USABILITYCENTER

Screen Documentation

RCS Release 2.0

AUGUST 27, 2012

Table of Contents

Global changes

Changed "New Search" button to "Clear Search" and moved it next to "Search"
Added the "Sample Notices" container to all Search pages and made them all consistent

Start - Search

Social Security • Registration and Customer Support

User Search

SSN:
_____ **or** **Username:** _____

User is:
○ on phone
○ in person

[**Search**] [Clear Search]

To Retrieve Account

To edit or create an online account, enter the SSN or Username above.

Customer Internet Screens — ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity

Create Account - Create Account

Add extra security

Login - standard account
Login - extra security account

To Register in Person — ❓ Help

In order to register for an account, the customer must be at least 18 years of age and have:
• a valid email address, and
• an SSN, and
• a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:
• state-issued driver's license or identification card, or
• U.S. passport or passport card, or
• military identification card, or
• government employee identifcation card.

Sample Notices — ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

In person search results - no account or registration attempt

Release 2: Added client header and changed title of No Account Found container. Added "Block Access" button.

If account is blocked, then the buttons are "Unblock" and "Deny Unblock."

Social Security • Registration and Customer Support

User Search

SSN: Username: User is:
_____ or _____ ○ on phone   **Search**   Clear Search
                    ● in person

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**

No Account Found

There is no account for SSN 999-99-9999

Create Account   Block Access

To Register in Person   ❓ Help

In order to register for an account, the customer must be at least 18 years of age and have:
- a valid email address, and
- an SSN, and
- a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:
- state-issued driver's license or identification card, or
- U.S. passport or passport card, or
- military identification card, or
- government employee identifcation card.

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

In person search results - failed registration

Release 2: Added Client header and changed title of "No Account Found" container. Added "Block Access" button.

If account is blocked, then the only buttons are "Unblock" and "Deny Unblock." If account is locked but not blocked, the buttons are "Unlock" and "Block Access"

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ User is: ○ on phone ● in person [**Search**] [Clear Search]

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**

| User Information | Transaction History |

No Account Found

Account Status: **No account**
Reason: **Failed OOW Quiz**
Date: **May 08, 2012; 03:14 PM EST**

[**Create Account**]   [Block Access]

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

To Register in Person   ❓ Help

In order to register for an account, the customer must be at least 18 years of age and have:

- a valid email address, and
- an SSN, and
- a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:

- state-issued driver's license or identification card, or
- U.S. passport or passport card, or
- military identification card, or
- government employee identifcation card.

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Search results - no account/locked

Release 2: If account is locked but not blocked, the buttons are "Unlock" and "Block Access"

Applies to both phone and in person.

Social Security • Registration and Customer Support

User Search

SSN: or Username: User is:
○ on phone
○ in person

Search   **Clear Search**

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**

| User Information | Transaction History |

No Account Found

Account Status: **Locked**
Reason: **Failed OOW Quiz**
Date: **May 08, 2012; 03:14 PM EST**

Unlock   **Block Access**

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

To Register in Person   ❓ Help

In order to register for an account, the customer must be at least 18 years of age and have:

- a valid email address, and
- an SSN, and
- a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:

- state-issued driver's license or identification card, or
- U.S. passport or passport card, or
- military identification card, or
- government employee identifcation card.

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

---

in person search results - pending account

Release 2: Added client header and tabs. Added "Block Access" button.

If account is blocked, then the only buttons are "Unblock" and "Deny Unblock." If account is locked but not blocked, the buttons are "Unlock" and "Block Access"

Social Security • Registration and Customer Support

User Search

SSN: | Username: | User is:
___ or ___ | ○ on phone ● in person | **Search** | Clear Search

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**

⚠ **The customer has not activated this account.**

If the customer no longer has access to the previously issued code, select "Create Account" below to re-verify the customer and issue a new code. Selecting the "Create Account" button below will cancel the previous pending account.

| User Information | Transaction History |

Account Pending

This account is pending activation. An activation code letter was requested on June 15, 2012.

Create Account   Block Access

Customer Internet Screens ❷ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

To Register in Person ❷ Help

In order to register for an account, the customer must be at least 18 years of age and have:

- a valid email address, and
- an SSN, and
- a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:

- state-issued driver's license or identification card, or
- U.S. passport or passport card, or
- military identification card, or
- government employee identifcation card.

Sample Notices ❷ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Telephone search results - no account

Release 2: Added client header and "Block Access" button. Changed title of "No Account Found" container.

If account has standard block, then the only buttons are "Unblock" and "Deny Unblock." For other types of block, the telephone user has no buttons.

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ [Search] [Clear Search]

John Jones SSN: **999-99-9999** DOB: **01/01/1970**

No Account Found

There is no account for SSN 999-99-9999

[Block Access]

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

To Register in Person   ❓ Help

In order to register for an account, the customer must be at least 18 years of age and have:
• a valid email address, and
• an SSN, and
• a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:

• state-issued driver's license or identification card, or
• U.S. passport or passport card, or
• military identification card, or
• government employee identifcation card.

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Telephone search results - pending account

Release 2: Added client header. Added tabs, "Block Access" button.

If account is blocked, then the only buttons are "Unblock" and "Deny Unblock." If account is locked but not blocked, the buttons are "Unlock" and "Block"

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ [Search] [Clear Search]

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**

⚠ **The customer has not activated this account.**

If the customer no longer has access to the previously issued code, a new code may be issued by visiting a local Social Security office.

[User Information] [Transaction History]

Account Pending

Pending account found; activation code and upgrade code requested June 14, 2012

[Block Access]

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

To Register in Person   ❓ Help

In order to register for an account, the customer must be at least 18 years of age and have:
• a valid email address, and
• an SSN, and
• a U.S. mailing address.

If the customer wants to register for online services, he or she may bring a government-issued proof of identity to a Field Office. Acceptable documents are:

• state-issued driver's license or identification card, or
• U.S. passport or passport card, or
• military identification card, or
• government employee identifcation card.

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Account Management Screens

□

Standard account

Release 2: added "Block Access button" and "Last Login" field.

Social Security • Registration and Customer Support

User Search

SSN: Username: User is:
                                    ○ on phone   **Search**   Clear Search
        or   ○ in person

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

| Account Summary | Transaction History |

Account Summary   ❓ Help

Email Address: **jjones@me.com**   Change Email Address
Account Type: **Standard**
                                        Add Extra Security
Account Status: **Active**
Last Login: **October 13, 2011; 10:15 PM**

Email Temp Password   Cancel Account   Block Access

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Account with Extra Security before OTP entered

Release 2: added "Block Access" button. Added "Last 4 Digits of Cell Phone" and "Last Login" fields. Added "Mail Reset Code" button for Telephone user.

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ User is:
◉ on phone
○ in person

Search   Clear Search

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

| Account Summary | Transaction History |

Account Summary   ❓ Help

Before you can provide the customer with any information, or take any action on this account, you must send a text message to his or her cell phone to complete the Extra Security login.

Email Address: **jjones@me.com**
Account Type: **Extra Security**

Mail Reset Code

Last 4 Digits of
Cell Phone: **5555**

Account Status: **Active**
Last Login: **June 20, 2012; 10:15 PM**

Send Text Message   Block Access

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Account with Extra Security after OTP entered

Release 2: added "Block Access" button. Also added "Last 4 Digits of Cell Phone" and "Last Login" fields.

Social Security • Registration and Customer Support

User Search

SSN: Username: User is:
     or   ○ on phone   **Search**   Clear Search
           ○ in person

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

| Account Summary | Transaction History |

Account Summary   ❓ Help

Email Address: **jjones@me.com**   Change Email Address
Account Type: **Extra Security**
Last 4 Digits of Cell Phone: **5555**   Remove Extra Security

Account Status: **Active**
Last Login: **June 20, 2012; 10:15 PM**

Email Temp Password   Cancel Account   Block Access

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Standard account blocked

Release 2: Added "Unlock" and "Deny Unblock" functionality. Added "Block Type," "Block Reason," "Block Date," "Block Location," to the Account Summary container.

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ User is: ○ on phone ● in person [Search] [Clear Search]

John Jones   **SSN: 999-99-9999**   **DOB: 01/01/1970**   **Username: JJJones1!2**

Account Summary	Transaction History

Account Summary   ❓ Help

Email Address: **jjones@me.com**
Account Type: **Standard**

Account Status: **Blocked**
Block Type: **Standard**
Block Reason: **Customer initiated**
Block Date: **May 30, 2012; 11:12 AM EDT**
Block Location: **Internet**
Last Login: **October 13, 2011; 10:15 PM EDT**

[Unblock] [Deny Unblock]

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

USABILITYCENTER

Panel_Bottom Half
default

| Unblock | Deny Unblock |

Customer Internet Screens ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

After "Deny unblock"

Reason(s) for authentication failure when denying unblock:

☐ SSN   ☐ Mother's name
☐ Address   ☐ Direct Deposit Account Number (DAN)
☐ Date of birth ☐ Master Beneficiary Amount (MBA)
☐ Place of birth ☐ Other

| **Save** | Cancel |

Customer Internet Screens ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Standard account after unblock

Release 2: Added "Unblock Date" and "Unblock Location," to the Account Summary container.

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ User is:
○ on phone
○ in person

Search **Clear Search**

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

| Account Summary | Transaction History |

Account Summary   ? Help

Email Address: **jjones@me.com**   **Change Email Address**

Account Type: **Standard**

Account Status: **Active**   **Add Extra Security**
Block removed
Unblock Date: **June 26, 2012 03:44 PM EDT**
Unblock Location: **Towson MD (375)**
Last Login: **October 13, 2011; 10:15 PM EDT**

Email Temp Password   **Cancel Account**   **Block Access**

Customer Internet Screens   ? Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ? Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

In person - Standard account suspended

Release 2: Added warning message. Added "Unlock" and "Deny Unblock" functionality. Added "Block Type," "Block Reason," "Block Date," "Block Location," to the Account Summary container.

Availability of Unlock and Deny Unblock is based on Top Secret profile and only available in person.

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ User is: ○ on phone ● in person   [Search]   [Clear Search]

John Jones   SSN: 999-99-9999   DOB: 01/01/1970   Username: JJJones1!2

⚠ **This account has been suspended.**
A person with management access can remove the suspension.

| Account Summary | Transaction History |

Account Summary   ❓ Help

Email Address: **jjones@me.com**
Account Type: **Standard**

Account Status: **Blocked**
Block Type: **Suspended**
Block Reason: **SSN, Date of Birth failed**
Block Date: **May 08, 2012; 03:14 PM EST**
Block Location: **Towson MD (375)**

Last Login: **October 13, 2011; 10:15 PM EST**

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

panel_bottom half

default

Customer Internet Screens

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

In person manager - Standard account suspended

Release 2: Added warning message. Added "Unlock" and "Deny Unblock" functionality. Added "Block Type," "Block Reason," "Block Date," "Block Location," to the Account Summary container.

Availability of Unlock and Deny Unblock is based on Top Secret profile and only available in person.

Social Security • Registration and Customer Support

User Search

SSN: _____ or Username: _____ User is: ⚪ on phone 🔘 in person   **Search**   Clear Search

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

⚠️ **This account has been suspended.**

A person with management access can remove the suspension.

| Account Summary | Transaction History |

Account Summary   ❓ Help

Email Address: **jjones@me.com**
Account Type: **Standard**

Account Status: **Blocked**
Block Type: **Suspended**
Block Reason: **SSN, Date of Birth failed**
Block Date: **May 08, 2012; 03:14 PM EST**
Block Location: **Towson MD (375)**

Last Login: **October 13, 2011; 10:15 PM EST**

Unblock   Deny Unblock

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

---

panel_bottom half

default

| Unblock | Deny Unblock |

Customer Internet Screens ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

deny unblock

Reason(s) for authentication failure when denying unblock:

☐ SSN   ☐ Mother's name
☐ Address   ☐ Direct Deposit Account Number (DAN)
☐ Date of birth ☐ Master Beneficiary Amount (MBA)
☐ Place of birth ☐ Other

| **Save** | Cancel |

Customer Internet Screens ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign in

Sample Notices ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Telephone - Standard account suspended

Release 2: Added warning message. Added "Block Type," "Block Reason," "Block Date," "Block Location," to the Account Summary container.

Social Security • Registration and Customer Support

User Search

SSN: | | Username:

or

[Search] [Clear Search]

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

⚠ **This account has been suspended.**

The customer must visit a Field Office to remove the suspension.

Account Summary | Transaction History

Account Summary   ❓ Help

Email Address: **jjones@me.com**
Account Type: **Standard**

Account Status: **Blocked**
Block Type: **Suspended**
Block Reason: **SSN, Date of Birth failed**
Block Date: **May 08, 2012; 03:14 PM EST**
Block Location: **Towson MD (375)**

Last Login: **October 13, 2011; 10:15 PM EST**

Customer Internet Screens   ❓ Help

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

Create Account - Verify your Identity
Create Account - Create Account

Finish Setting Up Your Account - Verify your Identity
Finish Setting Up Your Account - Create Account

Add extra security

Sign In
Sign In with Enhanced Security

Sample Notices   ❓ Help

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Created an account online
Created an account online (with extra security)
Added extra security

Created an account in person
Created an account in person (with extra security)
Upgraded account in person

Request to reset cell phone number

Block access - confirm

New for Release 2

Social Security • Registration and Customer Support

User Search

SSN: Username: User is:
          ○ on phone   **Search**   Clear Search
[   ] **or** [   ]   ○ in person

John Jones   **SSN: 999-99-9999**   **DOB: 01/01/1970**   **Username: JJJones1!2**

> ❝ **Please read the following to the customer:**
>
> *Are you sure you want to block all access to your information?*
>
> *If you block access to your information, you will not be able to access any of our online or automated telephone services. If you change your mind in the future, you will have to call or visit Social Security to unblock the account.*

Yes, Block Access   Cancel

Transaction History

New functionality for Release 2.

Social Security • Registration and Customer Support

User Search

SSN: [   ] or Username: [   ] User is: ○ on phone ○ in person **Search** Clear Search

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**   Username: **JJJones1!2**

Account Summary | Transaction History

Showing **1-25** of **96** transactions   << First < Previous **1** 2 3 4 Next > Last >>

Event	Success?	Date/Timestamp ▼	Location
Second factor reset request	Yes	June 26, 2012 09:12 am	Towson MD (555) Telephone
Search for customer	Yes	June 26, 2012 09:06 am	Towson MD (555) Telephone
Unblock	Yes	June 21, 2012 09:15 am	Columbia MD (103) In Person
Search for customer	Yes	June 21, 2012 09:05 am	Columbia MD (103) In Person
Deny unblock	--	June 20, 2012 12:06 pm	Columbia MD (103) In Person
Search for customer	Yes	June 20, 2012 12:01 pm	Columbia MD (103) In Person
Block Access	Yes	June 5, 2012 11:59 pm	Internet
Remove Extra Security	Yes	June 5, 2012 11:55 pm	Internet
Once-time password verification	Yes	June 5, 2012 11:55 pm	Internet
Authentication	Yes	June 5, 2012 11:50 pm	Internet
Change password	Yes	June 1, 2012 12:01 am	Internet
Password reset question attempt	Yes	May 31, 2012 11:59 am	Internet
Once-time password verification	Yes	May 31, 2012 11:55 pm	Internet
Authentication	Yes	May 31, 2012 11:50 pm	Internet
Change e-mail	Yes	May 25, 2012 09:02 pm	Manassas TSC (999)
One-time password verification	Yes	May 25, 2012 09:00 am	Manassas TSC (999)
Search for customer	Yes	May 25, 2012 08:56 am	Manassas TSC (999)
One-time password verification	Yes	May 15, 2012 09:03 am	Internet
Register cell phone number for one-time password verification	Yes	May 15, 2012 09:00 am	Internet
Authentication	Yes	May 15, 2012 08:55 am	Internet
Request elevation code/verify identity	Yes	May 3, 2012 08:58 pm	Internet
OOW quiz attempt	Yes	May 3, 2012 08:55 pm	Internet
Remove strikes/lockout	Yes	May 2, 2012 04:00 pm	Columbia MD (103) Telephone
Search for customer	Yes	May 2, 2012 03:53 pm	Columbia MD (103) Telephone
Registration failure	--	May 2, 2012 01:23 pm	Internet

Back to Top   << First < Previous **1** 2 3 4 Next > Last >>

Transaction history - failed registration

New for Release 2

User Search

SSN: Username:

[ ]   or   [ ]   **Search**   Clear Search

John Jones   **SSN: 999-99-9999**   **DOB: 01/01/1970**

| User Information | Transaction History |

Event	Success?	Date/Timestamp ▼	Location
Search for customer	Yes	June 27, 2012 04:00 pm	In Person Columbia MD (103)
OOW quiz attempt	No	May 29, 2012 09:01 am	Internet

Create Account - Need external verification

Added "Edit Address" button that takes user back to prior screen with editable address fields displayed.

Social Security • Registration and Customer Support

User Search

SSN:		Username:	User is:

SSN: _____ **or** Username: _____ User is: ○ on phone ○ in person

[**Search**] [Clear Search]

John Jones   SSN: **999-99-9999**   DOB: **01/01/1970**

We cannot verify the address against our records

" **Please read the following to the customer:**

We were unable to verify this address against our records:
801 Key Highway
Baltimore, Maryland 21230

[Edit Address]

We would like your permission to share your information with Experian, an external authentication service provider, to help us verify your identity. We also use Experian's fraud prevention services to protect you from identity theft.

Experian verifies the information you give us against their records. We do not share your Social Security number with Experian. Experian keeps your information only for the time period permitted by Federal laws, Regulations, or guidelines.

Do you agree to allow us to share your information with Experian?

○ Yes   ○ No

[**Next**]   [Exit]

Successful enrollment - standard

Removed sample notice and changed "Print" button to "Reprint"

Social Security • Registration and Customer Support

User Search

SSN: Username: User is:

[_____] **or** [_____] ○ on phone   **Search**   Clear Search
                           ○ in person

John Jones   **SSN: 999-99-9999**   **DOB: 01/01/1970**

⚠ **The confirmation letter was successfully sent to the printer.**

> **Please give the confirmation letter to the customer and read the following confirmation to the customer:**
>
> *We cannot finish setting up your account until you use the letter I will give you to go online and create a Username and Password.*
>
> *Please do this before the date shown in the letter.*

Reprint   Done

Successful enrollment - extra security

Removed sample notice and changed "Print" button to "Reprint"

Social Security • Registration and Customer Support

User Search

SSN:

[   ]   **or**

Username:

[   ]

User is:
○ on phone
○ in person

Search   [Clear Search]

John Jones   **SSN: 999-99-9999**   **DOB: 01/01/1970**

⚠️ **The confirmation letter was successfully sent to the printer.**

❝ **Please give the confirmation letter to the customer and read the following confirmation to the customer:**

We cannot finish setting up your account until you use the letter I will give you to go online and create a Username and Password. Please follow the instructions in the letter to add your extra security.

Please do this before the date shown in your letter.

Reprint   [Done]