



# FRONTLINE

Issue 29

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- Life After SSA
- Who is Dr. Wells?
- Letting Go of Paper

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## From a retiree:

Is retirement what you expected? *"It is so much more. I highly recommend it. Life is out there waiting. Grasp it before it is gone."*

National Council of Social Security Management Associations, Inc.

## 2009 Resolutions Revisited—Another Productive Year for NCSSMA

By Patty Maddox, Denver Region

At the 39th annual NCSSMA meeting, held in October 2008, members agreed to pursue action on seventeen resolutions. Thanks to the efforts of the members serving on NCSSMA's committees throughout this year, progress has been made on many of these important issues. Now that we're preparing for the 40th annual meeting, which will bring new resolutions, let's pause to look at what has happened with some of last year's initiatives.

**Resolution 3: NCSSMA will work with the Commissioner and DCO to actively pursue adequate staffing and resources to handle both current workloads and anticipated future workloads for all public contact offices. NCSSMA will continue to work with its external partners to secure support for resource allocation to field offices and the teleservice centers.**

The Staffing and Training Committee designed the 2009 Survey of Management to gather data regarding this issue. The survey results indicated that 77.4% of the managers believe that they do not have adequate staffing to keep workloads current. NCSSMA officers shared these results with SSA executives, including Linda McMahon and Commissioner Astrue, several times throughout the year in support of their repeated recommendations for increased field staffing. And, NCSSMA's Washington Representative also presented the results to Members of Congress and the Social Security

Advisory Board. NCSSMA's repeated communications of these survey results were instrumental in encouraging Congress to pass the final FY 2009 budget, which included increased staffing funds, and in providing information to the Obama Administration to ensure that the President's FY 2010 budget proposal reflected adequate funding to address increased staffing needs.

**Resolution 4: NCSSMA will advocate for revision of SSA management award allocations.**

The Labor Relations Committee used the 2009 NCSSMA Survey of Management to assess managers' views of the current award process. The survey results indicated that only 26.8% of the managers were satisfied with the management award process. One concern is that current awards do not reflect performance in the way that PACS intended. Because the majority of members are not satisfied with the awards process and NCSSMA is concerned that the current process will discourage our best employees from pursuing management careers, the Labor Relations Committee drafted a letter for the Executive Committee to send to the Deputy Commissioner of Operations describing these concerns. The letter was sent in September.

**Resolution 5: To improve telephone service NCSSMA endorses "Forward-on-Busy" and other automated options and will encourage Central Office to make these available to all field offices receiving new telephones systems.**

*(Continued on page 2)*

## Resolutions continued



"Forward-on-Busy" has been extended to 200 non-TSRP field offices. In these offices, callers are given the option of having their call forwarded to the toll free number rather than

holding until a field office employee is available to answer the call. TSRP offices have been given additional automation options that do not require FO involvement. SSA is now moving in a slightly different direction, but with a similar goal that actually combines these two functions. The agency is moving to a system called "Dynamic Forward on Busy," which gives callers six to ten automated service options as soon as they are forwarded to the toll free number. The agency is hopeful that this new version will encourage more callers to select the call forwarding option, rather than choosing to wait for a local employee.

In addition to pursuing these automated functions, NCSSMA also raised specific concerns regarding Telephone Service Replacement Project (TSRP) conversions with the Deputy Commissioner of Operations. These concerns led to the creation of a national TSRP workgroup. Since its creation in May 2009, this workgroup has already developed a number of guides and checklists designed to assist managers with the TSRP conversion process. These guides were very quickly made available to managers via the TSRP website. While some progress has already been made, the Management Committee is continuing to gather managers' input on TSRP and is continuing to advocate for VOIP improvements through ongoing communication with DCO.

**Resolution 6: NCSSMA will continue to work with and impress upon SSA leadership that field offices need an adequate number of computer workstations in order to facilitate agency training and to provide good service. NCSSMA will advocate for SSA to add additional computers to its existing ratio for offices and, more importantly, to make sure that this ratio is in each office.**

NCSSMA has been pursuing this issue for at least two years. These efforts were partially responsible for the formation of the Workstation Allocation Review Workgroup, which has been analyzing workstation needs in the various components and has been developing recommendations for Central Office. This workgroup did involve a NCSSMA member who was able to liaison between the workgroup and NCSSMA by informing the Automation Committee of the workgroup's

progress on this issue. This year, the workgroup did make specific recommendations to slightly increase the workstation allocation ratios for various components. Central Office adopted some of these recommendations, but additional workstations cannot actually be added to offices until the budget supports it. An interesting side note is that the agency is encouraging new office space to be designed so that employees' permanent workstations are placed at barrier walls to interview the public eliminating the need for a separate front end workstation. NCSSMA will continue to monitor the actual distribution of workstations while also continuing to communicate the need for workstation relief in the field.



**Resolution 8: NCSSMA will continue to work with Central Office to create security profiles that provide reasonable protections against fraud and abuse while allowing employees the necessary flexibility to accomplish agency business in the current budget climate.**

The Automation Committee has been pursuing changes in this area for the last few years. Service Representatives were given expanded access to EDCS earlier this year, but additional changes are still needed. The Automation Committee developed and drafted recommendations for changes to the following system profiles: Service Representative (SR), Manager, Student, and Area Systems Coordinator (ASC). After review by the NCSSMA officers and regional presidents, these proposals were shared with DCO in September 2009. These proposed changes include giving SRs access to load and transfer appeals, the ability to process Medicare Part D applications in MAPS, and the ability to process 090 denials in MCS. The proposal also requests increased access to the mainframe for managers and ASCs as well as access to eRPA for student employees. NCSSMA is continuing to advocate for these changes in order to allow the most efficient use of field office staff during this time of increased workload demands. During NCSSMA's recent visit with DCO they were told that some of the enhancements that were requested for Student pins would be made.

*(Continued on page 3)*



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## Resolutions continued

### **Resolution 13: NCSSMA will work with Central Office to immediately resolve the authentication problems preventing secure e-mail transmissions between SSA and congressional offices and to rescind the mandate to scan congressional inquiries into the ACT system.**



A September 2008 meeting between Linda McMahon and NCSSMA led to creation of a national workgroup for this issue. This workgroup created the Congressional Inquiries Application (CIA), a user friendly web-based stroke

tally system to replace ACT. This was successfully rolled out nationally in June 2009. Additionally, SSA is now beginning to roll out eCongressional to allow secure e-mail transmissions between SSA and congressional offices. These new tools should assist managers by reducing the time spent on documenting these contacts and, consequently, increasing the time that can be spent solving these sensitive cases.

### **Resolution 15: NCSSMA will work with Central Office to ensure that fee for services third party representatives submit claims and appeals via the Internet.**

At the time that this resolution was created, some progress had already been made toward this goal. The Appointed Representative Suite and System Process (ARSS) was in the beginning stages of development. This system of online tools for third party representatives will include an Internet version of the 1694, 1696, and 1699; authentication ability to recognize authorized representatives; and a link to the Authorized Representative Database which will propagate information from this new system to CPMS and claim systems. During the past year, Central Office has been evaluating related regulations in order to determine how to implement this system. Their analysis led to splitting this initiative into two phases.

The first phase will allow representatives to directly access the certified electronic medical files for ODAR cases, freeing ODAR employees of the time consuming task of copying medical folders for representatives. The second phase is expected to automate the 1696, authorized representative fee process, and notices to representatives. This system will link to MSSICS, MCS, and CPMS; eliminating the need for field office employees to key repetitive information into multiple systems. The second phase is also expected to include a mandate that authorized representatives conduct business with Social Security electronically. Because the second phase requires regulatory changes, it will take longer to implement. But, Central Office is continuing to pursue the

regulatory changes necessary for this phase. NCSSMA's Disability Committee not only fully supported Central Office's development of this system, but also actively contributed to its creation as the committee chairperson participated in the Disability Direct Streamlining Workgroup which created this system.

Only a few of the resolutions were highlighted here to provide a quick overview of NCSSMA's progress on these important issues to our members. We encourage you to read the Final Resolutions Report on our website at [www.NCSSMA.org](http://www.NCSSMA.org) for additional information. All of the NCSSMA committees worked diligently in gathering facts and professionally presenting all of the resolution issues to SSA executives on our behalf. Both NCSSMA and our Washington Representative have played a crucial role in advocating for additional resources for the agency. And finally, the willingness of SSA executives to listen and work with NCSSMA to make things better enables us to move forward in accomplishing SSA's crucial mission.

## Volunteer for FEEA – It's Easy!

As a member of NCSSMA, you know how important the Federal Employee Education & Assistance Fund (FEEA) is to feds all across the country in times of need. During CFC time, it's especially important to get the word out about FEEA's services and to remind your fellow feds that donations to FEEA CFC #11185 make the scholarship and emergency assistance programs possible. You can help by ordering supplies to hand out in your office and letting FEEA know about opportunities to visit your agency for a kickoff or fair. Send an e-mail to [volunteers@feea.org](mailto:volunteers@feea.org) for more information. And thank you for doing your part to help FEEA help federal employees!

## President's Corner by Greg Heineman, NCSSMA President



The cover article of this month's *FrontLine* documents the actions NCSSMA leadership has pursued on resolutions passed during last year's NCSSMA Annual Meeting at West Point. NCSSMA resolutions are the marching orders NCSSMA leaders follow to pursue improvement both internally and externally at SSA. You can see by the results detailed in the article that NCSSMA has been effective in pursuing those items important to you as management. At this year's meeting in Tampa, we will debate and pass a new group of resolutions. I expect many of the proposed resolutions will build on the progress made by NCSSMA committees and members over the past year. The resolution process keeps NCSSMA focused on what is important to our members, and keeps NCSSMA a vital and important organization both inside and outside of SSA.

With my second and final term drawing to a close, I am quite encouraged by both the level of interest in our national offices and the quality of candidates seeking those offices. Our Presidential Candidates, Joe Dirago and Lynn King have been significant leaders within NCSSMA over the years. Joe has

done a great job as our LMR Committee Chairman providing information to agency negotiators in advance of the current SSA-AFGE negotiations. Lynn King has revitalized NCSSMA's connection to the Federal Employee Education & Assistance Fund (FEEA). NCSSMA was a founding member of FEEA, and Steve Bauer, a NCSSMA Past President, is their longtime executive director. Our Vice Presidential Candidates, Fred Bourjaily and Jim Burkert, have also been strong contributors to NCSSMA's success over the years. We have energetic candidates in Billie Armenta for Secretary, Anna Gutierrez for Treasurer, and Brian Russell for our TSC Representative. I know that whatever the outcome of the election, NCSSMA will be well positioned to continue our positive work for community based service well into the future.

Beyond the candidates for national office, NCSSMA is blessed with strong leaders on the Executive Committee, made up of NCSSMA Officers and the ten Regional Presidents. The national representation on the Executive Committee ensures that issues affecting management all over the country are pursued in a positive manner. Our Washington Representative Rachel Emmons, ably assisted by her associate, Aaron Hunter, provides NCSSMA with the presence we need on Capitol Hill to pursue those issues critical to SSA, our members, and the public we serve. The results of our Hill efforts in the past year have been amazing, and thanks goes to Rachel and Aaron for their hard work.

As I move into my new role as Immediate Past President, I am honored to be joining a strong group of NCSSMA leaders who continue to provide energy and wise counsel to

NCSSMA leaders. There is no way I could have had any success at all as NCSSMA president without the help of Past Presidents Rick Warsinsky, Ron Buffaloe, Tony Pezza, Steve Korn, Mary Chatel, Bob Duncan, Don Seatter, Pete Toland, Steve Bauer and Ron Niesing. Rick initiated quarterly calls with this group which provided me with invaluable counsel in dealing with many of the challenges NCSSMA faced during the last two years. The next President will be well advised to take advantage of the advice they offer.

Finally I want to thank you, the NCSSMA membership, for the opportunity to serve you as President the past two years, and in other capacities over the past 16 years. I've had the opportunity to work with agency leaders, advocacy group representatives, and through Rachel, Members of Congress and Congressional staff to try and advance the causes listed in the resolutions we pass each year. As you can tell from the acknowledgements listed above, this has been no solo effort. In order for any future NCSSMA President to succeed, he or she will need to depend on a similarly large support system. As I have said in several of these columns over the past two years there is room for all of you to be involved in NCSSMA, and your help will always be welcomed, appreciated, and needed.

Special thanks to Sue King, our Communications Committee Deputy Chair for all of her contributions. She left us for a promotion in CO. We wish her the best of luck in her new position.

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## Profiles Page Featuring Dr. Reginald Wells

By Jewell Colbert, Kansas City Region and Virginia Schroder, New York Region

*Welcome to our series of ongoing conversations designed to enable our membership and other interested readers to get acquainted with members of the executive staff in Central Office. In this edition, Communications Committee members Jewell Colbert and Virginia Schroder share a conversation with Dr. Reginald Wells, the Deputy Commissioner for Human Resources.*

**On the Office of Human Resources' webpage, there are a total of six components; Office of Personnel, Office of Learning, Labor Management and Employee Relations, Civil Rights and Equal Opportunity, Human Capital Planning, and Executive and Special Services. What would you say is the one major initiative in each of these components that our members should be aware of?**

The Office of Personnel, led by Fred Glueckstein, worked collaboratively with other components to hire more new employees than at any time since the implementation of the SSI program approximately thirty-five years ago. Because of increased FY 09 budget appropriations as well as funds received through the American Reinvestment and Recovery Act, through August, SSA and the State DDS agencies hired approximately 7,000 employees.

In March 2009, the Office of Training was renamed the Office of Learning. Dr. Stephen Patrick leads this component. The transformation from training to learning is more than a name change. Learning is a life-long process. Life-long learning means that our employees will learn together while they expand their capacity to create the results they truly desire through open communication, personal commitment, and a career development path. The Office of Learning has developed a Business Plan to transform SSA into a premier learning organization that supports the development of talent and transfers organizational knowledge to the next generation of SSA employees. One aspect of this activity is concentrating on developing new tools and methods to facilitate programmatic, technical, personal, supervisory, managerial, and executive training for employees.

The Labor Management and Employee Relations office, headed by Milt Beever, is preparing to negotiate term contracts with SSA unions. This staff also develops, clarifies, and disseminates national labor relations and employee relations policy to regional and component staffs.

The Office of Civil Rights and Equal Opportunity, led by Jacy Thurmond, automated the EEO complaints process to improve timeliness and reduce man-hours and operating costs. Because this automation project eliminated the EEO complaint backlog, other Federal agencies are benchmarking its extraordinary success.

My Human Capital and Planning staff, led by Linda Walk, is analyzing the agency's anticipated surge of employee retirements. They provide statistical data to agency components to assist them in their succession planning.

Finally, Bonnie Doyle, who heads our Executive and Special Services Staff, is managing leadership development for the agency's Senior Executive Service (SES) programs. We have an unprecedented scenario in that we are running two SES Candidate Development Programs (CDP) concurrently. The first SES CDP class started in 2008 and will end in 2010. The second class started in October 2009 and will end in 2011.

**Since you started working for SSA, what has been your greatest challenge?**

I would say that my predecessor, Paul Barnes, now Regional Commissioner for the Atlanta region, was a tough act to follow. Paul is an outstanding leader with a stellar reputation. Therefore, when former Commissioner Joanne Barnhart asked me to lead the Office of Human Resources, I was very humbled by the opportunity to follow in Paul's footsteps. Since becoming the Deputy Commissioner for Human Resources, there have been several challenges. The most significant one has been achieving and sustaining diversity in the workplace. Over the years, the Office of Human Resources has used focused strategies for attracting a more diversified talent pool. Our efforts are guided by detailed information that compares SSA's population against the Civilian Labor Force (CLF). By focusing our efforts on attracting the broadest possible applicant groups, we have been able to achieve and maintain parity with the CLF for all groups, while building a workforce that is extremely well qualified and uniquely equipped to carry out the mission of the agency. We have found that couching those efforts in our service imperative (or business case) that mirrors the public we serve is a very powerful motivation to achieve and maintain a diverse workforce.

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## Dr. Wells continued

**A question that has been bantered among managers recently has to deal with EEO complaints for non-bargaining employees. For bargaining unit employees there is a clear, defined process as it relates to EEO filings. Is there a similar process for non-bargaining unit employees?**

Yes; the process is the same for bargaining and non-bargaining employees. Unfortunately, it is often viewed as a different process, because bargaining unit employees can elect union representation.

**In addition to EEO complaints, we received a question about whether there is a grievance process for non-bargaining unit employees. For example, what recourse do non-bargaining unit employees have if they disagree with their performance rating?**

Again, the process is the same for bargaining and non-bargaining employees. The performance appraisal process under the union contract is spelled out. It is an internal agency process where the appeal begins one level above the supervisor. If an employee believes his or her final performance rating is low because of discrimination or retaliation, the employee may file an EEO complaint. The EEO complaint grievance process is governed by the Equal Employment Opportunity Commission (EEOC). The key is to understand that these two processes are separate. I encourage all employees to consult with their local or regional Civil Rights and Equal Opportunity staffs. Also, a series of training modules for SSA managers that outlines the roles and responsibilities in the EEO process is scheduled to be rolled out this calendar year.

**Some regions are having difficulty with potential abuse of religious compensatory time. Employees with no annual leave are requesting two weeks at a time of religious compensatory time. Is there any guidance available to assist managers in dealing with potential abuse situations?**

There is guidance to assist managers and supervisors. For AFGE bargaining and non-bargaining unit employees, they can refer to Personnel Policy Manual Chapter S550\_4. This information is available on the Office of Personnel's webpage at [http://ssahost.ba.ssa.gov/ope/pmisps/virtuallib/s550\\_4.htm](http://ssahost.ba.ssa.gov/ope/pmisps/virtuallib/s550_4.htm). Managers and supervisors of employees covered by other union contracts should refer to the applicable contracts. Also, to aid and support the standardization of pay policies, the Office of Personnel Management (OPM) is reviewing

the religious compensatory time regulations. Until OPM issues new pay policy regulations for compensatory time, I encourage managers and supervisors to contact their local or regional Center for Human Resources.

**There has been a lot of concern related to the H1N1 virus now that the influenza season is here. Is there any government effort to get federal employees who deal with the public vaccinated for the swine flu? What are some strategies or advice you can provide in dealing with these issues?**

The first thing I recommend to all employees is to stay informed, take precautions and follow the public health advice. There is wealth of information on the Office of Personnel's medical webpage and the SSA intranet webpage contains a link to the current H1N1 information provided by the Centers for Disease Control and Prevention (CDC). In addition, the agency has prepared two Videos-On-Demand (VODs) to help employees in the prevention of illness in the workplace. These VODs (Illness Prevention Part I and Part II) are available on the Office of Learning's webpage. SSA's Medical Director, Dr. Roman Goy, and other senior executives are committed to ensuring that employees have the latest health information concerning the seasonal influenza. On October 5, 2009, the agency implemented its annual seasonal influenza vaccination program. As you have undoubtedly heard in the news reports, the CDC and scientists developed a vaccine to protect people against H1N1. Employees may access this new vaccine the same way they do the seasonal flu vaccine with the same reimbursement.

## *Ask Mary!* correction to August Edition

***How long is it taking for HSPD-12 to issue new credentials and what should we do in the meantime?***

If an employee requires a new credential for any reason (e.g., lost, stolen, or name change), they should go to the nearest HSPD-12 sponsor station that supports them to initiate this process. The time it takes to issue new credentials varies by region, based largely on the workload of the Registrars' and Determination Officers' in the region's Human Resources offices. Optimally, applicants receive credentials in 3-5 weeks. During this 3-5 week waiting time, applicants use existing temporary access procedures for their locations. For instance, at Headquarters, the sponsor station is the Parking and Credentialing Office (PCO). The PCO would issue the employee a temporary building access badge with an expiration date, until the new credential is issued. If you have general HSPD-12 questions, you can send them to [hspd12.training@ssa.gov](mailto:hspd12.training@ssa.gov) or contact your sponsor station.

## Video Service Delivery Pilot by Leslie McAuley, Seattle Region



It's in 27 offices around the country from Denver, CO, to Bend, OR to Hapolei, HI and in New York State. What is it? It's the Video Service Delivery Pilot which links SSA offices with claimants in remote locations, rural communities, or even from different service areas. This service provides video conferencing with the intention of providing face to face service to claimants at various locations around the country. Is it coming to a community site near you? Only time will tell. The results of the pilot have been outstanding.

In April 2007, the Denver Region submitted a pilot proposal to the SSA Technology Innovation Board to help achieve the next level of providing service by utilizing video conferencing called Video Service Delivery (VSD). The proposal called for the establishment of a cluster of VSD sites in the state of Wyoming, testing controlled access between rural community sites and SSA's infrastructure. This test allowed leverage of the existing resources in the Wyoming field offices, ensuring high-quality service to the rural public through virtual reception counters. The test helped determine the feasibility of a national VSD rollout.

Through four years of experience with VSD, the Denver Region has gained institutional knowledge of video conferencing and its potential. All of the testing to date however, has happened outside the SSA firewall using a Virtual Private Network over the Internet. The goals were to pilot a video service delivery model behind SSA's firewall and gain expertise with controlled access, specifically, traversing SSA's firewall to and from a trusted source. They believed this methodology helped them reach the next level in VSD and furthered service to rural communities.

In the Spring 2009 issue of *Oasis* an article entitled, "Using video technology to issue Social Security cards" tells the story of the successes and challenges of the pilot. The Minot, ND office has been using VSD for other services since October 2003. It was expanded to allow them to take face-to-face claims via a video link with the Turtle Mountain Indian Reservation. They can even use it to view documents for processing SS-5s. From small communities to large ones, VSD has crossed the boundaries to become an asset to many more communities as the pilot has expanded.

The VSD Pilot premiered in the New York Region with a new twist by linking one office to another office. Some busy urban offices have been partnered with some suburban offices. Tom MacBride, the Director of the Division of Operations of Analysis and Customer Service, the lead on the project, stated in a recent report that, "Office to office connections

continue to remain the most popular connections and generate the most transactions throughout the pilot project. The NY office to office cluster generated 713 transactions, Kapolei, HI and American Samoa 337 transactions..." To get a better understanding of how this was working I contacted the District Manager of the Newburgh District Office, Joe Dirago. He indicates that the VSD pilot is very successful. "The equipment is excellent and almost no problems are encountered with the technology. Suburban offices are providing daily assistance to their urban buddy offices and the public reaction is generally favorable. Some claims processing issues result from this method of service delivery, but have largely been addressed. The Newburgh-South Bronx pilot is going very well."

Joe also points out the public service delivery benefits and anticipated outcomes of the VSD Pilot which include:

- Improved appointment availability in the urban office;
- Reduced interview waiting times in the urban office;
- Improvement in the "left without service" performance in the urban office;
- Better bilingual service delivery in both District Offices; and
- An "esprit de corps" that will be cultivated in the offices regarding improving public service.

Joe has more to say on the subject. Read the dialogue below:

**Leslie:** [How is the community reacting to it? Excited or disgruntled?](#)

*Joe: The reaction of the public to VSD is generally positive. In the urban locations, the public is pleased not to have to wait too long for an interview to address their Social Security matters. However, there are a percentage of individuals that are reluctant to use this method of service delivery. Others love it and have responded well. The Newburgh staff has adapted well to the use of the VSD technology. A few have made a request for a make-up person for their daily appearance on the VSD screen! (We are working on that.)*

**Leslie:** [Are these replacing the old contact stations?](#)

*Joe: The New York VSD Pilot does not attempt to do this. However, Newburgh does have 5 different contact stations and I do envision that potentially the VSD equipment could be a replacement for the contact stations.*

*(Continued on page 8)*

## Video Service Delivery continued

Leslie: Do you think these would be used in larger cities as well as in smaller communities?

*Joe: The Area 1 VSD Pilot in the New York Region clearly demonstrates that the VSD technology has practical application as a means of service delivery. While it will not replace in-office interviewing, the use of VSD equipment can provide a relief valve to assist with service delivery challenges. Newburgh does have a small level 2 field office (Monticello) in its cluster and VSD equipment in each location could be beneficial in providing support on an as needed basis.*

Great customer service from office to office or a community site to an SSA office is on the move. Good examples of great customer service from the practical realities of life are seen in some of the comments about VSD in the Bend, OR field office. Theresa Quade, the District Manager of the Bend, OR field office, told FrontLine that the individuals in some of her communities are economically challenged and often do not have cars, money for gas or a telephone, so having this service available within walking distance is a blessing for them. The tribal offices in her communities have a free shuttle that will transport tribal members to and from their home to the VSD locations.

Theresa stated that the pilot is going well. "It's not really any different for our service delivery, it's just the same as a scheduled appointment day for the interviewer. Our Claims Representatives have mostly RSI, Survivor, and DIB/SSIDI claims. We are lucky enough to have generalist Claim Representatives so it's easy to fit these interviews in regardless of what Title they are. Usually there are general questions interspersed with the claims but the Claims Representative can easily handle those. We have one scheduled afternoon a week for VSD. It's just like a regular face to face interview for the CR."

Theresa also mentioned that if you have the flexibility within your staff, VSD could be used anywhere. The whole system is completely dependent on the individual environment of the service area and can be configured to meet whatever needs are most urgent. It's been a pretty seamless process for the Bend, OR office.

Whether on the East coast or the West coast, between offices or community sites and SSA offices, the VSD pilot appears to be a success. We can probably look forward to a connection near us in the not so distant future.

## Life After SSA

By Eric L. Williamson, Boston Region

In the next few years, SSA is expected to experience significant management turnover due to retirement. Many of our members are currently eligible to retire or soon will be. So what we really want to know is, what's it like? Let's be honest, we all dream of retirement regardless of our age, especially on those difficult days. To gain some insight we recently sent a questionnaire to several retired management employees regarding their life after SSA. We had 15 responses at the time of this writing with more coming in. The responses are very interesting. They provide a glimpse of what we have to look forward to when retiring and remind us of what we should seriously consider when deciding to retire. Their responses also provide perspectives of the SSA work experience.

Our participants retired with an average of 33.35 years of experience. Most retired as District Managers. Retirement experience ranged from 16 years to a novice 5 months. Everyone that completed the survey absolutely loves retirement (no surprise here). The reasons for retiring included health reasons, wanting to do something new, reaching the right time to retire, and several who were just tired of the demands of the job. They didn't want to keep up with the changes and the job just wasn't fun anymore. Whatever their reason for retiring, they all love the freedom to do nothing and everything.

As SSA employees, we work in a very stressful environment caused by a variety of issues which in time can take their toll. Interestingly, almost 100% of our retirees stated that the thing they missed most about working for the Social Security Administration is the SSA family! They cherished the friendships they made with their co-workers; the ability to help people and many of them loved the challenge of the job. What they least liked about working for SSA centered on issues such as having to deal with the bureaucracy; not being able to step outside of the box; not having control over critical issues such as resources; feeling that executives were not in touch with the reality of life in the field; and seeing decisions driven by politics, not good business sense. When asked if there was anything you would do differently if you had to work for SSA all over again, most had no regrets and stated they were satisfied with their careers. Jim Corbett, former DM of Traverse City, Michigan says, "I would probably not be so concerned about trying to get everything done and just concentrate on what was the most important."

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## Life After SSA continued

When asked what advice they would give to others who are considering retiring from SSA: Marcia Brixey says, "The best is yet to come. If you're afraid to retire -- and I have several friends who are afraid -- remember Eleanor Roosevelt's quote, 'We gain strength, and courage, and confidence by each experience in which we really stop to look fear in the face... we must do that which we think we cannot.'" Other retirees added that retirement is a gift. You have time to live, so do what you want, when you want, and at your own pace. Lois DiMaria who retired as a manager from Bowling Green, Ohio says, "Do plan to have something to keep you busy that you enjoy – it is actually immaterial as to what it is...reading, traveling, taking classes, painting, or anything at all." Barbara Olson, former DM of Morgantown, WV suggests that you read Ernie Zelinski's "The Joy of Not Working." It will help you get in the right mindset for retirement. Some advise that you exercise and take care of yourself. Wanda (Waldman) Durick, former DM of Santa Ana, CA says, "Put the same energy and enthusiasm in your retirement activities as you do in your job. It's fun to experience all that your community has to offer."

On the financial side, some strongly suggested that you look at your finances very carefully and make sure you have something to "retire to." This requires careful planning. Be realistic about what it will cost you to live and don't count on being able to work even if you want to. Also, be sure to factor in those unexpected expenses when looking at post-retirement income needs such as home repairs. Maintaining a budget can be very important to avoid spending more than you were while you were working. When you retire, do it right. Jim Glenn, former DM of McMinnville, TN has an interesting comment that retirees should consider: "Learn as much as you can about your options. I didn't know until I retired that you can transfer your regular IRAs into the Thrift Plan with all its many benefits (low cost, flexibility, ability to still invest in different funds, etc.). Also, look closely at your life insurance options, there is one option that doesn't penalize you for your age. The cost stays the same as others in the group."

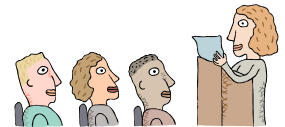
What did our retirees find most surprising about retirement? The feeling of freedom. As one retiree stated, "It is so much more than I expected. I highly recommend it. Life is out there waiting. Grasp it before it goes." All of our retirees had similar comments. The consensus is, if you want to retire, then just do it. I will leave you with this last quote from Dale Hilding, former Branch Manager of Pendleton, OR, "Retirement offers you an amazing opportunity. For the first time in your life, you have to meet only one person's expectations—your own! You are truly free of all

expectations except for those YOU choose. I found this to be truly liberating." I hope that you find this article inspiring and useful, whether you plan to retire within the next year or 30 years.

### What are they doing now?

**Marcia Brixey** (PA, Seattle Region) is founder and President of Money Wise Women Educational Services, a non-profit organization dedicated to educating and

empowering women to live financially healthy. Maria is also the author of *The Money Therapist: A Woman's Guide to Creating a Healthy Financial Life* (Seal Press) and a keynote speaker.



**Pat Hickey** (ADM, Bangor, ME) is on the Maine Substance Abuse Service Commission advising the legislature and the governor on issues surrounding substance abuse as well as a local committee advocating for prevention and recovery from substance abuse. She walks, visits friends, spends time at her camp on the lake and spends some of the winter in Florida.

**Dan Newsom** (DM, Searcy, AK) hosts two weekly radio programs: "Britbeat—Music of the British Invasion" and "That Old Tyme Rock and Roll." He also is on the board of Crowley's Ridge College, Searcy Kiwanis Club and the Robert Elliott Foundation which promotes education about depression and assists families who have lost a loved one to suicide. Dan plays guitar in his spare time.



**Lois DiMaria** (DM, Bowling Green, OH) is busy doing genealogy and cross stitch and now has time to read! Lois absolutely LOVES retirement!

**Nancy Ortiz** (DM, Santa Maria, CA) is doing a big, fat glorious nothing! She is sleeping late, yakking on DKos and other wildly progressive blogs, working on her nice old house and watching the birds. Nancy moved to one of those old southern towns where nice yards, big azaleas and clean windows count.

*(Continued on page 10)*

## Life After SSA continued

**Dale Hilding** (DM, Pendleton, OR) is doing lots of volunteer work—United Way, Boy Scouts, Emergency Services, and the Church.

**Rachele Adler** (DM, Glendale, NY) is relaxing, volunteering in the library, visiting with friends and spending her time as she wishes, not tied to a clock.

**Barbara Olson** (DM, Morgantown, WV) is actively involved with 2 community groups and is now able to dedicate enough time to make a difference.

**Jim Corbett** (MSS, Grand Rapids, MI) is doing volunteer work with his church and will soon begin working with the Michigan Home for Veterans in Grand Rapids. He has many hobbies including being an active Ham radio operator and a serious amateur musician as a pianist and not so serious as a cellist.

**Wanda Waldman Durick** (DM, Santa Ana, CA) is traveling domestically and internationally—on land and on cruises. She volunteers as a docent for a hiking trail to a historic lighthouse in the county and is involved in local politics. Wanda also serves on the board of a non-profit organization that promotes an aesthetically pleasing and healthy environment in the City.

**Marilyn Alimpich** (MSS, Dearborn, MI) is a Master Gardener. She does gardening for a couple of places including the Detroit Zoo. Marilyn also takes yoga classes, garden classes, art classes, attends lectures and book clubs, sails, meets with friends, travels and does whatever sounds interesting.



**Janet McDonald Tomlinson** (DM, Bradenton, FL) plays tennis six days a week! She walks, rides her bike and is helping her husband remodel some rooms in their house. She recently became a “Guardian Ad Litem” for two children and is learning a lot about the court system.

**Glenn Samuelson** (SA, St. Paul, MN) does some admissions work for a local long term care and rehab facility and volunteers his time at a local golf course in return for playing privileges. He also serves on the library board and chairs a board of the local community Senior Center.

**Don Conner** (DM, Mankato, MN) owns a lake cabin in Minaki, Ontario where he spends his summers building, maintaining and fishing. He also worked for the Census.



**Jim Glenn** (DM, McMinnville, TN) is enjoying retirement doing things he did when he was fourteen, riding a bicycle, jogging, and playing basketball.

**Myron Elias** (ADM, Newburgh, NY) travels, reads, and plays. He and his wife have just slowed everything down.

*If you have retired and would be willing to share your story with us for a future edition, please contact us by email at [Bethany.Paradis@ssa.gov](mailto:Bethany.Paradis@ssa.gov). We would love to hear from you.*

**We welcome your letters, stories, comments, editorials or suggestions for future articles.**

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## The Teleservice Connection by Barb Perian, TSC Representative

### What does FY 2010 hold for the TSCs?

In FY 2010 the Agency will begin roll out of a new 800 number phone system called Citizen Access Routing Enterprise or CARE 2020. CARE 2020 will be an internet protocol based program designed for Web Call Back, Click to Talk, Web Chat and Web Collaboration. This will enable us to communicate with people using our internet services. Approximately 80 million calls are placed to the 800 number system annually. It's exciting to think about how we can better serve these 80 million callers with new technology. Stay tuned!

We will probably continue to see changes in the number and size of our TSCs in FY 2010. Everyone has seen the announcement that a new TSC will open in Jackson, Tennessee. This new TSC will eventually support 175 Teleservice Representatives (TSRs). This is just one of many changes that have occurred in the TSCs over the last few years. In October, the Portland TSC closed and the Twin Cities TSC was remissioned as a Social Security Card Center. The Pittsburgh TSC has been

restructured as a center with eight TSRs. By the end of the year they will co-locate with a field office. Many TSCs around the country have greatly expanded. Some offices have grown by four times their size of a year or two ago! There is movement among the regions to create larger TSCs with about 200 TSRs while reducing the actual number of sites. Clearly the 800 Number can be answered from anywhere in the country. It appears that the Agency is trying to capture some savings in overhead costs which will hopefully result in more money available to spend on human capital. How many interviews, finger prints, forms, and performance expectation discussions does it take to grow from 80 TSRs to 200? I can only imagine the chaos that management of these facilities has gone through to get it all done! Hopefully these changes will only improve upon the service already provided by the 800 Number system.

These are ambitious changes. The TSC world, just like the rest of the Agency, is a very busy and exciting place to be in FY 2010 as we work very hard to service the rapidly growing numbers of callers and visitors.

## Editorial: Letting Go of Paper 101 for Managers

by Goran Thompson, Philadelphia Region

Since SSA's inception, paper has been the go-to product for managers' communication and record keeping needs. In fact, paper is so integrated in SSA management's culture, that some managers still choose to use paper instead of utilizing a cheaper, faster, and easier electronic alternative. It's easy to see why paper is popular; it's tangible, tactile, simple, durable, and at approximately ½ cent per sheet, cheap. As a colleague once put it, "No one has to train me on how to use a sheet of paper."

While the agency's primary focus is on paperless processing of disability claims, there is a simultaneous push for SSA employees to conduct their day to day operations in a paperless environment. Paper may be cheap, but electronic storage is cheaper. Currently one megabyte of storage can be purchased for about 1/10 of a cent and can store approximately five hundred pages of text (black and white, 2000 words per page, 12 point font, Times New Roman). Electronic storage is scaleable, searchable, and accessible. Things like Transmittals,

Secure Print Traffic, Human Resource Reminders, Fraud Alerts, Operational changes, etc., etc., all come to managers via electronic distribution. The question is why do so many managers continue to distribute this information with paper printouts? Regardless of the answer, one thing is clear. The Administration relies on managers to be the driving force behind agency initiatives and when it comes to paperless processing, managers are expected to lead by example.

*(Continued on page 12)*



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**Editorial** continued

With that in mind, let's look at a few steps managers can take to help facilitate the move to a paperless workflow. Perhaps the biggest hurdle a manager faces in the move to a paperless environment is simply a change in mindset. So, think paperless. Before using paper try to think of electronic alternatives. A shortcut link saved in a desktop folder, a favorite saved in Internet Explorer, pending lists sent via email, or using the office laptop to take notes and then storing them on an encrypted USB drive, all take the place of printed material. Get rid of those paper logs and create electronic ones using Excel.

Since the transition to electronic storage allows for the saving of pretty much everything, a simple, well executed organizational structure is imperative. Luckily, strategies used for organizing paper translate well to the electronic environment. Electronic files can be managed with folders and files, just like the paper in a filing cabinet. You might create a structure where main folders capture broad topics such as Human Resources and sub-folders within those folders capture more specific information like Leave or Personnel Reminders and then the actual files are saved within the appropriate sub-folders. The time spent building a folder hierarchy will more than pay for itself as the electronic information compounds. This same system can be applied to email messages, computer desktop shortcuts, or office shared drives.

Trash all of the non-essential paper. Take all the guides, reminders, lists, manuals, logs, etc. and introduce them to your friendly neighborhood shredding expert. While it is not feasible to trash every sheet of paper, there is no reason not to try. To be paperless, is to live paperless. So, let's "Go Green" and set a goal to perform management operations without paper ninety-five percent of the time. Then bask in the electronic glow.

*You can learn more about how to do things electronically with the assistance of your friendly Systems Coordinator or you can teach yourself a lot by taking advantage of some courses on Go Learn. The Seattle Region also has an excellent Automation Training website with short Video-On-Demands on a variety of topics.*

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