Digital Modernization Strategy —

Narrative 2024

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Provide More Digital Service Options for the Public

Improve the Employee Experience

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Note from the Commissioner

Since 1935, the Social Security Administration (SSA) has provided critical services to millions of Americans. Our mission is to ensure equity in delivering Social Security services throughout our programs. We are committed to removing all systemic barriers to participation in our programs. Similarly, we aspire to better serve our customers, employees, and stakeholders as articulated in our Agency Strategic Plan (ASP). Our priority is to optimize the experience of SSA customers; build an inclusive, engaged, and empowered workforce; and ensure stewardship of SSA programs.

Our customers and the public engage with SSA during key life events that can be both stressful and difficult. How we provide services during these times is a critical component of our culture and how our organization is perceived. In addition to providing equitable and accessible services to the public—while elevating the customer's experience—we must strive to deliver those services through more modern, immediate means. For our employees, digital modernization represents the opportunity to simplify internal processes, eliminate organizational silos, integrate across business components, and reimagine how we achieve our mission.

This Digital Modernization Strategy (DMS), anchored by previous Information Technology (IT) modernization efforts, will serve as a guiding principle for meeting the agency's strategic goals. Building on previous efforts, the strategy identifies impactful initiatives that will empower our workforce, improve our business processes and policy, and enrich our customer service.

I am pleased to present DMS as a vital initiative to improve the customer and employee experience and safeguard our programs.

Sincerely,

Martin O'Malley

Commissioner

Message from the Chief Information Officer

Rapid, continuous technology advancements and the recent national shift to increased virtual services and communications reinforce the pressing need to modernize our agency. We must fundamentally rethink how we deliver services, processes, and infrastructure. Without a full enterprise transformation, we run the risk of falling short on our mission.

We refer to DMS as a "North Star Vision." The DMS North Star Vision is a symbol of an ambitious direction that guides us to where we want to go. There are references to the North Star Vision throughout this document that illustrate how it aligns to the DMS and focuses on the following:

— Providing More Digital
   Service Options for the Public

— Improving the Employee Experience

This North Star Vision is key to transforming the agency. We strive to expand service options for the public, focusing on a product operating model and adaptable service channels. With our employees as our most valuable asset, we aim to simplify internal processes and modernize back-end solutions as services to continue to draw down technical debt and to help remove internal barriers to servicing our customers. As data and Artificial Intelligence (AI) become a valuable enabler and accelerator, respectively, we seek to use advanced algorithms to help inform our agency decision-making.

As we embark on this digital modernization journey together, we will remain flexible and agile in monitoring our progress and assessing our initiatives and aligned investments. Our path forward to the future state is sequenced across three years, spanning fiscal years 2024–2026.

We welcome you to join us in experiencing this transformation and celebrating our launching point.

Sincerely,

Marcela Escobar-Alava
Chief Information Officer

SSA's Modernization Journey

SSA's mission is critical to our society and impacts almost all Americans — SSA distributed over $1.2 trillion in benefits in fiscal year (FY) 2022 and over $1.3 trillion in FY 2023 to over 70 million beneficiaries and recipients. In 2017, the IT Modernization Plan formalized the agency's initiatives to modernize technology and raise the standards for service to the public, all while accommodating policy changes, executive orders, and constantly evolving customer expectations.

SSA's IT Modernization roadmap worked towards retiring legacy systems in favor of newer and more efficient technologies that meet business needs, all while mitigating the risk of disruption to the critical SSA services supported by those systems. SSA serves a growing customer base each year and manages their requests, applications, hearings, and appeals.

The successes achieved under the IT Modernization Plan are a testament to the SSA employees.

SSA has expanded electronic and automated customer service options and prioritized reducing the burden on customers, in addition to optimizing internal business processes for employees. SSA pivoted during the COVID-19 pandemic and created alternative solutions for providing services to the public while local SSA offices were open for appointments only and employees adapted to telework.

$1.3 trillion

70 million beneficiaries

Here are some exciting accomplishments realized under the IT Modernization Plan for a few domains:

Disability Domain – National Case Processing System for Disability (NCPS)
Developed and deployed a modern foundational system for disability case processing. Successfully replaced initial and reconsideration level claim systems and continue to develop additional functionality for hearing and appeals council levels.

Infrastructure Domain – Federal Cloud Computing Strategy – Cloud Smart
Accelerated cloud adoption, established a hybrid cloud strategy for IT Modernization Business Domain initiatives, championed a DevOps Progressive Life Cycle methodology, and implemented all planned initiatives on the Infrastructure domain roadmap.

Benefits Domain – Evidence Portal (EP)
Developed a repository that helps technicians find evidentiary documents faster, allowing them to make decisions quickly, and ultimately reducing processing times to help beneficiaries receive their payments timely.

SSA still has quite a bit of work to do to ensure we take stock of where we are now and establish an on-going modernization plan and ensure legacy systems along with support and maintenance are properly resourced since there is still a high reliance at the agency. How we continue to address legacy modernization will align to our new Product Operating Model, how we execute new development, and establish common services. Our continued commitment to modernization will be demonstrated by tracking progress, consolidating the application portfolio, and ultimately allowing the agency to retire legacy systems appropriately.

The agency is prioritizing transforming customer experience and advancing equity in SSA programs - challenges presented in the past 5 years since implementing our IT Modernization effort. SSA's new modernization strategy will continue to build on the successes delivered through the IT Modernization Plan. Efforts and investments that began under the IT Modernization Plan will carry through to completion under the new strategy. The IT -Modernization Plan enabled SSA to modernize back-end systems which transformed our customer- facing services – these are the very successes the new modernization strategy will continue to build on.

SSA's modernization strategy will leverage product management to improve the employee experience and serve as our roadmap to meet the expectations of the public, while continuing to provide essential SSA benefits and services to our customers. Thank you for joining us on this journey of ever-changing technology.

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SSA Mission, Vision, ASP, and PMA

SSA Mission

Ensure equity and accessibility in delivering Social Security services by improving the customer experience and addressing systemic barriers to participation in our programs.

SSA Vision Statement

Provide income security for the diverse population we serve.

SSA Agency Strategic Plan

The ASP strategic goals* below are critical areas of focus for delivering on our mission.

- Optimize the Experience of SSA Customers
- Build an Inclusive, Engaged, and Empowered Workforce
- Ensure Stewardship of SSA Programs

PMA Priorities

The President's Management Agenda (PMA)** priorities, presented below, influence our direction.

- Strengthening and Empowering the Federal Workforce
- Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience
- Managing the Business of Government

SSA employees interact with the public every day and experience the firsthand impacts of our programs. Enhancing our services and empowering our employees with digital technologies will help deliver world class services to the public more efficiently and effectively.

* https://www.ssa.gov/agency/asp/

**President's Management Agenda can be found here:
   https://www.whitehouse.gov/omb/management/pma/
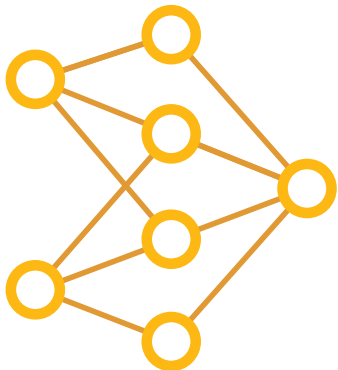
Improving Customer Experience
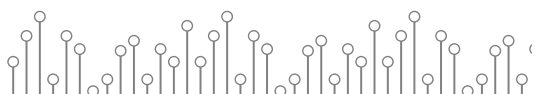
Strategic Intent and Vision

Digital modernization is a **"whole agency"** effort to upgrade or replace current processes, policies, and technologies to improve the customer and employee experience. This effort intersects business priorities with technology needs to provide tangible benefits to the public.

SSA's new Digital Modernization Strategy, or DMS, will transform current business processes, adopt new business processes and business architecture, transform to a new product operating model and target state architecture, improve data governance, reduce our technical burden, and implement new technologies with a focus on enhancing customer experience (CX) and employee experience (EX) to remove barriers to service.

These activities will support our transition to a **digitally modernized organization that supports millions of customer interactions** every year, fulfilling our mission in a challenging and dynamic environment.
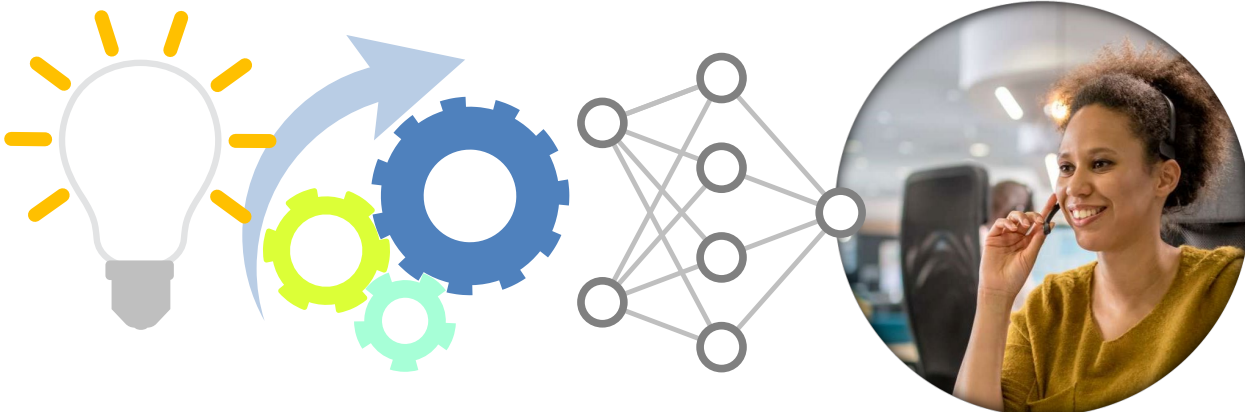
Modernization calls for rethinking how we serve the public, enabling our workforce, and ingraining innovation into our operations.
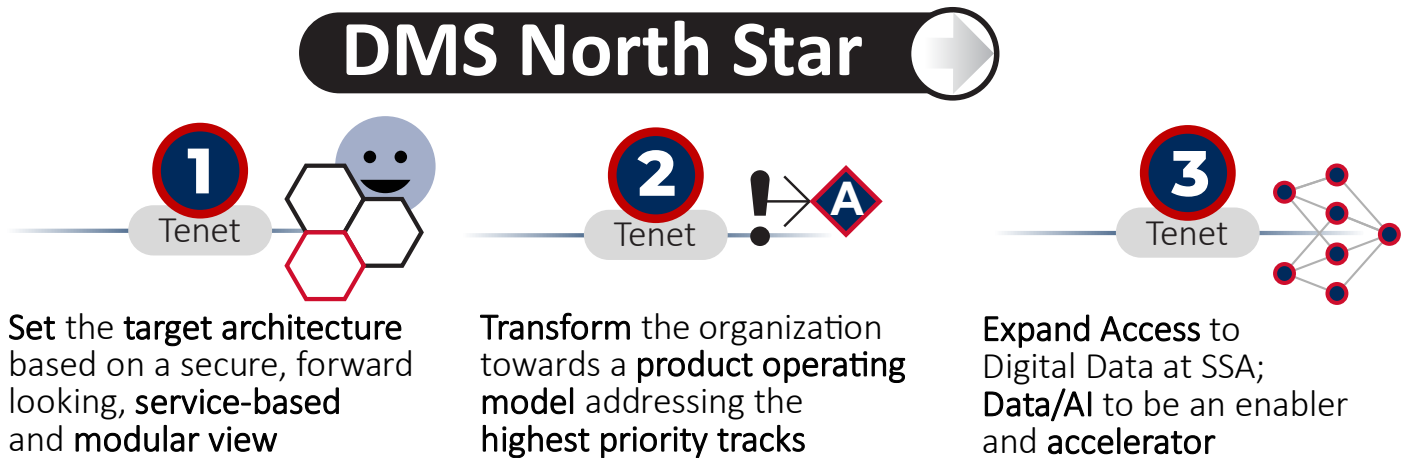
Enabling our Workforce

SSA employees are our most valuable resource and are necessary to provide the innovations required for the agency to reach its future state. Upskilling, reskilling, and providing developmental opportunities are key for a successful modernization strategy. The goal is to expand and leverage hiring flexibilities, explore options to attract and retain a diverse IT talent pool, retain institutional knowledge, and increase employee development opportunities.

Serving the Public

The public will be able to complete more business online without calling or visiting a local office or hearing office. Employees will be able to quickly connect and collaborate with colleagues to deliver on our mission and will have the tools and information they need to best serve our customers.

North Star Vision

Core to the DMS is the North Star Vision. The North Star Vision is made up of 3 Tenets or guiding principles that serve as the foundation and purpose for our strategy.

DMS North Star

1 Tenet

Set the **target architecture** based on a secure, forward looking, **service-based** and **modular view**

2 Tenet

Transform the organization towards a **product operating model** addressing the **highest priority tracks**

3 Tenet

Expand Access to Digital Data at SSA; **Data/AI** to be an enabler and **accelerator**
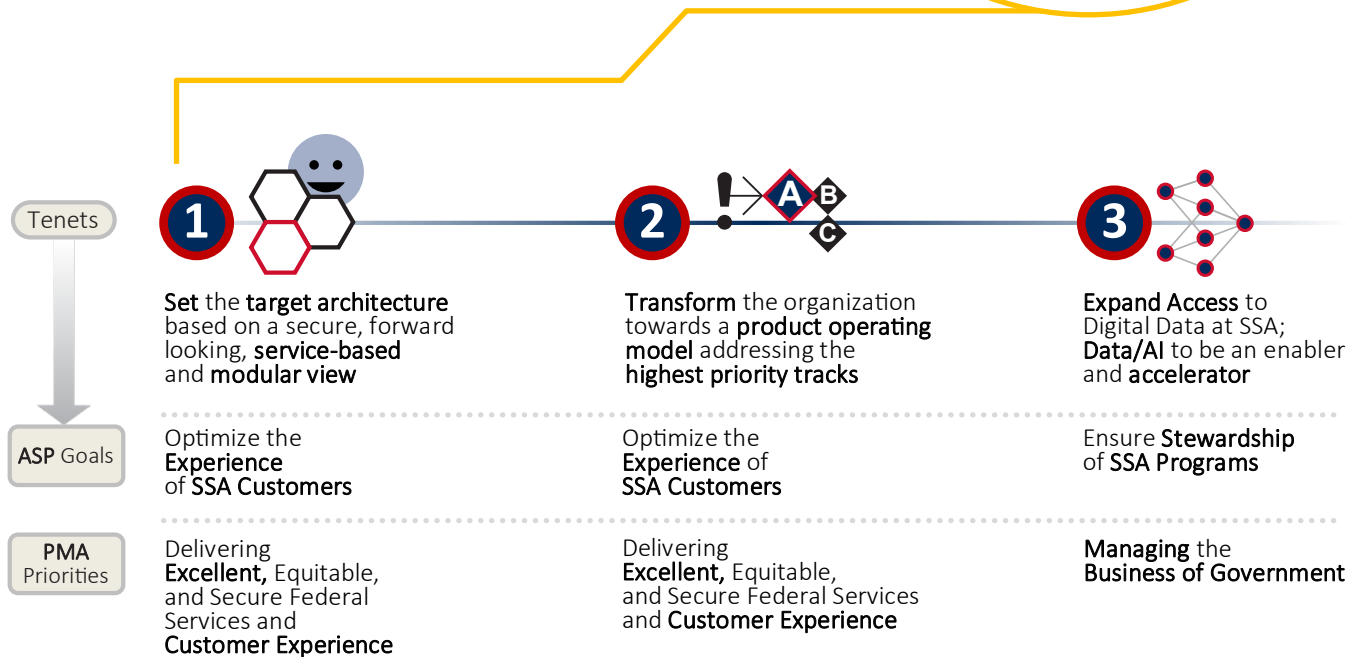
DMS Alignment to PMA & ASP

Digital modernization provides a unique opportunity for us to align across the President's Management Agenda (PMA) priorities and ASP strategic goals. This alignment will keep the scope of DMS-related activities focused and prioritized on delivering results that are relevant to our country's current needs.

The DMS North Star Vision alignment to ASP goals and PMA priorities is outlined below.

	1	**2**	**3**
Tenets	**Set** the **target architecture** based on a secure, forward looking, **service-based** and **modular view**	**Transform** the organization towards a **product operating model** addressing the **highest priority tracks**	**Expand Access** to Digital Data at SSA; **Data/AI** to be an enabler and **accelerator**
ASP Goals	Optimize the **Experience** of **SSA Customers**	Optimize the **Experience** of **SSA Customers**	Ensure **Stewardship** of **SSA Programs**
PMA Priorities	Delivering **Excellent,** Equitable, and Secure Federal Services and **Customer Experience**	Delivering **Excellent,** Equitable, and Secure Federal Services and **Customer Experience**	**Managing** the **Business of Government**

Objectives and Actions

Aligned to the PMA and ASP, the 3 Tenets of our DMS North Star Vision represent the importance of the DMS and why it exists, while the DMS Objectives reflect what we hope to accomplish over the next several years.

DMS objectives will guide the efforts to digitally modernize SSA. These objectives are crucial to the success of our digital modernization strategy because they directly influence our actions, outcomes, metrics, and ultimately our organization's ability to integrate modern IT components and practices.

Tenet	DMS Objectives	Actions
Set the target architecture based on a secure, forward looking, service-based and modular view	Prioritize the employee experience and enable employees to connect and collaborate with anyone, anywhere, anytime	• Implement tools that provide real-time system interactions across data and platforms, with integrated AI, optical image analysis and robotic process automation (RPA) that enable automated communications, tasks, and processes • Provide technicians a holistic view of the customer, claims process, and contact history • Expand geographic locations of infrastructure and use of video technology • Foster a digital culture by training & supporting employees on the use of digital tools and security • Reduce internal paper-producing processes, while offering more self-service digital tools • Enable virtual work and workload portability across operating components • Integrate advanced technology behind the scenes to simplify the claims intake process and reduce the number of applications employees use
	Retire technical debt and eliminate investments in outdated and legacy technology solutions	• Modernize back-end systems and databases in parity with the front-end user experience • Identify specific initiatives to address vendor-announced software end-of-life • Demonstrate continuous improvement and operational maintenance • Maintain and enforce technology standards (including cybersecurity), software versions, and enterprise application integration • Implement bridge strategies for depreciating legacy tools and ensuring enterprise capabilities
	Eliminate silos in the technology used to support core agency functions by building end-to-end processing systems	• Identify products along the entire value chain and services that should be shared across products to fill gaps in the customer experience • Standardize and enforce application design practices, while enhancing application testing and release practices • Leverage cloud-based services and infrastructure for computing, storage, and networking • Incorporate standard use of containers and modular design into system architecture • Extend use of low-code, no-code applications to business components

Tenet	DMS Objectives	Actions
Transform the organization towards a product operating model addressing the highest priority tracks	Put the customer first by taking a customer-centric approach that considers the customer's end-to-end journey	• Provide employees with a full view of the customer • Enhance customer feedback mechanisms by establishing feedback loops that include CX metrics to validate that product releases result in quantifiable improvements in the customer experience as well as alleviate pain points • Embed systematic customer insight collection at all journey phases • Utilize two-way communication channels • Product prioritization and orchestration should be informed by priority customer pain points uncovered in ongoing CX research
	Provide service channel options that meet the needs and preferences of our customers, partners, and employees	• Increase access to secure online platforms • Expand document upload, verification, and routing capabilities • Offer self-scheduled appointments and automate check-in tools for an increasing number of services
	Leverage technology to support policy and process changes that serve evolving customer needs	• Expand alternative signature methods to the traditional pen-and-ink or "wet" signature • Enable customers to provide information once for multiple services • Utilize automation to enhance business process execution, speed, and accuracy
	Strengthen the security and privacy of the personal information entrusted to us	• Simplify the enterprise risk management process to enable faster decision-making for product teams • Improve vulnerability management and reporting • Enhance security architecture by moving toward a zero-trust architecture • Advance identity and access management services
Expand Access to Digital Data at SSA; Data/AI to be an enabler and accelerator	Strengthen data integrity, quality, and availability	• Update our data governance and data sharing policies • Improve the overall quality, availability, security, and usability of SSA's data • Support increased data sharing within our organization • Improve the identification and quality of authoritative data sources
	Equip our employees and State Disability Determination Services (DDS) staff with accurate data to inform and accelerate decision-making	• Improve governance and application of enterprise data as an asset across the agency • Develop centralized authoritative data sources that employees can leverage to support their roles • Expand Enterprise Data Warehouse (EDW) dataset availability and user access • Develop simplified, data-driven solutions in line with enterprise architecture guidelines

Conclusion

This plan lays out an ambitious program to modernize our business and technology capabilities. It aligns with our strategic goals to Optimize the Experience of SSA Customers; Build an Inclusive, Engaged, and Empowered Workforce; and Ensure Stewardship of SSA Programs.

Over the three-year duration of the DMS, we will implement a more customer-centric view of our business processes to enable those we serve to interact with us through the service channel that best suits their needs. We will also build a technology infrastructure in alignment with our enterprise architecture strategy, using leading-edge technology that will enable us to be responsive, flexible, agile, and secure.

Our efforts under this plan will be guided by the DMS North Star Vision to:

— Set the target architecture based on a secure, forward looking, service-based and modular view

— Transform the organization towards a product operating model addressing the highest priority tracks

— Expand access to Digital Data at SSA; Data/AI to be an enabler and accelerator

We will measure DMS' effectiveness using a broad set of metrics aligned to strategic outcomes, such as through reduced customer wait times, decreased transaction processing times, and reduced manual case backlogs.

Governance of the DMS will guide the management of DMS initiatives, align stakeholders, and accelerate decision-making during execution.

The initiatives outlined throughout the DMS will provide better service to the public, support the work of our employees, and enable us to more efficiently use our resources.

This plan fosters the ability for the agency to create new business capabilities based on customer-focused design and a supportive technology infrastructure.

We are **committed** to ideas and feedback on ways to improve our programs and services through robust dialogue. Our **modernization strategy** is driven by input from SSA customers and stakeholders across the agency to get a robust picture of our desired **future state** and how that desired future state will serve the organization, our employees, and **the public.**

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Digital
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