Electronic Records Express (ERE)

User Guide for

Uploading Files Without a Barcode

November 2023

Overview

This guide provides Social Security Administration (SSA) appointed representatives (ARs) with instructions for uploading documents directly to their claimant's electronic folders (eFolders) without the need for the Request ID (RQID) found on the printed barcodes. _This functionality is available for cases pending at a Hearing Office, Appeals Council branch, or Disability Determination Services (DDS)._

Requirements for Uploading Documents Without a Barcode

- You must be logged into Appointed Representative Services
- You must access the eFolder of a claimant and use the "Upload New File" button to upload documents without a barcode

For instructions on how to access eFolder documents, please refer to the user manual "Access Claimant's Electronic Folder/Pickup Files". User manuals are available at https://www.ssa.gov/ar/.

Step 1: Select "Upload New File"

Once inside an electronic folder, upload new documents by selecting the **Upload New File** button.
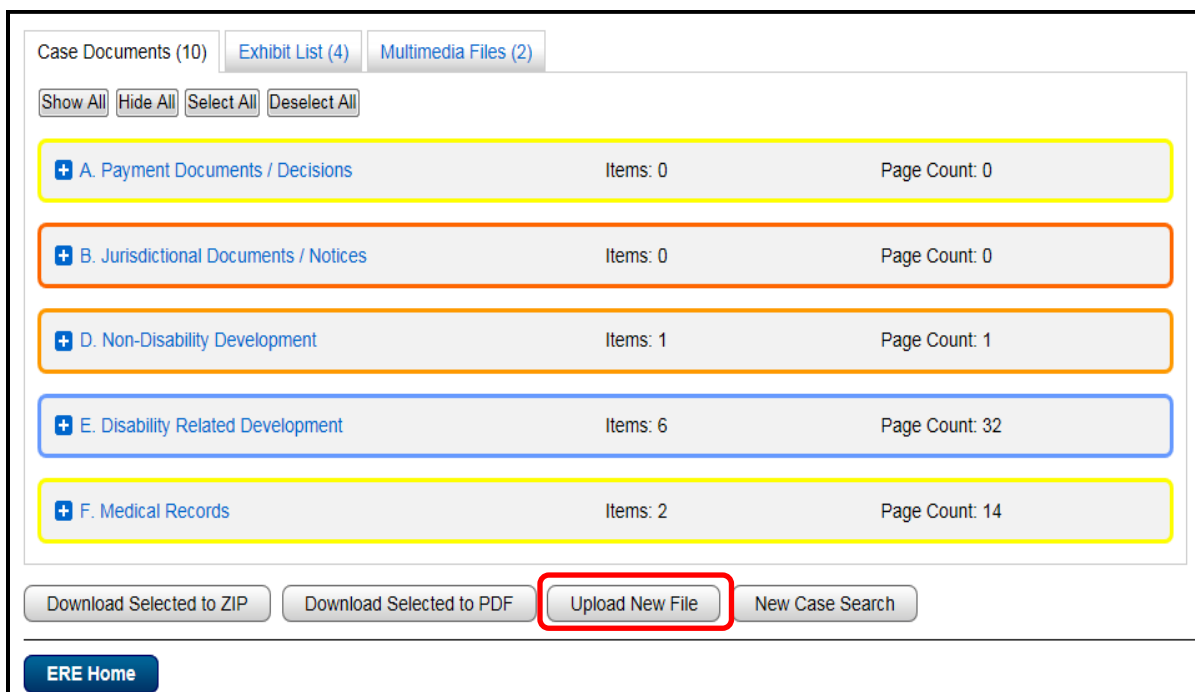
The RQID found on the barcode is no longer requested. The destination information is automatically generated.

Step 2: Attach Files

You may submit up to 25 files. All files must total less than 200MB.
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.

- Select the **Browse** button; this will launch the **Choose File to Upload** window.
- Navigate to the file(s) you wish to upload to the electronic folder.
- Select the file(s) and select **Open**. You can select multiple files by holding down the Shift key.
- The **Choose File to Upload** window closes and the file names display on the page. You have successfully attached the file(s).

ERE: Send Individual Response - DEMO
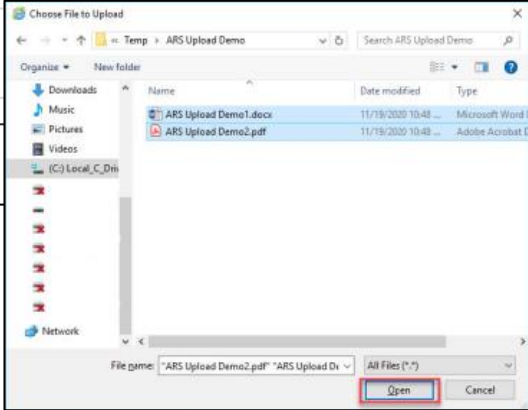
1 Add Files **2** Confirmation

Site Code: **Y32**   RF: **D**
State: **Louisiana**   DR: **S**
Destination: **LA - New Orleans**
Claimant SSN:

Attach Files to Response

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

File 1:   ARS Upload Demo1.docx   12 KB

Document Type: [-- ▼]

Notes: [   ]

[Delete]

File 2:   ARS Upload Demo2.pdf   138 KB

Document Type: [-- ▼]

Notes: [   ]

[Delete]

Add Files: [   ] [Browse...]

[**Submit**] [Cancel]

Step 3: Select Document Type

Select the appropriate document type from the dropdown list. The following document types can be submitted for cases pending at a _Hearing Office or Appeals Council branch_:

Document Name	Doc Type/ Form Number
Medical Evidence of Record	MER
Recent Medical Treatment	Form 4631
Medications	Form 4632
Work Background	Form 4633
Critical/Dire Need Request	CRTRQST
On the Record Request	OTRRQST
Representative Brief	REPBRIEF
Amended Alleged Onset Date	AMNDAOD
Appointment of Representative	Form 1696
Disability Report-Appeals	Form 3441
Activities of Daily Living	ADL
Request for Change in Time/Place of Disability Hearing	Form 769
Response to Show Cause Notice	RSPSCN
Representative Fee Agreement	FEEAGRMT
Misc Disability Development and Documentation	MDF E
Claimant's Change of Address Notification	CHNGADD
Withdrawal/Revocation of Representation	WDREP
Education Records – Medical	EDREC
Education Records – Non Medical	EDRECNMD
Waive Advance Notice of Hearing	3020 Form 510
Request Medical Expert Attendance at Hearing	L9
Subpoena Requests	511
Withdrawal of Hearing Request	WDHEAR Form HA-85
Correspondence Regarding Efforts to Obtain Evidence	EALTR
Objections to the Issues in the Notice of Hearing	HRNTCOBJ
Third Party (Non-medical) Statements	3NMST
Representative Correspondence	REPLTR
Objection to Video Hearing	VTCOUT

Based on your document type selection, you will be asked to enter some additional information regarding the document.

Document Type	Additional Fields
Medical Evidence of Record Education Records – Medical	• Treatment Source • From Date • To Date • Notes (Optional)
All other document types	• Document Date • Notes (Optional)

Documents that are not listed in the dropdown menu should **NOT** be submitted electronically. This includes:

Request for Review – Submit via mail, fax, or in person at your local field office. Using any other method, including submitting electronically, can cause significant delays in processing because Appeals Council (AC) staff does not receive an alert that a request was filed. Please visit https://mwww.ba.ssa.gov/appeals/best_practices.html for more information.

The following document types can be submitted for cases pending at a *Disability Determination Services (DDS).* Appointed Representatives should submit all evidence using doc type REPEVID/5032 for cases pending at the DDS.

Document Name	Doc Type/ Form Number
Attorney/Representative-Supplied Evidence	REPEVID/5032
Medical Evidence of Record	MER/0001
Education Records – Medical	EDREC/3157
Education Records – Non Medical	EDRECNMD/3158
Representative Correspondence	REPLTR
Function Report - Adult	3373/0075

Important Note

Prior to submitting evidence, the appointed representative should take the following actions:

1. Review the claimant's electronic folder and verify that the evidence to be submitted is not a duplicate. Duplicates should not be submitted to the electronic folder.

2. If a file contains multiple pieces of evidence, separate the evidence into individual documents (for cases pending at a Hearing Office or Appeals Council branch). Select the appropriate document type for each file.

Step 4: Attach Additional Files
Select **Browse** next to **Add Files** to attached additional files. Repeat Steps 2 and 3 for all files.

- You may submit up to 25 files. All files must total less than 200MB.
- 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.

Step 5: Submit Files
Select **Submit** to upload files to the claimant's eFolder.

Step 6: Confirmation

You will receive a **Confirmation** screen with a tracking number. You may wish to save this page for future reference. You can use the tracking number to track the status of your submission. You can also track the status using the claimant's SSN or by date/status/site.

For step-by-step instructions on how to track files submissions, please refer to the user manual "Track Status of Submissions". User manuals are available at https://www.ssa.gov/ar/.