

Allocations as follows:

Boston	690
New York	1534
Philadelphia	1567
Atlanta	3480
Chicago	2710
Dallas	1779
KC	1034
Denver	483
SF	2102
Seattle	588
OCO	805
TOTAL	16772

Social Insurance Specialist
(Claims Specialist)
GS-105-11-#5E237

Major Duties

This keystone position of the Social Security Administration authorizes entitlements to programs administered by the agency. The incumbent reviews and authorizes claims and other complex determinations for benefits under Titles II, XVI and/or XVIII of the Social Security Act. The position is located in multiple components throughout the Operations structure, including Field Offices (FOs), Program Service Centers (PSCs), Foreign Service Posts (FSPs), Workload Service Centers (WSCs), Workload Support Units (WSUs), Teleservice Centers (TSCs) and the Office of Central Operations (OCO) Processing Centers (PCs). Performs duties involved in one or more of the following: Title II, Title XVI, XVIII, a generalist in Title II, XVI, and XVIII, a field representative, a foreign claims specialist, a claims authorization specialist in a PSC or PC, a specialist in a WSC/WSU, or a combination of the above. The incumbent will perform the duties below as it relates to his or her assigned area.

Adjudicates and authorizes entitlement or disallowance actions at all levels of difficulty and complexity under programs administered by SSA. Develops, investigates, and resolves claims and post-entitlement actions that may involve suspension, resumption, adjustment, or termination of eligibility, or payments.

Conducts inquiries and/or interviews to obtain, clarify, and verify information about individual applicants' initial and continuing eligibility for programs administered by SSA. Assists the public by explaining the options for conducting business with SSA, including online services. Informs claimants and/or their representatives about their legal rights and reporting responsibilities.

Examines evidence to evaluate its validity and acceptability in establishing entitlement to benefits, and, when necessary, takes the required developmental actions to obtain all available relevant evidence. Assists the applicant in securing evidence, electronically records the evidence required, and when applicable, prepares and records special determinations of fact. Completes development and evaluation of all facts and evidence. Determines issues in any claim or referred post-adjudicative action, prepares formal or informal determinations relating the facts, evidence and issues to the requirements of the law, regulations, policies and precedents. Takes related actions to update or establish SSA records.

Responds to contacts from beneficiaries, recipients, the public or other SSA staff by researching inquiries or initiating action to make changes to the claims or beneficiary record. Develops facts through direct, mail, electronic, or telephone contacts with FOs, PSCs, WSCs/WSUs, FSPs, beneficiaries, or third parties to resolve discrepancies and to obtain complete information. Performs representational and information activities to secure cooperation of the public; to disseminate facts and advise on program coverage; and to enlist the understanding and cooperation of local organizations.

Provides technical guidance and mentoring (informal and formal) to other employees. Analyzes and prepares detailed reports of trainee's progress to management, orally or through the appropriate system. Participates in training sessions both as a student and/or as an instructor, as required.

Protects the rights of individuals by assuring claimants and/or their personal representative understand the claimant's legal rights and obligations under the Act and its relationship to other social welfare and benefit programs. Assists individuals in filing administrative appeals in the programs administered. Protects the integrity of SSA programs through identification, investigation, and resolution of potential program abuse/fraud. When appropriate, determines the need for and makes referrals to the appropriate component. Properly safeguards personally identifiable information (PII) from loss, theft, or improper

disclosure, including inadvertent disclosure, and immediately notifies management of any breach, loss, or potential loss of PII in any form.

Works as an integral part of the unit, office, module, component, team or center, taking all actions necessary to improve overall processing time and quality. Performs special projects and duties required to achieve the immediate organization's goals. Participates in studies, projects, etc. initiated by the unit, module, component, section, office, program service center, area, or SSA Headquarters; analyzes data and prepares reports of study results as required.

Performs other duties as assigned and assumes new responsibilities mandated by legislative or policy changes.

Factor 1. Knowledge Required by the Position

- Comprehensive knowledge of the mission, principles, objectives, policies, procedures, processes, and specific provisions of programs administered by SSA, including how these interact with other related programs to adjudicate assigned claims and effectively deliver services that meet the needs of the public.
- Knowledge of various federal and state laws pertaining to veterans benefits, disability, workers compensation, railroad retirement, tax codes, immigration and naturalization, and others having a relationship to SSA programs to make appropriate adjudicative decisions and referrals as needed and as assigned.
- Knowledge of the agency's organization and operations and familiarity with the work processes of organizations with which the agency must coordinate its operations to explain processes, administer parts of the SSA programs, to respond to requests and inquiries and to research claims properly.
- Knowledge of SSA automated programs and systems, including online services, and the ability to use them to perform all assigned aspects of claims taking, adjudication, and all post-entitlement actions.
- Ability to interpret and apply complex laws and regulations to resolve the assigned claims including the ability to recognize all the elements affecting a claim so that an accurate and complete claims determination can be made.
- Ability to analyze, locate and research policy, procedures, documents, records, and systems capabilities efficiently and effectively to make claims decisions, to insure proper referral of documents, and to respond to inquiries.
- Ability to conduct business in a professional and courteous manner with both the public and coworkers, and to support unit efforts to achieve a positive and productive work environment in order to meet the agency goals and mission.
- Skill to communicate effectively orally, electronically, and in writing with a diverse population representing varied cultures, races, ethnicities, education, socioeconomic backgrounds and values. This skill is essential to obtain information, to convey an understanding of complex requirements, to articulate program decisions, and to secure compliance as needed with the programs administered by SSA.

- Skill in adapting to changes in policies, procedures, technology, and priorities to maintain balanced workloads and to shift from one workload to another, as needs change to ensure work is processed timely and accurately.
- Skill in using the web, commercial software, computers, electronic storage and retrieval, input methods and electronic case processing to handle assigned workloads expeditiously.

Factor 2. Supervisory Controls

Management sets the work plans, overall objectives and resources available. Work is performed independently according to established procedures, with supervisors and technical experts available to discuss and provide guidance on technical issues of a precedent setting, sensitive, or unsettled nature. Work is typically assigned according to a system or priorities established by management and goes directly to the incumbent. The incumbent plans and carries out assignments, interprets policy, and determines the methods and contacts. The incumbent keeps the managers or leads informed of progress and issues involving potentially controversial matters. Completed work is considered as technically authoritative and is normally accepted without significant change. The work is subject to a quality control review to ensure uniformity in processing and to identify processing trends and problems. Incumbents serving as Title 16 specialists personally resolve any contested issues or eligibility factors in dispute at the reconsideration stage of the Title 16 appeals process, while making other conclusive and binding decisions in the areas described.

Factor 3 . Guidelines

Basic guidelines include the Social Security Act, laws, agency regulations, rulings and policies, precedent cases, separately negotiated State contractual agreements and local instructions and procedures. These guides are numerous, extensive, and complex, are subject to frequent change, and often are not applicable to specific cases. A great deal of ingenuity and judgment is required to apply the guides to a variety of difficult, complex and unique situations since gaps in specificity exist, precedents are not directly applicable, and numerous issues are involved. The incumbent adapts the guidelines to suit the case in keeping with the intent of governing provisions.

Factor 4. Complexity

The work consists of a variety of technical functions including the independent review and authorization of an award or disallowance of complex claims for benefits under Titles 2 and 16 of the Social Security Act. The development and adjudicative functions involve quasi-legal matters that require the incumbent to exercise substantial judgment when making final determinations on highly complex initial and/or post adjudicative cases. Work can involve explaining the programs, eliciting claims, post-entitlement, and reconsideration information and decisions, determining initial and continuing disability for benefits, and taking final authorization action. Incumbents analyze substantive issues and procedural matters in each case in order to determine required action. They weigh all relevant factors against controlling policies and regulations in order to reach and document determinations. Factors to be considered include the acceptability and validity of all supporting proofs, facts, and evidence; the existence of multiple, interrelated issues which may affect entitlement or eligibility; and the differing requirements of SSA, State and other agencies' laws and regulations.

Factor 5. Scope and Effect

The work is vital to the processes through which the agency directly informs and serves the public. Conclusions reached and the decisions made are normally binding on both an applicant and the agency. Those decisions can result in awards involving the expenditure of large sums of money or denials that may have major adverse consequences for an applicant. They may also affect an applicant's eligibility

for Medicare or Medicaid protection, for social services, food stamps, and other forms of income assistance. The work affects the economic well-being of beneficiaries, claimants and the trust fund.

Factor 6. Personal Contacts

Coverage of the programs is so extensive that all segments of the general public will be encountered as potential applicants, beneficiaries, claimants, legal representatives, employers, or other sources. Contacts are also with co-workers, other agencies and institutions providing other payments and/or services.

Factor 7. Purpose of Contacts

Contacts with the public are to explain the programs and to elicit information upon which entitlement, post-entitlement, and reconsideration decisions are made. Contacts with other agencies and institutions may involve negotiating to obtain information or to represent a claimant's needs and/or rights to payments or services. Much of the eligibility information is acquired through the interviews conducted which may involve some intuitive probing into very personal situations. The people contacted frequently have diverse needs, which require the incumbent to develop and adopt approaches to individual situations. The incumbent must also be able to explain complex rules and requirements to evoke responsive reactions or cooperation from individuals who may have little direct interest or concern on how a matter is resolved. Tact, sensitivity and diplomacy are required.

Factor 8. Physical Demands

The work is primarily sedentary with no special physical demands. There may be some walking, or for those with limited mobility the need to use a mobility device; standing; bending; and/or carrying of folders and light items such as papers and mail, etc.

Factor 9. Work Environment

Work is performed in a typical office setting. For some incumbents, the work may include contact stations or other temporary locations. Some travel may be required.