Justification for Non-Substantive Changes for Supplemental Security Income Telephone Wage Reporting and Supplemental Security Income Mobile Wage Reporting
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Background

SSA requires SSI recipients to report changes in wages monthly, as the receipt of earned income could affect their eligibility for SSI and their payment amount. SSI Mobile Wage Reporting (SSIMWR) is one of several electronic methods available to SSI recipients to report their monthly wages. SSIMWR allows recipients to report their wages through an application on their smartphone. Available since 2012, the application has not undergone any significant updates since the initial release. The changes outlined below provide much needed updates and fixes to the application, which will improve user experience. In addition, these changes do not affect the SSI Telephone Wage Reporting system, also included under this OMB number.

Justification for Non-Substantive Changes to the Collection

We are making the following revisions to the SSIMWR:

- **Change #1**: (Screenshot 1.1, 4.9, and 5.2) We added one pre-screen before the acceptance of Terms of Service screen. The redesigned screen adds a "Get Started" button. We are changing the name of the application to "SSA Mobile Wage Reporting" and that change first appears on this screen. We added connectivity checks to this screen, which will notify users of connectivity issues as early in the report process as possible (Screenshots 4.9 and 5.2).

  Justification #1: The updated user interface (UI) design enhances user experience and app functionality. The changes allow for smoother error handling and app flow. Furthermore, Internet connectivity checks performed at this page help promote successful use of the application by alerting users to connectivity issues that may prevent submission of their report before they begin entering information (Screenshot 4.9). Changing the name of the app from "SSI" to "SSA" accommodates future enhancements to extend the app to Social Security Disability Insurance (SSDI) beneficiaries.

- **Change #2:** (Screenshots 1.2 and 1.3) We redesigned this screen and changed button text to "Agree to the above Terms of Service" and "Decline." We updated the language of the Terms of Service.

  Justification #2: The updated UI design enhances user experience by allowing faster access to links and information. See Change #4 for an example of the links. The Terms of Service language has been changed to reflect the use of Amazon Web Service (AWS) technology and provides a more comprehensive view of the Terms of Service over the current version.

- **Change #3**: (Screenshots 1.4 and 1.5) We added a survey prompt if a user declines the terms and conditions on the Terms of Service screen. The survey page is rendered when user clicks

yes. We updated the colors to be more consistent with an Android or iOS design.

Justification #3: The changes enhance user experience by providing the opportunity for the user to send feedback about the app. The design updates allow the user a more consistent experience with the platform of apps they may be familiar with (Android/iOS).

- **Change #4**: (Screenshots 1.6, 1.7, and 1.8) The Privacy Policy, Paperwork Reduction Act, and FAQ links are available on the Terms of Service page. We redesigned these linked pages to improve the display of information.

  Justification #4: The updated UI design enhances user experience and allows for more display of content without small box scrolling.

- **Change #5:** (Screenshots 1.9 and 2.0) We added a separate screen immediately following the Terms of Service screen to display the Privacy Act statement. The screen includes a "Continue" button that the user taps to continue through the reporting path.

  Justification #5: The presentation of the Privacy Act statement in the path rather than as a link ensures users are able to consistently view the information.

- **Change #6:** (Screenshot 2.1) We redesigned the Reporting Month screen and updated language. The changes include new font size for header and removal of unneeded button at the bottom. We changed the language prompts and updated the button text to read "OK" instead of "Next." We also added a Field Office Locator Link for users who need to contact their local office.

  Justification #6: The updated UI design enhances user experience. The language changes clarify reporting instructions and allow for a friendlier, more conversational app experience. In providing a field office locator link, we are creating a more direct path to reaching out to SSA staff if the user has questions or needs additional assistance.

- **Change #7:** (Screenshots 2.2, and 2.3) We redesigned and reordered our data collection screens. The Report screen shown in figure 2.2 now displays before the Personal Information page instead of the page before entering wages. We changed font size and wording for the header.

  Justification #7: The updated UI design enhances user experience. The updated screen order and language foster a friendlier, more conversational app experience.

- **Change #8**: (Screenshots 2.4 and 2.5) We added new options for data collection. The Date Picker has been updated to the new Ionic date picker that is compatible across Android and iOS platforms. We added the "How often are you paid" selection.

Justification #8: The updates improve user experience. The change to the Date Picker fixes a known problem with the current app, as the current date picker does not function on all Android and iOS supported devices. An additional field of "How often are you paid" helps ensure the user is providing complete wage reports. Based on selected payment schedule, the app provides suggestions for users that ensure the correct number of paystubs are being submitted.

- **Change #9**: (Screenshot 2.6) We updated screen design and language. We removed the edit button as a bottom button and moved it up below the subtitle on the right side of the screen. In addition, the SSN defaults to a masked state; we introduced an "eye" icon to reveal SSN when clicked.

  Justification #9: The design and language changes allow for a friendlier, more conversational app experience. The language changes on the headers remove redundant language on the screen. The "eye" icon allows for greater security on the app by defaulting to hide the SSN and revealing the SSN only when clicked.

- **Change #10**: (Screenshots 2.7, 2.8, 2.9, 3.0, 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 5.1, 5.2, 5.3, and 5.4) We are adding a new optical character recognition (OCR) feature in the app to assist the user in completing wage entry fields. With the new feature, users can upload camera or file images of pay stubs and the OCR software will read the images and fill in recognized data fields. To accommodate the new feature, we have added and redesigned several screens, and changed the order in which screens are displayed (e.g., screenshot 2.2). We also modified language on the screens and provide additional information about the various data fields when users activate question mark icons. This feature does not remove the existing method of data entry; the new screens also support manual wage entry.
  - Screenshot 2.7 – This is a new screen for OCR data collection that presents the new option to use OCR or manually enter wages.
  - Screenshot 2.8 and 2.9 – This change combines on a single screen the current app's two separate screens for data collection.
  - Screenshots 3.0 and 3.1 – These screens provide confirmation of the image or file to be uploaded and display an informational message as OCR is processing the information.
  - Screenshot 3.2– These screens are also Screenshots 2.8 and 2.9. In this version, a yellow toast banner displays at the top of the Paystub Information screen, prompting the user to review OCR-completed fields for accuracy and complete any missing information. (See change #16 for more information on toasts.)
  - Screenshot 3.3, and 5.0 – The Review screens replace the Confirm screens in the current application. They provide a summary of pay stub information and provide a path to add more wages or submit the final wage report. As shown in Screenshot 5.0, the user is not shown the "Submit" option if they have not entered any pay stubs and is provided the option to "Add New" pay stubs or "Start Over." Screenshots 5.3 and 5.4 display confirmation pop ups when "Delete" paystub or "Start Over" is selected from the Review screens.

- o Screenshot 3.4 and 3.5 – The new Edit Paystub screen displays when users select the "edit" button on the Review screen (3.3) and allow users to edit pay stub data and save updates.
- o Screenshot 5.1 – This screen provides visual confirmation that a wage report submission is in process.

Justification #10: To accommodate the new OCR feature and the collection of pay stub level details, we needed to change the flow of information collection. The information we collect on the new Paystub Information screen is collected across two screens in the existing app. The new screens improve the flow of information collection and support the new OCR and File Upload feature. They also enhance user experience by providing confirmation and informational messaging to the user during the OCR submission process. The additional information provided in the question mark icons clarifies what data is needed and promotes accurate wage reporting. The language changes, additional review prompts, and new screen flow promote accurate wage reports and improve app usability. OCR technology will increase user satisfaction by offering a streamlined method of wage entry. Manual wage entry continues to be available for users who either do not wish to use the OCR feature or cannot use the OCR feature. Users who experience technical or other problems with wage submission using the OCR feature may also continue their report using manual entry.

- **Change #11**: (Screenshot 3.6, 3.7, 4.1, 4.2, 4.3, and 5.5) – We updated the screen design and language on the wage report submission and submission error page. We added a checkmark or failure icon in the upper left. We included email and text message reminders, FAQ, and Contact Us links (4.1, 4.2, and 4.3). We also updated information in the headers to provide clearer information about the wage submission than the previous app.

  Justification #11: The improved utilization of screen space, the updated headings, and the new checkmark or failure icon on the submission and error page improve user experience by prominently displaying necessary information. In addition, we included FAQ and Contact Us links on the screen to allow the user quicker access to this information.

- **Change #12**: (Screenshots 3.8, 3.9, and 4.0) As indicated in earlier changes and screenshots, we updated the screen design and language for the Personal Information pages. The headers and prompts offer more streamlined language. As mentioned in earlier changes, we included the "eye" icon, which reveals the SSN when clicked.

  Justification #12: The changes allow for a friendlier, more conversational app experience. The new language better signals whose information is required on this screen, which improves clarity and contributes to successful wage reports. The "eye" icon allows for greater security by revealing the SSN only when clicked.

- **Change #13:** (Screenshot 4.4) We updated the screen design and language on the Time Out page. Changes include header font size, and a new clock icon.

<u>**Justification #13**</u>: The updated UI design enhances user experience and allows for a friendlier, more conversational app experience. The navigational button offers a way for the user to exit the app if they are finished.

- <u>**Change #14**</u>: (Screenshot 4.5) We added an error screen to support the new OCR and File Upload feature. After a user submits a file to be processed by OCR or enters wages in manually, this screen may display if certain conditions are met (e.g., a person tries to submit the same image or file multiple times). Users may continue to enter pay stub information manually after receiving this error page.

  <u>**Justification #14**</u>: To increase app security and limit cost, users are limited in the amount of times they can submit paystubs to OCR or the amount of times they can submit wage reports. If a user exceeds those limits, they will still be able to enter information manually. This screen communicates that the Photo/Upload feature is not available and prompts manual pay stub entry.

- <u>**Change # 15**</u>: (Screenshot 4.6) We added new popovers across several app screens (i.e., Edit Paystub, 3.4 and 3.5; Paystub Information, 2.8 and 2.9; Personal Information, 2.3). These popovers provide detailed information about data fields.

  <u>**Justification #15**</u>: The change helps users understand the information they are submitting by providing detailed information on the fields and what information these fields are requesting. A common user complaint in the current app is uncertainty about the information a given data field is requesting. Popovers add clarity, enhance user experience, and promote accurate wage reports.

- <u>**Change #16**</u>: (Screenshots 4.7 and 4.8) We added toast notifications on several screens, including on the photo/upload screens, which appear conditionally as bright red or yellow notification banners throughout the updated app.

  <u>**Justification #16**</u>: The change helps users understand the information they are submitting and improves user experience by notifying a user to review their input fields for completeness and accuracy or giving session status for extended periods of inactivity. On the photo/upload screen (Screenshot 4.8). The conditional nature of toasts provides for a more seamless and less disruptive user experience than, for example, pop-up modals that require additional actions to clear.

Note: Please see accompanying document, "SSIMWR Before and After Screen Comparisons," for referenced screenshots.

SSA will implement these IT Modification changes to the screens upon OMB approval.

These actions do not affect the public reporting burden.