





## Use Electronic Records Express to Send Client Records

### Disability Programs

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Electronic Records Express is an initiative by State Disability Determination Services (DDS) and Social Security to increase the use of electronic options for submitting records related to disability claims. If you have been asked for, or you want to submit, additional information about a client's claim for Social Security disability benefits, consider an electronic option. Help ensure that your patients receive timely decisions by submitting your records electronically to Social Security and its partner agencies. You can choose the method of sending the information that works best for you.

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#### Advantages of sending client records online or by fax

- Send client records at your convenience;
- Submit information directly to Social Security, helping to expedite the decision on your client's disability claim;
- Save copying, paper, toner, and postage costs; and
- Eliminate the need for follow-up due to mail transit time.

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#### Sending records electronically is fast and easy

If you are not already doing so, Social Security urges representatives to submit all records electronically. Electronic processes can make it quicker and easier for

medical and other claimant records can be transferred securely, eliminating mail time and automating handling so disability applicants can receive a decision sooner.

### Secure website

Send electronic records or scanned paper records through the Social Security secure website using your existing Internet connection.

### Fax

Use your office fax to send records to Social Security any time day or night.

For either of these methods you must have and use a barcode provided by the state DDS or Social Security hearing office that is handling your client's disability claim. The information in the barcode directs the information you submit to the claimant's unique disability folder. For additional information about faxing, contact the state DDS or Social Security hearing office.

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### Another option

Continued support for paper submissions

- Mail submissions to the appropriate [local Social Security office](#); or
- Mail submissions to Social Security's contract scanning service as requested by the state DDS or the [local Social Security office](#).

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### Frequently asked questions

How will sending records electronically affect our work routines?

There will be minimum disruption to your established routines. Faxing replaces the photocopying you now do. And if you already have electronic client records, you upload files instead of printing them.

What are the costs?

The Electronic Records Express options are free

of government charges.

What security is provided for web options?

The website uses [128-bit secure socket layer \(SSL\) encryption](#) to protect records submissions to Social Security. Your account is protected by your confidential user ID and password combination.

Can I fax with my PC fax software?

Yes. However, the first page of each document must be the barcode provided to you by the state DDS or Social Security. So, you may need a scanner to scan the barcode into your computer.

***NOTE:*** *Each level of the disability claims process uses a unique barcode, so make sure the barcode you use is the one for that specific level. For example, if you are representing a client at the hearing level, use the barcode provided to you by the hearing office.*

If I want to use the secure website, which file formats are compatible?

The following file formats are accepted: .wpd, .doc, .docx, .jpg, .bmp, .mdi, .txt, .rtf, .xls, .xlsx, .pdf, .tiff, .tif. The most current list of acceptable file formats is available on our website.

Are Electronic Records Express options compliant with the Health Insurance Portability and Accountability Act (HIPAA) and the Family Educational Rights and Privacy Act (FERPA)?

Yes. When a person files a disability claim, he or she (or a parent or guardian) signs an [Authorization to Disclose Information](#) (Form SSA-827). This meets the requirements of HIPAA and FERPA and expressly permits sharing claimant's health information by fax or other electronic means as long as reasonable safeguards are used.

Is there a maximum number of pages that can be faxed or a maximum file size that can be sent through the secure website?

Yes. Please do not fax more than 200 pages

and do not send an electronic file or combination of files that exceeds 50 megabytes. If your submission is large, you can split it into segments. Be sure to use the barcode or claimant data provided to you by the state DDS or Social Security for each segment. You may need a scanner to scan the barcode into your computer. Note each level of the disability claims process uses a unique barcode, so it is important that you make sure the barcode you use is the one for that specific level.

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## For more information

If you would like to learn more about submitting client records online, visit [www.socialsecurity.gov](http://www.socialsecurity.gov) and go to



, send an E-mail to [electronic-records-express@ssa.gov](mailto:electronic-records-express@ssa.gov) or call 1-866-691-3061.

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