

EARNINGS CORRECTIONS PERSONAS

The following personas for Earnings Corrections were created using data obtained in user interviews. There are more personas for Corrections but additional user research will need to be conducted in order to create them.

Julie, Earnings Operations Expert (EOE)

“I review all work being processed. I make sure the corrections (are correct) before it’s sent out.”



- Work Location: **DEBS**
- Time in Current Role: **6 years**
- Time at SSA: **17 years**
- Education: **4 year college**

Married with 2 children

Enjoys playing violin and involves with her community activities

Loves doing Yoga and Pilates

Top Tasks

- Reviews the case, issue, and evidence submitted by NH
- Reworks the case (takes the same steps as the BET)
- Reviews notices prepared by BET for accuracy and grammar
- Print and mail traditional mods notices (when in office)
- Releases and clears cases in ICOR
- Closes the case in MICES and adds notes
- Assists BETs with problem cases (ex. Scrambled Wages)
- Conduct training and provide guidance on policy for BETS
- Reviews WMS (Workload Management System) to check for aged cases
- Checks MICES for assigned workloads

Challenges

- Multiple systems are involved
- Lack of case notes by BETS in MICES and ICOR
- Lack of history on some cases
- Lack of communication with FO
- Cases are a year behind due to pandemic
- Increase in congressional cases
- Increase in duplicate cases because of the backlog

Needs

- Combine multiple systems into one
- Ability to transfer jurisdiction of ICOR cases
- Improved communication with FO
- Make notes mandatory in a new application

Computer Skills



Job Knowledge



Reaction To Change



Schedule Availability



Age 45

Graduated (College)

Hired by SSA as Benefit & Earnings Tech

Earnings Operations Expert

Retirement

John, Benefits & Earnings Technician

"I want to have every piece of evidence used to make the determining factor so that when my case goes into review, you do not have to query anything."



- Work Location: Wabash
- Branch: Earnings Adjustment Branch
- Time in Current Role: 7 years
- Time at SSA: 7 years
- Language: English

- Likes playing online games

Tasks

- Earnings Adjustments including wage research and correcting records
- Disagreements on earnings records and scrambled wages
- Scouting requests from FO
- Work with and use ICERS for item correction
- Process and send out SS5s, PAW2 (W-2s), eFOIA applications and certified earnings records

- Queries used: SEQY, DEQY, ERQY, AEQY, Suspense File
- Tools used: 2.8, GIR, ORS, ECMS, MICES, Microfilm, QueryMaster

Interacts with

- Members of the public (via mail)
- Coworkers and management

Challenges or Pain Points

- Has numerous workloads
- Unable to see evidence or data input by FO
- Going back and forth between applications and systems
- Time involved in processing a single wage correction
- Impact from FO wage deletions
- Policy not followed consistently at FOs

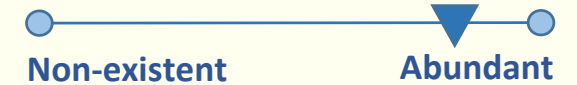
Needs

- More modern, updated system
- Less places to look for data
- An electronic/paperless process
- One place for documentation accessible by all users
- Streamlined business process
- Formatted notices with custom inserts to send to NH

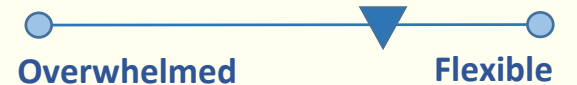
Job Knowledge



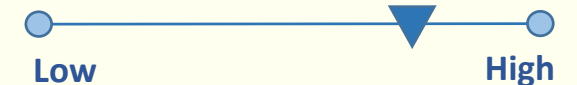
Peer Support



Schedule Availability



Tech Savvy



Reaction to Change



Age 32

Graduated College (BA)

Hired by SSA

Retirement