

# **Medical and Vocational Expert User Guide**

## **ERE for Experts: Registration Guide for Company Experts**



**June 2018**

## *Background*

The Office of Hearings Operations (OHO) contracts with Medical Experts (MEs) and Vocational Experts (VEs) to perform services such as providing testimony at ALJ hearings and responding to interrogatories. These services require reviewing case documentation stored in the electronic folder (eFolder).

ERE (Electronics Records Express) for Experts is a secure web service that provides registered experts with electronic access to the exhibited documents in eFolder sections A, E, and F of cases they are assigned in CPMS (OHO's Case Processing and Management System).

This registration guide is for a ME or VE working for a company that provides expert services to OHO. Individual Blanket Purchase Agreement (BPA) holders should refer to the "Registration Guide for Individual BPA Holders".

## *Registration*

Experts that work for a company with an active contract or BPA to perform medical or vocational expert services for OHO are eligible to obtain an ERE for Experts account. Registration consists of:

- Creating a *MySocialSecurity* account
- Adding extra security to your *MySocialSecurity* account
- Notifying your company that registration is complete

Each expert must create an individual *MySocialSecurity* account with extra security.

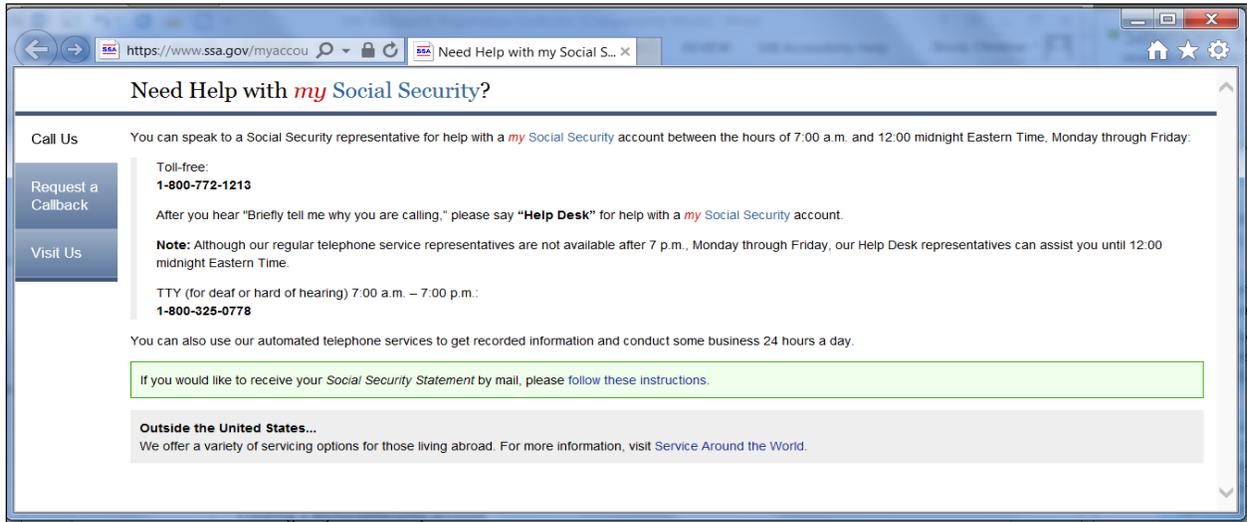
## *Getting Help*

If you are having issues creating a *MySocialSecurity* account, or adding the extra security to your *MySocialSecurity* account, contact the helpdesk for assistance. The Helpdesk can provide assistance with issues that occur while trying register. Use this link to access the helpdesk information webpage: <https://www.ssa.gov/myaccount/help/>.

There are three options available when requesting assistance on the *Need Help with my Social Security* webpage:

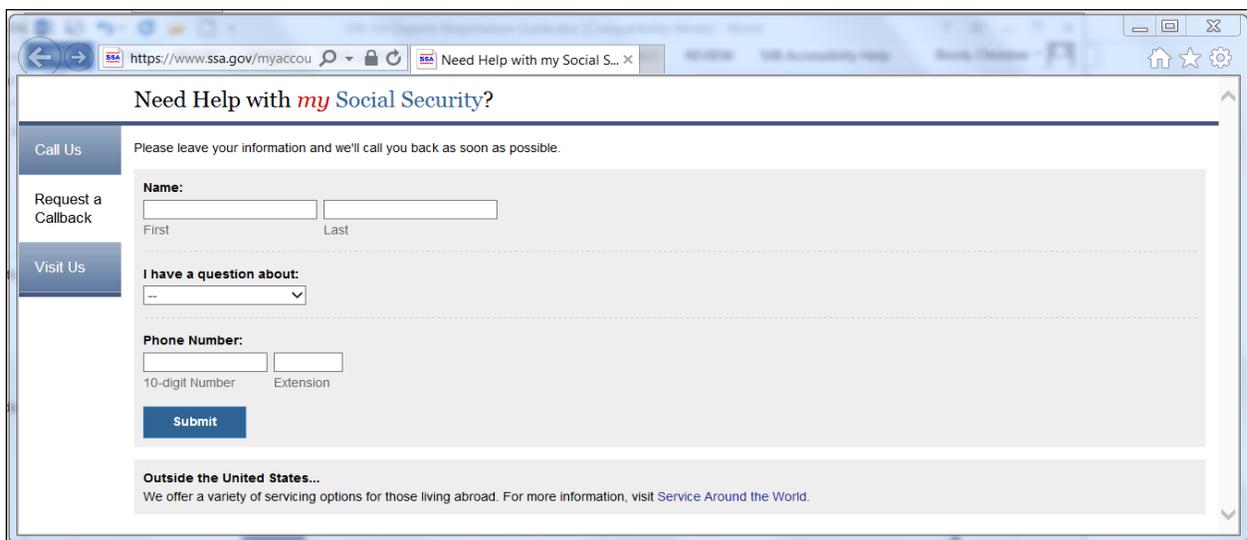
### Call Us

- The helpdesk hours of operations is 7:00am to 12:00am Eastern Time, Monday through Friday.



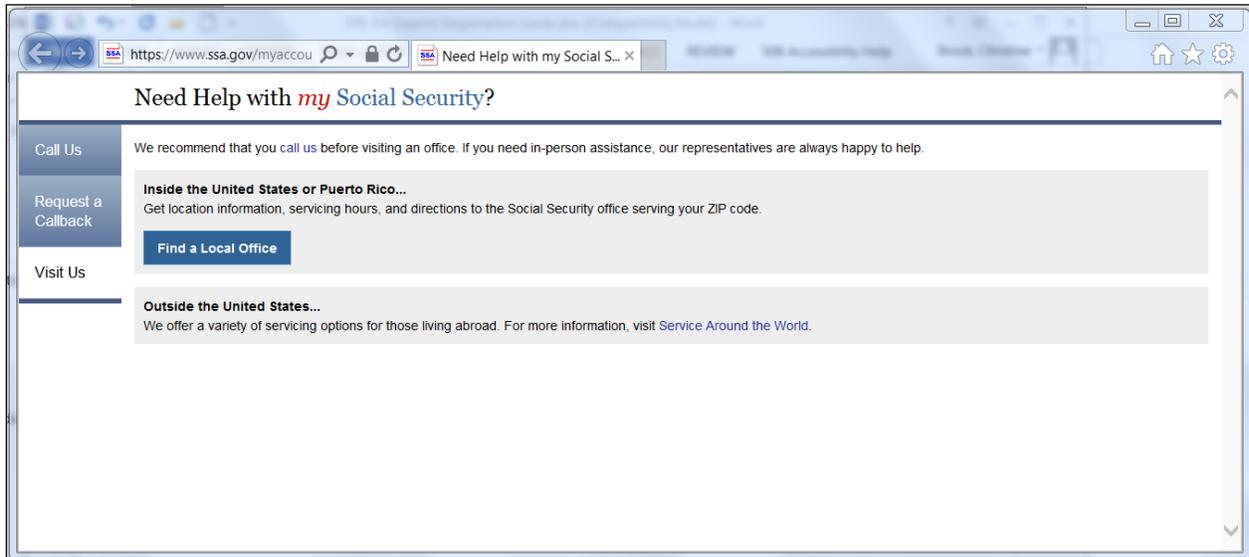
### Request a Call Back

- This option will send a message to the helpdesk and you will not have to place a phone call. Keep in mind, this option is only available during hours of operations, 7:00am to 12:00am Eastern Time, Monday through Friday.



## Visit Us

- This option allows you to locate the closest social security field office in accordance to your zip code.



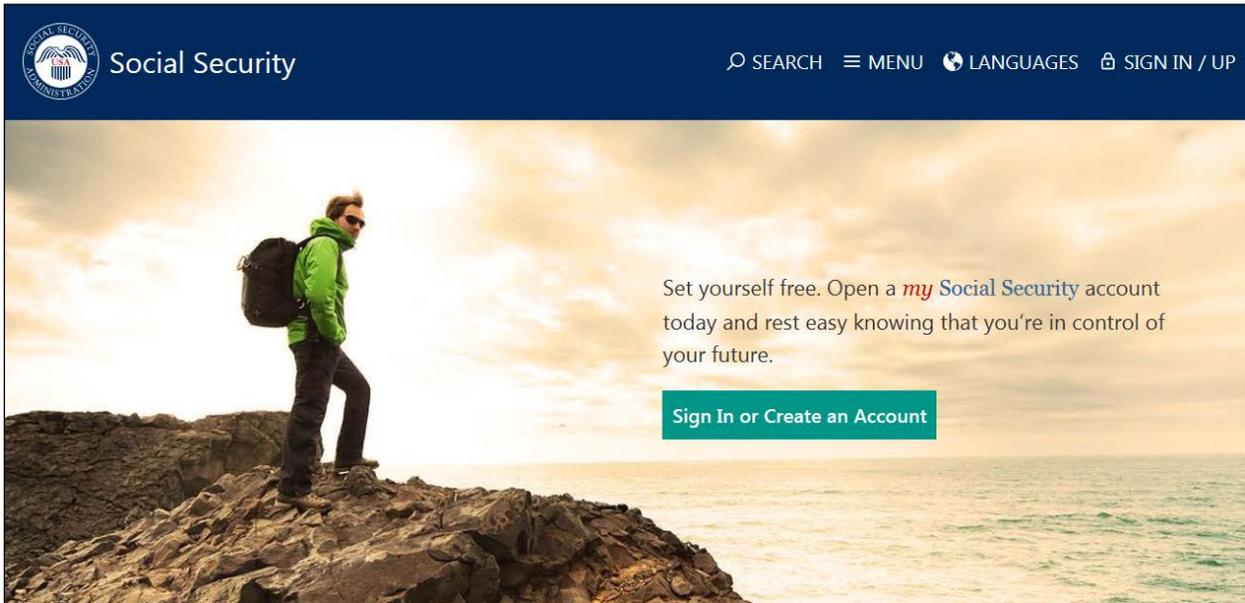
If the helpdesk is unable assist with the particular issue, they will direct you to visit your local Social Security field office. By using the *Visit Us* in the 3<sup>rd</sup> option above, you can locate the closest office nearest to your location. It is recommended to first call the field office to make an appointment.

## Step 1 - Create a *MySocialSecurity* account

If you already have a *MySocialSecurity* account, go to Step 1.8 (page 10).

If you already have a *MySocialSecurity* account with extra security, go to Step 3 (page 14).

1.1. Go to <https://www.ssa.gov/myaccount/> and click “Sign In or Create an Account”



## 1.2. Click “Create An Account”

New Users	Existing Users
<p><b>You must be able to verify some information about yourself and:</b></p> <ul style="list-style-type: none"><li>• Have a valid E-mail address,</li><li>• Have a Social Security number,</li><li>• Have a U.S. mailing address, and</li><li>• Be at least 18 years of age.</li></ul>  <p>You can only create an account using your own personal information and for your own exclusive use.</p> <p>You cannot create an account on behalf of another person or using another person's information or identity, even if you have that person's written permission.</p> <p>For example, you cannot create an account for another person:</p> <ul style="list-style-type: none"><li>• With whom you have a business relationship</li><li>• For whom you are a representative payee, or</li><li>• For whom you are an appointed representative.</li></ul> <p>Unauthorized use of this service may subject you to criminal or civil penalties, or both.</p> <p><input type="button" value="Create An Account"/> <a href="#">Learn More</a></p>	<p><b>Username:</b></p> <input type="text"/> <a href="#">Forgot Username</a> <p><b>Password:</b></p> <input type="text"/> <a href="#">Forgot Password</a> <p><input type="button" value="Sign In"/></p>

## 1.3. Read and agree to the Terms of Service and click “Next”

<input type="checkbox"/> I agree to the Terms of Service.
<input type="button" value="Next"/> <input type="button" value="Exit"/>

1.4. Enter the requested information. Under “Add Extra Security”, check “Yes, let’s start now”.

### Please tell us who you are

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**Your Name:**  
As shown on your Social Security card.

First M.I. Last Suffix

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**Social Security Number (SSN):**

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**Date of Birth:**

Month Day Year

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**Home Address:**  
We cannot accept a business address unless it is also the place where you live. The information you provide here will not update any information we have on file.

Street Line 1:   
Street Line 2:

City/Town:  State/Territory:  ZIP Code:

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**Primary Phone:** [? I don't have a phone number.](#)  
We only need this to verify your identity.

10-digit Number

### Add extra security

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You may add an extra level of security to your account by receiving a text message on your cell phone each time you sign in. Would you like to add this extra security feature?

Yes, let's start now.  No, maybe later.



1.5. Select from one of the three verification methods, enter the requested information, and click “Next”.

Option 1: The last 8 digits of a credit card

**To add this feature, you must first verify your identity with one of the following:**

- the last 8 digits from your Visa, MasterCard or Discover Card
- information from a W-2 tax form
- information from a 1040 Schedule SE (self-employment) tax form

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**Enter the last 8 digits from your Credit Card:** [? Tell me more.](#)

We can only accept Visa, MasterCard or Discover credit cards. We do not verify debit cards. This information is only used once to verify your identity.

XXXX - XXXX -  -

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**Next**

Option 2: Information from a W-2 tax for

**To add this feature, you must first verify your identity with one of the following:**

- the last 8 digits from your Visa, MasterCard or Discover Card
- information from a W-2 tax form
- information from a 1040 Schedule SE (self-employment) tax form

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**Enter the amount in Box 5 from your W-2:** [? Tell me more.](#)

We can better verify your identity if you use an older W-2 (within the last 5 years, excluding last year).

\$

**Enter the Employer Identification Number (EIN) from your W-2:**

You can find the EIN in Box B on your W-2.

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**Next**

Option 3: Information from a 1040 Schedule SE

**To add this feature, you must first verify your identity with one of the following:**

- the last 8 digits from your Visa, MasterCard or Discover Card
- information from a W-2 tax form
- information from a 1040 Schedule SE (self-employment) tax form

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**Enter the amount in Box 4 (or Box 6 on the long form) 1040 Schedule SE:** [? Tell me more.](#)  
We can better verify your identity if you use an older 1040 Schedule SE from the last 5 years.

\$

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**Next**

1.6. You will be asked three personal questions to verify your identity. Select the appropriate responses and click “Next”

**Please tell us about yourself**  
The following questions ask you for information that only you are likely to know. These questions help ensure that only you can create an account in your name. We will not store your answers.

[? Why are these questions important?](#)

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**In which of the following cities have you previously lived?**

- Mayberry
- Dallas
- Springfield
- Bedford Falls
- None of the above

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**Which of the following is a previous phone number?**

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- None of the above

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**What is the name of the county in which you currently live?**

- Silver Meadows
- Newfield Heights
- Orange Hills
- Rochester
- None of the above

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**Next**

- 1.7. Create a username and password. Enter and confirm your e-mail address. Select security questions and type in your answers. Click “Next”

**Please create your account details**

**Username:**  
[Text Input]  
8 to 20 letters and/or numbers  
- cannot be your Social Security Number (SSN)  
- cannot be your name

**Password:**  
[Text Input] [Repeat/Strength] [Text Input]  
8 characters minimum and must contain:  
- at least one uppercase letter (A-Z)  
- at least one lowercase letter (a-z)  
- at least one number (0-9)  
- at least one symbol (For example: ! @ # \$ % ^ & \*)

**Confirm Password:**  
[Text Input]

**Email Address:**  
We need this to communicate with you about your online account.  
[Text Input]

**Confirm Email Address:**  
[Text Input]

**Please create your password reset questions**  
If you forget your password, you can reset it by providing these answers.

**Question 1:**  
[Dropdown Menu]

**Answer 1:**  
[Text Input]

**Question 2:**  
[Dropdown Menu]

**Answer 2:**  
[Text Input]

**Question 3:**  
[Dropdown Menu]

**Answer 3:**  
[Text Input]

**Next** [Exit]

You have successfully created an account and requested extra security. You will receive a letter in the mail with an activation code. When you receive the mailing, you are ready for Step 2.

**NOTE:** Some users cannot create a *MySocialSecurity* account on their own. They may have a block on their credit that prevents them from verifying their identity, or they could be entering information that does not match what is in SSA’s systems. If you are one of the few that cannot create a *MySocialSecurity* account, please contact the helpdesk for assistance with getting your account created. The Helpdesk contact information is located at <https://www.ssa.gov/myaccount/help/>.

If you already have a *MySocialSecurity* account, you need to request extra security:

1.8. Log into your *MySocialSecurity* account

1.9. Click on the Security Settings tab, then click “Add Extra Security”

**my Social Security**

My Home Help Center **Security Settings**

### Security Settings

Security Option:

**Standard** - You sign in with a username and password. If you have a text-enabled cell phone, you may add extra security.

**Add Extra Security** [How does this work?](#)

Password:

Expires in 130 days (October 25, 2016)

**Update Password**

Current E-mail:

metamagan@gmail.com

**Update E-mail**

[Deactivate Online Account](#)

### Password Reset Questions

If you forget your password, you can change it by answering your password reset questions.

Question 1:  
Where were you when you first heard about 9/11?

Question 2:  
What was the name of your first stuffed animal?

Question 3:  
What is the middle name of your mother?

**Update Password Reset Questions**

1.10. Read and agree to the Terms of Service and click “Next”

**I agree to the Terms of Service.**

**Next** Exit

1.11. Enter the requested information and click “Add Extra Security”

### Provide Information

**Where can we mail the letter containing your upgrade code? Must be a mailing address in the United States or a U.S. Territory.**

Street Line 1:

Street Line 2:

City/Town:  State/Territory:  ZIP Code:

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**Primary Phone** [? I don't have a phone number.](#)

We only need this to verify your identity.

10-digit Number

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**To add this feature, you must first verify your identity with one of the following:**

- the last 8 digits from your Visa, MasterCard or Discover Card
- information from a W-2 tax form
- information from a 1040 Schedule SE (self-employment) tax form

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You have successfully requested extra security. You will receive a letter in the mail with an upgrade code, which can take up to 10 business days to arrive. When you receive the mailing, you are ready for Step 2.

## Step 2 – Complete the security upgrade

Once you have received a letter in the mail with an upgrade code, you are ready to complete the security upgrade.

- 2.1. Log into your *MySocialSecurity* account
- 2.2. Select the option “Yes, enable my extra security” and click “Next”

### Do you have your extra security letter and your phone?

**Do you have:**

- the letter containing your step-by-step instructions, and
- a cell phone with text messaging?

Yes, enable my extra security.

No, skip this for now.

I changed my mind, cancel my request for extra security.

**Next**   Exit

- 2.3. Enter your cell phone number and click “Get Text Message”

### Please add your cell phone

To enable your extra security features, you need a cell phone that is able to receive text messages.

 **Enter your Cell Phone Number:** [? What if I lose or change my phone number?](#)

We'll send a text message to this phone each time you sign in. (Your text message rates still apply.)

10-digit Number

**Get Text Message**   Previous   Exit

2.4. Enter the security code sent to your phone via text and select “Submit Security Code”

### Enable your Extra Security - Enter Text Code

#### Please enter your security code

 We sent a text message to: **(123) 456-7890**  
Please allow up to 2 minutes for the text message to arrive. The security code will expire 10 minutes from the time of your request.

**Enter the security code you just received:**

#### Having trouble?

Make sure that your cell phone number is correct.  
If not, please go back and [correct your number](#).

Check your reception and text messaging (SMS)  
You may need to move to a location where your phone can receive a text message. Please check that your phone can receive text messages.

Still having trouble?  
We can [send a new text message](#).

2.5. Enter the upgrade code found on the letter mailed to you and select “Submit Upgrade Code”

### Thank you for your security code!

Please enter the upgrade code from your letter to enable your account's extra security features.

 **Enter the Upgrade Code:**

You have successfully added extra security to your account.

### Step 3 – Access ERE for Experts

This is the URL you will use to access ERE for Experts: <https://secure.ssa.gov/ERECA/MEVE01View>

**You will only use this link to access claimant eFolder documents.** You will continue to use *MySocialSecurity* to access your personal information. **You cannot access eFolder documents using any URL except for the one listed above.**

**NOTE:** Do not auto save your password.

**If you are unable to access files, please contact your company. Your company must provide SSA with your full name and SSN. SSA will associate you to the company in our case processing system. You will not have access to any eFolder document.**