

**Justification for Non-Substantive Changes for Electronic Records Express (ERE)  
Third-Party  
OMB No. 0960-0767**

**Background**

The ERE Third-Party application allows us to provide online copies of documents and digital audio hearing recordings contained in disability claimants' files to the claimant's third-party appointed representative (AR) when the field office (FO) or Hearing Office (HO) processes a representative's written notice of appointment or Form SSA-1696 (Claimant's Appointment of Representative). Additionally, the application provides ARs with the capability to access status reports for cases pending at the hearing and appeals council levels but not for cases pending at the initial and reconsideration levels. ARs rely on the status reports to know which cases they can electronically access.

When ARs attempt to access a claimant's file pending at the initial or reconsideration levels before the FO has processed the written notice of appointment, or Form SSA-1696 (Claimant's Appointment of Representative), the ARs cannot access the file and there is a "strike" against the Ars login. After 10 "strikes" in a 24-hour period, the system locks the Ars out, and the ARs must call SSA's helpdesk to unlock their accounts.

Subsequently, ARs contact the FO to request the status of their written notice of appointment, or Form SSA-1696. The ARs not having access to status reports for cases pending at initial and reconsideration levels has created a significant workload burden on the SSA Helpdesk and FOs as well as frustration within the representative community.

The Social Security Administration (SSA) is enhancing the ERE Third-Party's application to allow appointed representatives to access a list of all their cases pending at the initial and reconsideration levels which will do the following; reduce the number of calls to FOs asking if a written notice of appointment or Form SSA-1696 has been processed; reduce the number of calls to the SSA Helpdesk for unlocking accounts; and greatly improve the customer service SSA provides to the representative community.

**Revision to the ERE Third-Party Status Report function:**

- **Change #1:** We are enhancing the "Get Status Report" page to add a new button labeled, "Get List of Initial and Reconsideration Cases."

**Justification #1:** We are making this enhancement to allow ARs to quickly view a list of up to 100 cases in alphabetical order by a claimant's last name. The information SSA provides the ARs for initial and reconsideration cases is already provided for cases pending at the hearing and appeals council by the "Get Status Report" function.

- **Change #2:** We are producing an excel spreadsheet with a list of all cases pending at the initial and reconsideration levels that have an appointment processed for a

representative. The AR will have the option to download the .csv file.

**Justification #2:** We are producing a excel spreadsheet to allow ARs to view a complete list of all cases pending at the initial and reconsideration levels where they have a processed appointment. The information SSA provides the ARs for initial and reconsideration cases is already provided for cases pending at the hearing and appeals council by the “Get Status Report” function.

SSA will implement these changes upon OMB approval. The tentative implementation date is January 13, 2024.

This action does not affect the public reporting burden.