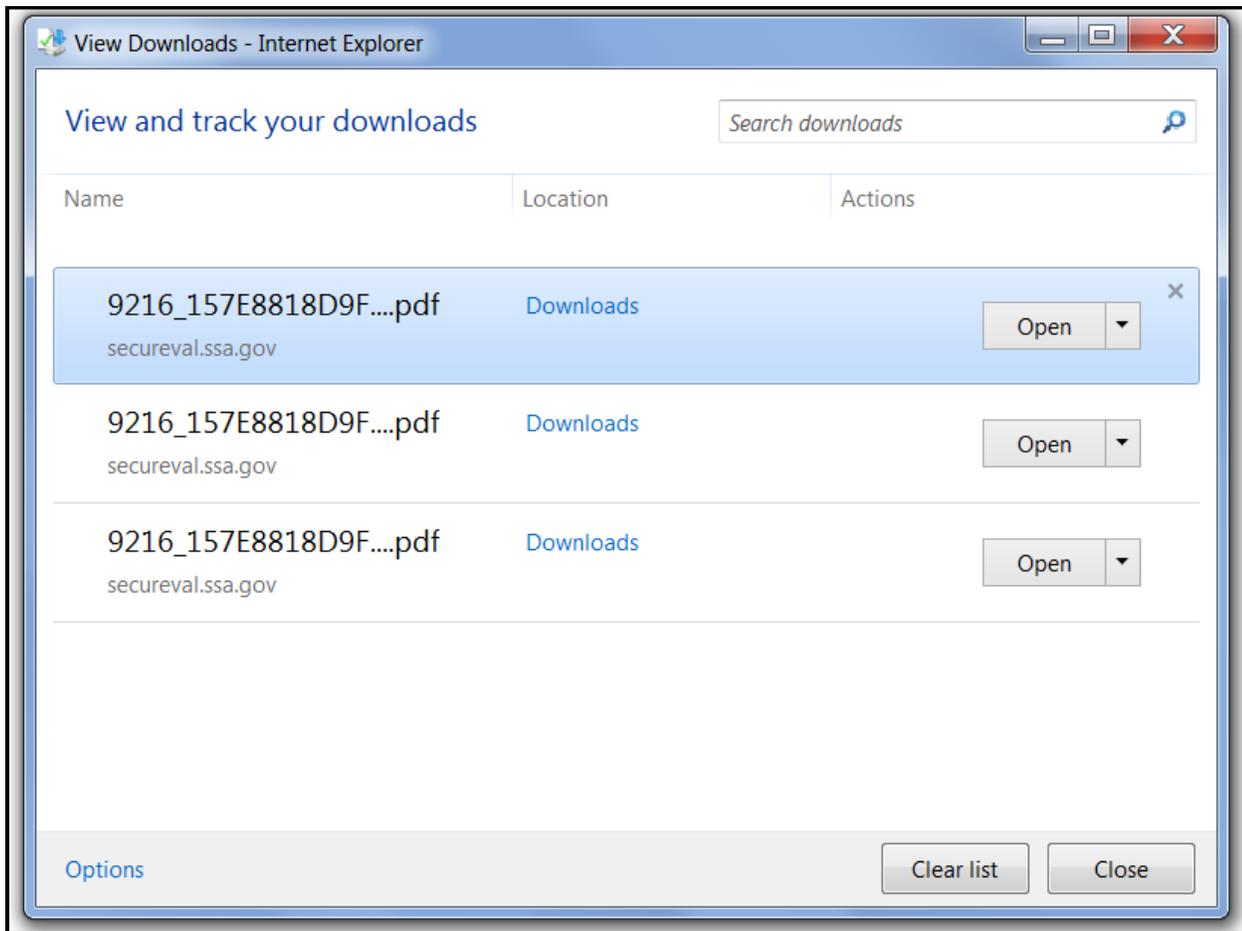
Signing Out

To end the ERE session, select the **Sign Out** button. This button is located on the upper left on most screens.

Troubleshooting

Unable to Access an eFolder

If you receive an **Access Denied** or **Unable to Process Your Request** message after entering the claimant SSN, the reason may be:

- You entered an incorrect SSN.
- You are not assigned to this specific case.
- The case is NOT electronic or pending at the Hearing level.
- The Interrogatory has been received or the Hearing has been held.
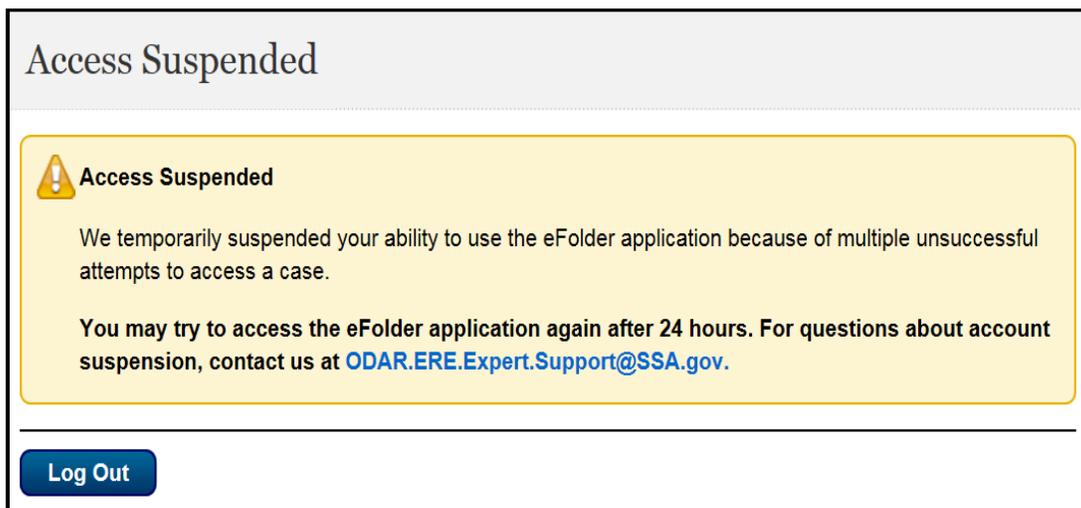
Verify that you entered the correct SSN and try again. If you receive another error message, we recommend you save a screen shot and email it, along with your contact information, to OHO.ERE.Expert.Support@ssa.gov.   Please DO NOT include SSNs in your email.

Access Suspended

We automatically suspend your ERE eFolder access account if you have 10 unsuccessful attempts when entering a claimant SSN. Once suspended, you will have to wait 24 hours for your ERE account to be automatically unlocked.

⚠ **Access Suspended**

We temporarily suspended your ability to use the eFolder application because of multiple unsuccessful attempts to access a case.

You may try to access the eFolder application again after 24 hours. For questions about account suspension, contact us at ODAR.ERE.Expert.Support@SSA.gov.

Log Out

If you enter an incorrect SSN more than three (3) times, we recommend that you stop and send an email to OHO.ERE.Expert.Support@ssa.gov . Do not include SSN's in your email correspondence.

Timing Out

ERE will automatically log you out:

- After 30 minutes of inactivity - This is a safeguard to protect your ERE eFolder access account and the claimant's information. If this happens, you will have to sign into ERE again using the specialized link.

- After 2 hours of activity - This is another safeguard. If this happens, you will have to sign into ERE again using the specialized link.

Common Problems

- Bookmarking - Never bookmark screens within ERE. The **only** bookmark you should use for ERE is for the sign-in screen at https://secure.ssa.gov/ERECA/MEVE01View.

- Back Button - DO NOT use the **Back** button or "X" out of your Internet browser. You should always use the *Sign Out* button at the top left of the ERE screen.

- Reset Password with a *my* Social Security account – exit the provided URL for ERE for Experts, then sign into https://www.ssa.gov/myaccount/ , select "Sign in to my account", and use the "Forgot Password" to create a new password. **NOTE:** The lock out is only for 24 hours.