

## APPOINTED REPRESENTATIVE REGISTRATION via INTERNET by Phone or Paper Form

- 1) Go to <https://secure.ssa.gov/acu/LoginWeb/loginHandler.do?SUITE=AR> and select the link "Did you register with SSA by phone or paper form and need to create a password"?

Social Security Online  
www.socialsecurity.gov

Business Services Online  
BSO Welcome | BSO Information | Keyboard Navigation

Log In to Online Services

For your security, please log out of the application and close all Internet windows when you are finished.

**Online Services Availability**

- Monday-Friday: 5 AM - 1 AM ET
- Saturday: 5 AM - 11 PM ET
- Sunday: 8 AM - 11:30 PM ET

**New User?**  
You must create an account to use this website. Once you do, you will be provided a User ID to log in to our online services.

To create new account you will need to:

- Provide personal information
- Provide contact information
- Create your password and security questions


[Create Log in Account](#)

Did you register with SSA by [phone or paper form](#) and need to create a password?

**Existing User?**  
Please log in below:  
User ID:   
Password:   
[Forgot user ID?](#)  
[Forgot your password?](#)

**User Certification:**  
I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.  
 I have read & agree to these terms.

- 2) Now turn the computer over to the rep. Ask the rep to read the **Complete Phone Registration Attestation** and select **I Accept**.



### Complete Phone Registration Attestation

Please read the following information about registering to use Business Services Online. Please select the link below to read about SSA's legal authority for collecting information.

[Paperwork Reduction Act Statement](#)

#### Registering for Business Services

To obtain a User ID and password, complete the registration form and select the submit button on the following page. The information you submit will be verified against our records.

Upon successful registration, you will have your User ID and password.

You may update your registration information or change your password at any time.

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

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#### User Certification for SSA Business Services Online

I certify that:

- I understand that SSA may prevent me from using these services if SSA determines or suspects there has been misuse of these services.
- I understand that I may be subject to penalties if I submit fraudulent information.
- I am aware that any person who knowingly and willingly 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.

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**By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services Online.**



3) Have the rep complete the **Complete Phone Registration** screen, self-select a password, and select **Complete Phone Registration**.

**NOTE:** If you receive an error message, review the name and date of birth information to ensure it matches information on the NUMI query and the CSA screens. All information must match to move forward.

**Complete Phone Registration**

A User identification (User ID) and password are required to use Online Services. Your User ID was issued during the registration process. You must now choose your personal password to complete registration.

\* Indicates required information

\*User ID:

\*First Name:

\*Last Name:

\*Social Security Number:

(If you do NOT have an SSN leave this field blank.)

\*Date of Birth:   
(MMDDYYYY)

\*Enter Password:

\*Re-enter Password:

**Your Password:**

- Must contain exactly 8 characters
- Must contain only numbers and letters
- Must contain at least 1 number and 1 letter
- Is not case sensitive



4) The **Phone Registration Successful** screen displays. Have the rep select **Login**.

**Business Services Online**

BSO Welcome | BSO Information | Keyboard Navigation

**Phone Registration Successful**

Your phone registration is complete.

Your password will expire on **January 19, 2011**.

You must change your password before this date to prevent it from expiring.

5) Have the rep log into **Business Services Online (BSO)** with their **User ID** and their self-selected **Password**. The rep must agree to the **User Certification** statement and select **Log In**.

**Business Services Online**  
BSO | Welcome | BSO Information | Keyboard Navigation

## Log In to Online Services

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### New User?

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To create new account you will need to:

- Provide personal information
- Provide contact information
- Create your password and security questions

[Create Log In Account](#)

Did you register with SSA by [phone or paper form](#) and need to create a password?

### Existing User?

Please log in below:

User ID:

Password:

[Forgot user ID?](#)

[Forgot your password?](#)

**User Certification:**

I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I have read & agree to these terms.

6) On the **Create a Login Account** screen, the rep must answer five knowledge-based questions chosen from the drop down boxes. We will use these security questions if the rep forgets his or her password. When finished, select **Next**.

**Appointed Representative Services**  
BSO Welcome | BSO Information | Keyboard Navigation

**Create a Login Account**  
**Step 2: Create Your Password**

Your password will be used to log in to online services; your User ID will be provided to you.  
\* Indicates required information

\*Enter Password:

\*Re-enter Password:

Security Questions and Answers

The security questions and answers you select will be used to validate your identity in case you forget your password.

\*Question 1:  
WHAT IS THE NAME OF YOUR FIRST NEPHEW?

\*Answer 1:  
ANSWER1

\*Question 2:  
WHAT IS THE MIDDLE NAME OF YOUR MOTHER?

\*Answer 2:  
ANSWER2

\*Question 3:  
IF YOU COULD PLAY ANY INSTRUMENT WHAT WOULD IT BE?

\*Answer 3:  
ANSWER3

\*Question 4:  
WHAT IS THE YEAR YOU GRADUATED HIGH SCHOOL?

\*Answer 4:  
ANSWER4

\*Question 5:  
WHAT IS THE NAME OF YOUR FIRST PET?

\*Answer 5:  
ANSWER5

7) The rep is now on the **Appointed Representative Services - Main Menu** screen. Direct the rep to select **Enter Activation Codes** from the left pane.




8) Maximize the screen with the **Enter Activation Code(s)** screen. Have the rep enter the activation code in the field and select **Activate Service(s)**.



9) The rep now needs the text-enabled cell phone. Have the rep enter the cell phone number in the field and select **Next**. A One-Time Password (OTP) is sent to the rep's cell phone. If the OTP is not received, have the rep select **Next** again.

**Appointed Representative Services**

Home Menu | Contact Us | BSO Information | Keyboard Navigation HELP

 **Enter Text-Enabled Cell Phone Number**

\*Indicates Required Information


**The following services you are activating require an increased level of security due to the sensitive information they may contain:**


- Access Claimant's Electronic Folder

Provide a Cell Phone Number

A text-enabled cell phone number must be provided so that SSA can send a one-time password to you by text message whenever you access specific services. This text-enabled cell phone number will also be used for services you request in the future.

\*Text-enabled Cell Phone Number: [Why do I need a text-enabled cell phone? \[?\]](#)

 **Make sure your cell phone number is available before you continue!**  
Please allow up to two minutes for the text message to arrive. The one-time password will be valid for a total of 10 minutes from the time of your request.

10) On the **Verify Your Cell Phone Number** screen, the rep enters the **OTP** in the field and selects **Next**.

Appointed Representative Services

Main Menu | Contact Us | BSO Information | Keyboard Navigation HELP

**Verify Your Cell Phone Number**

\*Indicates required information

**A one-time password has been sent to cell phone number: (123) 123-1234**  
Please allow up to two minutes for the text message to arrive. The one-time password will be valid for a total of 10 minutes from the time of your request.

**Enter One Time Password:**

Didn't receive a text message?  
Is your cell phone receiving service reception? You may need to move to a location where you can get a better signal.  
Still unable to continue? We can [send a new text message](#).

< Back Cancel Next >

11) The **Enter Activation Codes(s) – Confirmation** screen displays (below). The rep has now successfully activated access to his or her claimants' electronic folders.  
**NOTE:** Recommend that the rep delete the OTP from the cell phone as soon as he or she receives the confirmation screen. The OTP's are only valid for 10 minutes and may cause confusion if they accumulate.

Appointed Representative Services

Main Menu | Contact Us | BSO Information | Keyboard Navigation

**Enter Activation Code(s) - Confirmation**

**You have successfully activated Appointed Representative Registration.**

The service(s) listed are now available from the Main Menu.

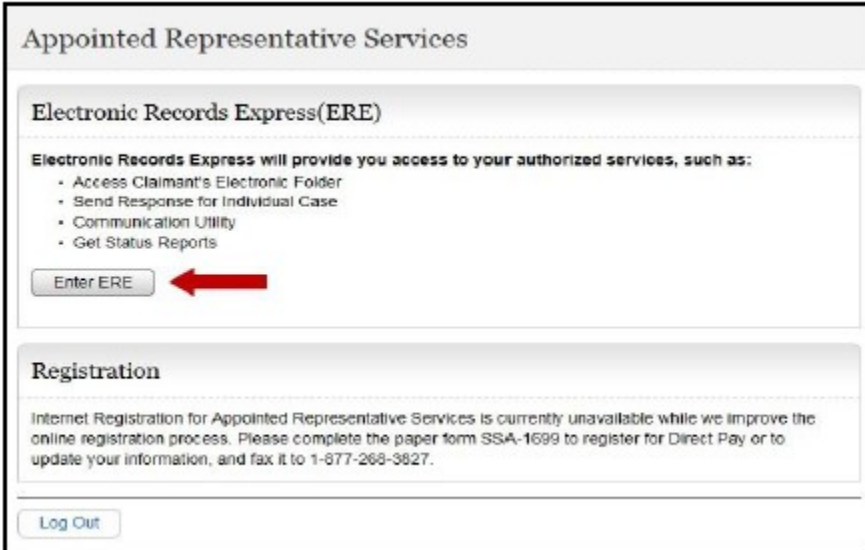
Go to the Main Menu



## Electronics Record Express Log In

Explain to the rep that the following steps are required each time they access a claimant's electronic folder.

1) Have the rep select **Enter ERE**.



The screenshot displays the 'Appointed Representative Services' interface. It features a section titled 'Electronic Records Express(ERE)' which lists authorized services: 'Access Claimant's Electronic Folder', 'Send Response for Individual Case', 'Communication Utility', and 'Get Status Reports'. Below this list is a button labeled 'Enter ERE', which is highlighted by a red arrow. The interface also includes a 'Registration' section with a message about the unavailability of online registration and a 'Log Out' button at the bottom.

Appointed Representative Services

**Electronic Records Express(ERE)**

Electronic Records Express will provide you access to your authorized services, such as:

- Access Claimant's Electronic Folder
- Send Response for Individual Case
- Communication Utility
- Get Status Reports

Enter ERE

**Registration**

Internet Registration for Appointed Representative Services is currently unavailable while we improve the online registration process. Please complete the paper form SSA-1699 to register for Direct Pay or to update your information, and fax it to 1-877-268-3827.

Log Out

2) Have the rep select the **Access Claimant's Electronic Folder** link. The system sends a new OTP to the rep's cell phone. This happens quickly!

**NOTE:** The rep should NOT double-click; it will generate multiple OTPs, and only the most recent will be valid.



3) Have the rep enter the **OTP** and select **Next**.



4) The **Acknowledgement for Online Services** screen is where the rep will enter a claimant's SSN, but not today! The linking process takes place overnight – the rep will not have access to a claimant's folder for 24-hours.

The screenshot shows a web form titled "ERE: Electronic Folder Agreement". Below the title is a section titled "Acknowledgement for Online Services". The text reads: "By entering this United States Government Website, I agree to the following terms and conditions:". This is followed by a bulleted list of five terms. Below the list is a "WARNING" section with four bullet points detailing consequences of improper disclosure or misuse. At the bottom, there is a statement: "By providing the Claimant's Social Security Number to access his or her Electronic Folder and selecting the 'I Agree' button, you certify that you have read, understand, and agree to the above statements." Below this statement is a text input field labeled "Claimant's Social Security Number (SSN):". At the very bottom of the form are two buttons: "I Agree" and "Cancel".

**ERE: Electronic Folder Agreement**

**Acknowledgement for Online Services**

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

- I will not disclose any information or data about a claimant that I access on this website without the claimant's written, signed consent unless there is a Federal law or regulation authorizing me to disclose this information or data;
- I will not knowingly furnish, or participate in furnishing, false or misleading information to the Social Security Administration;
- I will not enter this website unless I have installed anti-virus software, anti-spyware software, and personal firewalls on my computer;
- I will update my operating system, application software, and security software regularly to maintain the latest data protection;
- I will not store User-IDs and passwords on my computer;

**WARNING**

- If you improperly disclose any information or data that you access on this website or fail to take proper measures to protect that information or data from improper disclosure, and your actions result in an improper disclosure, you may be suspended for 1-5 years from representing anyone before the Social Security Administration, or you may be disqualified from representing anyone before the Social Security Administration for an indefinite period of time.
- If you improperly disclose any information or data that you access on this website or fail to take proper measures to protect that information or data from improper disclosure, and your actions result in an improper disclosure, you may be found guilty of a felony and subject to a fine of not more than \$10,000 or imprisonment of not more than 5 years, or both.
- If you knowingly furnish, or participate in furnishing, false or misleading information to the Social Security Administration, you may be subject to civil and/or criminal prosecution.
- Use of the Certified Electronic Folder may be monitored, recorded, and audited. We may disclose unauthorized or improper use to law enforcement personnel investigating or prosecuting a violation of civil or criminal law and the officials of domestic and foreign agencies.

By providing the Claimant's Social Security Number to access his or her Electronic Folder and selecting the "I Agree" button, you certify that you have read, understand, and agree to the above statements.

Claimant's Social Security Number (SSN):

5) Point out the **User Resources** that are available in electronic format. User Resources includes guides that walk the rep through all the services available to them in ERE. User Resources can be found on most screens in ERE.

6) Have the rep select **Sign Out** in the upper left.



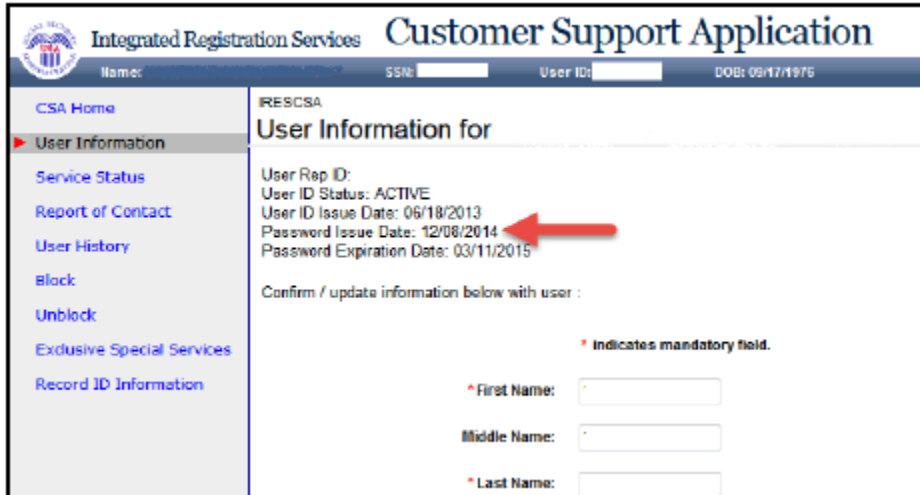
7) Ask the rep if he or she would like to walk through the log-in process one more time together. If yes, have the rep log into [www.socialsecurity.gov/ar](http://www.socialsecurity.gov/ar) .

8) Complete the *In-Person Proofing Check Sheet (ARTS)* after each enrollment. Use this check sheet to add all enrollment status entries into ARTS.

9) You may log-out of the workstation or refresh to avoid PII disclosure!

## Completing Enrollment – Existing Password

The CSA **User Information** screen will display a date in the **Password Issue Date** field if the rep previously created a password.



The screenshot displays the 'User Information for' screen in the Integrated Registration Services Customer Support Application. The page header includes the SSA logo and the text 'Integrated Registration Services Customer Support Application'. Below the header, there are fields for Name, SSN, User ID, and DOB. The main content area shows the following user information:

- User Rep ID:
- User ID Status: ACTIVE
- User ID Issue Date: 06/18/2013
- Password Issue Date: 12/08/2014 (indicated by a red arrow)
- Password Expiration Date: 03/11/2015

Below the information, there is a section for 'Confirm / update information below with user :'. This section includes a legend: '\* Indicates mandatory field.' and three input fields: '\* First Name:', 'Middle Name:', and '\* Last Name:'.

1) If the rep already has a password, go to  
<https://secure.ssa.gov/acu/LoginWeb/loginHandler.do?SUITE=AR>

2) Now turn the computer over to the rep. Have the rep log into **Business Services Online** with their **User ID** and **Password**. The rep must agree to the **User Certification** statement and select **Log In**.

2a) If the rep has answered the five knowledge-based questions, he or she will enter their activation code. Return to page 12 to complete enrollment.

2b) If the rep has not yet answered the five knowledge-based questions, continue to step 3 below.

3) Ask the rep to read the **Complete Phone Registration Attestation** then select **I Accept**.

 **Complete Phone Registration Attestation**

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Please select the link below to read about SSA's legal authority for collecting information.

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**Registering for Business Services**  
To obtain a User ID and password, complete the registration form and select the submit button on the following page. The information you submit will be verified against our records.

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- I am aware that any person who knowingly and willingly 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.

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**By selecting the "I Accept" button, you certify that you have read, understand and agree to the user certification of Business Services Online.**



4) The rep must answer five knowledge-based questions chosen from the drop down boxes. We will use these security questions when the rep's password is forgotten. When finished the rep will select **Next**.

Your password will be used to log in to online services; your User ID will be provided to you.  
\* Indicates required information

**\*Enter Password:**

**\*Re-enter Password:**

**Security Questions and Answers**

The security questions and answers you select will be used to validate your identity in case you forget your password.

**\*Question 1:**  
WHAT IS THE NAME OF YOUR FIRST NEPHEW?   
**\*Answer 1:**  
ANSWER1

**\*Question 2:**  
WHAT IS THE MIDDLE NAME OF YOUR MOTHER?   
**\*Answer 2:**  
ANSWER2

**\*Question 3:**  
IF YOU COULD PLAY ANY INSTRUMENT WHAT WOULD IT BE?   
**\*Answer 3:**  
ANSWER3

**\*Question 4:**  
WHAT IS THE YEAR YOU GRADUATED HIGH SCHOOL?   
**\*Answer 4:**  
ANSWER4

**\*Question 5:**  
WHAT IS THE NAME OF YOUR FIRST PET?   
**\*Answer 5:**  
ANSWER5





5) Return to page 11 of this guide to complete enrollment.

NOTE: If the rep does not remember his or her password, the rep will enter his or her USER ID then select the **Forgot your password?** link.

**Business Services Online**  
BSO Welcome | BSO Information | Keyboard Navigation

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[Create Log In Account](#)

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**Existing User?**  
Please log in below:

User ID:

Password:

[Forgot user ID?](#)

**→** [Forgot your password?](#)

**User Certification:**  
I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.

I have read & agree to these terms.

There are two scenarios if the rep does not remember the password:

- a) The rep never set-up the knowledge-based questions and must now request a new temporary password. The rep will complete the screen below and select **Request Temporary Password**. We will mail this temporary password to the rep via USPS.

**Business Services Online**  
BSO Welcome | BSO Information | Keyboard Navigation | HELP

**Request Password by Mail**

You have requested to receive a temporary password by mail to replace your forgotten password.

To request a temporary password, enter your First Name, Last Name, Social Security Number (if you have one) and Date of Birth, then select Request Temporary Password.

First Name:

Last Name:

U. S. Social Security Number:

Date of Birth (mm dd yyyy):

The enrollment cannot continue at this time. Tell the rep to return when he or she has received the temporary password, or arrange to assist over the phone.

- b) If the rep set-up the knowledge-based questions, he or she will get the **Forgot Password** screen. If the rep answers the three questions correctly, he or she can create a new password then select **Submit New Password**.

**Business Services Online**  
BSO Welcome | BSO Information | Keyboard Navigation HELP

**Forgot Password**

**Request to replace forgotten password**

To select a new password, you must answer three random questions that your previously supplied answers to. If you correctly answer the questions you will be allowed to select a new password.

WHAT IS THE NAME OF YOUR FIRST NEPHEW? :

WHAT IS THE NAME OF YOUR FIRST NIECE? :

WHAT IS THE MIDDLE NAME OF YOUR MOTHER? :

**Choose your new password**

Input New Password:

Confirm New Password:

**To maintain a secure system, your password needs to meet the following requirements:**

- Must contain exactly **8 characters**
- Must contain **only numbers and letters**
- Must contain **at least 1 number and 1 letter**
- Is **not case sensitive**

6) Once this step is complete, go to page 10 and continue enrollment.