



**NATIONAL COUNCIL OF  
 SOCIAL SECURITY MANAGEMENT ASSOCIATIONS, INC.  
 REPORT OF RESOLUTIONS OF THE 51<sup>st</sup> ANNUAL MEETING  
 Revised: October 20, 2020**

[Gregory Brusik](#) (NCSSMA VP), Director  
[Rick Warsinskey](#) (Past President), Deputy

Chair	Subcommittee	Deputy	Resolutions
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<u>Technology and Innovation</u>			
Gregory Holmes (ARMA)	<a href="#">Technology</a>	Vacant	<a href="#">17, 19</a>
	<a href="#">Innovation</a>	DeAndre' Chilton (CSSMA)	<a href="#">16, E3</a>

<u>Operations</u>			
Dan Combs (DRSSMA)	<a href="#">TII</a>	Vacant	<a href="#">13, E2</a>
	<a href="#">TXVI</a>	Jacqueline Botello (PRMA)	<a href="#">9</a>
	<a href="#">Disability</a>	Kevin Gerber (KCMA)	<a href="#">12</a>
	<a href="#">Policy Review</a>	Eric Hong (NYRMS)	IRDs

<u>Legislative Initiatives and Grassroots Committee</u>			
Rich Elmore (KCMA)		Carla Melendez (CSSMA)	<a href="#">2, 18, E1</a>

<u>Labor Management Relations Committee</u>			
Scott Hale (ARMA)		Angela Hubbard (NESSMA)	<a href="#">5, E7</a>

<u>Management Committee</u>			
Vacant	<a href="#">Administration</a>	James Sandoval (DRMA)	<a href="#">6, E4</a>
	<a href="#">Structure</a>	Tony Pezza (NYRMS)	<a href="#">1</a>

<u>Service Delivery Committee</u>			
Christopher Maher (CSSMA)		Vacant	<a href="#">15, E23, E5</a>

<u>Membership Committee</u>			
Val Fisher (NYRMS)		Mona Harter (CSSMA)	

<u>Training and Succession Management Committee</u>			
Nicole Bure (NESSMA)		Elizabeth Leeds (CSSMA)	<a href="#">10, 14</a>

<u>Teleservice Center Committee</u>			
Faye Spikes (KCMA)		Steven Merriam (DRMA)	<a href="#">3, E6</a>



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Communications Committee			
Chair	Subcommittee	Deputy	Resolutions
Monique Theriot (DRMA)	<a href="#">Social Media</a>	Nick Tichnell (PRMA)	
	<a href="#">Communications</a>	Vacant	
	FrontLine	Vacant	
		Amy Evenson (NWMA)	
	<a href="#">Editorial Board</a>	Greg Brusik (NCSSMA VP)	
		Peggy Murphy (IPP)	
		Michelle Rulison (PRMA) R: 1-5	
		Joe Deaton (DRMA) R: 6-10	
		<a href="#">Rachel Emmons</a> (NCSSMA Washington Representative)	
	<a href="#">Steve Clifton</a> (Past President)		
SharePoint	Lisa Chrabolowski (NESSMA)		
Website	<a href="#">Jason Welsh</a> (SFRMA)		

Planning Committee			
Chair	Subcommittee	Deputy	Resolutions
Tim Milton (KCMA)	<a href="#">Annual Meeting</a>	Fair Stirman (NWMA)	
	<a href="#">Sponsors</a>	Rachel Emmons	

**FY 2020 Resolution Status**

Adopted: 1, 2, 3, 5, 6, 9, 10, 12, 14, 15, 16, 17, 18, 19 and E23 | Referred: 13 and 20

Failed: 4 and 21 | Withdrawn: 8 and 22 | Tabled: 7 and 11

Updated vote: Resolution 20 failed carry-over to FY 2021.

**FY 2021 Resolution Status**

Adopted: [E1](#), [E2](#), [E3](#), [E4](#), [E5](#), [E6](#), [E7](#)

**Action Plan Due: October 30, 2020**

**Mid-Term Report Due: March 26, 2021**

**Final Report Due: July 16, 2021**



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**RESOLUTION #1 (2020): OPERATIONS SUPERVISOR CLASSIFICATION  
ASSIGNED TO: MANAGEMENT STRUCTURE SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Commissioner of Social Security and the Deputy Commissioner for Operations to reclassify the Operations Supervisor (OS) to the GS-13 level. This is justified by properly crediting the OS position for the actual Scope and Effect of the position, as well as properly crediting the position for the significant technical and administrative workload the OS is required to oversee at the GS-12 level.

**ACTION PLAN (2020):** DCHR last year, in responding to DCO's request that DCHR review an updated version of the Operations Supervisor Position Description submitted to DCO by NCSSMA, indicated that the decision to modify job duties as the basis for any reclassification, rests with the component therefore:

- (1) The Committee will prepare an updated version of the OS PD for submittal through NCSSMA leadership to DCO with the intent of initiating a dialog the intent of which will be to obtain DCO's concurrence that the additional job duties are appropriate to the OS position.
- (2) If concurrence is reached with DCO, the Committee will draft a suggested submittal document for joint submittal by DCO and NCSSMA to DCHR recommending that the position be reclassified to the GS-13 level.
- (3) If NCSSMA cannot obtain DCO concurrence, the Committee will prepare a suggested submittal for NCSSMA to forward to DCO requesting resurrection of the Operations Officer (GS-13) position in large offices to alleviate current problems relative to succession planning while at the same time revisiting the strategy for pursuing the OS upgrade.

**MID-TERM REPORT (2020):** The Structure Committee submitted an OS GS-13 position description rewrite and suggested email communication for DCO to the executive team for review. At this time, the only remaining action item is for the executive team to discuss the proposal with DCO.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD



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**RESOLUTION #2 (2020): HIRING AUTHORITY  
ASSIGNED TO: LEGISLATIVE INITIATIVES AND GRASSROOTS COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with its Washington Representative, Government Managers Coalition, Federal-Postal Coalition, Hill partners and the Commissioner of Social Security to further advocate for the ability to hire using the authority included through the Direct Hire of Students and Recent Graduates Act and the NDAA.

**ACTION PLAN (2020):** The Legislative Initiatives and Grassroots Committee will work with the NCSSMA Executive Committee to advocate for greater flexibility in available hiring authorities at SSA as indicated in the resolved of this resolution. The Committee will assist in writing papers and providing data in order to support the need for increased hiring authorities.

The Committee could also include the need for flexible hiring authorities as a topic of reference during our educational outreach of our congressional contacts.

**MID-TERM REPORT (2020):** The Legislative Initiatives and Grassroots Committee continues to be available to assist the NCSSMA Executive Committee to advocate for greater flexibility in available hiring authorities at SSA as indicated in the resolved of this resolution.

The Legislative Initiatives and Grassroots Committee has taken the following steps in order to facilitate additional congressional contacts by its committee members:

- Committee members continue to submit local stories of community-based service to show the impact field office service makes for customers in our local communities. The Executive Committee will use some of these stories to prepare papers for upcoming Hill visits. We will continue to solicit for stories that are of interest to key representatives on committees identified by our Washington Representative. The remainder of these stories will be shared in our educational outreach to congressional contacts.
- Committee members continue to update state statistical data of key SSA data as it becomes available, relating to the congressional districts and states of appropriators. As in the past, committee members will also utilize these state statistical sheets for their upcoming educational outreach attempts.



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- Members have been instructed to start contacting key representatives on the House Labor HHS subcommittee by April 21<sup>st</sup>, and will later make outreach to key Senators on the same subcommittee later this summer.
- Many committee members have participated in outreach in past years, and they will continue to recruit other managers who are constituents of key representatives as the need arises.
- As new committee leads are assigned, they will receive training on how to conduct proper educational outreach.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #3 (2020): FIELD OFFICE AND TELESERVICE CENTER STAFFING  
ASSIGNED TO: TELESERVICE CENTER COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Commissioner of Social Security and the Deputy Commissioner for Operations to advocate for acceptable levels of Field Office and Teleservice Center staff to provide quality, community-based services as the American public expects. Furthermore, NCSSMA will continue its advocacy efforts with Congress to ensure sufficient agency funding to meet the expectations of the American public.

**ACTION PLAN (2020):**

- The TSC Committee will work with the Commissioner and Deputy Commissioner of Operations (DCO) to determine the additional hiring needs for the TSC's and the location of the group of new hires anticipated in March/April of 2020.
- The TSC Committee will create a survey or letter for the FO's to determine the need for new hires, and if there are FO workloads that could be completed by the TSC. We will also work to determine how well the supervisor to employee ration is working.
- The TSC Committee will work with Office of Customer Service (OCS) to have TSC Level days



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re-assessed. The level day identifies the number of agents needed to accomplish the daily logon goals.

- The TSC Committee will work with OCS and DCO to ensure enough agents are hired at the TSC to allow the LCSR's to not have to be on the N800# taking calls. When this occurs, supervisors are then required in many instances to log onto the Care 20/20 phone system to take calls where assistance is needed. This, in many instances, is creating a degradation in services provided as many of the current supervisors are not trained on CHIP and those that have are not familiar with the upgrades.
- The TSC Committee will work diligently with TSC Representatives to develop ways to improve employee morale, performance and quality of services provided.
- The TSC Committee will work with the NCSSMA Technology and Innovation Committees to determine if improvements can be made to the current *My Social Security* service options available and how we make recommendations for change.

**MID-TERM REPORT (2020):** The TSC has begun the second round of hiring. Announcements have closed and interviews will begin in March 2020. So far over 300 CSRs were hired across the nation with an additional 800 expected to begin training in April 2020. In the 2021 Budget there may be a stronger opportunity for increased hiring in the FOs.

Conversations with FO personnel LCSR's have identified certain areas of consideration where the workload currently completed at the FO, could be completed by CSRs, while they are still taking calls. The TSC Committee will continue working on this area to determine next step and will present to OC and OPSOS. Additional training may be considered in certain areas to prevent unnecessary referrals to the FO.

The TSC Committee will continue to work with OCS on determining adequate level days. Due to the expedited training, new hires take gated calls, which assists in reaching the Daily Agent Report Time goals. While back in training class, new hires will continue to take gated calls on Level 1 and Level 2 days.

Will continue working with OCS and DCO to alleviate the need for LCSR's to be reskilled to the 800#. When the LCSR's are on the 800#, the supervisors in some instances are then handling the CSR assist calls.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.



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**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #5 (2020): PERFORMANCE MANAGEMENT SYSTEM  
ASSIGNED TO: LABOR MANAGEMENT RELATIONS COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for inclusion in developing or providing feedback for an updated performance management system, which will replace the current Performance Assessment and Communication System.

**ACTION PLAN (2020):** Implementation of the 2019 National Agreement with the AFGE will occur in October 2019 with no changes to the current PACS system. Therefore, NCSSMA will take the following actions to prepare for our inclusion in discussions and planning for a new or revised performance management system:

- The LMR committee will meet on October 22, 2019 to discuss actions needed to solicit feedback on what managers want to see in a new or revised performance management system. The committee will gather feedback in the form of surveys, direct solicitation from managers, review of the survey completed in 2018 and other feedback channels as appropriate.
- Draft a communication for review by the NCSSMA President and EC to advocate for inclusion at the earliest point conversations begin concerning a new or revised performance management system.
- Encourage LMR committee members to submit any ideas they may have for discussion, including soliciting ideas and comments from their regional ECs.
- The LMR committee will present their findings to the NCSSMA EC for consideration and potential action.

**MID-TERM REPORT (2020):** The 2019 National Agreement was implemented in October with no changes to the current PACS system. The NCSSMA President reached out to the Deputy Commissioner of Human Resources (DCHR) who shared the agency's talent management plan and invited us to share feedback. With this new information on the implementation of the agency's talent management system (TMS), the LMR Committee will change our focus with Resolution #5 from PACS to the TMS. We will solicit feedback from our regional members to address the specific questions posed by the DCHR and draft a consolidated response.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.



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**UPDATED ACTION PLAN (2021): TBD**

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**RESOLUTION #6 (2020): SUPERVISOR VACANCIES  
ASSIGNED TO: MANAGEMENT ADMINISTRATIVE SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for filling supervisory vacancies in field offices (FOs) and teleservice centers (TSCs) based on operational need rather than adherence to a discretionary ratio or ceiling. NCSSMA will continue to emphasize to agency leadership, Congress, and other interested parties the essential role that FO and TSC managers and supervisors play in delivering service to the public.

**ACTION PLAN (2020):**

- We will ensure this topic is Included on agenda for DCO meetings.
- Additionally, we plan to present the topic on EC conversations to get a clearer picture of where the EC would like to head on the matter
- The committees will jointly work with the NCSSMA President and Washington Rep to determine the best way to continue to share this message with our Hill contacts (i.e. during Hill visits, documents shared, etc.).
- The committees will explore the possibility of writing a position paper, sharing the challenges managers continue to face due to employee/management ratios.
- If necessary, the committees will explore using surveys to assemble feedback useful in this matter
- The committees will also review previous work done on the matter as it will give us a baseline to operate from.

**MID-TERM REPORT (2020):** The committee has held several calls to discuss this resolution and determine action.

- The management committee provided us with a copy of their position paper from 2018, which discussed the need for sufficient management staff, so we could potentially update it and submit to the COSS and DCO. The management committee will be updating this paper to focus primarily on SMO for their committee. Our committee had a discussion to determine the best route for us to take, which includes the following options:
  - Update the paper by focusing on customer service, accountability and 2019 FEVs results as they relate to the need to have sufficient management staff in our offices.
  - Shift gears and focus the paper on the critical role of the OS and how it differentiates from facility heads (and should remain that way). This paper would not specifically





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address ratios or supervisory vacancies, but would focus on the critical supervisor role and how it relates to service delivery.

- Collaborate with the management committee and put together one paper that focuses on the supervisor vacancies, management ratios (removing facility heads from the ratios), etc.
- We submitted Supervisor Vacancies as a suggested agenda topic for the March meeting with DCO.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021. This resolution was reassigned from Service Delivery to Management Structure Committee.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #9 (2020): SSI ADMINISTRATIVE LAW JUDGE REVERSAL PUBLIC SERVICE INDICATOR**  
**ASSIGNED TO: TXVI SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Commissioner of Social Security and the Deputy Commissioner for Operations (DCO) to change the Public Service Indicator for SSI Administrative Law Judge reversals to one case pending over 60 days old if there are less than 10 total pending cases. This updated PSI would allow the field offices to have additional time on cases where an exception exists, a case is transferred to a new field office or the claimant has requested additional time to submit proofs.

**ACTION PLAN (2020):**

- Each subcommittee member will compile and analyze anecdotal ALJ reversal data from their respective regions.
- We will also analyze the FY 2019 ALJ Reversal PSI at the macro level from all 10 regions.
- We would like to create and execute a survey for all NCSSMA members.
- We will work with the NCSSMA EC to draft a letter to agency leadership in order to present our data and findings.

**MID-TERM REPORT (2020):**

- Subcommittee has held monthly meetings to ensure participation and engagement of all members.



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- Subcommittee members complied and submitted FY 2019 ALJ reversal data for their respective regions providing additional data to understand performance by field offices nationwide.
  - For example, a quick analysis of the data shows that more than fifty percent of field offices nationwide missed the ALJ reversal PSI at one point during the fiscal year. The average case cleared over 60 days was one case. This data supports NCSSMA resolution #9 to change the PSI for SSI Administrative Law Judge reversals to one case pending over 60 days old if there are less than 10 total pending cases.
- Subcommittee members submitted questions for the creation and execution of a survey for all NCSSMA members.

**Next Steps:**

- Additional analysis of ALJ reversal data will be performed.
- During the next meeting, the final survey questions will be selected to implement the survey for all NCSSMA members.
- Subcommittee expects implementation of survey by March 27, 2020 and the results by April 17, 2020.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #10 (2020): ELECTRONIC PROFICIENCY APPLICATION DATABASE  
ASSIGNED TO: TRAINING AND SUCCESSION MANAGEMENT COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for changes to the Electronic Proficiency Application Database (ePAD). The ePAD review database should use the same dynamic pathing format as the Performance Quality Review (PQR) tool. Upgrading the ePAD review system to mirror the PQR tool would allow ePAD reviews to be more effective and efficient while providing resource and policy references as well as standardized responses for any corrective action needed.

**ACTION PLAN (2020):** The Training and Succession Management (TSM) committee plans to hold its first meeting with its members between Monday, October 21 and Tuesday, October 29. During our first call we will solicit feedback from its members, but also discuss the following action plan, which we may tailor based on the suggestions of the committee. As the fiscal year



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progresses, we will take into consideration all of the issues presented to the committee and determine if the issue warrants submission in a National Resolution at the next annual meeting.

The TSM committee will advocate for changes in the Electronic Proficiency Application Database (ePAD). We will explore the possibility of consolidating the multiple review systems into one cohesive platform. For example, adjusting the ePAD 2.0 and ePAD 3.0 systems to mirror PQR would promote agency effectiveness and efficiency and would provide resource and policy references alongside necessary correction case actions. The TSM committee, through regular calls with the Director of Operations Training, will follow-up on already planned training enhancements and the success of these installations. We will work also with the Director of Operations Training to review and make suggestions on any proposed training program changes.

**MID-TERM REPORT (2020):** We have had a good attendance rate from committee members on all three of our calls, a solid response rate to our surveys, and have had great brainstorming calls regarding issues and potential changes we would like to see in future EPAD and training releases. On our January call we solicited many positive enhancement suggestions, which we were able to pass on to Gina Favela, the EPAD project manager and she is eager to see if our suggestions can be integrated into the two future releases. On March 3, 2020 Sean Brown & Rita Owen from the Operations Training Team (OTT) and Gina Favela EPAD Team Project Manager will be guest speakers on our committee call, so they can discuss the enhancements to each of their respective programs. After the March 3<sup>rd</sup> we will really amp up our EPAD suggestions and enter them into a platform that is sharable.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #12 (2020): IMPROVING THE ONLINE DISABILITY PROCESS  
ASSIGNED TO: DISABILITY SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for improvements to the online disability process so that mandatory answers provide sufficient information to make a potential onset date determination and secure medical evidence without follow-up contact.

**ACTION PLAN (2020):** The Operations-Disability Subcommittee will advocate for improvements to the online disability process so that mandatory answers provide sufficient information to make a potential onset date determination and secure medical evidence without follow-up contact. To



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facilitate our goal, we will draft a letter to the Deputy Commissioner of Operations (DCO) offering our assistance and support for the following changes:

- We will solicit each regional association for information via our committee members to gather feedback on challenges encountered with disability iClaims. We will also establish a pool of application questions that will help the claimant provide sufficient data to derive the correct onset date.
- We will work with OEST channels to share information on enhancements to improve the disability iClaims quality and Field Office development. This will improve Field Office time in transferring claims to DDS and ultimately improve the Overall Disability Time. We will also advocate for the following:
  - Enhancing the application path for applicants to select medical sources when keying their medical records information.
  - Enhancing the disability iClaim to enable claimants to create their own barcodes to upload medical records they wish to submit.
- We will advocate for EDCS/EVIEW System enhancements in order to enable DDSs to email claimants forms they need completed for their medical determination. They will do so by enabling claimants to 1) complete all disability forms requested by DDS online, 2) create a barcode and 3) upload these forms directly to EDCS.
- We will advocate for enhancements to RASR as part of IT Modernization to continue the automation process of direct fee payments. Specifically, we will suggest the following requirements:
  - Require third party representation documents be submitted directly into the electronic folder using a barcode. This will give representatives the ability to view documents are in file.
  - Allow Third Parties the ability to discontinue their own representation for claimants.

The Disability Subcommittee will monitor progress and offer our feedback and assistance on this initiative. Additionally, the NCSSMA Executive Committee (EC) will work with the Commissioner and Deputy Commissioner for Operations (DCO) to advocate for these changes via meetings, discussions, and other communications.

**MID-TERM REPORT (2020):** The committee continues to work with the NCSSMA Executive Committee to pursue enhancements to the disability iClaim and enhancements to RASR to improve the customer experience and overall disability processing time. The Disability Subcommittee has completed the following activities:

- We gathered feedback from members on challenges that field offices experience with disability iClaims. Many ideas were given, including providing the 821 as part of the claims



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path or as a form link upon submission of the claim, not allowing incomplete 3368s to be submitted, and improving the collection of workers' compensation information.

- We received suggestions on how to improve iClaim so that a more accurate disability onset can be provided. Some examples of ideas submitted include rewording disability onset questions so that a more accurate onset date can be arrived at, including the earnings record in the claims path to assist claimants in determining when they last worked, and providing more clear descriptions of onset date and SSA's disability definition.

We are reviewing all submitted suggestions and compiling them to identify the most common suggestions. These ideas will be presented to the NCSSMA Executive Committee.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #13 (2020): ELECTRONIC SSA-827  
ASSIGNED TO: TII SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for an update to the i3368 to eliminate the user's option to submit a signed paper SSA-827 when they are e827 eligible. Eligible e827 users should be required to sign the e827 electronically when submitting the i3368.

**ACTION PLAN (2020):** Resolution 13 was referred to committee for consideration. The committee will draft an action plan, in consultation with the Executive Committee, and submit for review and approval before taking action.

Here is our proposed action plan:

- We will discuss this resolution with the Philadelphia Region (the introducing region) to obtain greater depth of understanding and background of the issues they are facing with regard to the SSA-827.
- We will also solicit each regional association for information via our committee members to help with making a strong justification for the resolution.
- We will collaborate with the NCSSMA Technology and/or Innovation Subcommittees to determine the technical feasibility of the resolution. If the committee determines it



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necessary, we will submit a position paper citing the results of our research to the office of the Chief Business Officer and/or OEST to determine feasibility of this solution.

- To further determine feasibility of this resolution, we will submit a position paper to OPSOS requesting their certification that the resolution is permissible under current SSA policy.

**MID-TERM REPORT (2020):** The TII Subcommittee has held three conference calls, gathered anecdotal information from employees, and researched policy. In March, Dan Combs and David Lescarini will seek background policy details as well as historical information about the i3368 from OEST/CBO during their visit to HQ. Specifically, Dan and David will inquire about FY 20 plans for i3368 upgrades (if any) and feasibility of making the e827 mandatory in the i3368 path. After we obtain these details, our next steps are to draft a position paper to route to OPSOS. Here are some of our specific accomplishments thus far:

- We surveyed FO managers and employees and compiled examples of the impact of the optional e-827.
- In addition to making e-827 mandatory, the Subcommittee also compiled recommendations for modernizing the current i3368.
- We surveyed committee members to better understand how the e-827 process works in the i3368 path from the user's perspective.
- We identified reasons why people do not choose to e-sign the 827.
- We identified barriers to making the e827 mandatory.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #14 (2020): TRANSITION TO LEADERSHIP COURSES  
ASSIGNED TO: TRAINING AND SUCCESSION MANAGEMENT COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for the Office of Learning to work with Regional Training Centers, Teleservice Centers, and Field Offices to ensure new members of management receive Transition to Leadership (TL) TL-101, TL-201, TL-301 and LE 4.2 (formerly known as TL-401) supervisory training within a year of accepting a management position.

**ACTION PLAN (2020):** The Training and Succession Management (TSM) committee plans to hold its first meeting with its members between Monday, October 21 and Tuesday, October 29. During our first call we will solicit feedback from its members, but also discuss the following action



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plan, which we may tailor based on the suggestions of the committee. As the fiscal year progresses, we will take into consideration all of the issues presented to the committee and determine if the issue warrants submission in a National Resolution at the next annual meeting.

- The TSM Committee will work with the NCSSMA President on a letter to agency leadership advocating for new members of management to receive Transition to Leadership (TL) TL-101, TL-201, TL-301, and TL-401 supervisory training within a year of accepting a management position.
- The TSM Committee will pursue several efforts to evaluate the current virtual training environment and solicit feedback on available agency training programs. We will explore the possibility of modifying the training platforms or request additional resources to meet the needs and better prepare frontline employees and management to do their jobs.

**MID-TERM REPORT (2020):** In regarding to **Resolution #14: Transition to Leadership Courses**, we received some assistance from the agency as page 37 of the recently released [2019-2020 Agency Performance Plan](#) outlines new supervisor training mandates.

FY 2020 Target Goals

- 95% of new supervisors enroll in supervisor training within the first 90 days of the effective date of their supervisory appointment
- 95% of new supervisors complete supervisor training within 1 year of the effective date of their supervisory appointment

DCO Parameters

- The initiative is only applicable to new permanent supervisors and temporary supervisors in an “S” PD for one (1) year or more,
- The goal will only measure new supervisors (i.e. not TLs, PMs, MSS, etc.) who have not previously attended supervisor training, and
- The 90-day timeframe to enroll in and the 365-day timeframe to complete management training will begin with the start of the probationary period (this should align with the start date of their supervisor position unless they had previous supervisory experience).

Our committee has requested the NCSSMA executive board discuss and determine if these new Agency goals satisfy our resolution.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD



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**RESOLUTION #15 (2020): COMMUNICATION AND ACCOUNTABILITY  
ASSIGNED TO: SERVICE DELIVERY COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for greater accountability and improved communication between the Field Offices (FOs), Teleservice Centers (TSCs) and Program Service Centers (PSCs).

**ACTION PLAN (2020):**

- Introductory Conference call / Brainstorming -10/23/19 (completed)
- Conference call to narrow down ideas due – 11/08/19
- Conference call to discuss ideas – November
- Development of data to support resolution – due Mid-January
- Conference call to discuss data – Late January
- Position Paper for NCSSMA – by Midyear

**MID-TERM REPORT (2020):** The Administration Subcommittee created a survey to send out to the national membership. We have submitted this survey for executive review and are awaiting a response. Once a response is received, we will proceed accordingly.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021. Resolution reassigned from Management Administration to Service Delivery. Work on resolution should be coordinated with the Teleservice Center Committee.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #16 (2020): CONSOLIDATED AND CENTRALIZED WORKLOAD REPORT  
ASSIGNED TO: INNOVATION SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with Regional and Headquarters components to determine the feasibility and requirements of a consolidated and centralized workload report and advocate for its creation.

**ACTION PLAN (2020):** This resolution is a carry-over from last year. We plan to survey managers concerning what information they need to do their jobs, so we can then provide that feedback to OEST.

**MID-TERM REPORT (2020):** We have gathered feedback from the committee members as to what they would like to see regarding a consolidated report. We are consolidating the responses





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in preparation to write a description of what we would like to see. The information can then be shared with the appropriate CO component.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #17 (2020): eOPF, PQR and PACS SYSTEMS CONSOLIDATION  
ASSIGNED TO: TECHNOLOGY SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Office of Systems to advocate for the consolidation of the electronic personnel file (e7b), Performance Quality Review system (PQR), and the Performance Assessment and Communication System (PACS) into one system to reduce administrative time and streamline the electronic record keeping process.

**ACTION PLAN (2020):** OEST has stated that there is currently no funding available for this initiative. Therefore, the committee will draft a letter emphasizing the need for this enhancement.

**MID-TERM REPORT (2020):** An opportunity presented itself in conjunction with the LMR committee's Resolution 5. They were asked to provide feedback on several questions, two of which align with Resolution 17. We will be working with them to provide feedback.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #18 (2020): SSI PROGRAM SIMPLIFICATION  
ASSIGNED TO: LEGISLATIVE INITIATIVES AND GRASSROOTS COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Office of Policy and Regulations, our Washington Representative, Congress, the Social Security Advisory Board and others to support SSI program simplification.

**ACTION PLAN (2020):**



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- We will work collaboratively with the Legislative Initiatives and Grassroots Committee, Rachel and Joe Deaton and Rick Warsinskey.
- We will review past SSI program simplification requests by NCSSMA.
- We will review past responses by the Agency and Congress to NCSSMA SSI program simplification proposals.
- We will brainstorm the best way to present and deliver SSI program simplification to the Agency and to Congress.

Legislative Initiatives and Grassroots Committee: The committee will work with the NCSSMA Executive Committee to advocate for SSI simplification. The Committee will collaborate with the T16 Subcommittee who will consider and develop other possible simplification proposals. The Committee can perform outreach and educate key congressional contacts on moving forward on SSI simplification.

**MID-TERM REPORT (2020):**

- On December 19, 2019, a letter was forwarded by NCSSMA president, Peggy Murphy to key Agency leaders advising them that NCSSMA is interested in working with the Agency on simplification of the SSI program.
- On December 20, 2019, the Acting Associate Commissioner for Office of Income Security Programs (OISP) replied to NCSSMA president advising her that they were open to discuss the proposals.
- A conference call was scheduled by OISP for February 5, 2020; however, call was postponed until approved FY 2021 SSA budget. The call was subsequently held on March 4.
- The Legislative Initiatives and Grassroots Committee and Operations Title XVI subcommittee will continue to work with the NCSSMA Executive Committee to advocate for SSI simplification. Leaders from the Operations T16 Subcommittee and Legislative Initiatives and Grassroots Committee, Executive Committee members and Washington Representative will hold discussions on planning strategy to promote SSI simplification to key decision makers or other advocates.

**Next Steps:**

- Conference call discuss conference call with OISP, OPSOS March 4.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD



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**RESOLUTION #19 (2020): eRPS APPLICATION MODERNIZATION  
ASSIGNED TO: TECHNOLOGY SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate with Central Office for transparency on the Information Technology Modernization plans for the Electronic Representative Payee System (eRPS). NCSSMA will also advocate for a voice in development of eRPS enhancements to ensure the application will meet the efficiency, quality, and productivity needs of field users while minimizing unnecessary duplicative documentation inputs. NCSSMA will advocate for increased clarity and ease of use in the eRPS misuse application to assist technicians in completing a quality work product in an efficient manner.

**ACTION PLAN (2020):** OEST is not currently expending many resources to improve eRPS due to the need to make the representative payee program and related systems, compliant with federal mandates. Resources are currently being spent on advanced designation, automating criminal background checks to better enforce the criminal bar policy and improving interfaces with state agencies as they relate to the representative payee program. The committee hopes to be able to have a representative on the User Acceptance Testing/User Experience Group to provide feedback on what changes will be made to the eRPS program.

**MID-TERM REPORT (2020):** We received updated information that OEST will be looking at enhancements for eRPS this year. Our goal has changed from the action plan. We intend to provide a list of needed enhancements to OEST. Working with the T2 sub-committee, we solicited enhancement ideas from both committees. The deadline just recently ended and we are in the process of consolidating the responses.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #20 (2020): QUALITY STEP INCREASE GUIDANCE  
ASSIGNED TO: MANAGEMENT STRUCTURE SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Commissioner of Social Security and the Deputy Commissioner for Operations and others to review the monetary awards guidance as it applies to and impacts SSA management. NCSSMA will advocate for equity with regard to how Quality Step Increases (QSIs) are awarded to Operations management personnel.



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**ACTION PLAN (2020):** Resolution 20 was referred to committee for consideration. The committee will draft an action plan, in consultation with the Executive Committee, and submit for review and approval before taking action.

- The Committee will draft a request for forwarding by NCSSMA to DCO to ask precisely how the money pool for QSIs for field office and teleservice management personnel is determined and distributed. It will also ask who is the ultimate decider in the field and what, if any, instructions or parameters as to final distribution are mandated.
- Once the above data is obtained, the Committee will conduct survey of NCSSMA membership the results of which be used to prepare final recommendations for consideration by the NCSSMA EC.

**MID-TERM REPORT (2020):** The Structure Committee submitted a suggested email communication for DCO to the executive team. At this time, the only remaining action item is for the executive team to discuss the topic with DCO.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote failed to carry over resolution to FY 2021. No further action will be taken on this resolution.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #E23 (2020): COMMUNITY-BASED SERVICE  
ASSIGNED TO: SERVICE DELIVERY COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will strongly advocate with Central Office, Congress, and other interested parties for continued customer choice in the delivery of Social Security Administration services including an unreduced, well-resourced network of teleservice centers and community-based field offices.

**ACTION PLAN (2020):**

- We will ensure this topic is Included on agenda for DCO meetings, with particular focus on the hiring piece
- The committee will work with the NCSSMA President and Washington Rep to determine the best way to continue to share this message with our Hill contacts (i.e. during Hill visits, documents shared, etc.).
- The committee will work with the Grassroots Committee to gather public service stories for Hill documents, focusing on stories within specific congressional districts (i.e. target those



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on appropriations committee, etc.). The stories will be used in Hill documents and papers shared with the COSS and DCO.

- The committee will analyze potential service delivery changes under the new COSS to determine if they support the resolutions
- The committee may use surveys or position a position paper on this resolution.

**MID-TERM REPORT (2020):**

- The committee has held several calls to discuss this resolution and determine action.
- We submitted FO Hiring as a suggested agenda topic for the March meeting with DCO; however, we have since received information regarding FO hiring.
- The Grassroots Committee gathered public service stories for the Hill documents. Some members of the NCSSMA EC will be heading to the Hill in March, where these documents will be shared.

**FINAL REPORT (2020):** Action curtailed due to COVID-19. Vote passed to carry over resolution to FY 2021.

**UPDATED ACTION PLAN (2021):** TBD

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**RESOLUTION #E1 (2021): ENUMERATION AT ENTRY  
ASSIGNED TO: LEGISLATIVE AND GRASSROOTS COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate with Central Office and Regional Offices, including Public Affairs to partner with Department of Homeland Security to increase the number of foreign born individuals who can apply for a social security number through the Enumeration at Entry program.

**ACTION PLAN (2021):** TBD

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**RESOLUTION #E2 (2021): EXR MODERNIZATION  
ASSIGNED TO: T2 OPERATIONS SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations will advocate for changes to the expedited reinstatement process in order to eliminate paper processing. Systems barriers to prompt payment should be identified and eliminated.

**ACTION PLAN (2021):** TBD



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**RESOLUTION #E3 (2021): SERS EXPANSION  
ASSIGNED TO: INNOVATION SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will advocate for expansion of the Social Security Electronic Remittance System (SERS) to allow full processing of all remittances received in the field offices.

**ACTION PLAN (2021): TBD**

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**RESOLUTION #E4 (2021): AGENCY REOPENING WORKGROUP  
ASSIGNED TO: MANAGEMENT ADMINISTRATION SUBCOMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Deputy Commissioner Operations (DCO) to form a partnership comprised of management teams from each Region and the Teleservice to provide input for action needed to continue operations in the Field Office (FO) and Teleservice Center (TSC) environments during this pandemic and any future emergencies. NCSSMA also advocates for a presence at any National or Regional workgroups related to the Agency's reopening plan.

**ACTION PLAN (2021): TBD**

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**RESOLUTION #E5 (2021): CENTRALIZED REPORT PRINTING  
ASSIGNED TO: SERVICE DELIVERY COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) resolves to work with the Deputy Commissioner for Operations to create a centralized remote printing option for all of our systems. Centralization of printing and mailing would allow Agency employees to perform their assigned duties, which are critical to the Agency's mission. The remote printing option should include options for inclusion of return envelopes to local field offices.

**ACTION PLAN (2021): TBD**

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**RESOLUTION #E6 (2021): TSC LEAD CUSTOMER SERVICE REPRESENTATIVE MEETINGS  
ASSIGNED TO: TELESERVICE CENTER COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Office of Customer Service (OCS), Office of Public Service and



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Operations Support (OPSOS) and Regional Commissioners to establish a monthly meeting for all Lead Customer Service Representatives.

**ACTION PLAN (2021):** TBD

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**RESOLUTION #E7 (2021): LITIGATION TECHNICAL ASSISTANT  
ASSIGNED TO: LABOR MANAGEMENT RELATIONS COMMITTEE**

**COMMITTEE DIRECTIVE:** The National Council of Social Security Management Associations (NCSSMA) will work with the Deputy Commissioner Operations (DCO) to develop a cadre of volunteer Field Office/Teleservice management personnel who will receive necessary and appropriate training to prepare them to function as Technical Assistants in matters being litigated before third parties.

**ACTION PLAN (2021):** TBD. Resolution will be coordinated with Membership Committee.