



## **Improving Customer Experience with Federal Services**

**High Impact Service Provider Annual CX Action Plan**

**Social Security Administration**

*July 2019*



## Introduction

- Individuals who need to conduct Social Security business may contact us online, over the phone, or by visiting one of our local offices.
- Often the first point of contact is through our website, which provides a wealth of information and a suite of online services.
- Our customer service representatives are also available to serve the public on our National 800 Number and in our local field offices across the country.
- In November 2018, we conducted our High Impact Service Provider Maturity Self-Assessment by scoring customer experience with consideration for all three of our service channels to the public.
- We scored 27 out of 30 points, rating ourselves as mature in all five assessment areas: measurement, governance, organization and culture, customer research, and service design. Slides 3 through 5 summarize our assessment.
- While our overall self-assessment maturity score is rated high from an enterprise perspective, we recognize opportunities still exist to improve.
- Our disability programs and the benefit appeals process can be challenging for applicants seeking benefit payments. Reducing the wait time for a hearing decision (which will in turn improve the customer's experience) is an agency priority. We are focusing our FYs 2019 - 2020 CX Action Plan on the customer experience during the hearing process. Slides 6 through 9 focus on our Action Plan.





## HISP Annual Maturity Self-Assessment Summary

Measurement: 6 / 6

Governance: 5 / 6

Please give a 2-3 sentence summary of your efforts:

- All customers who contact us have the option to obtain information or conduct business online, by phone, or in-person.
- We routinely conduct studies and surveys to evaluate the effectiveness of our programs.

What are you most proud of?

- We continue to expand online services, modernize our Information Technology (IT) infrastructure, and enhance *my Social Security*, our online portal for the public. *my Social Security* is a convenient, safe online option for people interested in viewing their Social Security records or conducting business with us.
- Since its launch in 2012, *my Social Security* has consistently ranked as one of the top 10 in customer satisfaction for all Federal websites.
- With about 6 million people creating a new *my Social Security* account each year, we had nearly 39 million registered users at the end of FY 2018.

What nascent / ongoing activities do you hope to grow?

- We continue to focus on improving the *my Social Security* user experience.
- We will expand *my Social Security* capabilities by adding additional services for both individual and third party users and enhance existing options, making it convenient for our customers to conduct business with us online. As online options expand, so does our ability to measure our customers' satisfaction and experience.

What's blocking you from initiating / making / fully implementing changes?

- Although we expect to implement planned enhancements, modernizing technology is critical to our success. We initiated our IT modernization plan in FY 2018 and will continue investing in achieving our goals over the next five years.

What else would you like to share?

*No additional comment*

Please give a 2-3 sentence summary of your efforts:

- Our Deputy Commissioner for Budget, Finance, and Management is the Chief Financial Officer, Performance Improvement Officer and executive lead for customer experience (CX). The Deputy Commissioner works across the agency to improve customer service.
- We have a variety of performance measures, budgeted workload measures, and strategies in place to evaluate performance and progress.

What are you most proud of?

- We use data to assess our progress towards achieving our goals and to make decisions to improve the quality of our customer service.
- We recently added questions to our ForeSee survey questions to capture additional feedback about the customer experience and the changing needs of the public.

What nascent / ongoing activities do you hope to grow?

- We will continue to monitor our performance metrics and customer feedback to assess progress in improving customer service.

What's blocking you from initiating / making / fully implementing changes?

- Although we expect to implement planned enhancements, modernizing technology is critical to our success.

What else would you like to share?

*No additional comment*





# 2019 HISP Self-Assessment Summary

## Organization & Culture: 5 / 6

Please give a 2-3 sentence summary of your efforts:

- Our employees remain our most important asset. We are accountable for ensuring they have the training and technology they need to take timely, quality actions that provide the level of service the public expects and deserves.

What are you most proud of?

- Our programs affect nearly every person at some point: when they retire, after the onset of a disability, or following the death of a loved one. Our approximately 63,000 Federal employees and 15,000 State employees deliver timely, quality service to the over 70 million people who depend on these programs. In FY 2018, we paid over \$1 trillion through the course of the fiscal year to an average of more than 70 million Social Security beneficiaries and Supplemental Security Income recipients each month.

What nascent / ongoing activities do you hope to grow?

- We plan to modernize our training delivery capabilities by expanding virtual training modalities to include other potential platforms, such as Adobe Connect, to ensure employees maintain the needed skillsets to deliver quality service to the public.

What's blocking you from initiating / making / fully implementing changes?

- While employee turnover in some areas presents a challenge, we continue to foster an empowered, knowledgeable, compassionate, and engaged workforce.

What else would you like to share?

*No additional comment*

## Customer Research: 5 / 6

Please give a 2-3 sentence summary of your efforts:

- We continuously analyze post-call, ForeSee, and annual customer survey data to develop strategies to adjust our operating processes for improving our customers' experience. Continuous evaluation of the collection of program data, research, and analysis assists us in identifying strengths and weaknesses in our programs.

What are you most proud of?

- We continue to expand our suite of automated and online service options, and are pleased that 7 of our 8 online applications earned scores of at least 80 out of 100 in the ForeSee E-Government Satisfaction Index. These high scores confirm that we are providing services people want to use.

What nascent / ongoing activities do you hope to grow?

- We plan to expand the post-call survey to callers who use the National 800 Number automated self-service option and who call our field offices, once we implement the Unified Communications Platform (UCP). Expanding the post-call survey will allow us to collect additional information across multiple service channels and enhance our understanding of our customers' needs.

What's blocking you from initiating / making / fully implementing changes?

- Modernizing our technology is critical to delivering services effectively in-person, on the telephone, or online. In FY 2020, through our IT Modernization Plan, we will continue to build modern applications that improve the customer experience, improve how we communicate with beneficiaries and recipients, and enhance data-driven decision-making using customer feedback across all service channels.

What else would you like to share?

*No additional comment*





## Service Design: 6 / 6

Please give a 2-3 sentence summary of your efforts:

- Our biennial survey of future customers shows an increasing preference for conducting business online, and a consistently strong preference for conducting business by telephone. As a result, we continue to expand our suite of automated and online service options.

What are you most proud of?

We continue to expand options for our customers to do business with us. The following are examples:

- Video Service Delivery (VSD) allows us to balance our workloads, reduce wait times, and provide a face-to-face service option for individuals living in rural and frontier areas to bridge distances. We currently offer a video service option in nearly 700 sites around the country. We completed over 100,000 transactions using video in FY 2018.

What nascent / ongoing activities do you hope to grow?

- We continue to partner with other organizations (e.g., hospitals, libraries, community centers, American Indian tribal centers, homeless shelters, and other government agencies) to offer more video service options and to increase awareness and participation. We also plan to expand video service delivery at our hearings units in our disability determination services and corresponding field offices.

What's blocking you from initiating / making / fully implementing changes?

- While we continue to look for additional partners to assist us with VSD expansion, availability of space is critical.

What else would you like to share?

*No additional comment*





# Hearings Operations Overview

- The hearing process begins after an applicant for benefits has been denied at the initial and reconsideration (in most states) levels. The next step in the appeals process is a hearing before an Administrative Law Judge (ALJ). As of May 31, 2019, 665,744 people are waiting for a hearing decision.
- Eliminating the hearings backlog and reducing the time it takes to get a hearing decision remains one of our most critical priorities. Our [Compassionate And REsponsive Service \(CARES\)](#) plan is a multi-pronged approach to eliminate the hearings backlog through increased decisional capacity, business process efficiencies, and IT innovations.
- With our CARES plan and the \$290 million in dedicated hearings backlog funding we received in FYs 2017 through 2019, we plan to eliminate the hearings backlog and reduce the average wait for a hearing decision to 270 days in FY 2021.
- To ensure that we continue to deliver timely, quality service to the millions of people who depend on our services, our FYs 2019 - 2020 CX Action Plan focuses on the customer experience during the hearing process.

## Areas of Focus

Reflecting upon our 2019 CX Maturity Self-Assessment, our HISP has decided to focus on raising our maturity in the following areas in FY 2019 / 2020:

- Measurement
- Governance
- Organization & Culture
- Customer Research
- Service Design





## FY 2019 / 2020 CX Improvement Actions

### Example HISP Customer Profile

#### **Who is one of the primary customer served by your HISP?**

Our primary customer in the hearings and appeals process is an applicant who was denied benefits at the initial and (in most states) reconsideration levels.

#### **What goal(s) is this customer trying to accomplish by interacting with your service?**

Applicants are requesting monthly benefits, and in some cases, entitlement to Medicare benefits.

### Customer Needs + Frustrations

#### **What makes the difference for this customer when they're interacting with your service (ex. clear guidance upfront, knowledgeable employee to help them pull together an application, a fast processing time)?**

A reduced wait time for a hearing and decision.

#### **What common blockers might they face when interacting with your service?**

We have a complex disability program with a backlog of people waiting for a hearing decision.

### HISP Implementation Challenge(s)

#### **What can make it difficult for your HISP to meet this need? Is it an internal IT system, process, or unclear guidance?**

A challenge to eliminating the hearings backlog is reducing service disparities in wait times across the nation. We will continue to improve our national workload management capabilities to help reduce wait times.

### Stats

#### **What data do you have that documents this experience/service? Could be something like "Less than 1/3 of our customers are connected to internet or smartphones," or "Employee engagement scores on FEVS dropped two points last year"**

As of May 31, 2019:

- Hearings pending was approximately 665,744 cases (number of people waiting for a hearing decision)
- Hearings pending has declined for 29 consecutive months and continues to fall.
- The average processing time for a hearing decision was 520 days.





## FY 2019 / 2020 CX Improvement Actions

### Action

Focus Area: **Measurement, Service Design**

#### Goals to be accomplished by September 30, 2020:

- Reduce hearings pending to 385,000 cases.
- Reduce the average wait time for a hearing decision to 390 days.

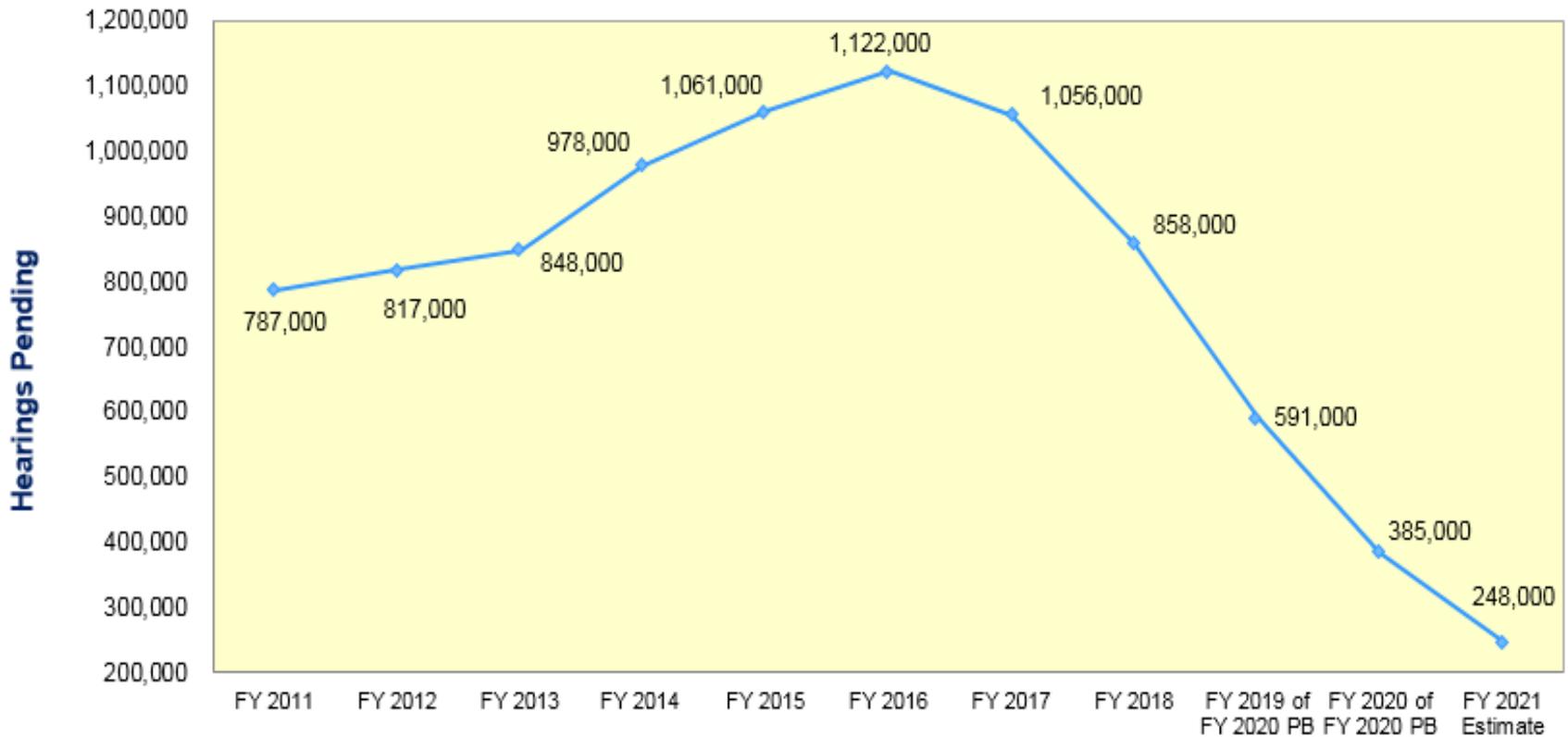
#### Critical Activities and Milestones:

- Continue to focus on our oldest cases first.
- By September 30, 2020, complete 95 percent of the cases that begin the fiscal year 270 days old or older.





# Hearings Pending





# Hearings Processing Time

