Screen #1 – Welcome/Starting Page

This is the "Starting page" where individuals receive information about the process. It informs them that we may use the date of this request as their date of the application if they submit the requested information and keep an appointment to file an application for benefits. The page also offers links to the Frequently Asked Questions (FAQ), the Terms of Service (ToS), and the Privacy Act (PA) statement. The FAQ link directs individuals to a SSA.gov page where individuals can find different SSA topics, which includes information about appointments and ways to contact us to reschedule an appointment when needed.

Individuals selecting the ToS link receive the pop-up message below.
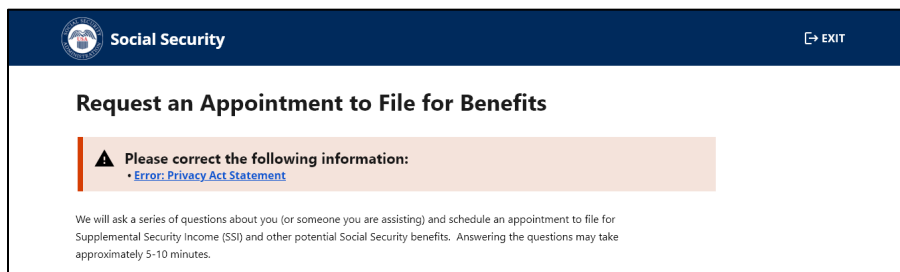
Screen #1 – (Cont.) Welcome/Starting Page

The ToS link informs individuals of various privacy and security aspects before the individual enters the Government information system. The ToS acknowledges that we may monitor activity within the online system. Individuals can either select "Back" to go back to the online tool, or "Exit" to leave the tool.

The pop-up message also provides a direct link to SSA's Internet Privacy Policy that explains the agency's online information practices.

Individuals selecting the PA statement link will receive the message below.
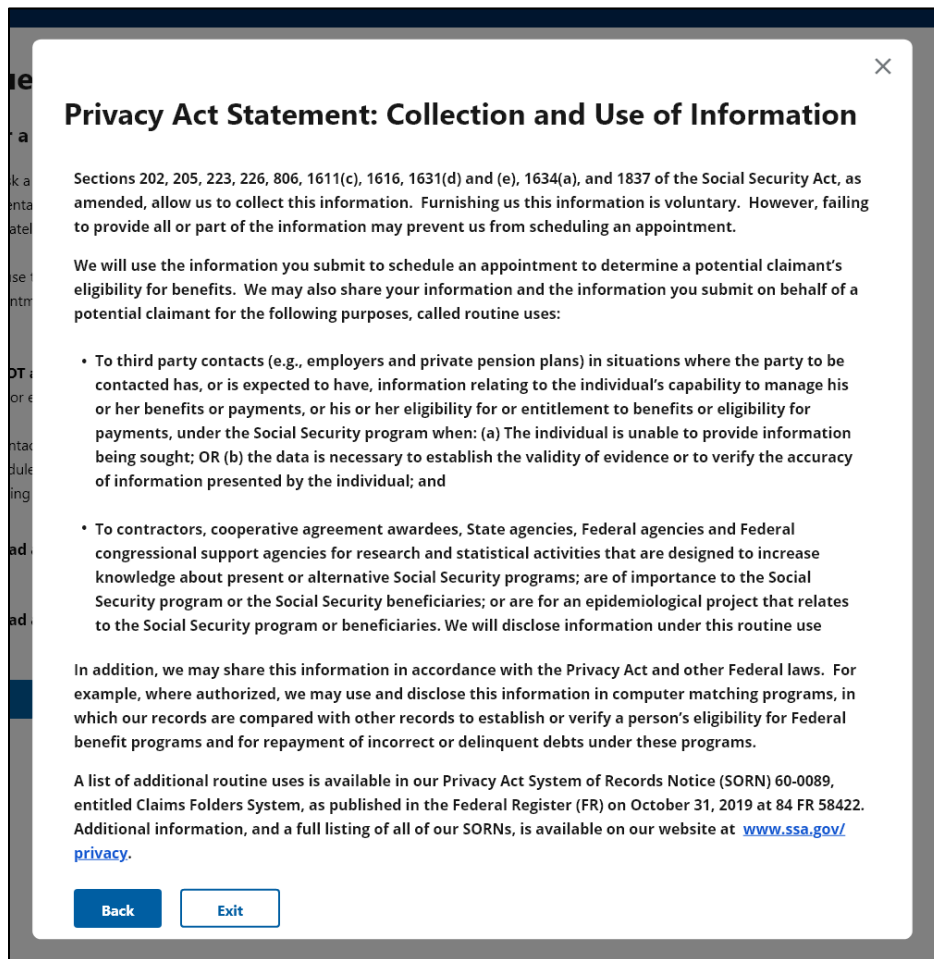
Individuals must select the link and view the PA statement before continuing, otherwise they will receive the following alert:

Screen #2 Selecting path for users

We ask individuals to indicate who they are answering the questions about. If they select option #1 "Yourself" or option #4 "Someone else who is with you as you answer these questions", individuals will continue the path for "First-Party users" (see screen #4). A first party user is an individual who can sign an application on their own behalf. If the individual selects any other option, the system presents the third-party/Assistor path. Although individuals making the request for their child or for an incompetent adult whose care they are responsible for (option #2) are also considered "First-Party users" as they might be able to sign the benefit application on the claimant's behalf, for the purpose of the description of this online tool, we include them on the "Third-Party/Assistor Screens" package as it follows the same pathing for questions and format.

All fields with an asterisk (*) are mandatory fields and individuals must enter a response in order to proceed to the next screen. If an individual does not enter or select a response, the system provides an alert for individuals to take action and correct the information.

Screen #3 Personal Information

Social Security   ⮌ EXIT

Request an Appointment to File for Benefits

2 of 8 **Personal Information**

* Indicates required information

*First name: John
Middle name: Albert
*Last name: Doe
Suffix: Select one... ⬍

*Phone type
◉ U.S.
○ International

*Phone number
444-444-4444

*Mailing address
Street address: 123 Test St
Street address line 2:
Street address line 3:
Street address line 4:
City: Baltimore
State: MD ⬍
ZIP Code: 21231

Email
johndoe@mail.com

ⓘ Your phone number and address are being collected so we have a number to contact you about the appointment and an address where we can send an appointment confirmation. We will also send your appointment confirmation electronically if an email is provided above.

[Next] [Previous] [Exit]

Individuals must provide their personal contact information (name, phone number, and mailing address) in order to submit their appointment request and receive an appointment confirmation via mail. If an individual voluntarily provides an email address, we will email the appointment confirmation as well.

Screen #3 (Cont.) Personal Information – Alerts

Individuals who do not provide all the required information will receive an alert prompting them to either enter the missing information or to enter the information in the proper format. For example, phone number must be numeric and 10 digits, and the zip code must match the city and state based on the postal service directory. At any point, individuals can choose to exit the tool by selecting the "Exit" button. To ensure that the individual does want to exit the tool, the system provides the following alert.

Screens #4 Date of Birth and # 5 Social Security Number

Upon entering their personal contact information and selecting next, the individual is asked to provide their date of birth and social security number. We require this information to establish the appointment under the correct record and to alert us if there are special internal indicators that need further evaluation. In addition, we use the provided date of birth to determine if the individual is under the age of 13 years old to ensure compliance with the Children's Online Privacy Protection Act (COPPA) and OMB M-03-22 guidelines. Individuals under the age of 13 who attempt to use this tool will receive the following alert to contact us for additional assistance.

Screen #6 Disability Information

The Supplemental Security Income (SSI) program provides monthly payments to certain adults and children with a disability or blindness, and individuals age 65 and older without a disability. Therefore, we request individuals to indicate if they have a disability or if they are blind. If they select "Yes" to the first question, the system presents the third question to provide us with an estimated date of when the condition began. This information, along with the date of birth, helps us to determine the type of appointment needed (e.g., aged, adult, or child appointment). In addition, we provide a message about the option to request special notices for those with a visual impairment.

Individuals selecting "No" to the first two questions receive the following alert advising them of the SSI eligibility requirement. The alert does not prevent individuals from continuing to request an appointment, as individuals are able to file an application to obtain a formal determination from SSA about whether they may be entitled to benefits.

Screen #7 Language Preference

This screen provides a scroll down with 89 languages and an option for "other" for the individual to indicate their language preference. We request information about the language preference for both speaking and reading. We use the information about the speaking language preference to provide interpreters during the appointment interview. We use the information about reading language preference to provide reading materials (if available) about our programs and certain notices.

Screen #8 Special Circumstances

Social Security

Request an Appointment to File for Benefits

7 of 8 **Special Circumstances**

*Indicates required information

*Select all life circumstances that apply to you
This information will help us provide the best service for these special cases.

- ☐ Military casualty/Wounded Warrior
- ☐ Veterans Affairs 100% disability
- ☐ Homelessness
- ☐ Medical condition that is untreatable and expected to result in death
- ☐ Need sign language interpreter services
- ☐ Need visual accommodation
- ☐ Recently released from a correctional institution
- ☐ None of the above

Next **Previous** **Exit**

This screen offers the option for individuals to choose from a list of special circumstances that may apply to them. We use this information to provide either expedited appointments or additional assistance as needed during the appointment interview.

Screen #9 Review and Submit

This screen provides the opportunity for the individual to review all the provided information prior to submission. If individuals need to correct any information, they can go back to the previous pages to edit the answers.

Screen #9 (Cont.) Review and Submit

If the information is correct and no changes are needed, individuals can agree with the electronic signature agreement and select "Submit" to transmit the information to us. Individuals must agree with the electronic signature agreement to submit the information, otherwise they will receive an alert message.

Screen #10 Information submitted and alert

After the individual submits the requested information, and the information passes certain internal checks, the system displays this screen to inform the individual that SSA has received the information. This screen also provides the specific date the individual submitted the appointment request and the dates that an application must be submitted by to avoid losing benefits.

If the information provided does not pass the internal checks, the system provides the following alert informing the individual that we cannot process the request and they can call us.

Screen #11 Alert – Online Tool Unavailable or Tool shutting down – 15 minutes
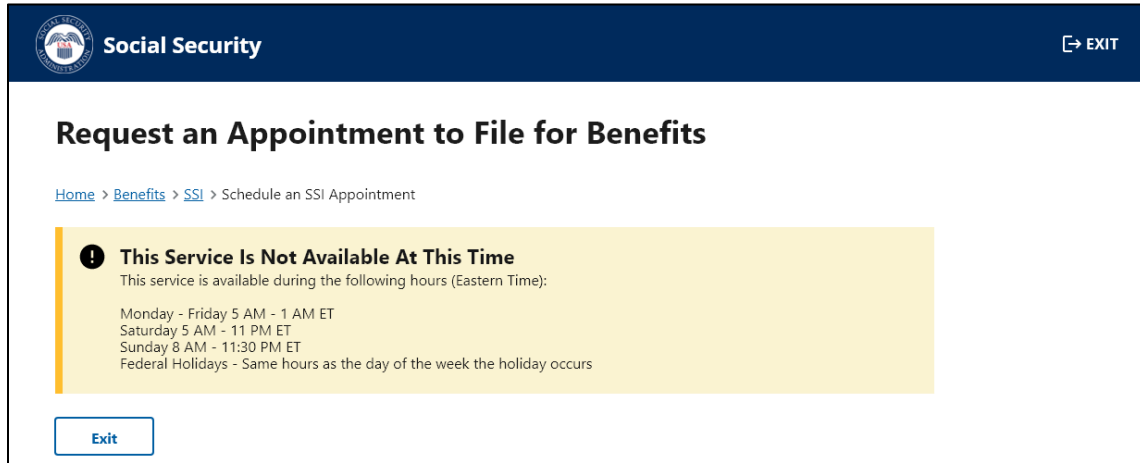
Our systems undergo daily maintenance during certain timeframes. During this "downtime", our systems may be interrupted and unavailable. Individual trying to use the tool during the "downtime" will receive the message above.

Individuals attempting to use this online tool within 15 minutes of the "downtime" will receive the screen below to alert them about the system interruption.
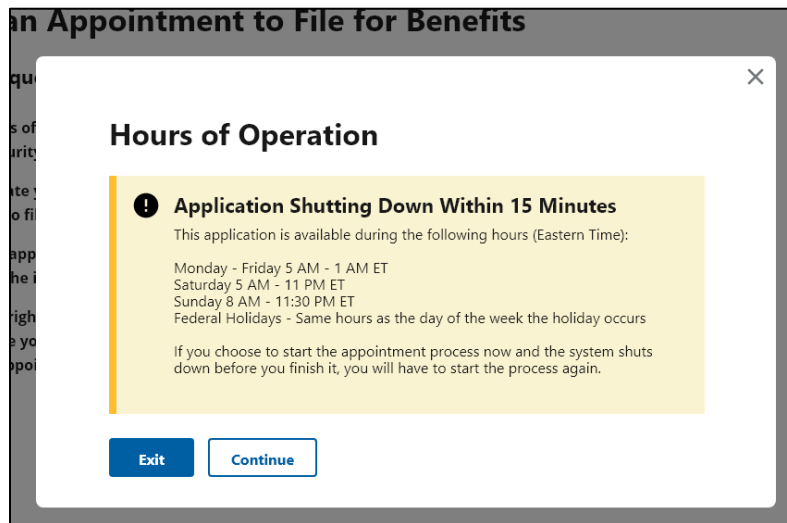
Screen #12 Email Confirmation Message

Subject: Online Appointment Request

The Social Security Administration has received your request for an appointment. You will receive the date and time of your appointment by mail and email in 7-14 business days.

If you are interested in applying for benefits, we may use today—MM DD YYYY—as the application date, but only if you file a signed application by a certain date. For Supplemental Security Income (SSI), you must file by MM2 DD2 YYYY2. For Social Security benefits, you must file by MM3 DD3 YYYY3.

We are here to help. If you have questions about this message, please call us at 1-800-772-1213.

Please do not reply to this email, as we are unable to respond to messages sent to this address.

Once the information is transmitted to SSA, and if an email address was provided, individuals will receive an email confirmation with the information shown above.