

**Automated User Account Setup**  
**Electronic Records Express**  
**Sponsor Instruction Guide**



**Office of Disability Programs**  
**Office of Process Policy**

May 2006

# Automated User Account Setup – Sponsor Instruction Guide

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## Access the Account Maintenance Menu

You should login to the Electronic Records Express website using your personal User ID and password. The website address is: <http://eme.ssa.gov>. Upon a successful login, you will see the Electronic Records Express home page. In the left navigation panel, select the “Account Maintenance” hyperlink.

The screenshot shows the Electronic Records Express website interface. The browser title is "Electronic Records Express - Home Page - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha CI". The page header includes "Social Security Online" and "Electronic Records Express". The main navigation bar contains "Home", "Questions?", "How to Contact Us", and "Search".

The left navigation panel includes the following links:

- Account Maintenance** (highlighted with a green box)
- User Instructions
- Change Password
- Logout
- What's New?

The main content area is divided into three columns:

- Electronic Records Services:**
  - [Send Response for Individual Case](#)
  - [Send Grouped Files](#)
  - [Send Consultative Exam Report](#)
  - [Send CE Report\(s\) with Scanned Signature](#)
  - [Send CE No Show Response](#)
  - [Send Report to Doctor for Review](#)
  - [Pickup Files](#)
- Document Exchange Services:**
  - [Send Request to Doctor](#) [pilot for CT DDS]
  - [Teacher Questionnaire](#)
- Communications Services:**
  - Secure Messaging [\[Home\]](#) [\[Inbox\]](#)
  - [Communication Utility](#)

The right column contains:

- Bulletin Board:**
  - Welcome to the Electronic Records Express Website.
  - ONGOING WEBSITE MAINTENANCE**
  - NOTE:** The website will be unavailable every night between 4am and 5am EST for routine maintenance.
  - Click [here](#) to send us an email to get more information or call us at toll-free at **1-866-691-3061**.
- User Information:**
  - Please verify and update your profile information**
  - Name:** Demo Admin
  - Email:** [demoval1@yahoo.com](mailto:demoval1@yahoo.com) [\(change\)](#)
  - Phone:** 4109669087

The footer includes the "FIRSTGOV" logo, a list of policies: [Privacy Policy](#) | [Accessibility Policy](#) | [Linking Policy](#) | [Site Map](#) | [Help](#), and the "Benefits.gov" logo.

Next, you will see the Account Maintenance Menu screen which is shown below.

The screenshot shows a web browser window with the title "Electronic Records Express - Account Maintenance Menu - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha CI". The browser's address bar shows "www.socialsecurity.gov". The page has a red header with "Electronic Records Express" and a dark blue navigation bar with "Home", "Questions?", "How to Contact Us", and "Search". On the left, a sidebar contains "Electronic Records Express Home", "Change Password", and "Logout". The main content area features the Social Security Administration logo and the title "Electronic Records Express Account Maintenance Menu". It is organized into three sections: "Create Users" with links for "Create an Individual End-User Account" and "Create an Organizational Shared End-User Account"; "Search Accounts" with links for "Search on Specified Criteria" and "List All Accounts Alphabetically by User Id"; and "My Account Maintenance" with links for "Modify My Account Information" and "Change My Password". The footer includes the "FIRSTGOV" logo, a list of policies (Privacy Policy, Accessibility Policy, Linking Policy, Site Map, Help), and the "Benefits.gov" logo.

From the Account Maintenance Menu, you can select options which will allow you to create users, search accounts, and perform maintenance on your own account.

## Create an Individual End-User Account

From the Account Maintenance Menu, select the “Create an Individual End User Account” hyperlink.

Note that mandatory fields on this web page are marked with a red asterisk.

You may select the “Demo Account” checkbox at the top of the page. Doing so will set up a demo account. This is probably not an option you want to select for your providers as files submitted under a demo account login do not get received by DMA and routed into the electronic folder. Therefore, please be certain that you are not selecting this checkbox when you are setting up medical evidence providers to use the Electronic Records Express Services website to upload files to the DDS.

Enter a User ID in the text box shown below. SSA Policy requires that all User IDs be exactly 8 characters in length and they must contain at least 1 numeric and 1 alphabet character. Special characters (e.g., &, %, #, @, etc.) are not permitted. Once you have typed in the User ID, click the **Check User ID** button.

https://199.173.231.150 - Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer prov

File Edit View Favorites Tools Help

Social Security Online  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

**Electronic Records Express**  
**Create an Individual End-User Account**

An asterisk (\*) indicates a mandatory field.

Demo Account

User Id \*

First Name: \*

Middle Name:

Last Name: \*

Organization Type: \* [Select Type]

Organization Name:

Department:

Position:

Primary Phone: \*  Ext:  [Select Type]

Alternate Phone:  Ext:  [Select Type]

Alternate Phone:  Ext:  [Select Type]

Alternate Phone:  Ext:  [Select Type]

The screenshot below shows that the User ID “newuser2” does not exist. So, this may be used as a User ID for the account signup. If the User ID you entered had already existed, you would have to select a different User ID to signup the provider.

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Social Security Online  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

## Electronic Records Express

### Create an Individual End-User Account

- User ID newuser2 does not exist.

An asterisk (\*) indicates a mandatory field.

Demo Account

User Id \*

First Name: \*

Middle Name:

Last Name: \*

Organization Type: \*

Organization Name:

Department:

Position:

Primary Phone: \*  Ext:

Alternate Phone:  Ext:

Alternate Phone:  Ext:

Next you'll continue to enter information into the web page:

- First Name
- Last Name
- Select an organization type from the drop down menu
- Organization Name
- Department
- Position title of the new user

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

First Name: \*

Middle Name:

Last Name: \*

Organization Type: \* [Select Type]

Organization Name: [Select Type]

Department:

Position:

Primary Phone: \*

Alternate Phone:

Alternate Phone:

Alternate Phone:

Primary Email: \*

Alternate Email:

Address Line 1: \*

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States

City: \*

State/Territory: \* ALABAMA

Zip Code: \*

Continue entering information into the web page:

- Primary telephone number
- Select type of phone number from the drop down menu (work, fax, cell, pager, other)
- You may enter up to 3 additional alternate telephone numbers
- Enter primary email address
- You may enter an alternate email address
- Enter the address for the user

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Primary Phone: \*  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Alternate Phone:  Ext:  [ Select Type ] v

Primary Email: \*

Alternate Email:

Address Line 1: \*

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States v

City: \*

State/Territory: \* ALABAMA v

Zip Code: \*

---

Primary Site: \* [ Select Site ] v

Primary Site Contact: \* [ Select Contact ] v

Select the functions that apply to the user: \*

- Consultative Exam (CE)
- Consultative Exam with Scanned Signature (CESS)
- Communications Utility (CU)
- Grouped Files (Grouped MER)
- Send Individual Case (MER)

You will see a line separator in the web page. This signals you to enter sponsor information.

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Address Line 2:

Address Line 3:

Address Line 4:

Country: \* United States v

City: \*

State/Territory: \* ALABAMA v

Zip Code: \*

---

Primary Site: \* [ Select Site ] v

Primary Site Contact: \* [ Select Contact ] v

Select the functions that apply to the user: \*

- Consultative Exam (CE)
- Consultative Exam with Scanned Signature (CESS)
- Communications Utility (CU)
- Grouped Files (Grouped MER)
- Send Individual Case (MER)
- Send Report to Doctor for Review (CEReview)
- Send Request to Doctor (REQ)

Add Comments:

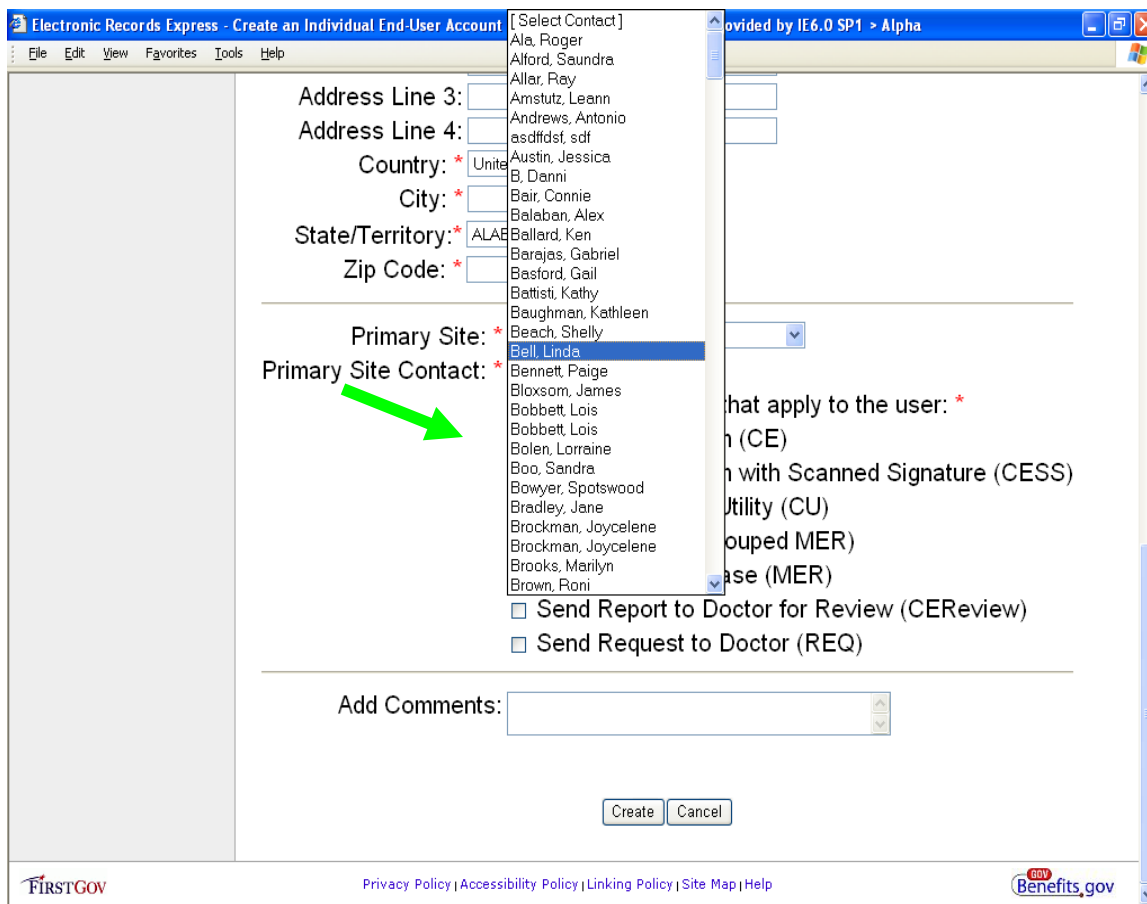
Create Cancel

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov



From the drop down list, select the primary DDS site the user will send evidence.

Select the sponsor from the drop down list.



The next step is extremely important. You will be selecting the website utilities that permit the user access. Please be sure to select all utilities the user needs.

Note: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.

Electronic Records Express - Create an Individual End-User Account - Microsoft Internet Explorer provided by IE6.0 SP1 - Alpha

File Edit View Favorites Tools Help

Address Line 3:

Address Line 4:

Country: \* United States

City: \*

State/Territory: \* ALABAMA

Zip Code: \*

Primary Site: \*

Primary Site Contact: \*

Select the functions that apply to the user: \*

- Consultative Exam (CE)
- Consultative Exam with Scanned Signature (CESS)
- Communications Utility (CU)
- Grouped Files (Grouped MER)
- Send Individual Case (MER)
- Send Report to Doctor for Review (CEReview)
- Send Request to Doctor (REQ)

Add Comments:

Create Cancel

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You may type in any comments in the “Comments” text box.

Click the **Create** button to continue to create the account. Click the **Cancel** button to cancel this account setup.

You will now see a summary page for the account.

Electronic Records Express - Create an Individual End-User Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express**


www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

 **Electronic Records Express**  
**Create an Individual End-User Account**

User Id: **newuser2**

First Name: **New**  
 Middle Name:  
 Last Name: **User**

Organization **Hospital/Clinic Personnel**  
 Type: **(Excluding Contract Copy Services)**

Organization Name:  
 Department:  
 Position:

Primary Phone: **410-555-5555** Ext: Type: **WORK**  
 Alternate Phone: Ext: Type:  
 Alternate Phone: Ext: Type:

Electronic Records Express - Create an Individual End-User Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1

File Edit View Favorites Tools Help


Address Line 2:  
 Address Line 3:  
 Address Line 4:  
 City: **Anytown**  
 State/Territory: **AL**  
 Zip Code: **21235**  
 Country: **United States**

---

Primary Site: **AL - BIRMINGHAM DDS [S01]**  
 Primary Site **Bell, Linda**  
 Contact:  
 Function(s) **Consultative Exam (CE)**  
 selected: **Communications Utility (CU)**  
**Grouped Files (Grouped MER)**  
**Send Individual Case (MER)**  
**Send Report to Doctor for Review (CEReview)**  
**Send Request to Doctor (REQ)**

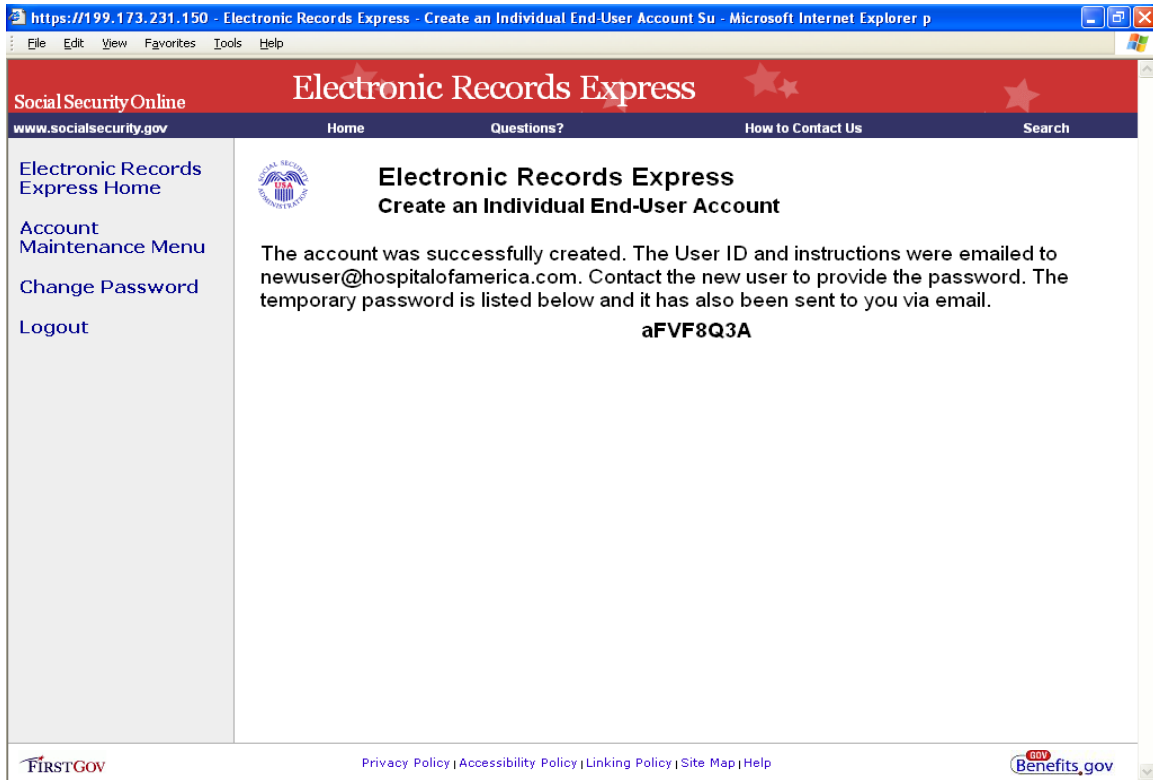
---

Added Comments:

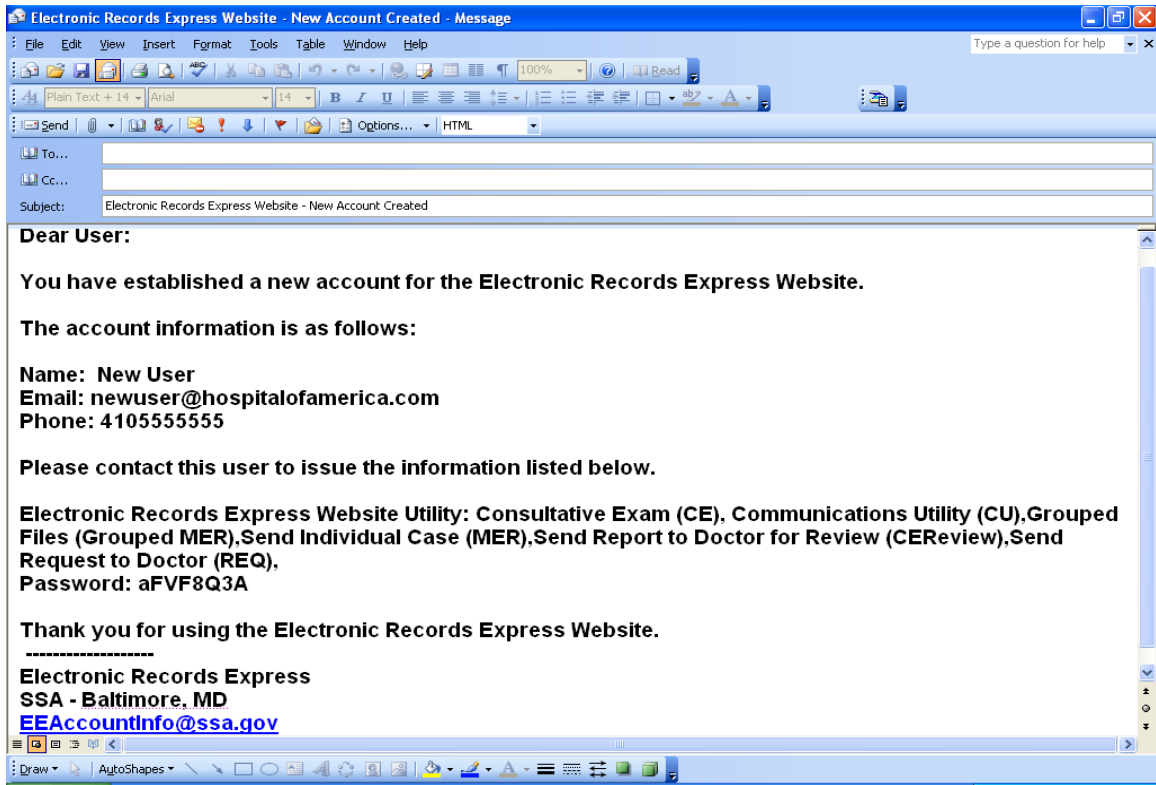
FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help 

Click the **Edit** button to return to the prior screen to change any information you have entered. Click the **Submit** button to create the account. Click the **Cancel** button to cancel the account setup.

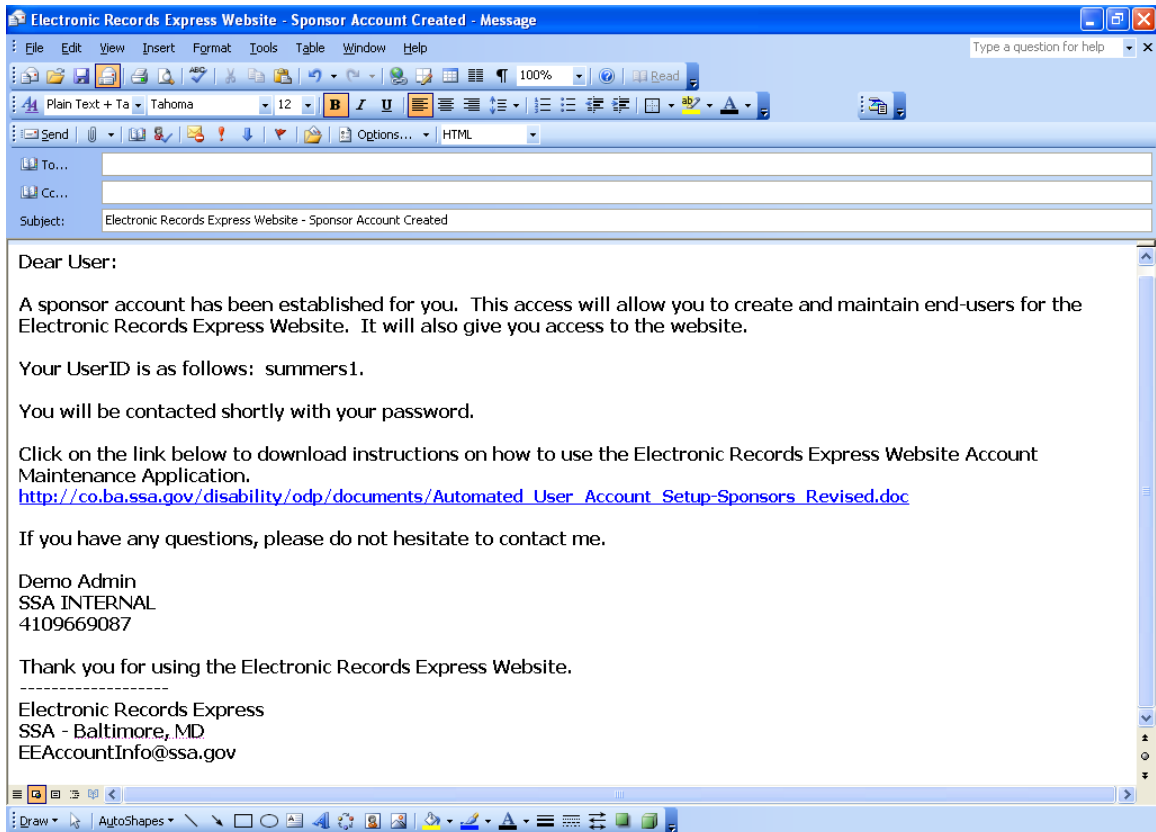
Clicking **Submit** will activate the new account. You will receive a confirmation screen similar to the one shown below:



You, the sponsor, will receive a confirmation email similar to the one shown below:



Your provider will receive an email message similar to the one shown below:



## **What happens now?**

The User ID and instructions have been emailed to the primary email address you provided for the new user.

The sponsor must contact the new user to provide the password. The temporary password is listed on the website confirmation screen and it has also been sent to you via your SSA email address.

Please be sure to explain to your new user that the password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change their password.

Your new user now has access to the Electronic Records Express website.

## Create an Organizational Shared End-User Account

From the Account Maintenance Menu, select the “Create an Organizational Shared End User Account” hyperlink.

Note that mandatory fields on this webpage are marked with a red asterisk.

You may select the “Demo Account” checkbox at the top of the page. Doing so will set up a demo account. This is probably not an option you want to select for your providers as files submitted under a demo account login do not get received by DMA and routed into the electronic folder. Therefore, please be certain that you are not selecting this checkbox when you are setting up medical evidence providers to use the Electronic Records Express Services website to upload files to the DDS.

Enter a User ID in the text box shown below. SSA Policy requires that all User IDs be exactly 8 characters in length and they must contain at least 1 numeric and 1 alphabet character. Special characters (e.g., &, %, #, @, etc.) are not permitted. Once you have typed in the User ID, click the **Check User ID** button.

The screenshot shows a web browser window displaying the 'Electronic Records Express' website. The page title is 'Electronic Records Express - Create an Organizational Shared End-User Account'. The browser's address bar shows 'www.socialsecurity.gov'. The page features a navigation menu with links for 'Home', 'Questions?', 'How to Contact Us', and 'Search'. On the left side, there is a sidebar with links for 'Electronic Records Express Home', 'Account Maintenance Menu', 'Change Password', and 'Logout'. The main content area is titled 'Electronic Records Express Create an Organizational Shared End-User Account'. It includes a checkbox for 'Demo Account' and a 'User Id' field with a 'Check User ID' button. Below these are several mandatory fields (marked with a red asterisk) for 'Organization Type', 'Organization Name', 'Department', 'Primary Phone', 'Alternate Phone', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'Address Line 4', and 'Country'. A green box highlights the 'User Id' field and the 'Check User ID' button.

The screenshot below shows that the User ID “neworg39” does not exist. So, this may be used as a User ID for the account signup. If the User ID you entered had already existed, you would have to select a different User ID to signup the organizational shared end user account.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Social Security Online  
www.socialsecurity.gov

Home Questions? How to Contact Us Search

Electronic Records Express  
Create an Organizational Shared End-User Account

• User ID neworg39 does not exist.

An asterisk (\*) indicates a mandatory field.

Demo Account

User Id \* neworg39

Organization Type: \* [Select Type]

Organization Name: \*

Department:

Primary Phone: \* Ext: [Select Type]

Alternate Phone: Ext: [Select Type]

Alternate Phone: Ext: [Select Type]

Alternate Phone: Ext: [Select Type]

Address Line 1: \*

Address Line 2:

Address Line 3:

Next you'll continue to enter information into the web page:

- Select an organization type from the drop down menu
- Organization Name
- Department
- Primary telephone number
- Select type of phone number from the dropdown menu(work, fax, cell, pager, other)
- You may enter up to 3 additional alternate phone numbers for the organization
- Enter the organization's address

You will see a line separator and you should begin entering the sponsor's information.

From the drop down list, select the primary DDS site the user will send evidence.

Select the sponsor from the drop down list.



https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Primary Site: \* [Select Site] v  
Primary Site Contact: \* [Select Contact] v

Select the functions that apply to the user: \*

- Consultative Exam (CE)
- Consultative Exam with Scanned Signature (CESS)
- Communications Utility (CU)
- Grouped Files (Grouped MER)
- Send Individual Case (MER)
- Send Report to Doctor for Review (CEReview)
- Send Request to Doctor (REQ)

**Primary Contact Information**

First Name: \*   
Middle Name:   
Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v  
Alternate Phone:  Ext:  [Select Type] v  
Alternate Phone:  Ext:  [Select Type] v  
Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*   
Alternate Email:

The next step is extremely important. You will be selecting the website utilities that the users will have access to. Please be sure to select all utilities the users need.

Note: The secure messaging option needs prior approval from the Electronic Records Express Project Manager.

Note: the Consultative Exam (CE) utility cannot be selected for an Organizational Shared End User account.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

**The CE selection is not available. CE Providers must have an individual end user account and may not share their login with anyone.**

---

Primary Site: \* [Select Site] v

Primary Site Contact: \* [Select Contact] v

Select the functions that apply to the user: \*

Consultative Exam (CE)

Consultative Exam with Scanned Signature (CESS)

Communications Utility (CU)

Grouped Files (Grouped MER)

Send Individual Case (MER)

Send Report to Doctor for Review (CEReview)

Send Request to Doctor (REQ)

---

**Primary Contact Information**

First Name: \*

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

You'll see another line separator in the page. You will now enter information for the organizational shared end user account's primary contact (name, phone, and email).

You'll notice another line separator and then you will enter information for the organizational shared end user account's backup contact.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

**Primary Contact Information**

First Name:

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

---

**Backup Contact Information**

First Name:

Middle Name:

Last Name: \*

Primary Phone: \*  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Alternate Phone:  Ext:  [Select Type] v

Primary Email: \*

Alternate Email:

You may type in any comments in the “Comments” text box.

Click the **Create** button to continue to create the account. Click the **Cancel** button to cancel this account setup.

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Primary Phone: \*  Ext:  [ Select Type ] ▾  
 Alternate Phone:  Ext:  [ Select Type ] ▾  
 Alternate Phone:  Ext:  [ Select Type ] ▾  
 Alternate Phone:  Ext:  [ Select Type ] ▾

Primary Email: \*   
 Alternate Email:

---

**Backup Contact Information**

First Name: \*   
 Middle Name:   
 Last Name: \*

Primary Phone: \*  Ext:  [ Select Type ] ▾  
 Alternate Phone:  Ext:  [ Select Type ] ▾  
 Alternate Phone:  Ext:  [ Select Type ] ▾  
 Alternate Phone:  Ext:  [ Select Type ] ▾

Primary Email: \*   
 Alternate Email:

---

Add Comments

Create Cancel

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You will now see a summary page for the account.


https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express** Home Questions? How to Contact Us Search

www.socialsecurity.gov

Electronic Records Express Home  
 Account Maintenance Menu  
 Change Password  
 Logout

 **Electronic Records Express**  
**Create an Organizational Shared End-User Account**

User Id: neworg39

Organization **Hospital/Clinic Personnel**  
 Type: **(Excluding Contract Copy Services)**

Organization **John Hopkins Medical Center**  
 Name:  
 Department:

|                  |                     |      |       |             |
|------------------|---------------------|------|-------|-------------|
| Primary Phone:   | <b>410-555-1212</b> | Ext: | Type: | <b>WORK</b> |
| Alternate Phone: |                     | Ext: | Type: |             |
| Alternate Phone: |                     | Ext: | Type: |             |
| Alternate Phone: |                     | Ext: | Type: |             |

Address Line **111 South Main Street**  
 1:  
 Address Line  
 2:

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Address Line **111 South Main Street**  
 1:  
 Address Line  
 2:  
 Address Line  
 3:  
 Address Line  
 4:  
 City: **Anytown**  
 State/Territory: **AL**  
 Zip Code: **21221**  
 Country: **United States**

---

Primary Site: **MD - BALTIMORE DDS [V40]**  
 Primary Site **Morgan, Roy**  
 Contact:

Function(s) **Consultative Exam with Scanned**  
 selected: **Signature (CESS)**  
**Communications Utility (CU)**  
**Grouped Files (Grouped MER)**  
**Send Individual Case (MER)**  
**Send Report to Doctor for Review (CEReview)**  
**Send Request to Doctor (REQ)**

---

**Primary Contact Information**  
 First Name: **New**

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

**Primary Contact Information**  
 First Name: **New**  
 Middle Name:  
 Last Name: **User**

Primary **410-555-1212** Ext: Type: **WORK**  
 Phone:  
 Alternate Phone: Ext: Type:  
 Alternate Phone: Ext: Type:  
 Alternate Phone: Ext: Type:

Primary Email: **clarence.davis@ssa.gov**  
 Alternate Email:

---

**Backup Contact Information**  
 First Name: **New Jr**  
 Middle Name:  
 Last Name: **User**

Primary **410-552-1212** Ext: Type: **WORK**  
 Phone:  
 Alternate Phone: Ext: Type:  
 Alternate Phone: Ext: Type:

https://199.173.231.150 - Electronic Records Express - Create an Organizational Shared End-User - Microsoft Internet Explorer p

File Edit View Favorites Tools Help

Primary Email: **clarence.davis@ssa.gov**  
Alternate  
Email:

---

**Backup Contact Information**  
First Name: **New Jr**  
Middle Name:  
Last Name: **User**

Primary **410-552-1212** Ext: Type: **WORK**  
Phone:  
Alternate Ext: Type:  
Phone:  
Alternate Ext: Type:  
Phone:  
Alternate Ext: Type:  
Phone:

Primary Email: **clarence.davis@ssa.gov**  
Alternate  
Email:

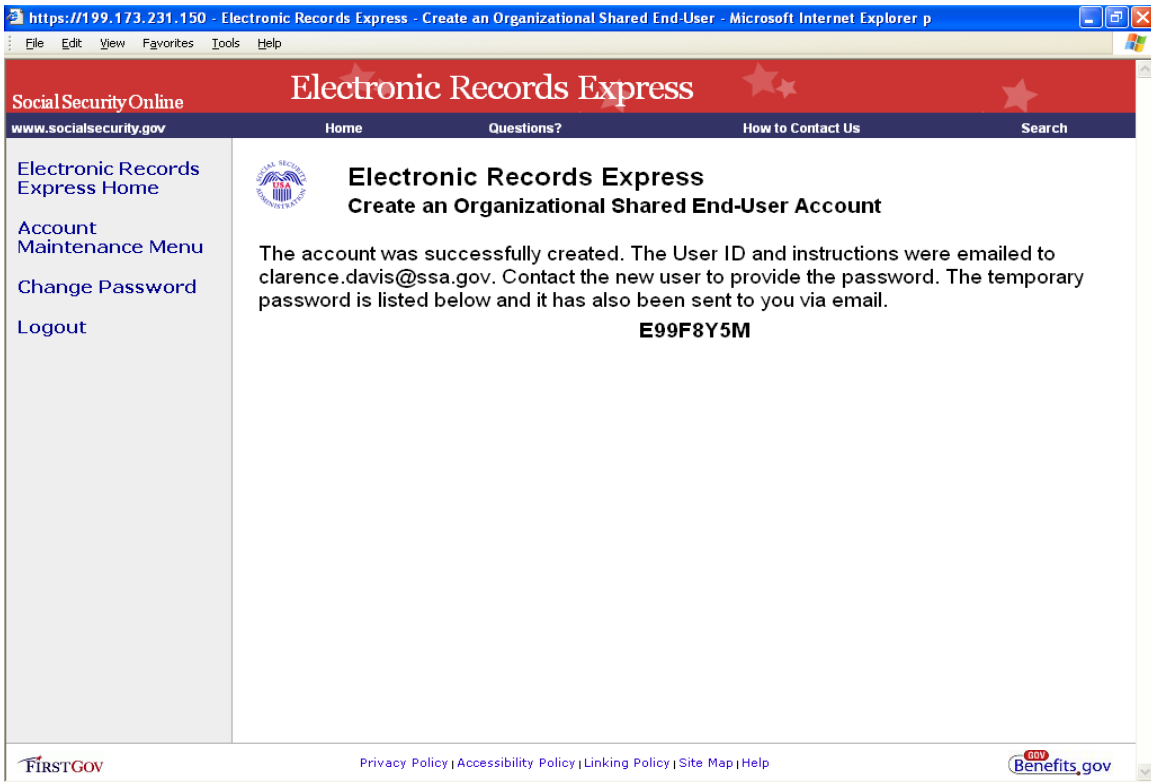
---

Added  
Comments:

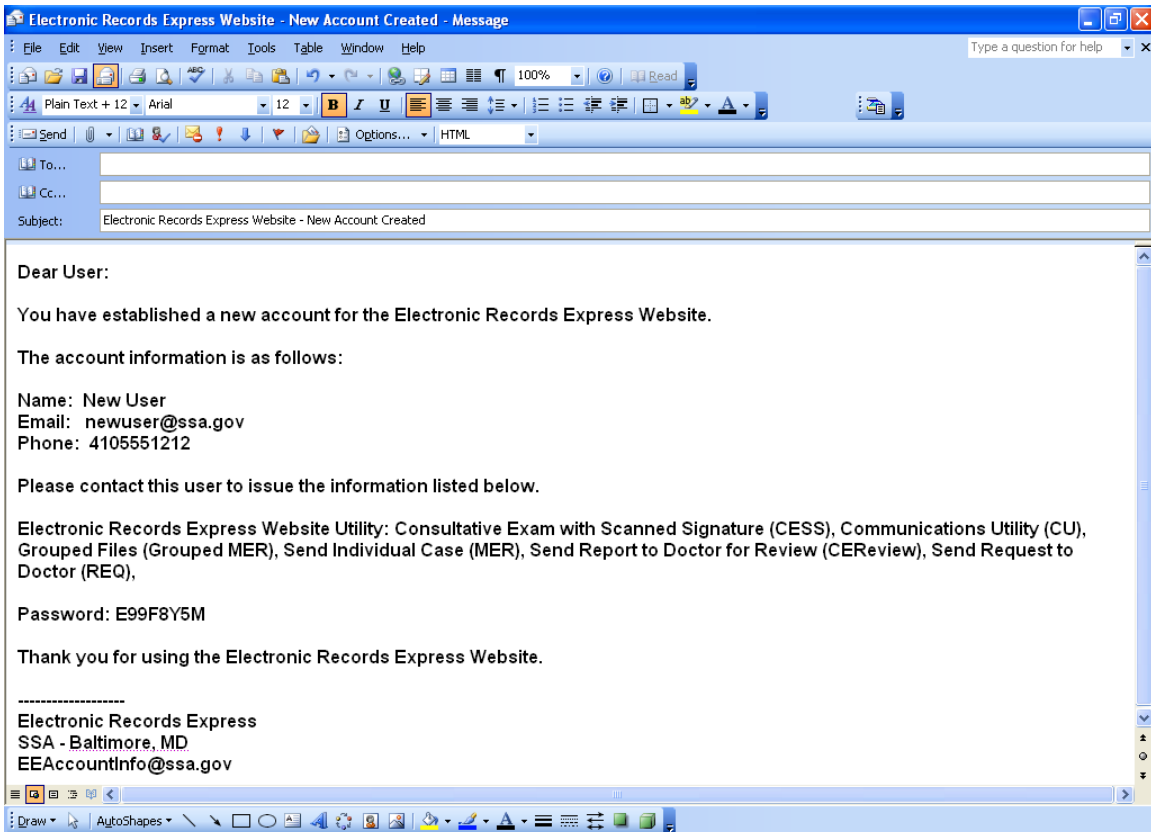
FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov

Click the **Edit** button to return to the prior screen to change any information you have entered. Click the **Submit** button to create the account. Click the **Cancel** button to cancel the account setup.

Clicking **Submit** will activate the new account. You will receive a confirmation screen similar to the one shown below:



You will receive a confirmation email similar to the one shown below:



## **What happens now?**

The User ID and instructions have been emailed to the primary contact's email address that you provided.

The sponsor must contact the new user to provide the password. The temporary password is listed on the website confirmation screen and it has also been sent to you via your SSA email address.

Please be sure to explain to your new user that the password which was automatically generated by the website is valid for one time use only. The first time the new user logs into the website, he/she must change their password.

Your new user now has access to the Electronic Records Express website.



## Search Accounts on Specified Criteria

From the Account Maintenance Menu, select the “Search on Specified Criteria” link.

You may enter many different types of information to find accounts. Search criteria include:

- User ID
- First name
- Last name
- Phone
- Email
- Primary DDS Site

You may select one of the radio buttons to:

- Match **all** information entered
- Match **any** information entered
- Match information **exactly**

The screenshot shows a web browser window titled "Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha CI". The browser address bar shows "www.socialsecurity.gov". The page header includes "Social Security Online" and "Electronic Records Express". The main content area is titled "Electronic Records Express Search on Specified Criteria". It features a search form with the following fields: "User Id:", "First Name:", "Last Name:", "Phone:", "Email:", and "Primary Site:" (a dropdown menu with "[ Select Site ]"). Below the form are three radio buttons: "Match All Information Entered" (selected), "Match Any Information Entered", and "Match Information Exactly". Underneath, there is a section "Select functions to include in the search" with a list of checkboxes: "Consultative Exam (CE)", "Consultative Exam with Scanned Signature (CESS)", "Communications Utility (CU)", "Grouped Files (Grouped MER)", "Send Individual Case (MER)", "Send Report to Doctor for Review (CEReview)", "Send Request to Doctor (REQ)", and "Secure Messaging (SM)". A left sidebar contains links for "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout".

Next, you may check the boxes for the utility access the user(s) have. You may click a radio button to match either **all** or **any** of the selected functions.

You may also select the checkbox to include demo accounts in your search.

Electronic Records Express - Search on Specified Criteria - Microsoft Internet Explorer provided by IE6.0 SP1 > Alpha CI

File Edit View Favorites Tools Help

Logout

Last Name:

Phone:

Email:

Primary Site: [ Select Site ]

Match All Information Entered  
 Match Any Information Entered  
 Match Information Exactly

---

Select functions to include in the search

Consultative Exam (CE)  
 Consultative Exam with Scanned Signature (CESS)  
 Communications Utility (CU)  
 Grouped Files (Grouped MER)  
 Send Individual Case (MER)  
 Send Report to Doctor for Review (CEReview)  
 Send Request to Doctor (REQ)  
 Secure Messaging (SM)

Match All Selected Functions  
 Match Any Selected Functions

---

Include Demo Accounts  
 Exclude Deleted Accounts

---

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov

A search for users with Primary Site affiliation S34 yielded the results shown below. Please note that you may have to use the scroll bar at the bottom of your web browser to see the complete database.

- Electronic Records Express Home
- Account Maintenance Menu
- Change Password
- Logout



## Electronic Records Express Search Results

Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

| User Id  | Account Type | First Name | Last Name | Organization                          | Phone         | Email               | Site |
|----------|--------------|------------|-----------|---------------------------------------|---------------|---------------------|------|
| abrooks1 | EndUser      | J.         | Brooks    |                                       | 505--345-6100 | david.hsieh@ssa.gov | S34  |
| aghaffa1 | EndUser      | Ali        | Ghaffari  |                                       | 505-762-6492  | david.hsieh@ssa.gov | S34  |
| ajakins1 | EndUser      | Alan       | Jankins   |                                       | 505-687-6849  | david.hsieh@ssa.gov | S34  |
| apreeve1 | EndUser      | Anthony    | Reeve     | Industrial Rehabilitation Clinics     | 505-797-7691  | david.hsieh@ssa.gov | S34  |
| cadams12 | EndUser      | Carl       | Adams     |                                       | 505-883-8984  | david.hsieh@ssa.gov | S34  |
| clmorga1 | EndUser      | Clifford   | Morgan    | Psychology & Counseling Services, Inc | 505-8657100   | david.hsieh@ssa.gov | S34  |
| collins1 | EndUser      | Charles    | Collins   |                                       | 505-532-0880  | david.hsieh@ssa.gov | S34  |
| crclift1 | EndUser      | C.R.       | Clifton   |                                       | 352-336-      | david.hsieh@ssa.gov | S34  |

## List All Accounts Alphabetically by User ID

From the Account Maintenance Menu, select the link “List all accounts alphabetically by User ID”. The next page shown below illustrates the result of this search. The database of users is organized with the following information categories:

It may be necessary for you to use the scroll bar at the bottom of your web browser window to see the entire database.

You can select a category to sort the database. To do this, simply click a column heading across the top of the database.

Sorting the database may be useful if you are looking for a user’s last name, user ID, or Site (if you wish to list all users your site has signed up).

Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

| User Id  | Account Type  | First Name | Last Name | Organization                 |
|----------|---------------|------------|-----------|------------------------------|
| 0000000p | RegionalAdmin | AK         | X         | AR - FORT SMITH OHA [X55]    |
| 00dbuise | Organization  | Danielle   | Buise     | LM                           |
| 00dbuise | Organization  | Danni      | Buise     | LM                           |
| 011969KP | Sponsor       | Kathy      | Pierson   | OK - OKLAHOMA CITY DDS [     |
| 01dbuise | Organization  | Danielle   | Buise     | LM                           |
| 01dbuise | Organization  | Danielle   | Buise     | LM                           |
| 01tcva01 | EndUser       | Virgina    | Roeder    | Veterans Adimn Outpatient Cl |
| 01tcva02 | EndUser       | Cindy      | Castillo  | Veterans Adimn Outpatient Cl |
| 01tcva03 | EndUser       | Jeffrey    | Hyde      | Veterans Adimn Outpatient Cl |
| 029130pb | Sponsor       | Paige      | Bennett   | NC - RALEIGH DDS [S36]       |
| 05Mozart | EndUser       | Carolyn    | Conroy    |                              |
| 060214aa | EndUser       | Shane      | MacGowan  | The pogues                   |
| 094299gy | Sponsor       | George     | Yamashiro | HI - HONOLULU DDS [S14]      |
| 0f124311 | Sponsor       | CA         | X         | CA - PASADENA OHA [X61]      |
| 0qinghua | Admin         | adfirst    | adm last  | SSA Internal                 |

https://199.173.231.150 - Electronic Records Express - List All Accounts - Microsoft Internet Explorer provided by IE6.0 SP1 >

File Edit View Favorites Tools Help

Records Express

Questions? How to Contact Us Search

Records Express

Click on the links below to find specific text on this page.

| Last Name | Organization                      | Phone        | Email                    | Site |
|-----------|-----------------------------------|--------------|--------------------------|------|
|           | AR - FORT SMITH OHA [X55]         | 456          | qinghua.liu@ssa.gov      |      |
| ise       | LM                                | 4105942565   | danielle.c.buise@ssa.gov | S01  |
| ise       | LM                                | 4102525252   | danielle.c.buise@ssa.gov | S01  |
| erson     | OK - OKLAHOMA CITY DDS [S39]      | 4054192576   | kathleen.pierson@ssa.gov |      |
| ise       | LM                                | 4105942565   | danielle.c.buise@ssa.gov | S01  |
| ise       | LM                                | 4105945858   | danielle.c.buise@ssa.gov | S01  |
| eder      | Veterans Adimn Outpaitient Clinic | 231-932-9720 | david.hsieh@ssa.gov      | S94  |
| stillo    | Veterans Adimn Outpaitient Clinic | 231-932-9720 | david.hsieh@ssa.gov      | S94  |
| de        | Veterans Adimn Outpaitient Clinic | 231-932-9720 | david.hsieh@ssa.gov      | S94  |
| nnett     | NC - RALEIGH DDS [S36]            | 800-443-9360 | Paige.Bennett@ssa.gov    |      |
| nroy      |                                   | 828-698-1779 | david.hsieh@ssa.gov      | S36  |
| cGowan    | The pogues                        | 1            | jeffrey.caplan@ssa.gov   | V40  |
| mashiro   | HI - HONOLULU DDS [S14]           | 808-973-2244 | George.Yamashiro@ssa.gov |      |
|           | CA - PASADENA OHA [X61]           | 123          | qinghua.liu@ssa.gov      |      |
| m last    | SSA Internal                      | 44123        | qinghua.liu@ssa.gov      |      |

## Modify an Account

To modify information in an existing account (individual end user or organizational shared end user), click on “Search on Specified Criteria” from the Account Maintenance Menu. Enter the information you know and search for the account.

A search performed with the last name “Davis” was entered and the following accounts were listed.

Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.

| User Id                  | Account Type  | First Name | Last Name | Organization                          | Phone        | Email                   |
|--------------------------|---------------|------------|-----------|---------------------------------------|--------------|-------------------------|
| <a href="#">cdavis12</a> | EndUser       | Carolyn    | Davis     | University of Virginia Health Systems | 434-982-0894 | david.hsieh@ssa.gov     |
| <a href="#">cjdav615</a> | Sponsor       | Carolyn    | Davis     | AR - LITTLE ROCK DDS [S04]            | 501-682-7634 | Carolyn.J.Davis@ssa.gov |
| <a href="#">clardog2</a> | RegionalAdmin | Clarence   | Davis     | SSA Internal DDS                      | 4109659032   | clarence.davis@ssa.gov  |
| <a href="#">gtDavis1</a> | EndUser       | G          | Davis     |                                       | 505-242-8502 | david.hsieh@ssa.gov     |
| <a href="#">HMEDCEN1</a> | Organization  | Andrea     | Davis     | Hutcheson Medical Center              | 706-858-2567 | david.hsieh@ssa.gov     |
| <a href="#">jdavis12</a> | EndUser       | James      | Davis     | JANJAS                                | 870-267-1775 | david.hsieh@ssa.gov     |
| <a href="#">jdavis31</a> | Sponsor       | Jill       | Davis     | VA - FAIRFAX DDS [S93]                | 703-934-0391 | jill.davis@ssa.gov      |

Click on the hyperlinked information (User ID, First Name, or Last Name) fields for the desired account. This will take you to the Account Summary page for the account.



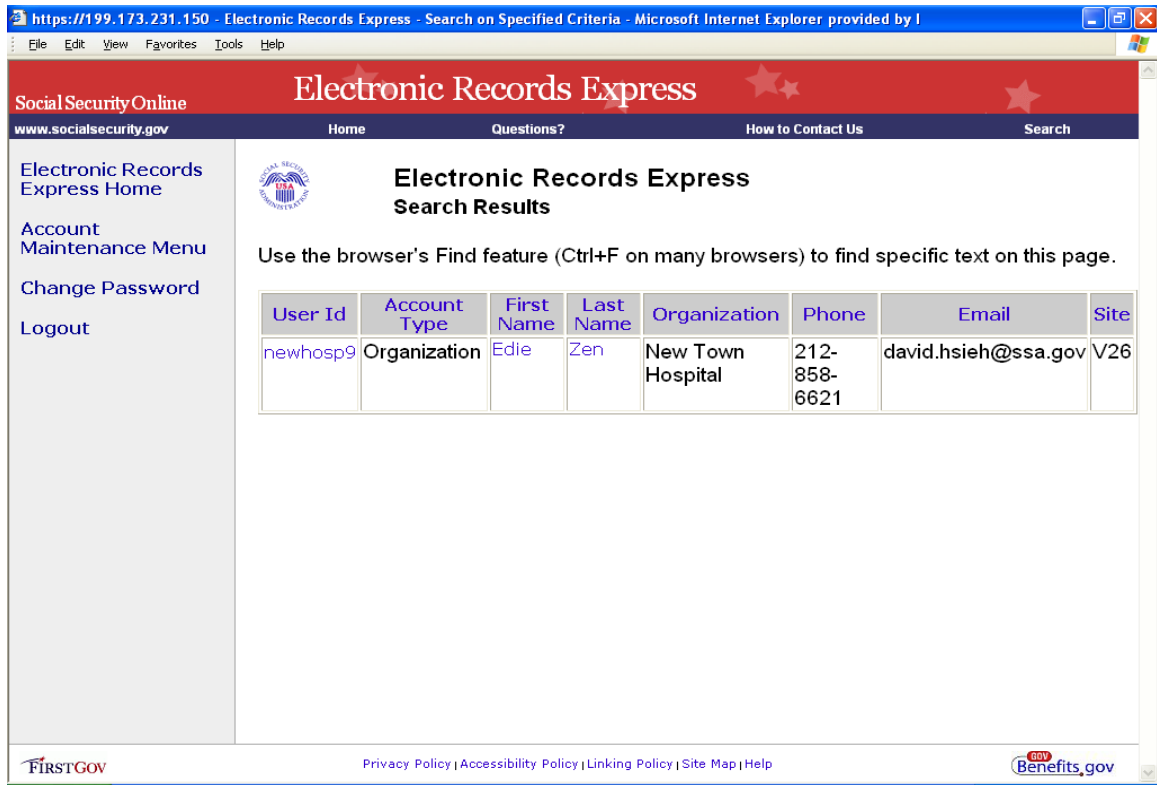
Scroll down to the bottom of the Account Summary page and click the **Modify** button. This brings up the Modify Account page which is laid out in the same format that was used to establish the account. You may find the information you want to modify and make changes.

Be sure to click the **Modify** button at the bottom of this page. You will then see a summary page for the account. After verifying the account information is accurate on the next screen, click the **Submit** button at the bottom of the page to activate your changes.

## Suspend an Account

To suspend an existing account (individual end user or organizational shared end user), click on “Search on Specified Criteria” from the Account Maintenance Menu. Enter the information you know and search for the account.

A search for “newhosp9” in the User ID field yielded the following results:



The screenshot shows a web browser window displaying the 'Electronic Records Express' search results page. The browser's address bar shows the URL: <https://199.173.231.150>. The page title is 'Electronic Records Express - Search on Specified Criteria'. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The page header features the 'Social Security Online' logo and the text 'www.socialsecurity.gov'. The main navigation bar includes 'Home', 'Questions?', 'How to Contact Us', and 'Search'. The left sidebar contains links for 'Electronic Records Express Home', 'Account Maintenance Menu', 'Change Password', and 'Logout'. The main content area displays the 'Electronic Records Express Search Results' and a message: 'Use the browser's Find feature (Ctrl+F on many browsers) to find specific text on this page.' Below this message is a table with the following data:

| User Id                  | Account Type | First Name | Last Name | Organization      | Phone        | Email               | Site |
|--------------------------|--------------|------------|-----------|-------------------|--------------|---------------------|------|
| <a href="#">newhosp9</a> | Organization | Edie       | Zen       | New Town Hospital | 212-858-6621 | david.hsieh@ssa.gov | V26  |

The footer of the page includes the 'FIRSTGOV' logo, a link to 'Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help', and the 'Benefits.gov' logo.

Clicking on the hyperlinked information (User ID, First Name, or Last Name) fields for this account takes you to the Account Summary page for the account.



https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 - AI

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express**


www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home

Account Maintenance Menu

Change Password

Logout

 **Electronic Records Express Account Summary**

User Id: **newhosp9**

Role: **Organizational Shared End-User**

Status: **Active**

Organization **Hospital/Clinic Personnel**  
Type: **(Excluding Contract Copy Services)**

Organization **New Town Hospital**  
Name:  
Department: **Med Records**

Primary **8186665252** Ext: **2415** Type: **CELL**  
Phone:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Address Line **1313 Nightingale Drive**

To suspend the account, scroll to the bottom of the Account Summary page and click the **Suspend** button.

https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 - AI

File Edit View Favorites Tools Help

Phone:

Primary Email: **david.hsieh@ssa.gov**  
Alternate Email:

---

**Backup Contact Information**

First Name: **Barb**  
Middle Name:  
Last Name: **Levell**

Primary **2128689965** Ext: Type: **WORK**  
Phone:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Alternate Phone: Ext: Type:

Primary Email: **david.hsieh@ssa.gov**  
Alternate Email:

---

[View Log History](#)

Modify **Suspend** Reset Password Delete

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help 



You will then receive confirmation that the account has been suspended.

https://199.173.231.150 - Electronic Records Express - Suspend Account - Microsoft Internet Explorer provided by IE6.0 SP1 > AI

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express**

www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

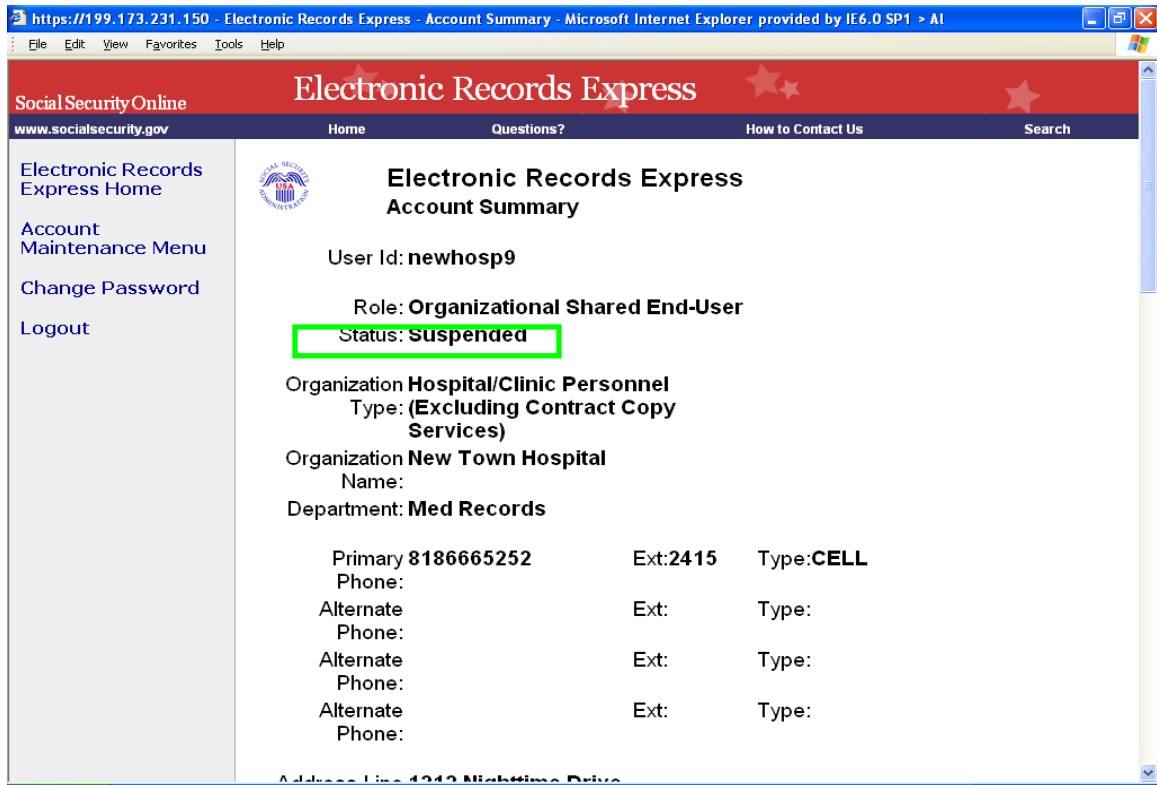
 **Electronic Records Express**  
**Suspend Account**

The account with User Id **newhosp9** was successfully suspended.

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov

## Reactivating a Suspended Account

Access to the account can be restored at a later time if/when appropriate. To reactivate a suspended account, simply search for the account following the prior directions. The screen shot below of the Account Summary page shows that the account for “newhosp9” is suspended:



The screenshot shows a web browser window with the URL <https://199.173.231.150>. The page title is "Electronic Records Express - Account Summary". The browser is Microsoft Internet Explorer provided by IE6.0 SP1. The page content includes a navigation menu on the left with links for "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The main content area displays the "Electronic Records Express Account Summary" for user "newhosp9". The user's role is "Organizational Shared End-User" and their status is "Suspended", which is highlighted with a green box. The user's organization is "Hospital/Clinic Personnel" (Type: "Excluding Contract Copy Services") and "New Town Hospital". The department is "Med Records". Contact information includes a primary phone number "8186665252" (Ext: 2415, Type: CELL) and three alternate phone numbers.

**Electronic Records Express**  
**Account Summary**

User Id: **newhosp9**

Role: **Organizational Shared End-User**

Status: **Suspended**

Organization **Hospital/Clinic Personnel**  
Type: **(Excluding Contract Copy Services)**

Organization **New Town Hospital**  
Name:  
Department: **Med Records**

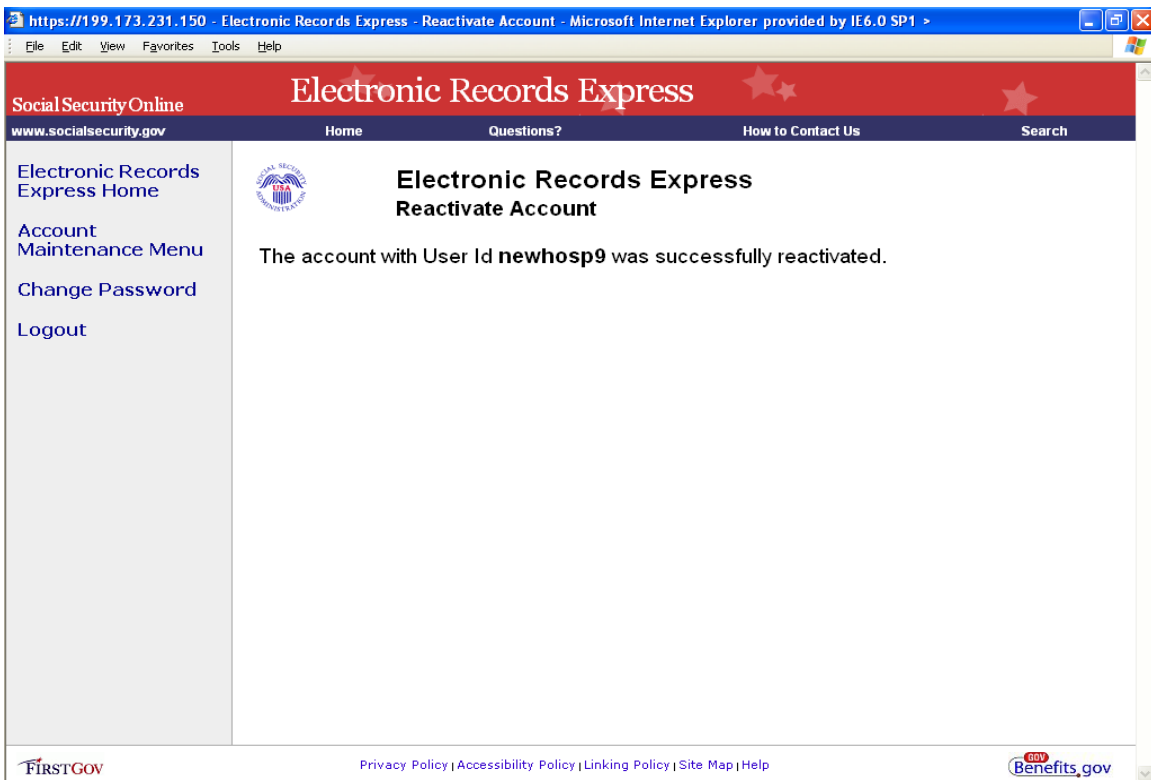
|                  |                   |      |             |       |             |
|------------------|-------------------|------|-------------|-------|-------------|
| Primary Phone:   | <b>8186665252</b> | Ext: | <b>2415</b> | Type: | <b>CELL</b> |
| Alternate Phone: |                   | Ext: |             | Type: |             |
| Alternate Phone: |                   | Ext: |             | Type: |             |
| Alternate Phone: |                   | Ext: |             | Type: |             |

Address Line: **1212 Nightingale Drive**

Scroll down to the bottom of the page and select the Reactivate button at the bottom of the Account Summary page.



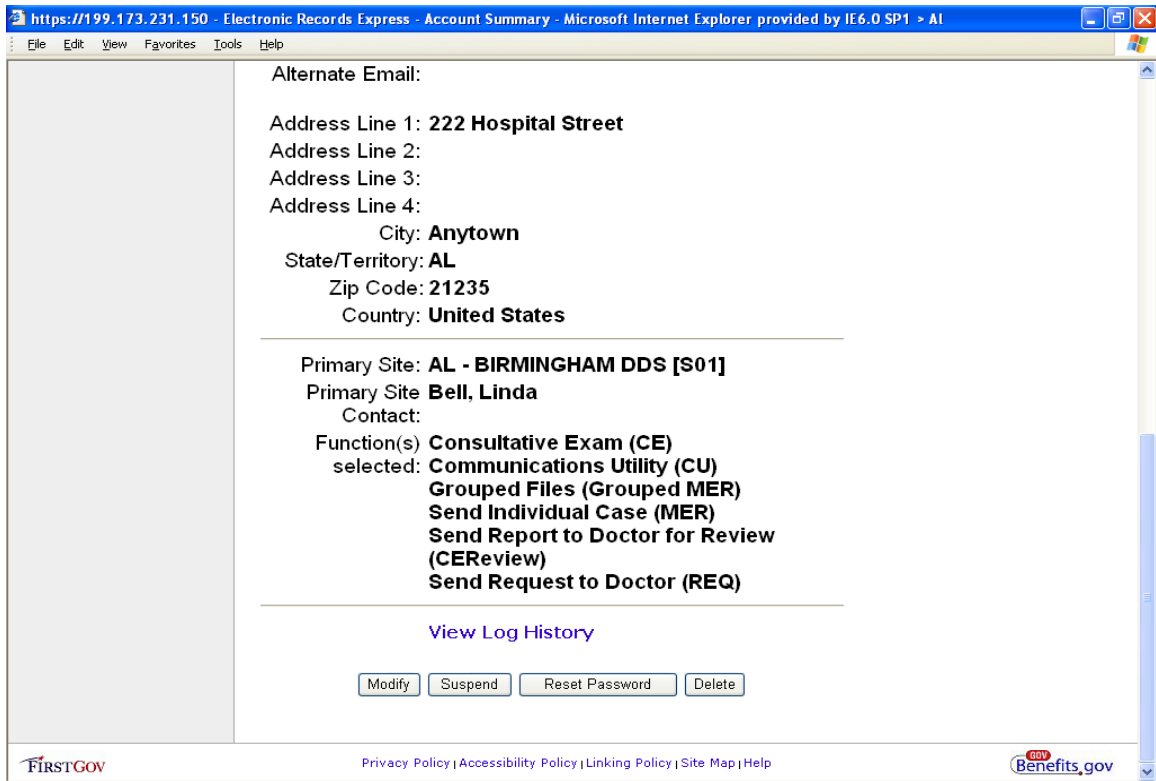
You will receive a confirmation page similar to the one shown below. The account may now be accessed once again by the user(s).



## Resetting a Password

To reset an account's password, click on "Search on Specified Criteria" from the Account Maintenance Menu. Enter the information you know, search for the account, and then select the account that you wish to reset the password on.

This brings you to the Account Summary page. Scroll to the bottom of the page and select the **Reset Password** button.



The screenshot shows a web browser window with the address bar displaying "https://199.173.231.150 - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 > AI". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The main content area displays the following information:

- Alternate Email:
- Address Line 1: **222 Hospital Street**
- Address Line 2:
- Address Line 3:
- Address Line 4:
- City: **Anytown**
- State/Territory: **AL**
- Zip Code: **21235**
- Country: **United States**

---

Primary Site: **AL - BIRMINGHAM DDS [S01]**  
Primary Site **Bell, Linda**  
Contact:

Function(s) **Consultative Exam (CE)**  
selected: **Communications Utility (CU)**  
**Grouped Files (Grouped MER)**  
**Send Individual Case (MER)**  
**Send Report to Doctor for Review (CEReview)**  
**Send Request to Doctor (REQ)**

---

[View Log History](#)

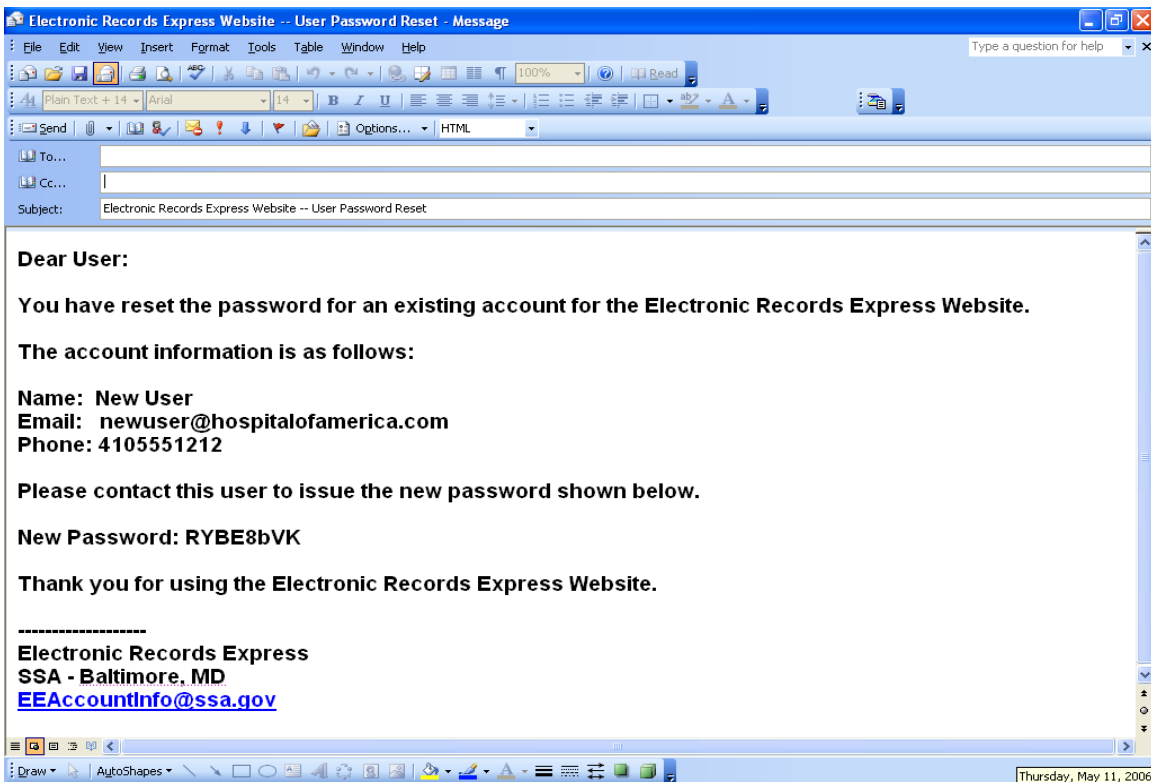
Buttons:

Footer: **FIRSTGOV** | [Privacy Policy](#) | [Accessibility Policy](#) | [Linking Policy](#) | [Site Map](#) | [Help](#) | **Benefits.gov**

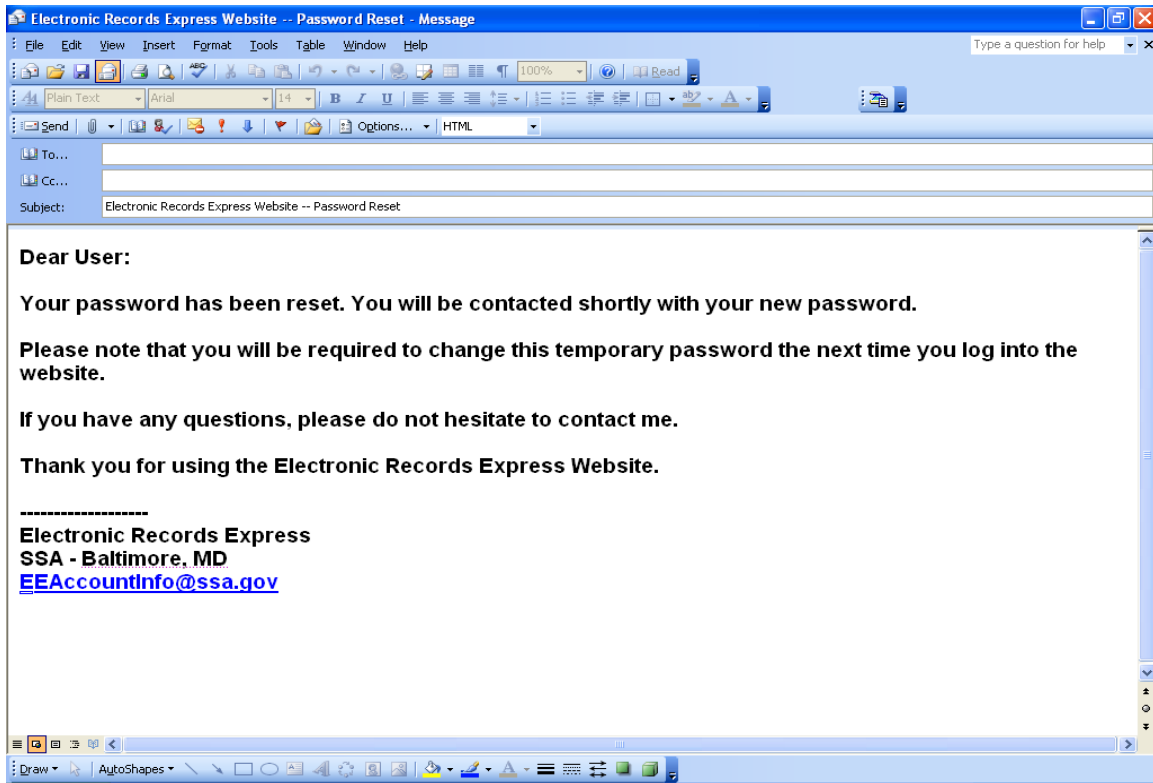
You will receive the new password after the web page refreshes.



You, the sponsor, receive the following email which also contains the new temporary (one time use) password:



The user receives the following email to confirm that the sponsor has reset the password and will contact the user shortly to provide the new password:

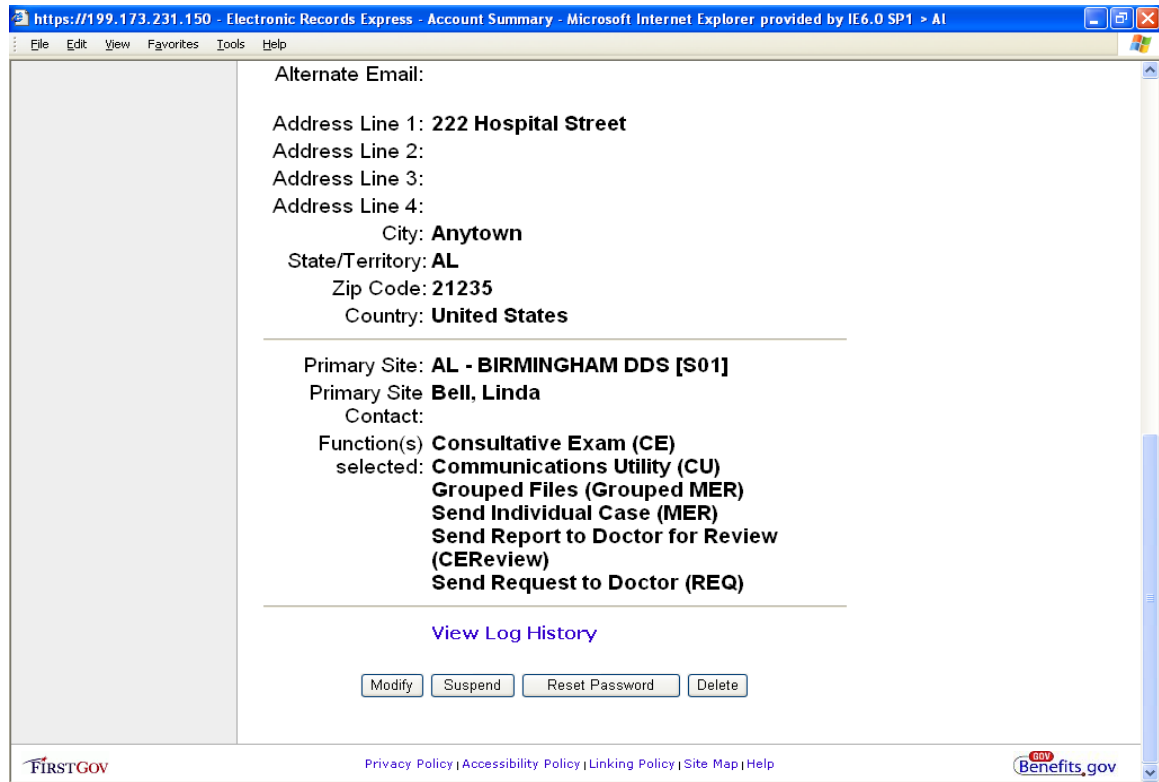


## Deleting an Account

**Please note that you should not be deleting accounts at this time. Deleting accounts permanently deletes all information including audit trails. The example shown below is provided as a courtesy only.**

Search accounts by desired criteria. This example shows the “newuser2” account being deleted.

Click the **Delete** button at the bottom of the page.



The screenshot shows a web browser window with the following content:

- Address Bar: <https://199.173.231.150> - Electronic Records Express - Account Summary - Microsoft Internet Explorer provided by IE6.0 SP1 - AI
- Menu: File, Edit, View, Favorites, Tools, Help
- Content:
  - Alternate Email:
  - Address Line 1: **222 Hospital Street**
  - Address Line 2:
  - Address Line 3:
  - Address Line 4:
  - City: **Anytown**
  - State/Territory: **AL**
  - Zip Code: **21235**
  - Country: **United States**
- Primary Site: **AL - BIRMINGHAM DDS [S01]**
- Primary Site **Bell, Linda**
- Contact:
- Function(s) **Consultative Exam (CE)**
- selected: **Communications Utility (CU)**
- Grouped Files (Grouped MER)**
- Send Individual Case (MER)**
- Send Report to Doctor for Review (CEReview)**
- Send Request to Doctor (REQ)**

At the bottom of the content area, there is a link: [View Log History](#)

At the bottom of the page, there are four buttons: , , , and

Page footer includes: **FIRSTGOV**, [Privacy Policy](#) | [Accessibility Policy](#) | [Linking Policy](#) | [Site Map](#) | [Help](#), and **Benefits.gov**

The next page asks you to confirm your request to delete the specified account. Click the **Continue** button to delete the account. Next you’ll receive a confirmation that the account was deleted.




https://199.173.231.150 - Electronic Records Express - Delete Account Verification - Microsoft Internet Explorer provided by IE

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express**

www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

 **Electronic Records Express**  
**Delete Account**

You have requested that the account with User Id **newuser2** be deleted.

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov


https://199.173.231.150 - Electronic Records Express - Delete Account - Microsoft Internet Explorer provided by IE6.0 SP1 > Alp

File Edit View Favorites Tools Help

Social Security Online **Electronic Records Express**

www.socialsecurity.gov Home Questions? How to Contact Us Search

Electronic Records Express Home  
Account Maintenance Menu  
Change Password  
Logout

 **Electronic Records Express**  
**Delete Account**

The account with User Id **newuser2** was successfully deleted.

FIRSTGOV Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help Benefits.gov

## Modifying Your Account

From the Account Maintenance Menu, click on “Modify My Account Information”. The screen shots below show the information you can modify on your account. Be sure to click the **Modify** button to activate your changes.

The screenshot shows a web browser window with the URL `https://199.173.231.150 - Electronic Records Express - Modify My Account - Microsoft Internet Explorer provided by IE6.0 SP1`. The page header includes "Social Security Online" and "Electronic Records Express". A navigation bar contains links for "Home", "Questions?", "How to Contact Us", and "Search". A left sidebar lists "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The main content area is titled "Electronic Records Express Modify My Account" and includes a note: "An asterisk (\*) indicates a mandatory field." The user's current information is displayed: "User Id: summers1", "Role: Sponsor", and "Status: Active". Below this are input fields for "First Name" (containing "New"), "Middle Name", and "Last Name" (containing "User"). There is an "Associated Sites" dropdown menu with options: "[ Select Sites ]", "AK - ANCHORAGE DDS [S02]", "AL - BIRMINGHAM DDS [S01]", and "AL - BIRMINGHAM OHA [X77]". Other fields include "Department", "Position", "Primary Phone" (with value "4105555555" and a "WORK" type dropdown), and two "Alternate Phone" entries, each with an "Ext:" field and a "[ Select Type ]" dropdown.

**Role: Sponsor**  
**Status: Active**

First Name: \*

Middle Name:

Last Name: \*

Associated Sites: \*   
AK - ANCHORAGE DDS [S02]  
AL - BIRMINGHAM DDS [S01]  
AL - BIRMINGHAM OHA [X77]

Department:

Position:

Primary Phone: \*  Ext:

Alternate Phone:  Ext:

Alternate Phone:  Ext:

Alternate Phone:  Ext:

Primary Email: \*

Alternate Email:

[View Log History](#)

## Changing Your Password

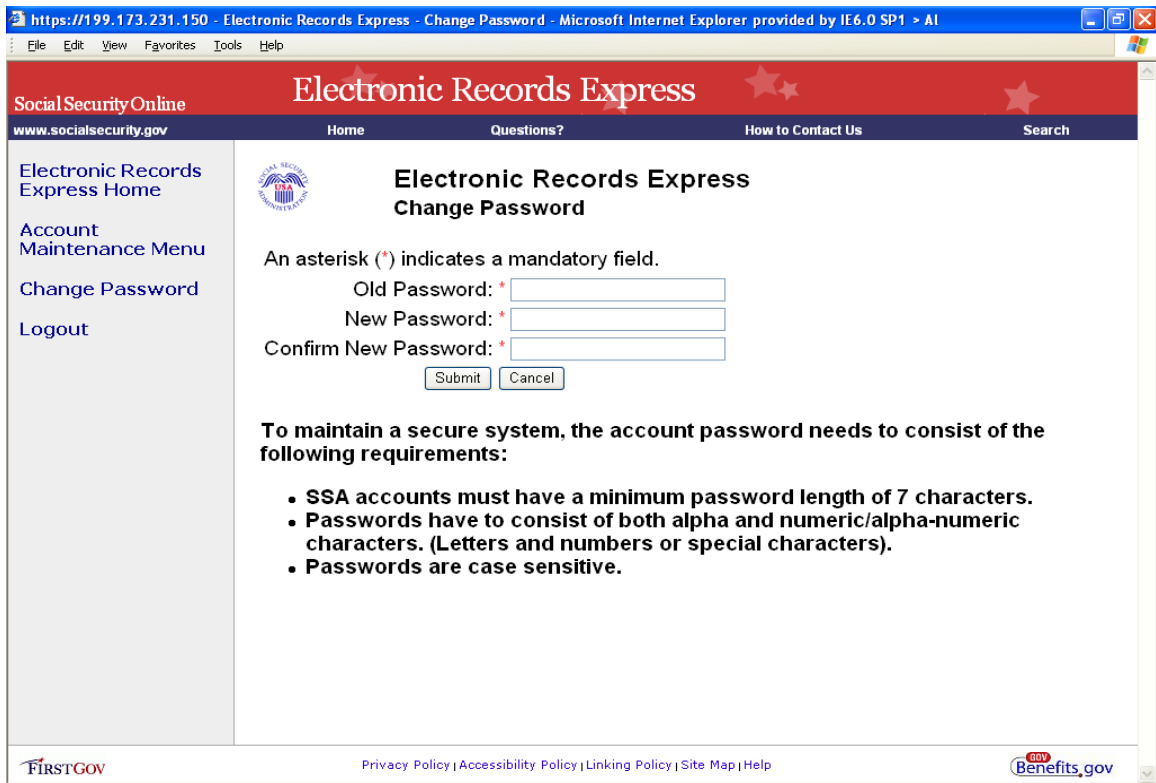
From the Account Maintenance Menu, click the “Change Password” hyperlink.

Enter the old password.

Enter the new password.

Enter the new password again to verify it was entered correctly.

Click the **Submit** button to submit your password change.



The screenshot shows a web browser window with the URL <https://199.173.231.150>. The page title is "Electronic Records Express - Change Password". The browser is Microsoft Internet Explorer provided by IE6.0 SP1. The page content includes a navigation menu on the left with links for "Electronic Records Express Home", "Account Maintenance Menu", "Change Password", and "Logout". The main content area is titled "Electronic Records Express Change Password" and contains a form with three input fields: "Old Password: \*", "New Password: \*", and "Confirm New Password: \*". Below the fields are "Submit" and "Cancel" buttons. A note states: "An asterisk (\*) indicates a mandatory field." Below the form, there is a section titled "To maintain a secure system, the account password needs to consist of the following requirements:" followed by a bulleted list: "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).", and "Passwords are case sensitive." The footer includes the "FIRSTGOV" logo, a link to "Benefits.gov", and a list of policies: "Privacy Policy | Accessibility Policy | Linking Policy | Site Map | Help".