General Principles of IT Modernization

* Accessibility
* Input from internal and external stakeholders
* Compliance with laws, regulations, and subregulatory guidance
  + Efficiency cannot substitute for due process (abandoned iAppeals one area where SSA did not follow this principle)
* Options for people who cannot use automated systems (e.g. difficulty with mySSA identity verification)
* Protection of privacy

Specific Modernization Ideas

* Improve systems to handle change of address and other contact information for claimants, beneficiaries, representatives, rep payees, etc.
* Increase automation of appointment of representative (SSA-1696) form and related forms such as 1695
  + It is not currently possible to attach these to initial DI claims (and essentially impossible to file initial SSI claims online at all); nor can any evidence be attached even though it can be when using iAppeals for requests for reconsideration, ALJ hearing, or Appeals Council review.
* Recognize firms as representatives
  + In response to a NOSSCR question about this, OHO said about this “We are collaborating with our partners in the Office of Information Systems to build the necessary infrastructure, through our IT Modernization Plan, to recognize firms as representatives. IT Modernization is a large scale, long-term project with many project deliverables to enhance the way we adhere to providing a mission focused program throughout its lifecycle. To date, we do not have a specific timeframe to recognize firms as representatives, however, we are making progress to ensure we are able to enhance the way we deliver services.”
* Provide electronic access to claims files at the initial and reconsideration levels, as well as for continuing disability reviews (CDRs) at levels below ALJ hearing.
  + This includes being able to view and submit evidence and being able to obtain a status report of all the representative’s cases.
* Simplify addition of prior files (both paper and electronic) to new claims and CDRs.
* Use information SSA already has to pre-fill Work History Report before sending to claimant. Alternately, send with a copy of the DEQY.
* Create ERE document type for HA-55 (video hearing opt-out form)
* Update OHO (and other?) case processing system to flag cases as continuing disability review, including alerts to locate and associate comparison point decisions
  + Deputy Commissioner Gruber said in November 2017 that a general update to OHO case processing system was in progress – this should be part of that update.
* Automate submission of queries (DEQY, NDNH, etc.) to claims files before ALJ hearings. Ideally, queries should be added to the file when acknowledgment of hearing request sent, with updates at the time of hearing scheduling, and again more than 10 business days before hearing if any changes.
* Improve tracking and processing of submitted documents
  + WorkTrack does not seem sufficient—things still get lost. Is it improper use of system, not enough staff to scan things in, or something different?
  + Make it easier for SSA staff to find documents within files.
* Consider whether current system at PSCs, where cases are “put on hold” and made inaccessible until the next business day (as it was explained to NOSSCR staff) increases or decreases efficiency
* Provide email and text receipts when beneficiaries make income reports.