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

Text Size Social Security Official Website of the U.S. Social Security Administration	 I Accessibility Help
Automated Scheduling	OMB No. 0000-0000 Paperwork Reduction Ac Privacy Statement
Getting Started	
Automated Scheduling allows you to inform us of 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 	
Next Main Menu Log Out	_

AR with multiple locations

Official Websita 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., Ballimore MD 21212	
123 Shady Side Bivd., Philadelphia PA 19040	
11237 Aubergine Way, Suite 3B, Rahway NJ 07605	

Expert with one BPA

	Text Size 💌 Accessibility Help
Official Website of the U.S. Social Security Administration	
Automated Scheduling	OMB No. 0000-0000 Papervork Reduction Ac 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 - Phiadelphia Region	
Next Main Menu Log Out	

Expert with multiple BPAs

	Text Size 💌 🕴 Accessibility Help
Official Website of the U.S. Social Security Administration	
Automated Scheduling	OMB No. 0000-0000 Paperwork Reduction Ac 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

	Text Size 💌 Accessibility Help
Official Website of the U.S. Social Security Administration	
Automated Scheduling	
* Indicates required information	
My Profile for In Person Hearings	
 * Time Zone: The time zone you select will be the default time zone reflected on your availability calend 	lar.
*Are there other representatives associated with you? ◎Yes ●No	
Go to Calendar Main Menu 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

/ Help

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 So	e U.S. Social Security Administration	
Automated Schedu	ıling	
Indicates required information		
My Profile for In Per	son Hearings - Locations	5
Name: Terry Q. Smith BPA: SS09-08-34857 Where can you testify?	he Philadelphia Region:	
Please select an office in this	region, and select Go to see the av	vailable hearing locations.
*Then add or remove the l	GO GO	nearings for this office.
Locations in this office:	Add >>	S.
Please note: If you appear in more the above and add locations Go to Calendar	an one office in this region, please s s for each office. Menu Log Out	elect each one from the drop-down list

VHR

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

VHR with no associates

		Text Size 💌 🕴 Accessibility Help
USA North Stera	Social Sccurity Official Website of the U.S. Social Security Administration	
Auton	nated Scheduling	
* Indicates	s required information	
My Pr	ofile for In Person Hearings	
Name: BPA:	Terry A. Smith \$\$09-08-31857	
You : You i	are the only reporter assoc ated with this BPA. ndicated a preference of at least 4 hearings per day.	
Pleas	se contact your Hearing Office if you need to change these preferences.	
Go to	Calendar Main Menu Log Out	

VHR with associates

	Text Size 💌 🕴 Accessibility Help
Official Website of the U.S. Social Security Administration	
Automated Scheduling	
* Indicates required information	
My Profile for In Person Hearings	
Name: Terry A. Smith Company: VHR Company BPA: SS09-08-34857	
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

Λu	tomated Sched	luling				John A. Re	p <u>E</u>	<u>lit Profile</u>
M To that	y Calendar edit your availability, sele t day.	ect the link immediately followi	ng the	e date. To see details o	f all hear	ings scheduled on a sp	oecific date,	select details fo
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Mo Ma	onth: rch 2012 💌 Go	Time Zone: Eastern V Go				Phone 🖴 Video	in person	What's this
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Main Menu I og Out

AR with associates

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Main Menu Log Out

Expert with no associates

Official Website of	the U.S. Social Security A	dministration		
Automated Sched	luling		Terry Q. Sn	nith <u>Edit Profile</u>
My Calendar To edit your availability, sele that day.	ect the link immediately	following the date. To see det	ails of all hearings scheduled on a sp	ecific date, select details fo
March 2012	BPA: SS05-08-936	57 - Philadelphia Region	Select another BPA	🖨 Print this Calend
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Feb 27	28 Available All D	ay 29	Mar 1 Available All Day	2
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details 17 Unavailable	18 Available All Day	19 Unavailable	20 Available All Day	21 Unavailable
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Expert with associates

Social Official Website	Security of the U.S. Social Security Adminis	stration			
Automated Sche	eduling		Terry Q. Smith <u>Edit Profile</u>		
My Calendar To cdit your availability, s that day	select the link immediately follow	ing the date. To see details	of all hearings scheduled on a s	specific date, select <i>details</i> fo	
March 2012	BPA: SS05-08-93657 - P	hiladelphia Region 🛛 👂	Select another BPA	🖨 Print this Calend	
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Feb 27	28	29	Mar 1	2	
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	ODAR Baltimore HO ODAR Washington DC HO ODAR Philadelphia HO				
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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

utomate	d Scheduling		John A	Rep Edit Profile
aily Cale	ndar			
Previous Day	May 10, 2012 Next Day >		🖨 Print this Calendar	
Time Zone: Ea	stern Key: SPhone 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	

AR with associates

utomated	l Scheduling		fol	nn A. Rep	Edit
Daily Cale	ndar				
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Time	Participants	Site	Room		
10:15 am	Rep: John A. Rep	ODAR Baltimore	0		
10.15 am	Claimant: Brown, Carla	ODAR Datamore	2		
1:00 pm	Claimant: Brown, Carla Rep: John A. Rep Claimant: Smith, John	ODAR Baltimore	6		
1:00 pm 1:45 pm	Claimant: Brown, Carla Rep: John A. Rep Claimant: Smith, John Rep: John A. Rep Claimant: Smith, John	ODAR Baltimore ODAR Baltimore	6 2		
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1:00 pm 1:45 pm 2:30 pm 3:00 pm	Claimant: Brown, Carla Rep: John A. Rep Claimant: Smith, John Rep: John A. Rep Claimant: Evans, Jane Rep: John A. Rep Claimant: Green, Robert Rep: John A. Rep Claimant: Robertson, Carla	ODAR Baltimore ODAR Baltimore ODAR Baltimore ODAR Baltimore ODAR Baltimore	2 6 2 2 2 2		
1:00 pm 1:45 pm 2:30 pm 3:00 pm 3:30 pm	Claimant: Brown, Carla Rep: John A. Rep Claimant: Smith, John Rep: John A. Rep Claimant: Evans, Jane Rep: John A. Rep Claimant: Green, Robert Rep: John A. Rep Claimant: Robertson, Carla Rep: John A. Rep Claimant: Williams, John	ODAR Baltimore	2 6 2 2 2 2 6		

Log Out

Expert without associates

utom	ated Scheduling		Terry (Q. Smith Edit Profile
aily (Calendar			
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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	
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	
3:00	Claimant: Montana, Seymour VE: Smith, Terry Q.	ODAR Baltimore 1 ODAR Baltimore 1	1	
4.00	Claimant: Sylvia Samuels	ODAR Baltimore 1	1	

Experts with associates

SECUL	Social Security Official Website of the U.S. Social Security Adm	nistration		
itoma	ted Scheduling		Terry	Q. Smith <u>Edit Profile</u>
aily C	alendar			
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	Bantiainante	Site	Room	
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Time 9°00	Claimant: Browning, Carla VE: Experts Inc.	ODAR New York 6 ODAR Baltimore 3	6 3	
Time 9:00 9:00	Claimant: Browning, Carla VE: Experts Inc. Claimant: Mills, Stephanie VE: Experts Inc.	ODAR New York 6 ODAR Baltimore 3 Hagerstown Hagerstown	6 3 2 2	
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Back to Monthly Calendar

Log Out

Main Menu

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
OAM Only (8am 11:59am)
PM Only (12pm - 5pm)
O Unavallable
Apply this availability to other dates (optional)
In s will overwrite any availability you have entered for these dates, except if there are hearing(s) scheduled.
☐ Select all ☐ Monday
Availability can be updated up to six months at a time, up to one year in advance.
Start Date: End Date:
to
Save

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. 15
Number of Reps unavailable: 0
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.
mm/dd/www
Save

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;

 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