



# Abbey, Claims Specialist (CS)

*"I use earnings queries every day for my claims."*



Work Location: Field Office

Time in Current Role: 10 years

Time at SSA: 15 years

Education: 4 year college

- Abbey is married with three kids
- She enjoys assisting customers filing for benefits
- She is a fitness enthusiast and loves yoga

## Top Tasks

- Interview customers for filing for benefits on phone and/or in-person
- Answer phones or work reception
- Prepare for daily interviews:
  - Complete pre-interview check list
  - Pull SEQY/DEQY to develop claims
  - Use ERQY and AEQY to verify employer information
  - Check for EARQ (Earnings Alerts) for every claim
- Resolve customers earnings errors when necessary
- Process claims
  - Use earnings data to develop claims
  - Pull tickle list
- Interacts with customers, staff, attorneys, etc.

## Challenges

- Juggling multiple workloads
- Must interact with many systems (DISCO, PCOM, Query Master, WHAT) to obtain queries
- Can only have 1 web-based application open at one time
- Queries with large amounts of onscreen data are automatically routed to the printer
- DEQY results display is hard to read and understand

## Needs

- A one-stop shop (have all queries in one location)
- A scrolling snapshot of a customer's earnings record
- A consolidated view of queries (e.g. WHAT)
  - Scrolling, sorting capability and tabs
- Ability to access POMS/policy through links

Computer Skills



Job Knowledge



Peer Support



Schedule Availability



Reaction To Change



Age 45

Graduated College

Hired by SSA (Clerical)

Service Rep

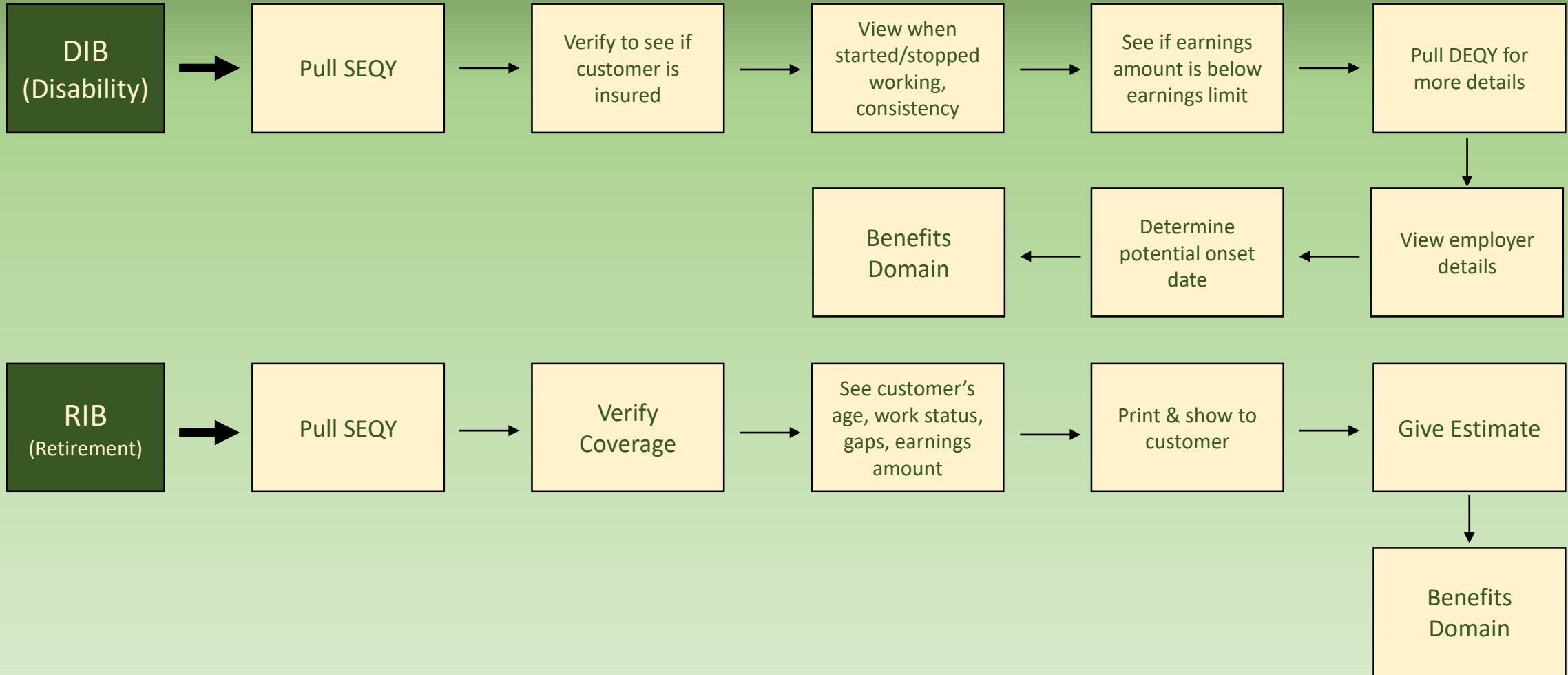
Claims Specialist

Retirement





# User Flows for Abbey, CS





# Fernando, Lead Customer Service Rep (LCSR)

*"I am very technical and follow procedure stated in POMS."*



Work Location: Teleservice Center

Time in Current Role: 10 years

Time at SSA: 25 years

Education: 4 year college

- Married with four kids
- Fernando enjoys helping people in need
- Active in his community

## Top Tasks

- Conducts service observations and quality reviews
- Completes mail audits
  - Obtain secure print traffic and pending tickle lists
- Answers calls on 800N based on call level or when required
  - Uses CHIP to access multiple queries when talking to customers on the phone.
  - Uses DEQY and SEQY for earnings corrections
  - Uses AEQY to verify employer information using EIN
  - Uses suspense file to check for missing wages in earnings correction process
- Assists other CSRs
- Interacts with customers on the phone, SSA management and staff

## Challenges

- Staying updated on system and policy changes to know what to do to resolve customers inquiries
- Handling a high volume of calls
- Maximizing all resources and time management is very important

## Needs

- Ability to link to other systems and/or queries
- Plain language, not so many codes
- Ability for SEQY to give details about insured status and pension sources

Computer Skills



Job Knowledge



Peer Support



Reaction To Change



Schedule Availability



Age 50

Graduated College

Hired by SSA

Customer Service Rep

Lead Customer Service Rep

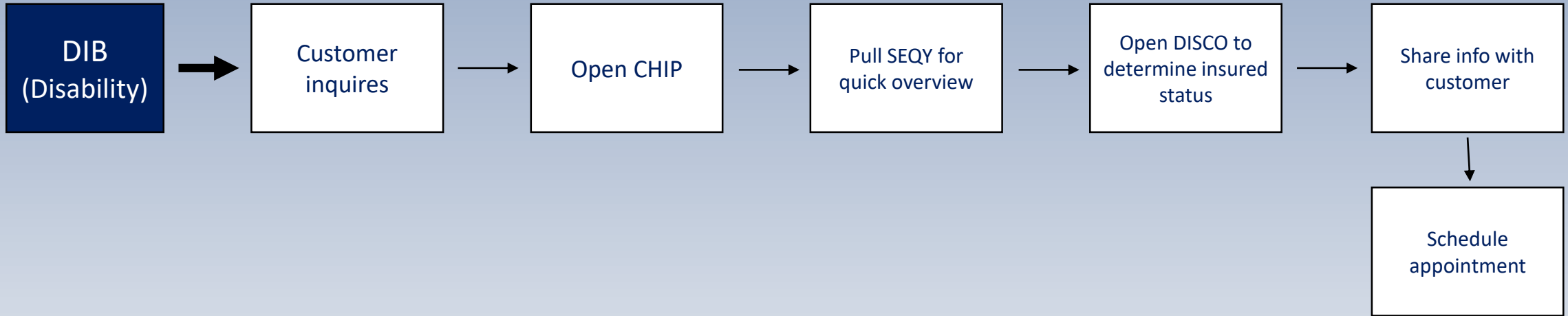
Retirement



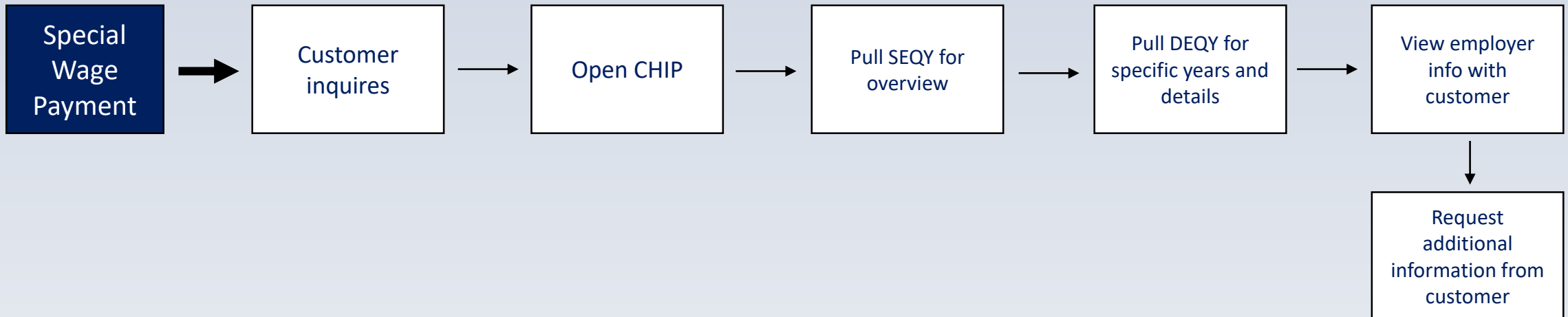


# User Flows for Fernando, Lead CSR

## TASK 1:



## TASK 2:





# Brandon, Customer Service Representative (CSR)

*“Customers don’t know which earnings amount belongs to which year on SEQY and DEQY.”*



Work Location: Field Office

Time in Current Role: 6 years

Time at SSA: 6 years

Education: 4 year college

- Married with two kids
- Likes to use the Benefits Matrix to give accurate estimates
- Enjoys hiking and fishing

### Top Tasks

- Give customers information they need to plan for retirement i.e. determine eligibility, provide benefit estimates
- Process Special wage payments such as severance pay
- Remove earnings in scrambled earnings/identity theft situations
- Determine eligibility in disability claims
- Resolve discrepancy in earnings records

### Challenges

- Have to open DEQY separately when details are needed after viewing SEQY
- Not able to sort view summary earnings by highest, lowest and years with no earnings
- Helping customers read and understand SEQY & DEQY print outs
- Hard to understand codes/acronyms
- Have to flip through pages when viewing entire earnings records in DEQY

### Needs

- A one-stop shop (have all queries in one location)
- More efficient way to move through pages in DEQY
- Plain English and better translations
- Better display of information: columns, less clutter, more visually pleasing
- Get rid of automatic print feature in DEQY

Computer Skills



Job Knowledge



Peer Support



Schedule Availability



Reaction To Change



Query Usage



Age 42

Graduated College

Other Career

CSR

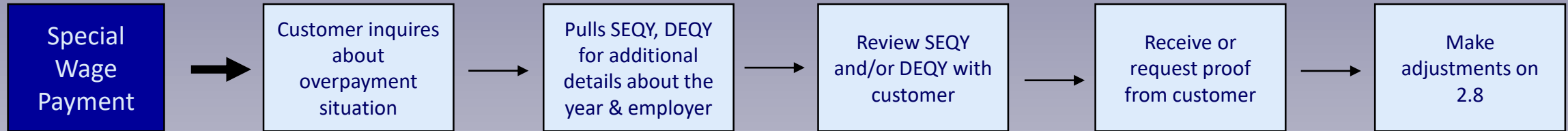
Retirement



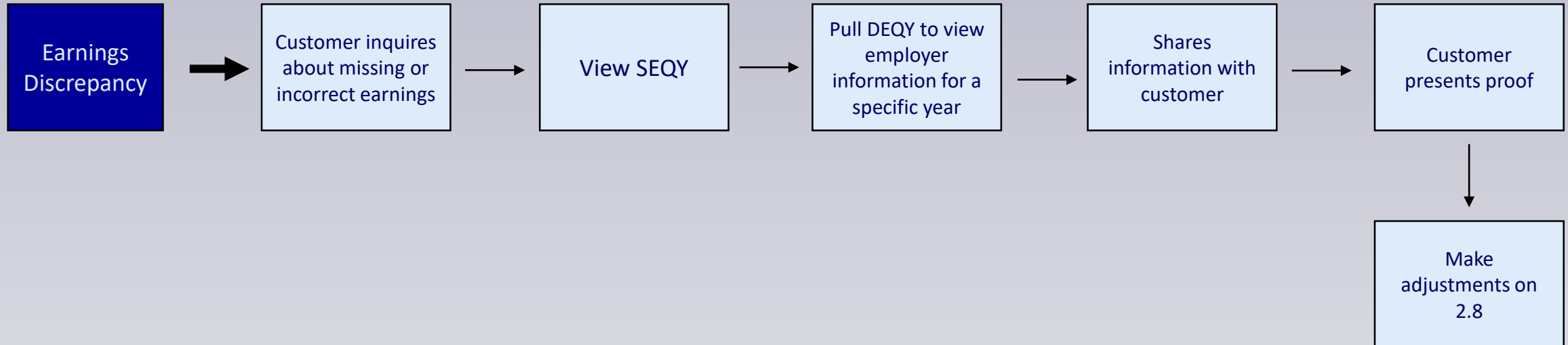


# User Flows for Brandon, CSR

## TASK 1:



## TASK 2:



# Common User Pain Points

Difficult to understand codes/acronyms

Want to scroll up and down to view whole earnings data instead of flipping through different pages

Have to go ask other technicians to understand what notes in Remarks mean

Customers have difficulty reading earnings data

Have to type 1,2,3,5,8 every time for Requested Details

Have to open queries separately

Difficult to read screens

Can't see employer details in SEQY



System prints automatically for large data

Cluttered information

Can't see full name of customer

# Opportunities

Add ability to sort view earnings by highest, lowest, years with no earnings and by employer

Combine information in SEQY and DEQY

Show customer's full name

Add ability to click on Remarks for detailed information

Reduce codes/acronyms

Add ability to default set frequently used Requested Details

Give option to print or not print instead of printing automatically

Adjust space between years and earnings to make it more legible



Implement web based, modern design

Clear up information/give option to customize view