

## 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"?

The screenshot shows the 'Business Services Online' login page. At the top, there is a navigation bar with 'Social Security Online', 'www.socialsecurity.gov', 'BSO Welcome | BSO Information | Keyboard Navigation', and a 'HELP' link. Below this is a header with the Social Security Administration logo and the text 'Log In to Online Services'. A red security warning reads: 'For your security, please log out of the application and close all Internet windows when you are finished.'

On the left, under 'Online Services Availability', the following hours are listed:

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

The main content area is split into two columns:

- 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 have read & agree to these terms.

At the bottom, there is a footer with 'www.socialsecurity.gov', 'BSO Welcome | BSO Information | Keyboard Navigation', and a 'HELP' link.

- 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.***

I Do NOT Accept

I Accept

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**

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



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 HELP



### Log In to Online Services

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

<h4>New User?</h4> <p>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.</p> <p><b>To create new account you will need to:</b></p> <ul style="list-style-type: none"> <li>Provide personal information</li> <li>Provide contact information</li> <li>Create your password and security questions</li> </ul> <p><a href="#">Create Log In Account</a></p> <p><b>Did you register with SSA by <a href="#">phone</a> or <a href="#">paper form</a> and need to create a password?</b></p>	<h4>Existing User?</h4> <p>Please log in below:</p> <p><b>User ID:</b> <input type="text" value="WTRSK9NT"/></p> <p><b>Password:</b> <input type="password" value="••••••"/></p> <p style="text-align: center;"> <a href="#">Forgot user ID?</a>  <a href="#">Forgot your password?</a> </p> <p><b>User Certification:</b></p> <div style="border: 1px solid gray; padding: 5px; min-height: 40px;">       I understand that the Social Security Administration (SSA) will validate the information I provide against the information in SSA's files.     </div> <p><input type="checkbox"/> I have read &amp; agree to these terms.</p> <p style="text-align: right;"><input type="button" value="Log In"/></p>
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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 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.

< Back      Cancel      Next >

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

The screenshot shows the 'Appointed Representative Services' portal. At the top, there is a navigation bar with links for 'Main Menu', 'Contact Us', 'BSO Information', and 'Keyboard Navigation', along with a 'HELP' icon. Below the navigation bar is the title 'Verify Your Cell Phone Number' and a small USA logo. A yellow warning icon is followed by the text: '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.' Below this is a section titled 'Enter One Time Password:' with an empty input field. A red arrow points to the input field. Underneath the input field, there is a link: '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.' At the bottom of the screen, there are three buttons: '< Back', 'Cancel', and 'Next >'. The 'Next >' button is highlighted.

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.

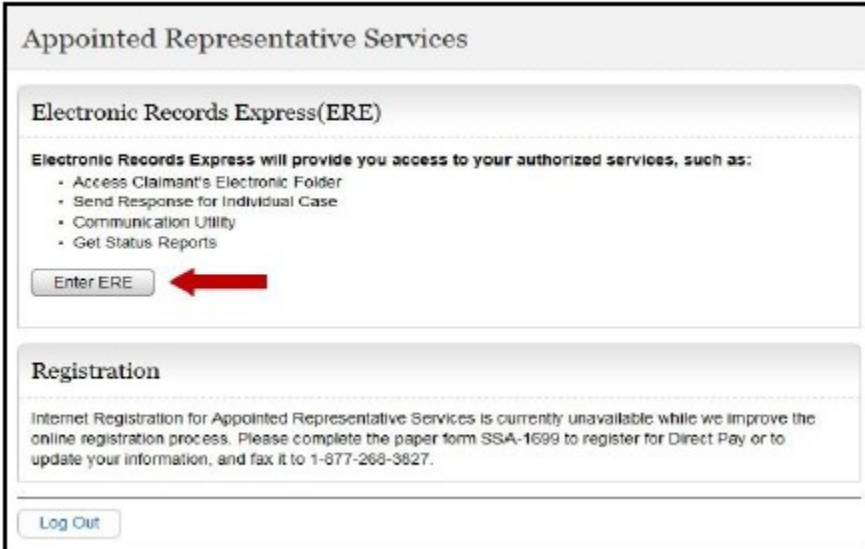
The screenshot shows the 'Appointed Representative Services' portal. At the top, there is a navigation bar with links for 'Main Menu', 'Contact Us', 'BSO Information', and 'Keyboard Navigation', along with a 'HELP' icon. Below the navigation bar is the title 'Enter Activation Code(s) - Confirmation' and a small USA logo. The main text reads: 'You have successfully activated Appointed Representative Registration. The service(s) listed are now available from the Main Menu.' At the bottom of the screen, there is a single button labeled '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 with a red arrow. A 'Log Out' button is located at the bottom of the page. A 'Registration' section below the ERE section states that internet registration is currently unavailable and provides instructions to complete form SSA-1699 and fax it to 1-877-268-3827.

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-based agreement form titled "ERE: Electronic Folder Agreement". The main heading is "Acknowledgement for Online Services". Below this, it states: "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: not disclosing information without consent, not knowingly furnishing false information, installing security software, updating systems, and not storing User-IDs and passwords. A "WARNING" section follows, detailing consequences for improper disclosure (suspension or disqualification) and knowingly furnishing false information (civil/criminal prosecution). At the bottom, it says: "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." There is a text input field for the "Claimant's Social Security Number (SSN):" and two buttons: "I Agree" and "Cancel".

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.



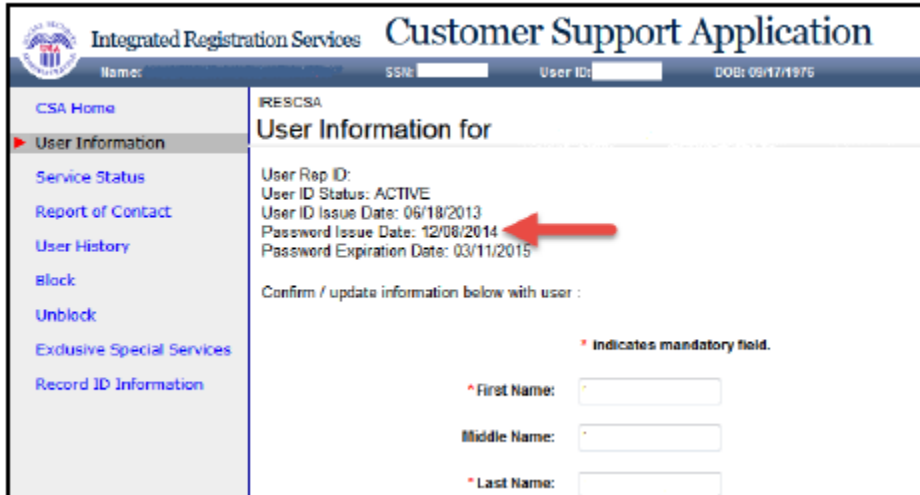
7) Ask the rep if he or she would like to walk through the log-in process one more time together. If yes, have the rep log into [www.socialsecurity.gov/ar](http://www.socialsecurity.gov/ar) .

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.



Integrated Registration Services Customer Support Application

Name: \_\_\_\_\_ SSN: \_\_\_\_\_ User ID: \_\_\_\_\_ DOB: 09/17/1975

CSA Home  
User Information  
Service Status  
Report of Contact  
User History  
Block  
Unblock  
Exclusive Special Services  
Record ID Information

IRESCSA  
User Information for

User Rep ID:  
User ID Status: ACTIVE  
User ID Issue Date: 06/18/2013  
Password Issue Date: 12/08/2014  
Password Expiration Date: 03/11/2015

Confirm / update information below with user :

\* Indicates mandatory field.

\* First Name:   
Middle Name:   
\* 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**.

**Business Services Online**  
 BSD | Welcome | BSD 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.

**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.

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.

**Social Security Online**  
 www.socialsecurity.gov

**Appointed Representative Services**  
 Main Menu | Contact Us | BSD Information | Keyboard Navigation

JOHN PUBLIC  
 Rep ID: ABCD9REPID

**Appointed Representative Services - Main Menu**

You have access to the following functions:

**Electronic Records Express (ERE)**  
 Electronic Records Express will provide you access to your authorized services, such as:

- Access Client's Electronic Folder
- Send Responses for Individual Case
- Communication Utility

**Main Menu**

**Manage Account**


- [View/Edit Account Info](#)
- [Change Password](#)
- [Disable Account](#)

**Manage Services**

- [View/Edit Services](#)
- [Request New Services](#)
- [View Pending Services](#)
- [Enter Activation Codes](#)

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**

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.

---

**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.

*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

**Log In to Online Services**

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

**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.

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** HELP

BSO Welcome | BSO Information | Keyboard Navigation

## 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.