

iAppeals Interviewing: Rep Name _____ Date _____

Grouping (5-10 m)

Tell me a little about yourself.

The office you work in; is this a law firm?

Are you an attorney, non-attorney rep, or support staff?

When it comes to computer experience, would you categorize yourself as an expert, intermediate user, or novice?

Current Experience (5-10 m)

How long have you been doing this type of work?

I'd like to get an idea for where your clients usually are in the process when they first request your services. Could you estimate a percent for how many are in each of these phases?

___% Initial ___%Reconsideration ___%Hearing ___%Appeals Council ___%Other

How do you currently gather information from your clients to file their appeals?

(iAppeals, other electronic, paper, combination?)

(If they do not mention iAppeals) Have you ever used SSA's website to file an appeal?

If yes, what was that experience like?

Why don't you use the web now?

If no, is there a specific reason why you don't?

(If they DO use iAppeals) How long have you been filing online?

Why do you use the online system? How does it benefit you or your clients?

Is there anything in particular that you like about filing online?

Is there anything in particular that you do NOT like about filing online?

Make a wish list of the top 5 improvements you'd like to see in (iAppeals).

1. _____
2. _____
3. _____
4. _____
5. _____

Experience with Attachments (35 m)

What types of documentation do you typically submit with an appeal? (specific forms, medical records or evidence, something else?)

- | | | | |
|-------------------------------|----------------------------------|---|--------------------------|
| <input type="checkbox"/> 827 | <input type="checkbox"/> 3881 | <input type="checkbox"/> Fee agreement | <input type="checkbox"/> |
| <input type="checkbox"/> 1695 | <input type="checkbox"/> 795 | <input type="checkbox"/> Good Cause | <input type="checkbox"/> |
| <input type="checkbox"/> 1696 | <input type="checkbox"/> 820/821 | <input type="checkbox"/> Medical Evidence | <input type="checkbox"/> |

How do you submit that documentation? *(email to FO or to UDAR, fax, ERE, ??)*

Have you used other applications or websites that allow you to attach files?
(ERE, webmail [Gmail, Yahoo, Hotmail, etc], other?)

Are you familiar with Electronic Records Express, or ERE?

If so, have you personally used ERE?

If yes, Tell me about your experience with ERE.

Is there anything in particular that you **like** about ERE?

Is there anything in particular that you **do NOT like** about ERE?

What types of files do you generally upload—PDFs, or JPEG, something else?

When you keep copies of documentation that you send to SSA, are you keeping paper copies, or electronic?
(currently scan items in somewhere for their own records?)

One of the enhancements SSA is considering for our online appeal process is to allow representatives to electronically send some documents when filing an appeal... For example, perhaps you would be able to submit a scanned 1696 at the same time that you file the appeal.

Is that something you would be interested in?

Describe in detail for me, please, how you might expect that to work; what would happen 1st, what would happen next...

If you were to complete a process where you uploaded some forms or other documents to SSA while you were filing your client's appeal, would you still follow up with paper copies of the same forms?

If yes, what would you need to see on-screen in order to be convinced that sending paper copies of these forms was unnecessary?

Read Paperwork Reduction Act Statement:

Paperwork Reduction Act Statement – This interview, cleared under OMB No. 0960-0788, meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. Participation in this activity is voluntary. We estimate that it will take approximately 18 minutes to complete. If you would like to comment on our time estimate, please send your comments to: SSA, 6401 Security Blvd Baltimore, MD 21235-6401.