Important - The Third-Party Path follows the identical flow and screen description as the path for the first party users, except for an additional screen (screen # 8 part of this package). The additional screen requests contact information of the individual providing the information for the potential claimant. Individuals can distinguish these screens by looking at the message located at the top of the pages (e.g., "For the person you are assisting..." Both, the first and third party/Assistor paths are also available to mobile users.



Social Security	[→ EXIT
Request an Appointment to File for Benefits	
If you believe you may be eligible for Supplemental Security Income (SSI), or if you are assisting someone who wants to file for SSI, you can request an appointment to file for SSI and any other benefits you (or the person you are assisting) may be eligible to receive. The online process takes about 5-10 minutes and no documentation is required at this time. We will need basic information about you and, if applicable, the person you are assisting.	
Information we need:	
 Name, date of birth, and Social Security number of the individual interested in SSI. Mailing address, phone number, and email address (optional) for the individual interested in SSI. Your name, phone number, and email address (optional) if you are assisting another individual. Once you have completed the online process, a Social Security representative will schedule the appointment. We will send an appointment confirmation with the appointment date and time to the individual interested in filing by mail and email (if an email address is provided). In some cases, a Social Security representative way contact you by phone to schedule the appointment. 	
If you are not able to complete the request, you may schedule an appointment by phone by calling 1-800-772-1213 (TTY 1-800-325-0778) from 8:00 a.m. to 7:00 p.m. Eastern time, Monday through Friday. You may also contact your local Social Security office. You can find the phone number for your local office by using our <u>field Office Locator</u> .	

Individuals visiting the SSA website to learn about <u>Supplemental Security Income (SSI)</u> payments will be provided with a description of the SSI program and information about how to file an application. In the informational section, individuals will be able to access the link "**Request an Appointment to File for Benefits**" which will direct them to the "Landing Page" shown above. This page informs individuals about the information needed prior to accessing the online tool, the process for the request, and what to expect next once the information is submitted.

Screen #2 – 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 #2 – (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.

Privacy	Act Statement: Collection and Use of Information
Sections 20	2, 205, 223, 226, 806, 1611(c), 1616, 1631(d) and (e), 1634(a), and 1837 of the Social Security Act, as
amended, a	llow us to collect this information. Furnishing us this information is voluntary. However, failing
to provide a	ıll or part of the information may prevent us from scheduling an appointment.
We will use	the information you submit to schedule an appointment to determine a potential claimant's
eligibility fo	r benefits. We may also share your information and the information you submit on behalf of a
potential cl	aimant for the following purposes, called routine uses:
 To third	party contacts (e.g., employers and private pension plans) in situations where the party to be
contacte	d has, or is expected to have, information relating to the individual's capability to manage his
or her be	enefits or payments, or his or her eligibility for or entitlement to benefits or eligibility for
payment	's, under the Social Security program when: (a) The individual is unable to provide information
being so	ught; OR (b) the data is necessary to establish the validity of evidence or to verify the accuracy
of inform	nation presented by the individual; and
 To contr	ctors, cooperative agreement awardees, State agencies, Federal agencies and Federal
congress	ional support agencies for research and statistical activities that are designed to increase
knowled	ge about present or alternative Social Security programs; are of importance to the Social
Security	program or the Social Security beneficiaries; or are for an epidemiological project that relates
to the So	cial Security program or beneficiaries. We will disclose information under this routine use
In addition,	we may share this information in accordance with the Privacy Act and other Federal laws. For
example, w	here authorized, we may use and disclose this information in computer matching programs, in
which our r	ecords are compared with other records to establish or verify a person's eligibility for Federal
benefit pro	grams and for repayment of incorrect or delinquent debts under these programs.
A list of add entitled Cla Additional i <u>privacy</u> .	itional routine uses is available in our Privacy Act System of Records Notice (SORN) 60-0089, ims Folders System, as published in the Federal Register (FR) on October 31, 2019 at 84 FR 58422. nformation, and a full listing of all of our SORNs, is available on our website at <u>www.ssa.gov/</u>

Individuals must select the link and view the PA statement before continuing otherwise they will receive the following alert:

Social Security	[→ EXIT
Request an Appointment to File for Benefits	
Please correct the following information: • Error: Privacy Act Statement	
We will ask a series of questions about you (or someone you are assisting) and schedule an appointment to file for Supplemental Security Income (SSI) and other potential Social Security benefits. Answering the questions may take approximately 5-10 minutes.	

Screen #3 Selecting path for users



We ask individuals to indicate who they are answering the questions about. If the individual selects any option other than "Yourself" or "Someone else who is with you as you answer these questions", the system presents the third-party/Assistor path.

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.

2 of 9 Borr	onal Information			
*Indicates required in	formation			
For the person you	are assisting			
*First name	Middle name	*Last name	Suffix	
John	Albert	Doe	Select one 🖨	
*Mailing address Street address 123 Test St Street address line 3		Street addr	ess line 2 ess line 4	
City	State Z	IP Code		
Baltimore	MD 🕈	21231		
Email	 m			

Individuals must provide the personal contact information (name, phone number, and mailing address) for the person they are assisting 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.

Social Security	[→ EXIT
Request an Appointment to File for Benefits	
2 of 9 Personal Information	
Please correct the following information: Error: First name Error: Last name Error: Phone number Error: Mailing address 	
* Indicates required information	
For the person you are assisting	
*First name Middle name *Last name Suffix Please enter a first name.	
*Phone type	
 ● U.S. 	
O International	
*Phone number	
44-444-4444	
*Mailing address	
The entered ZIP Code must match the street address, city and state entered. Street address Street address line 2	
123 Test St	
Street address line 3 Street address line 4	
City State ZIP Code	
Baltimore MD 🗘 21231	
Email	
johndoe@mail.com	
Their phone number and address are being collected so we have a number to contact them about their appointment and an address where we can mail an appointment confirmation. We will also send their appointment confirmation electronically if an email is provided above.	

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.

at nt	Are you sure you want to exit? You have entered information that will be lost if not submitted.	×
oc ni er	Exit without submitting Go back	

Screens #5 Date of Birth and #6 Social Security Number

Social Security	[→ EXIT
Request an Appointment to File for Benefits	
3 of 9 Date of Birth	
*Indicates required information	
For the person you are assisting	
"What is their date of birth?	
Month Day Year	
12 29 1966	
Next Previous Exit	
Social Security	[→ EXIT
Request an Appointment to File for Benefits	
Request an Appointment to the for benefits	
4 of 9 Social Security Number	
* Indicates required information	
For the person you are assisting	
*What is their Social Security Number (SSN)?	
Example: 111-11-1111	
***_**	
If they do not have an SSN, please review the <u>SSI eligibility requirements</u> or learn more about <u>obtaining an SSN</u> .	

Upon entering the personal contact information for the person they are assisting and selecting next, the individual is asked to provide the date of birth and social security number of the person they are assisting. 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.

Screen #7 Disability Information

Social Security	[→ EXIT
Request an Appointment to File for Benefits	
5 of 9 Disability	
*Indicates required information	
For the person you are assisting	
* Do they have a physical or mental disabling condition that has lasted or can be expected to last at least 12 months or result in death? Yes No	
*Are they blind or do they have low vision even with glasses or contacts? O Yes O No	
*What date did the physical or mental disabling condition begin?	
We know it can be hard to identify a specific date for many people. If you do not know the specific day but you know the month, you can enter the first day of the month. If you do not know the specific month, try to make your best guess based on your memory.	
Example: 4 21 1975 Month Day Year 4 21 1975	
• There are several ways to receive information from us if they are blind or have a visual impairment. They can request special notice options at the conclusion of this request for an appointment.	
Next Previous Exit	

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

Ple	ease review the answers before clicking next. To be eligible for SSI benefits, they must be disabled, blind, or over the age
of	65.
th	ere are several ways to receive information from us if they are blind or have a visual impairment. They can request
sp	ecial notice options at the conclusion of this request for an appointment.
Next	Previous Exit

Screens #8 Information about You (Parent/Spouse/Someone Else)

Social Security	[+	EXIT
Request an Appointment to File for B	enefits	
6 of 9 Your Information		
* Indicates required information This is information about <u>you</u>		
*First name Middle Initial *Last name	Suffix	
Robert J Doe	Select one 🗢	
Phone type U.S. International		
*Phone number		
123-456-7890		
Email		
thirdpartyhelper@mail.com		
• We will use your email address to send you an appointment request receipt.		
Next Previous Exit		

This screen is to collect information about the individual using the tool. We request this information to contact the individual that requested the appointment (if needed) and evaluate if they are the parent of a child or legal representative of an incompetent adult whose care they are responsible for. Their response helps us to determine to who address the appointment mail notices and determine who is receiving the appointment (e.g., parent, legal guardian, etc.,).

Screen #9 Language Preference

Social Security	[→ EXIT
7 of 9 Language Preference	
Indicates required information For the person you are assisting	
What language do they prefer for speaking? English X	
• This is the language used while they go through the application process with a representative. We can arrange for an interpreter at no cost to them.	
What language do they prefer for reading? English X	
Next Previous Exit	

This screen provides a scroll down with 89 languages and an option for "other" for the individual to indicate the language preference for the person they are assisting. 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 #10 Special Circumstances

Social Security		
Request an Appointment to File for Benefits		
8 of 9 Special Circumstances		
*Indicates required information		
For the person you are assisting		
*Select all life circumstances that apply to them 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 the person they are assisting. We use this information to provide either expedited appointments or additional assistance as needed during the appointment interview.

Screen #11 Review and Submit

Social Security		[→ EXI
Request an Appointment to File for Benefits		
9 of 9 Review and Submit		I
Information about who you are assisting	-	
Are you answering these questions about yourself? No		
Who are you answering these questions about? Someone else		
First name John Middle name Albert Last name Doe Suffix No answer		
Phone Type U.S. Phone number 444-444-4444		
Mailing address Street address 123 Test St City Baltimore State MD Zip Code 21231		
Email johndoe@mail.com		
What is their Date of Birth? 07/26/1966		
What is their Social Security Number (SSN)? ***_*** Show SSN		
Do they have a physical or mental disabling condition that has lasted or can be expected to last at least 12 months or result in death? No		
Are they blind or do they have low vision even with glasses or contacts? No		
Your Information	-	
First name Robert Middle initial J Last name Doe Suffix No answer Phone Type U.S .		
Phone number 123-456-7890 Email thirdpartyhelper@mail.com		
Appointment Information	_	
What language do they prefer for speaking? English		
What language do they prefer for reading? English		
Select all life circumstances that apply to them None		
Electronic Signature Agreement I understand and agree that my request will be signed electronically when I select the check box below. I understand that my electronic signature has the same legal meaning, validity, and effect as my handwritten signature. I have provided the Social Security Administration with truthful and accurate information.		
I agree with the Electronic Signature Agreement above.		
You can select the "Previous" button below to go back and make changes if needed. If the information is correct, select "Submit" button to complete the process and send all collected information to us.	the	
Submit Previous Exit		

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 #11 (Cont.) Review and Submit

Social Security	[→ EXIT
Request an Appointment to File for Benefits	
9 of 9 Review and Submit	1
Please correct the following information: terror: Electronic Agreement Signature	
Information about who you are assisting —	
Are you answering these questions about yourself? No	
Who are you answering these questions about? Someone else	
First name John Middle name Albert Last name Doe Suffix No answer	
Phone Type U.S. Phone number 444-444 4444	
Mailing address Street address 123 Test St City Baltimore State MD Zip Code 21231	
Email johndoe@mail.com	
What is their Date of Birth? 07/26/1966	
What is their Social Security Number (SSN)? 123-45-6789 Hide SSN	
Do they have a physical or mental disabling condition that has lasted or can be expected to last at least 12 months or result in death? No	
Are they blind or do they have low vision even with glasses or contacts? No	
Your Information -	
First name Robert Middle initial J Last name Doe Suffix No answer	
Phone Type U.S. Phone number 123-456-7890 Email thirdpartyhelper@mail.com	
Appointment Information -	
What language do they prefer for speaking? English	
What language do they prefer for reading? English	
Select all life circumstances that apply to them None	
Electronic Signature Agreement Iunderstand and agree that my request will be signed electronically when I select the check box below. I understand that my electronic signature has the same legal meaning, validity, and effect as my handwritten signature. I have provided the Social Security Administration with truthful and accurate information. Please click the Electronic Signature Agreement to continue. 'I agree with the Electronic Signature Agreement above.	
You can select the "Previous" button below to go back and make changes if needed. If the information is correct, select the "Submit" button to complete the process and send all collected information to us.	
Submit Previous Exit	

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 #12 Information submitted and Alert



Individuals that selected the option #2 ("A minor child..." or "An incompetent adult whose care...") will receive the message above providing the specific dates that an application must be submitted by to avoid losing benefits.

All other individuals will receive the message below with information about the appointment request.

Screens #12 (Cont.) Information submitted and Alert



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.

Social Security	[→ EXIT
Request an Appointment to File for Benefits	
We cannot process your request at this time. If you need help to schedule an appointment, please <u>contact us</u> .	
Print Exit	

Screens #13 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. Individuals 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 #14 Email Confirmation Messages

Subject: Online Appointment Request

The Social Security Administration has received your request for an appointment for John Doe. We will send the date and time of the appointment in 7-14 business days to the address you provided for John Doe.

If you are interested in applying for benefits on behalf of John Doe, 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 is provided, the system will release an email to the individual who provided the information to acknowledge the submission. The email will contain the language above providing information about the appointment and time frames for filing an application.

The system will also email the potentially eligible individual to alert them of the appointment request. The email sample is shown below.

Subject: Online Appointment Request

The Social Security Administration has received a request for an appointment for you. You will receive the date and time of the 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 at your appointment or by the dates we will provide if you do not file on your appointment date.

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.