SOCIAL SECURITY ADMINISTRATION (SSA) GOVERNMENT TO GOVERNMENT SERVICES ONLINE (SGO)

INSTRUCTOR LESSON PLAN

TIME REQUIRED: 1 HOUR

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LESSON DESCRIPTION

The information below provides the instructor with an overview of the lesson and the materials that are required to effectively present this instruction.

TMS #   3858382

TIME REQUIRED 1 hour

MATERIALS/ Lesson materials:
TRAINING AIDS

- **SSA/GSO** PowerPoint Presentation
- Flip chart

TRAINING   The following are required to ensure the trainees are able to meet the
AREA/TOOLS lesson objectives:

- Classroom or private area suitable for participatory discussions
- Seating, writing materials, and writing surfaces for trainee note taking and participation
- Handouts, which include a practical exercise
- Large writing surface (easel pad, chalkboard, dry erase board, overhead projector, etc.) with appropriate writing materials
- Computer with PowerPoint software to present the lesson material

PRE-PLANNING ☐ Become familiar with all training materials by reading the Instructor Lesson Plan while simultaneously reviewing the corresponding PowerPoint slides. This will provide you the opportunity to see the connection between the Lesson Plan and the slides, which will allow for a more structured presentation during the training session.

        ☐ Practice is the best guarantee of providing a quality presentation. At a minimum, do a complete walkthrough of the presentation to practice coordination between this Lesson Plan, the trainee handouts, and the PowerPoint slides and ensure your timing is on track with the length of the lesson.

        ☐ When required, reserve the training room.

        ☐ Arrange for equipment such as flip charts, an overhead projector, and any other equipment (as needed).

□ Talk to people in your office who are most familiar with this topic to collect experiences that you can include as examples in the lesson.

□ This lesson plan belongs to you. Feel free to highlight headings, key phrases, or other information to help the instruction flow smoothly. Feel free to add any notes or information that you need in the margins.

TRAINING DAY

□ Arrive as early as possible to ensure access to the facility and computers.

□ Become familiar with the location of restrooms and other facilities that the trainees will require.

□ Test the computer and projector to ensure they are working properly.

□ Before class begins, open the PowerPoint presentation to the first slide. This will help to ensure the presentation is functioning properly.

□ Make sure that a whiteboard or flip chart and the associated markers are available.

□ Provide a sign in sheet and at the conclusion of the session, ensure that all trainees sign in.

INTRODUCTION TO (SSA) (GSO)

INSTRUCTOR INTRODUCTION

Complete the following:

- Introduce yourself
- Orient learners to the facilities

TIME REQUIRED

1 hours

PURPOSE OF LESSON

Explain the following:

- This lesson is intended to provide you with a working knowledge of how to request Veterans records from Social Security Administration using the SSA/SGO website.

  Ask employees to review classroom rules prior to starting the discussion

LESSON OBJECTIVES

Discuss the following:

SLIDE 3

In order to accomplish the purpose of this lesson, the employees will be required to accomplish the following lesson objectives.

- Enable learners to login/register

- Familiarize learners with secured messaging/mail inbox page

- Explain folder links that are available

- Discuss how to send/receive secured messages

- Explore how to cancel/delete/prioritize messages

- Discuss how to download files and maintain a mailbox

MOTIVATION

This new innovative interface with Social Security will greatly reduce waiting time as it pertains to requesting and receiving Veterans SSA records. Instead of waiting 4-6 weeks for SSA records, in most cases, you will receive records back in 3-5 business days

SLIDE 4	Introduction- GSO is a web-based tool that is maintained by SSA and protects Claimants' data by providing improved physical security as medical records are requested and transmitted through a secure electronic messaging system.

The GSO application supports the Veteran Benefits Administration (VBA's) vision of moving towards processing claims in a paperless environment by automating the request and retrieval of SSA records. |
| **SLIDE 5**

Briefly discuss the following, ensure that stress that the super user on station will be the only one who submits names for registration purposes | To receive a User ID and Password to access Government-to-Government Services Online (GSO) Secure Messaging, the following information must be provided:

•   Employee's full name

•   Employee's physical work address

•   Employee's VA work email address

•   Employee's work phone number with area code

Your Super User will collect and submit this information to the Social Security Administration (SSA) sponsor. Once SSA receives this information, a registration form will be completed and processed by the SSA sponsor.

A GSO technician will email you a User ID and a temporary password. |
| **SLIDE 6- Demo this process** | From SSA's home page, www.socialsecurity.gov, use the "Business Services" tab at the top of the page—then click on the button "Log in or Use Government Services Online" at the bottom of the page. Or, open an Internet browser (such as Internet Explorer or Netscape) and type the URL: http://www.ssa.gov/gso/gsowelcome.htm |
| **SLIDE 7-** | Briefly discuss the "welcome page" direct the learners to the log-in button |

SLIDE 8- If you need assistance with your password, systems access, or suspension, please send an email to UIT.Edata.mailbox @ssa.gov . This email address is intended for password and technical issues with access. Do not use this address to ask questions or address other problems. Contact your Super User instead.

- Enter your User ID and Password (remember the password is case sensitive).

- Click Login.

- If this is your first time entering GSO Secure Messaging, you will be required to change your password immediately and the below screen will appear.

- Enter a new password that is at least 7 characters long and includes both letters and numbers. You will be prompted to change your password every 90 days.

SLIDE 9-

Demonstrate- Click on Secure Messaging highlighted in blue to access your Mailbox Home page.

Ensure that your learners get familiar with this page

SLIDE 10-

Click on each link to demonstrate what each of the links do

SLIDE 11-

Demonstrate how to compose and send a message

SLIDE 12-

Click on the "Show Address List" which will show SSA National Record Center (NRC) and click the "Add To": button. Do not send a request to the Office of Central Operations.

Type in the Subject ###-##-#### Request for Medical Records".
The format is the Claimant's Social Security Number followed by "Request for Medical Records".
Type this message in the text box (do not add it as an attachment):

SLIDE 13-

This format must be followed <u>exactly</u> and all information must be included.

Only use the highlighted fields if submitting a subsequent request.

Note: You can compose this template and save it to your desktop. When you need it for a GSO secure message, block, copy, and paste it into the text box.

- Click **Send** to transmit the message.
- Click **Save** to save the message to send later.
- Click **Cancel** to delete the message.

Once you click on Send, you will get a "Secure Messaging Sent" confirmation email. You can access a sent message from the **Sent** link at the left of the screen. A copy of your message is saved for 20 days. Twenty days after the message is sent, it is deleted and cannot be recovered.

Take a screen shot of the sent message and place in the folder or eFolder.

Receiving Secure Messages

SLIDE 14-

You will receive an email from EDataAdmin@ssa.gov notifying you when there is a secure message for you waiting at the GSO portal. Do not reply to this email address.
To check new or pending messages, click on the link in the email or the URL http://www.ssa.gov/gso/gsowelcome.htm. Log in and select "Check Mail" or "Inbox".

The Secure Message Inbox screen will appear

This screen shows any new messages and any messages you have opened. If the Subject shows READ, the message is a system-generated notification showing a message you sent to someone was opened by them.

SLIDE 15-

GSO deletes incoming messages after 20 days. The Expires date shows the date the message will be deleted from GSO. There is no way to retrieve a deleted message, so you need to download it or save it or it will be lost. **You need to check every day to make sure you have downloaded or saved all messages over**

14 days old.

Important: If a "Read" message has not yet been received by SSA then SSA National Records Center (NRC) will make a follow-up to the RO Super User at the 15th day point. (*This will support SSA's goal to prevent duplicate requests, by being proactive prior to the 20-day expiration.*)

SLIDE 16-

Simply click on the message in your inbox to open the message

SLIDE 17-

To delete a message or messages- Put an X in the box to the left of the message or several messages, and then click on the "Delete" button.

Once a message has been deleted, it cannot be recovered.

Cancelling a Request

SLIDE 18-

To cancel a request, find and open your original message in the SENT box from the SENT link on the left of the screen.
Click on the REPLY button at the top of the screen.
Put your cursor in the first space of the "Subject" box and type in CANCEL.
DO NOT erase the rest of the text in the "Subject" line.

Priority Requests

SLIDE 19-

Priority requests are defined as VA claims or appeals that are critical in nature. The acceptable reasons for a priority request are
- *"Congressional/executive interest",*
- *"high priority" (includes homeless, terminally ill, or SI/VSI cases)*
- *"old prior request" (a request for medical information that has reached the follow-up time at 35 day)*

To make a priority request, use regular GSO secure messaging instructions with the following additional instructions:

- ▪ *Type in the "Subject" field "PRIORITY ###-##-####*

Request for Medical Records". ["###-##-####" is the SSN.]

- *In the message in the text box, use the standard request and add the reason for the priority request from the list above. The exact language in quotations in the above bullets must be used when submitting a priority request.*
- *Priority requests should be rare.*

NOTE: Do not set the priority level to anything other than normal. This is an SSA internal function.

Click on the SEND button to send the message.

Downloading a File

SLIDE 20-

After an electronic medical record is downloaded from the GSO portal to your PC or desktop [Right click, Save As, to Desktop], the contents of the zip file will need to be extracted. Right click on the zip file; when the dialog box appears, hold the cursor over the Extract All selection as shown below.

SLIDE 21-

The data can be "extracted to" any location, but you will probably want to extract the data to your desktop as shown

SLIDE 22-

After the file is extracted, it will appear as a folder where ever you saved it.

 Open the folder and the contents should appear as is on the slide

Mailbox Maintenance

SLIDE 23-

The Secure Messaging application automatically deletes all messages (read, unread and pending) after 20 days. The messages are permanently deleted and cannot be

restored. The deletion date is shown on the Inbox screen in the column labeled "Expires". You should check regularly to see if you have any messages that are nearing their expiration date and take action to save or download them before they are deleted. Messages that expire cannot be retrieved.

Periodically delete files from the trash folder by selecting the checkbox to the left of the file name(s). Then select the "Delete Checked Item(s)" option at the bottom of the page.

If your email address or other information changes, contact your Super User to update your SSA-GSO registration.

If you no longer need access to the SSA Government to Government Services Online Secure Messaging application, notify your Super User so that your account can be deleted.

SLIDE 24-   **QUESTIONS**