

I. External Automated Scheduling Screen Flows

Introduction

This screen package begins with the “Getting Started” pages. The external users will log in using the existing IRES Log In to BSO screen. After the Appointed Representative (AR) successfully logs in, he or she will view a slightly modified AR Main Menu. After a medical expert (ME), vocational expert (VE) or verbatim hearing recorder (VHR) successfully logs in, he or she will view a new IRES Main Menu for Experts.

Common User Interface Features

- All screens use Uniform Experience Framework (UEF) style patterns where applicable.
- All screens display the user’s IRES/BSO log in name at the top like current applications under IRES.
- Log Out logs the user completely out of IRES/BSO.
- Main Menu navigates the user to the IRES Main Menu specific to the type of user.


Getting Started


The “Getting Started” screens briefly highlight the purpose of the application and functions that the user will be able to perform. Variations exist depending whether the AR has one or multiple locations, or whether the expert has one or multiple Blanket Purchase Agreements (BPAs).

AR with one location

The screenshot shows the Social Security Administration's website interface for the Automated Scheduling application. At the top right, there are links for "Text Size" and "Accessibility Help". The main header features the Social Security Administration logo and the text "Social Security Official Website of the U.S. Social Security Administration". Below this, the page title "Automated Scheduling" is displayed, along with a reference to "OMB No. 0000-0000 Paperwork Reduction Act Privacy Statement". The central content area is titled "Getting Started" and contains the following text: "Automated Scheduling allows you to inform us of your availability to be scheduled for the Office of Disability Adjudication and Review (ODAR) disability hearings." It then lists the tasks the user will perform: "You will do the following within the application:" followed by a bulleted list: "• Access your profile", "• Enter or Edit your availability", and "• View a calendar showing the hearings for which you have been scheduled". At the bottom of the page, there are three buttons: "Next", "Main Menu", and "Log Out".

AR with multiple locations

Text Size  | [Accessibility Help](#)



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling

OMB No. 0000-0000
[Paperwork Reduction Act](#)
[Privacy Statement](#)

Getting Started

Automated Scheduling allows you to set your availability to be scheduled for the Office of Disability Adjudication and Review (ODAR) disability hearings.

You will do the following within the application:


- Access your profile
- Enter or Edit your availability
- View a calendar showing the hearings for which you have been scheduled


***Please select an address:**
You will have a separate profile and calendar for each address.

- 6745 Charles St., Baltimore MD 21212
- 123 Shady Side Blvd., Philadelphia PA 19040
- 11237 Aubergine Way, Suite 3B, Rahway NJ 07065

[Next](#) [Main Menu](#) [Log Out](#)

Expert with one BPA

Text Size  | Accessibility Help

 **Social Security**
Official Website of the U.S. Social Security Administration

Automated Scheduling OMB No. 0000-0000
[Paperwork Reduction Act](#)
[Privacy Statement](#)

Getting Started

Automated Scheduling allows you to set your availability to be scheduled for the Office of Disability Adjudication and Review (ODAR) disability hearings.


You will do the following within the application:


- Access your profile
- Enter or Edit your availability
- View a calendar showing the hearings for which you have been scheduled

Your BPA: SS05-08-93657 - Philadelphia Region

[Next](#) [Main Menu](#) [Log Out](#)

Expert with multiple BPAs

Text Size  | Accessibility Help

 **Social Security**
Official Website of the U.S. Social Security Administration

Automated Scheduling OMB No. 0000-0000
[Paperwork Reduction Act](#)
[Privacy Statement](#)

Getting Started

Automated Scheduling allows you to set your availability to be scheduled for the Office of Disability Adjudication and Review (ODAR) disability hearings.

You will do the following within the application:

- Access your profile
- Enter or Edit your availability
- View a calendar showing the hearings for which you have been scheduled

Please select a Blanket Purchase Agreement (BPA):
You will have a separate profile and calendar for each BPA.

SS05-08-93657 - Philadelphia Region

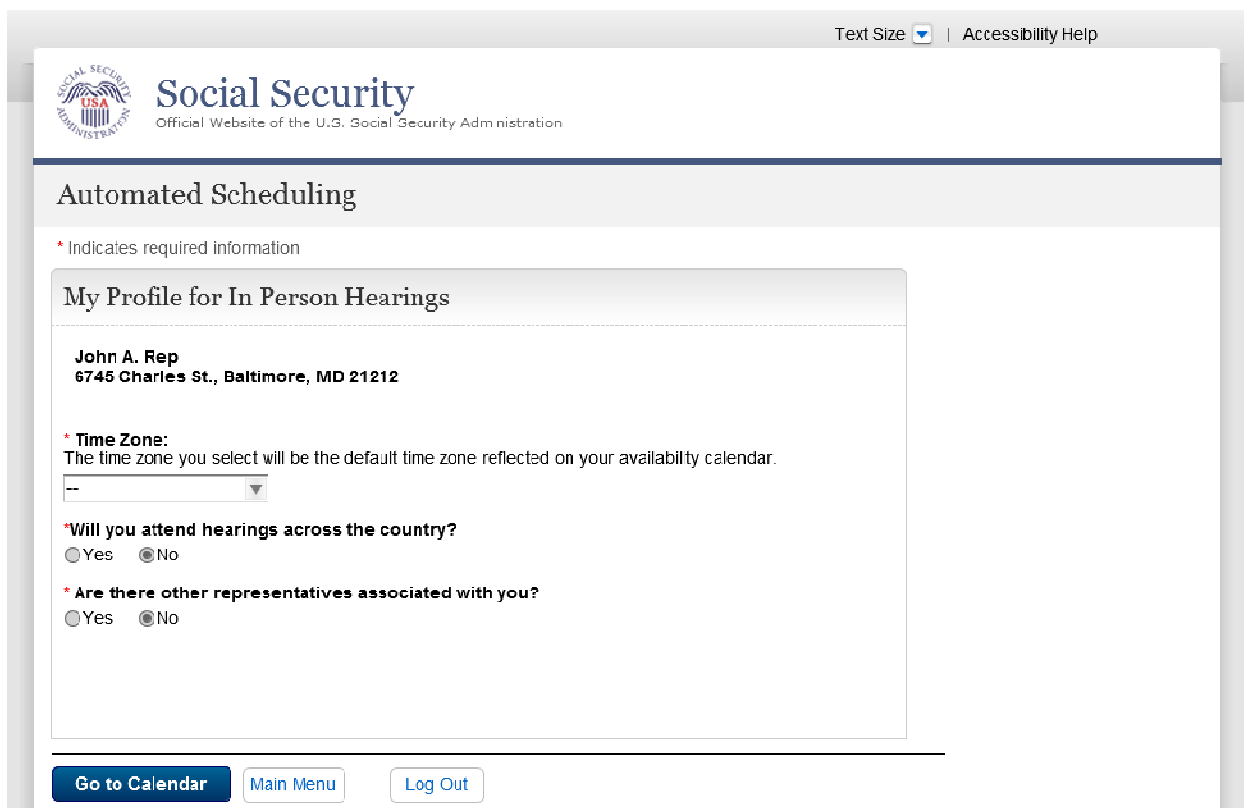
SS08-74-63744 - New York Region

[Next](#) [Main Menu](#) [Log Out](#)

Profile

Each AR or Expert is invited to the hearing office to receive assistance in completing or reviewing his or her profile. The profile collects general information about the user that determines the availability choices presented to the user and provides information for the internal scheduling batch engine to propose hearings in which the user can participate. The Profile screens are initially displayed when the user enters the application, and thereafter when the user selects “Edit Profile” on the Monthly Calendar screen. The profile pages slightly vary according to user type (AR versus expert) and whether the user has associates working with him or her.

AR



The screenshot shows the Social Security Administration's website interface. At the top right, there are links for "Text Size" and "Accessibility Help". The main header features the Social Security Administration logo and the text "Social Security Official Website of the U.S. Social Security Administration". Below this is a section titled "Automated Scheduling". A note states "* Indicates required information". The main content area is titled "My Profile for In Person Hearings" and contains the following information:

- John A. Rep**
6745 Charles St., Baltimore, MD 21212
- * Time Zone:**
The time zone you select will be the default time zone reflected on your availability calendar.
--
- * Will you attend hearings across the country?**
 Yes No
- * Are there other representatives associated with you?**
 Yes No

At the bottom of the form, there are three buttons: "Go to Calendar", "Main Menu", and "Log Out".

Additional screen panel displayed when the AR selects “Yes” for the other associates question.

*** Enter the number of representatives, including yourself:**
If you have multiple representatives, your availability must be for an entire day.

ME or VE

Text Size  | Accessibility Help

 **Social Security**
Official Website of the U.S. Social Security Administration

Automated Scheduling

* Indicates required information

My Profile for In Person Hearings

Name: Terry Q. Smith
BPA: SS09-08-34857

*** Minimum Number of Hearings**
Please enter the minimum number of hearings you prefer to attend in a day.


*** Are there other experts associated with you?**
 Yes No


[Next](#) [Main Menu](#) [Log Out](#)

Additional screen panel displayed when the Expert selects “Yes” for the other associates question.

*** Enter the number of experts, including yourself:**
If you have multiple experts, your availability must be for an entire day.

The ME and VE may choose the locations of hearings at which they are willing participant in person.

Text Size  | Accessibility Help



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling

* Indicates required information

My Profile for In Person Hearings - Locations

Name: Terry Q. Smith
BPA: SS09-08-34857


Where can you testify?

***First, select an office in the Philadelphia Region:**
Please select an office in this region, and select Go to see the available hearing locations.

***Then, add or remove the locations where you will attend hearings for this office:**

Locations in this office:

* My locations:

 Please note:

If you appear in more than one office in this region, please select each one from the drop-down list above and add locations for each office.

VHR

A VHR cannot update profile information after it is input at the hearing office.

VHR with no associates

The screenshot shows the Social Security Administration's website interface. At the top right, there are links for "Text Size" and "Accessibility Help". The main header features the Social Security Administration logo and the text "Social Security Official Website of the U.S. Social Security Administration". Below this is a section titled "Automated Scheduling". A note indicates that an asterisk (*) denotes required information. The main content area is titled "My Profile for In Person Hearings" and displays the following information:

Name: Terry A. Smith
BPA: SS09-08-348E7

You are the only reporter associated with this BPA.
You indicated a preference of at least 4 hearings per day.

Please contact your Hearing Office if you need to change these preferences.

At the bottom of the page, there are three buttons: "Go to Calendar", "Main Menu", and "Log Out".



Automated Scheduling

* Indicates required information

My Profile for In Person Hearings

Name: Terry A. Smith
Company: VHR Company
BPA: SSC9-08-34857

There are **10** reporters (including you) associated with this BPA.
You indicated a preference of at least **4** hearings per day.

Please contact your Hearing Office if you need to change these preferences.

[Go to Calendar](#)

[Main Menu](#)

[Log Out](#)

Monthly Calendar

The Monthly Calendar page will be displayed after the Getting Started screen if it is not the first time the user accesses the application. The Monthly Calendar displays approved hearings and provides links to set availability, to review in more detail the hearings approved for a certain day and to edit the user's profile. The Monthly Calendar varies dependent upon whether or not the user has associates.

AR with no associates

Text Size | Accessibility Help



Social Security
Official Website of the U.S. Social Security Administration

Automated Scheduling

John A. Rep | [Edit Profile](#)

My Calendar

To edit your availability, select the link immediately following the date. To see details of all hearings scheduled on a specific date, select *details* for that day.

March 2012 6745 Charles St., Baltimore, MD 21212 [Select another address](#) [Print this Calendar](#)

Month: Time Zone:


Monday	Tuesday	Wednesday	Thursday	Friday
Feb 27	28 Available All Day	29	Mar 1 Available All Day	2
	9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore details		9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore details	
5 Today	6 Available All Day	7 Available All Day	8 Available All Day	9 Available All Day
9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore	9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore details			
12 Available AM	13 Available All Day	14 Available All Day	15 Available All Day	16 Available All Day
9:00 † ODAR Baltimore details				
17 Available All Day	18 Available All Day	19 Available All Day	20 Available All Day	21 Available All Day
	9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore 1:45 † ODAR Baltimore 2:30 † ODAR Baltimore details		9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore 1:45 † ODAR Baltimore details	
24 Available All Day	25 Available All Day	26 Available All Day	27 Available All Day	28 Available All Day
			9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore 1:45 † ODAR Baltimore details	
27 Available All Day	28 Available All Day	29 Available All Day	30 Available All Day	31 Available All Day

[Main Menu](#)

[Log Out](#)

AR with associates

Text Size | [Accessibility Help](#)



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling
John A. Rep | [Reps. Inc.](#) | [Edit Profile](#)

My Calendar

To edit your availability, select the link immediately following the date. To see details of all hearings scheduled on a specific date, select *details* for that day.

March 2012
6745 Charles St., Baltimore, MD 21212
[Select another address](#)
[Print this Calendar](#)

Month:

March 2012

Time Zone:

Eastern

Key: Phone Video In person [What's this?](#)

Monday	Tuesday	Wednesday	Thursday	Friday
Feb 27	28	29	Mar 1	2
5 Today	6 15 Available	7 15 Available	8 15 Available	9 15 Available
	ODAR Baltimore HO		ODAR Baltimore I IO ODAR Washington DC HO	
12 15 Available	13 15 Available	14 15 Available	15 15 Available	16 15 Available
	ODAR Baltimore HO ODAR Washington DC HO			
17 15 Available	18 15 Available	19 15 Available	20 15 Available	21 15 Available
			ODAR Baltimore HO ODAR Washington DC HO	
24 15 Available	25 15 Available	26 15 Available	27 15 Available	28 15 Available
27 15 Available	28 15 Available	29 15 Available	30 15 Available	31 15 Available

[Main Menu](#)
[Log Out](#)

Expert with no associates

Text Size | Accessibility Help



Social Security
Official Website of the U.S. Social Security Administration

Automated Scheduling

Terry Q. Smith | [Edit Profile](#)

My Calendar

To edit your availability, select the link immediately following the date. To see details of all hearings scheduled on a specific date, select *details* for that day.

March 2012 BPA: SS05-08-93657 - Philadelphia Region [Select another BPA](#) [Print this Calendar](#)

Month: Time Zone:

Monday	Tuesday	Wednesday	Thursday	Friday
Feb 27	28 Available All Day	29	Mar 1 Available All Day	2
	9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore details		9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore details	
5 Today	6 Available All Day	7 Unavailable	8 Unavailable	9 Unavailable
9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore	9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore details			
12 Available AM	13 Unavailable	14 Unavailable	15 Unavailable	16 Unavailable
9:00 † ODAR Baltimore details				
17 Unavailable	18 Available All Day	19 Unavailable	20 Available All Day	21 Unavailable
	9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore 1:45 † ODAR Baltimore 2:30 † ODAR Baltimore details		9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore 1:45 † ODAR Baltimore details	
24 Unavailable	25 Unavailable	26 Unavailable	27 Available All Day	28 Unavailable
			9:00 † ODAR Baltimore 10:15 † ODAR Baltimore 1:00 † ODAR Baltimore 1:45 † ODAR Baltimore details	
27 Unavailable	28 Unavailable	29 Unavailable	30 Unavailable	31 Unavailable

[Main Menu](#)

[Log Out](#)

Expert with associates

Text Size | Accessibility Help



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling

Terry Q. Smith | [Edit Profile](#)

My Calendar

To edit your availability, select the link immediately following the date. To see details of all hearings scheduled on a specific date, select *details* for that day.

March 2012 BPA: SS05-08-93657 - Philadelphia Region [Select another BPA](#) [Print this Calendar](#)

Month: Time Zone: Key: Phone Video In person [What's this?](#)

Monday	Tuesday	Wednesday	Thursday	Friday
Feb 27	28	29	Mar 1	2
5 Today	6 5 Available	7 5 Available	8 5 Available	9 0 Available
	ODAR Baltimore HO ODAR Washington DC HO ODAR Philadelphia HO		ODAR Baltimore I HO ODAR Washington DC HO ODAR Philadelphia HO	
12 0 Available	13 5 Available	14 0 Available	15 0 Available	16 0 Available
	ODAR Baltimore HO ODAR Washington DC HO ODAR Philadelphia HO			
17 0 Available	18 0 Available	19 0 Available	20 5 Available	21 0 Available
			ODAR Baltimore HO ODAR Washington DC HO ODAR Philadelphia HO	
24 0 Available	25 0 Available	26 0 Available	27 0 Available	28 0 Available
27 0 Available	28 0 Available	29 0 Available	30 0 Available	31 0 Available

[Main Menu](#) [Log Out](#)

Daily Calendar

The Daily Calendar displays all the hearings scheduled for the day and additional details about the hearings. The Claimant Name is displayed for all user types. However, the AR name is only displayed when an AR is logged in, and the expert name is only displayed when an expert is logged in. Since at any one time there can be an associate in one location and an associate in another location, the Daily Calendar includes a location selection feature.

AR

Text Size | Accessibility Help



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling

John A. Rep | [Edit Profile](#)

Daily Calendar

< Previous Day **May 10, 2012** Next Day > Print this Calendar

Time Zone: Eastern **Key:** ☎ Phone ▶ Video ↓ In person ⓘ What's this?

Time	Participants	Site	Room
10:15 am	↑ Rep: John A. Rep ↓ Claimant: Brown, Carla	ODAR Baltimore	2
1:00 pm	☎ Rep: John A. Rep ☎ Claimant: Smith, John	ODAR Baltimore	6
1:45 pm	↑ Rep: John A. Rep ↓ Claimant: Evans, Jane	ODAR Baltimore	2
2:30 pm	☎ Rep: John A. Rep ☎ Claimant: Green, Robert	ODAR Baltimore	2
3:00 pm	☎ Rep: John A. Rep ☎ Claimant: Robertson, Carla	ODAR Baltimore	2
3:30 pm	☎ Rep: John A. Rep ☎ Claimant: Williams, John	ODAR Baltimore	6
4:45 pm	☎ Rep: John A. Rep ☎ Claimant: White, Jane	ODAR Baltimore	2

[Back to Monthly Calendar](#)[Main Menu](#)[Log Out](#)

AR with associates

Text Size | Accessibility Help



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling

John A. Rep | [Edit Profile](#)

Daily Calendar

< Previous DayNext Day > Print this Calendar

Baltimore HO


Location: Time Zone: Eastern **Key:** Phone Video In person [What's this?](#)

Time	Participants	Site	Room
10:15 am	Rep: John A. Rep Claimant: Brown, Carla	ODAR Baltimore	2
1:00 pm	Rep: John A. Rep Claimant: Smith, John	ODAR Baltimore	6
1:45 pm	Rep: John A. Rep Claimant: Evans, Jane	ODAR Baltimore	2
2:30 pm	Rep: John A. Rep Claimant: Green, Robert	ODAR Baltimore	2
3:00 pm	Rep: John A. Rep Claimant: Robertson, Carla	ODAR Baltimore	2
3:30 pm	Rep: John A. Rep Claimant: Williams, John	ODAR Baltimore	6
4:45 pm	Rep: John A. Rep Claimant: White, Jane	ODAR Baltimore	2

[Back to Monthly Calendar](#)[Main Menu](#)[Log Out](#)

Expert without associates

Text Size | Accessibility Help



Social Security

Official Website of the U.S. Social Security Administration

Automated Scheduling

Terry Q. Smith | [Edit Profile](#)

Daily Calendar

[< Previous Day](#) **March 18, 2012** [Next Day >](#) [Print this Calendar](#)

BPA: SS05-08-93657 - Philadelphia Region

Time Zone: Eastern **Key:** Phone Video In person What's this?

Time	Participants	Site	Room
9:00	Claimant: Brown, Carla VE: Smith, Terry Q.	ODAR Baltimore 3 ODAR Baltimore 3	3 3
10:15	Claimant: Smith, James Donald VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
11:00	Claimant: Fine, Matthias V. VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
1:00	Claimant: Abernathy, Kelvin VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
1:45	Claimant: Ho, Jun VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
2:30	Claimant: Holstein-Jones, Alberta VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
3:00	Claimant: Montana, Seymour VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
4:00	Claimant: Sylvia Samuels VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1 1

[Back to Monthly Calendar](#)[Main Menu](#)[Log Out](#)



Automated Scheduling

Terry Q. Smith | [Edit Profile](#)

Daily Calendar

< [Previous Day](#) **March 1, 2012** [Next Day](#) >

BPA: SS05-08-93657 - Philadelphia Region

[Print this Calendar](#)

Baltimore HO

Location:

Baltimore

Time Zone: Eastern

Key: Phone Video In person [What's this?](#)

Time	Participants	Site	Room
9:00	Claimant: Browning, Carla VE: Experts Inc.	ODAR New York 6 ODAR Baltimore 3	6 3
9:00	Claimant: Mills, Stephanie VE: Experts Inc.	Hagerstown Hagerstown	2 2
10:15	Claimant: Smith, James Donald VE: Experts Inc.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
11:00	Claimant: Fine, Matthias V. VE: Experts Inc.	Hagerstown Hagerstown	2 2
1:00	Claimant: Abemathy, Kevin VE: Experts Inc.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
1:45	Claimant: Ho, Jun VE: Experts Inc.	Hagerstown Hagerstown	2 2
2:30	Claimant: Holstein-Jones, Alberta VE: Experts Inc.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
3:00	Claimant: Montana, Seymour VE: Experts Inc.	ODAR Baltimore 1 ODAR Baltimore 1	1 1
4:00	Claimant: Sylvia Samuels VE: Experts Inc.	ODAR Baltimore 1 ODAR Baltimore 1	1 1

[Back to Monthly Calendar](#)

[Main Menu](#)

[Log Out](#)

Daily Availability

A user may provide or update his or her availability for a day by selecting the availability link on a day in the Monthly Calendar as long as there are no proposed or approved hearings for that day. If that is the case, a message is displayed informing the user that scheduling is in process. If the day selected is the current day, or the day has occurred in the past, availability previously provided is displayed but cannot be updated.

The granularity of the choices is different for a user that has no associates, for a user that has associates, and an AR that is willing to appear across the country. Those users that have associates are required to provide the number of associates that are available.

The user has the option to apply any day's availability to other dates.

AR or Expert with no associates

Friday, February 17, 2012
Last updated February 12, 2012 by John A. Rep Time Zone: Eastern

Availability:

Available all day
 AM Only (8am - 11:59am)
 PM Only (12pm - 5pm)
 Unavailable



Apply this availability to other dates (optional)

This will overwrite any availability you have entered for these dates, except if there are hearing(s) scheduled.

Select all
 Monday Tuesday Wednesday Thursday Friday

Availability can be updated up to six months at a time, up to one year in advance.

Start Date: **End Date:**

 **to** 

AR or Expert with associates

Friday, February 17, 2012

Last updated February 12, 2012 by John A. Rep

Time Zone: Eastern

Availability for Reps Inc.:

There are **15** representatives in your company. Please enter:

Number of Reps available:

Number of Reps unavailable:

Apply this availability to other dates (optional)

This will overwrite any availability you have entered for these dates, except if there are hearing(s) scheduled.

Select all

Monday

Tuesday

Wednesday

Thursday

Friday

Availability can be updated up to six months at a time, up to one year in advance.

Start Date:

mm/dd/yyyy



to

End Date:

mm/dd/yyyy



Save

Cancel

Paperwork Reduction Act

Paperwork Reduction Act

This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the *Paperwork Reduction Act of 1995*.

You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. The OMB control number for this collection is 0960-XXXX; expiration date XX/XX/XXXX. We estimate that it will take about XX minutes to read the instructions, gather the facts, and answer the questions.

You may send comments on our time estimate to: Social Security Administration, 6401 Security Blvd, Baltimore, MD 21235-6401. **Send only comments on our time estimate to this address.**

Close

Privacy Statement

Privacy Act Statement

[Insert legal citation] authorize us to collect this information. We will use the information you provide **[Insert purpose for collecting the information]**.

The information you furnish on this form is voluntary. However, failure to provide all or part of the information **[Insert potential repercussion to not providing the information]**.

We can rarely use the information you supply for any purpose other than **[repeat purpose for collecting the information]**. However, we may use it for the administration and integrity of Social Security programs. We may also disclose information to another person or to another agency in accordance with approved routine uses, which include but are not limited to the following:

1. To enable a third party or an agency to assist Social Security in establishing rights to Social Security benefits and/or coverage;
2. To comply with Federal laws requiring the release of information from Social Security records (e.g., to the Federal Government Accountability Office and Department of Veterans' Affairs);
3. To make determinations for eligibility in similar health and income maintenance programs at the Federal, State, and local level; and,
4. To facilitate statistical research, audit, or investigative activities necessary to assure the integrity and improvement of Social Security programs (e.g., to the Bureau of the Census and private concerns under contract to Social Security).

We may also use the information you provide in computer matching programs. Matching programs compare our records with records kept by other Federal, State, or local government agencies. Information from these matching programs can be used to establish or verify a person's eligibility for Federally-funded or administered benefit programs and for repayment of payments or delinquent debts under these programs.

A complete list of routine uses for this information are available in Systems of Records Notice entitled, **[Insert citation to appropriate Privacy Act System of Records Notice(s)]**. These notices, additional information regarding this form, and information regarding our programs and systems, are available on-line at www.socialsecurity.gov or at your local Social Security office.

Close