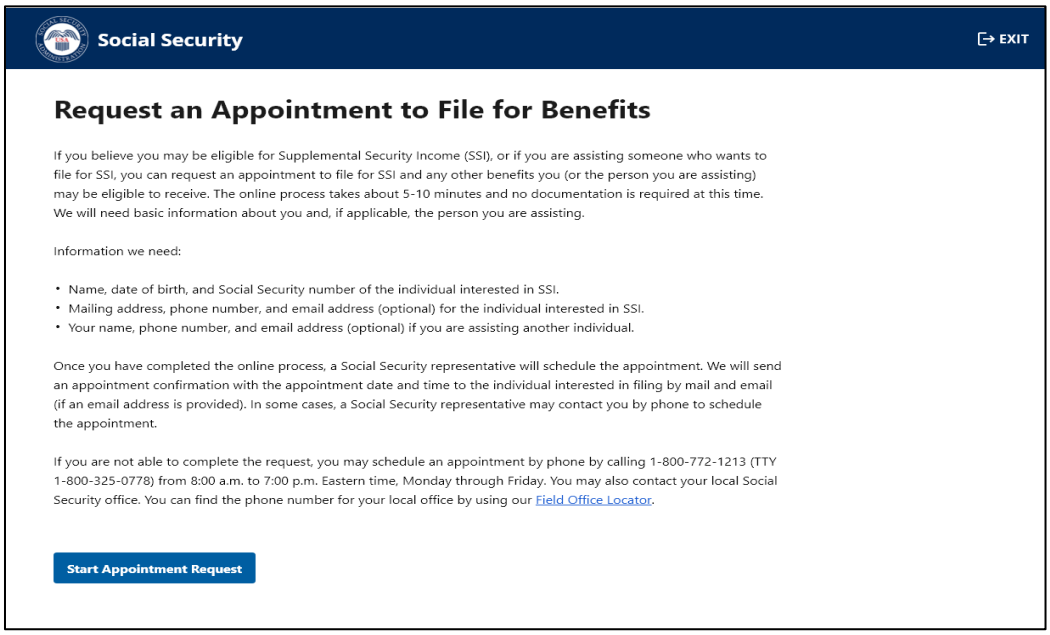
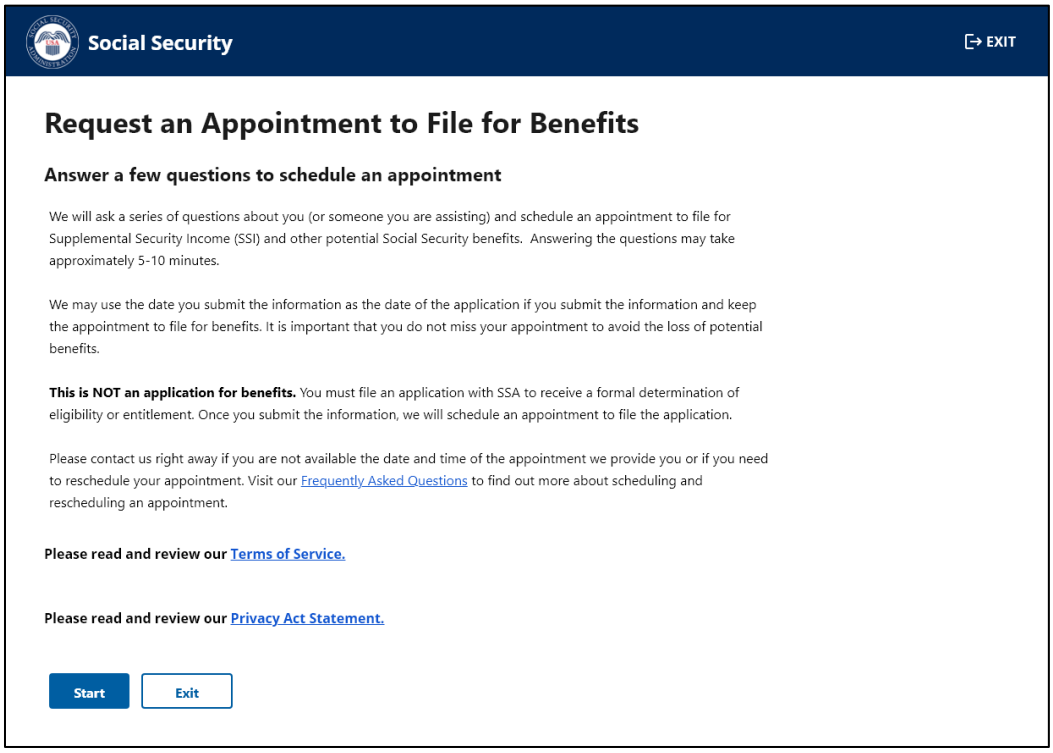
Important - The Third-Party Path follows the identical flow and screen description as the path for the first party users, except for an additional screen (screen # 8 part of this package). The additional screen requests contact information of the individual providing the information for the potential 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.

Screen #1 – SSA.gov Landing Page



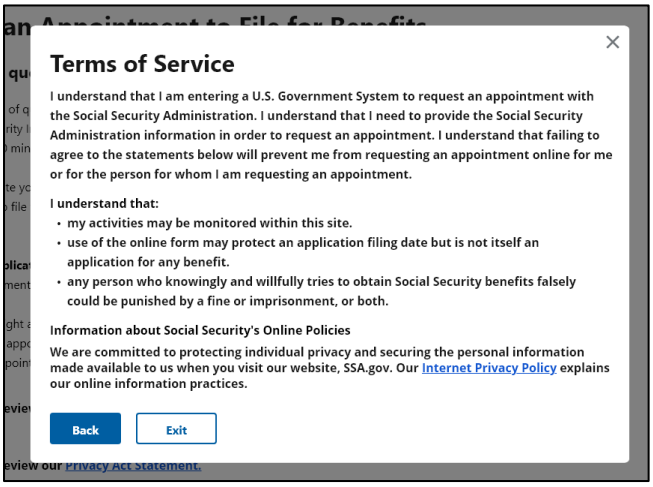
Individuals visiting the SSA website to learn about Supplemental Security Income (SSI) payments will be provided with a description of the SSI program and information about how to file an application. In the informational section, individuals will be able to access the link "**Request an Appointment 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.

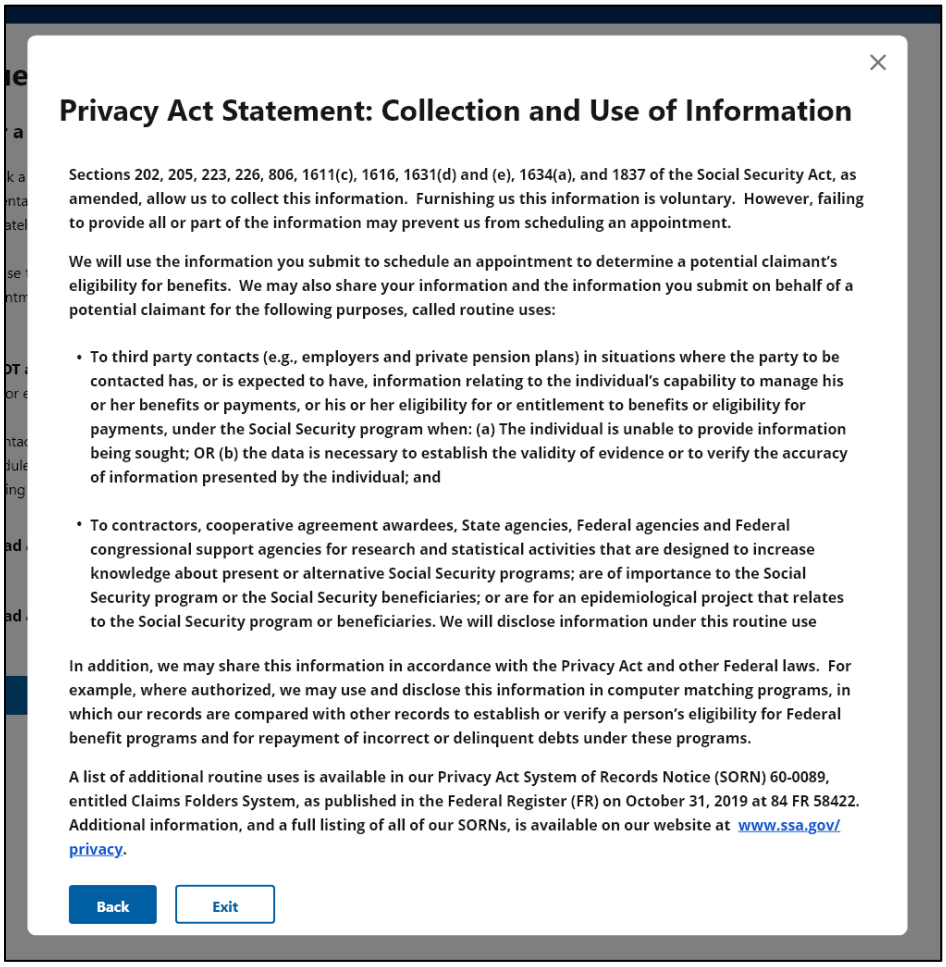


Screen #2 – (Cont.) Welcome/Starting Page

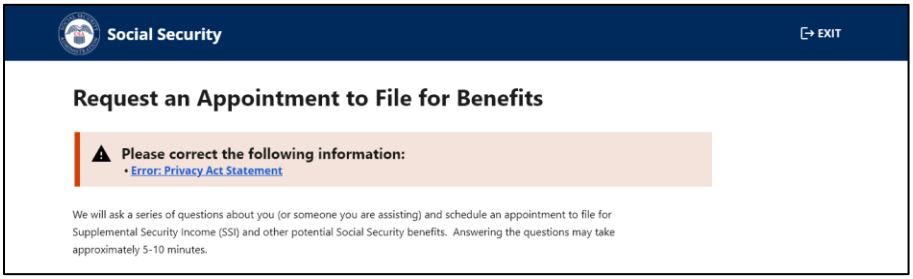
The ToS link informs individuals of various privacy and security aspects before the individual enters the Government information system. The ToS acknowledges that we may monitor activity within the online system. Individuals can either select "Back" to go back to the online tool, or "Exit" to leave the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

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

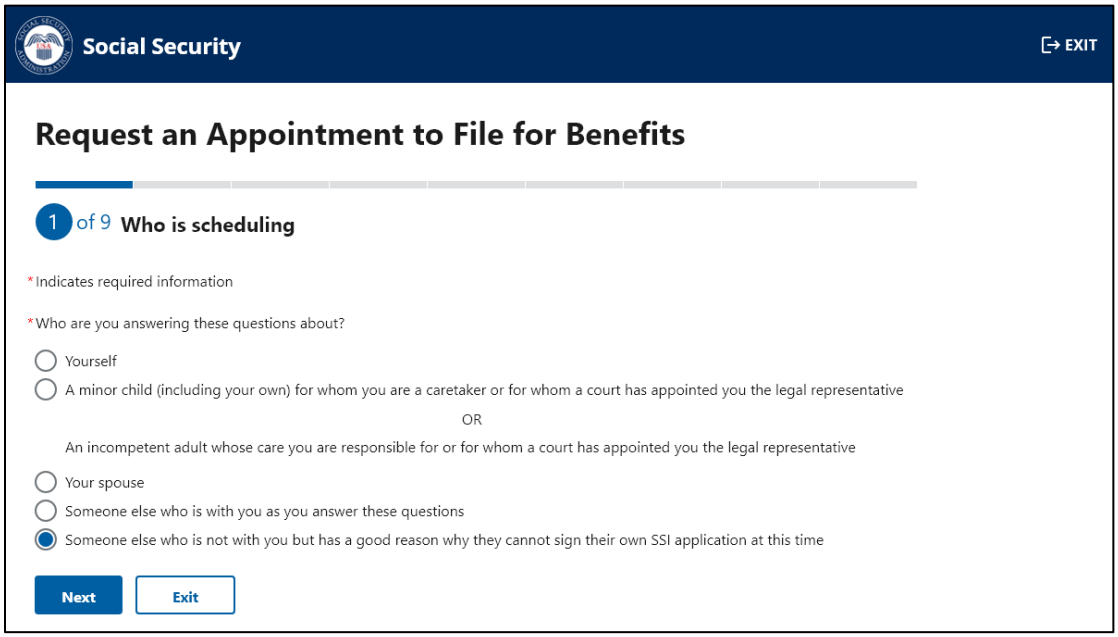
Individuals selecting the PA statement link will receive the message below.



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



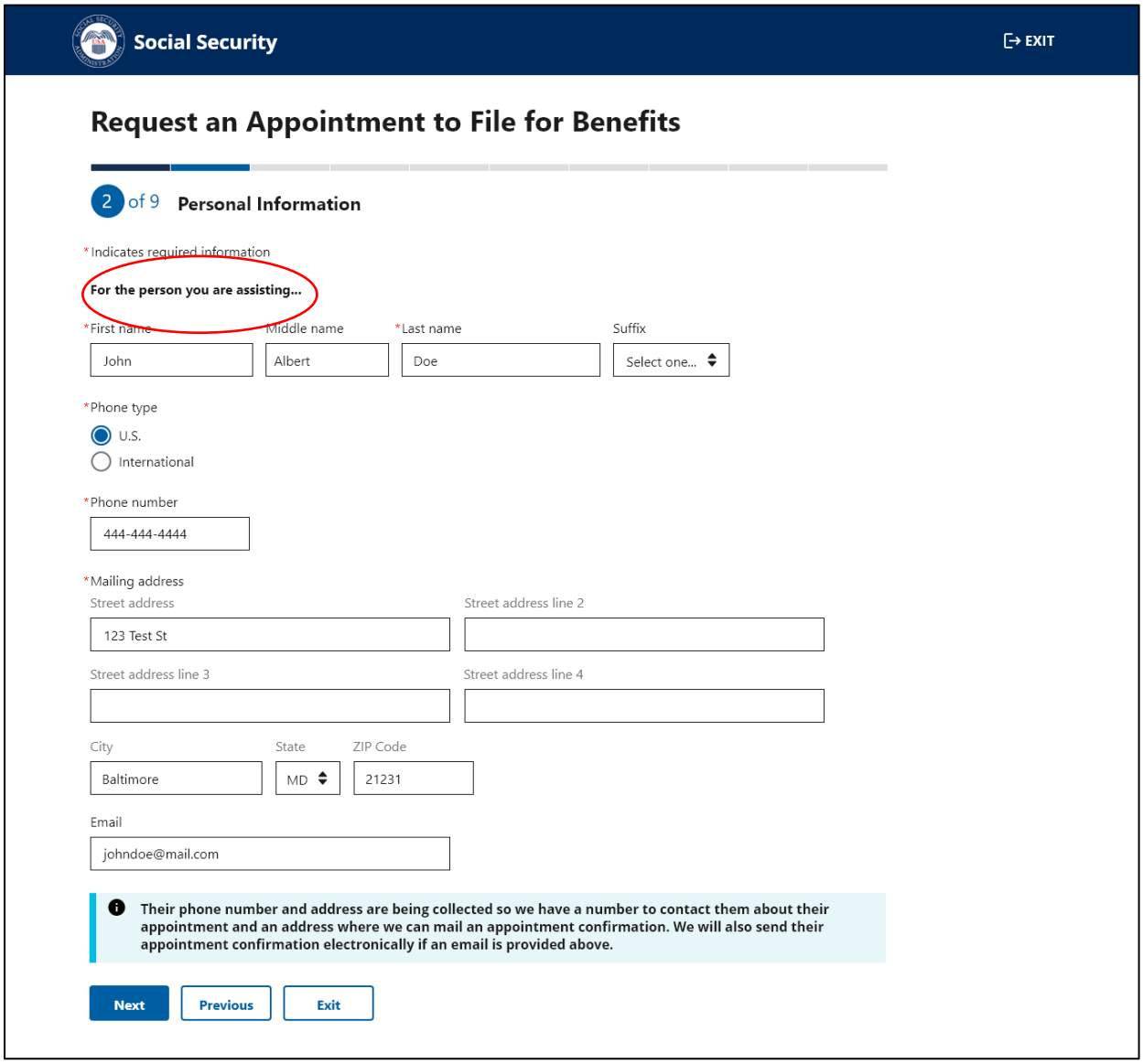
Screen #3 Selecting path for users



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.

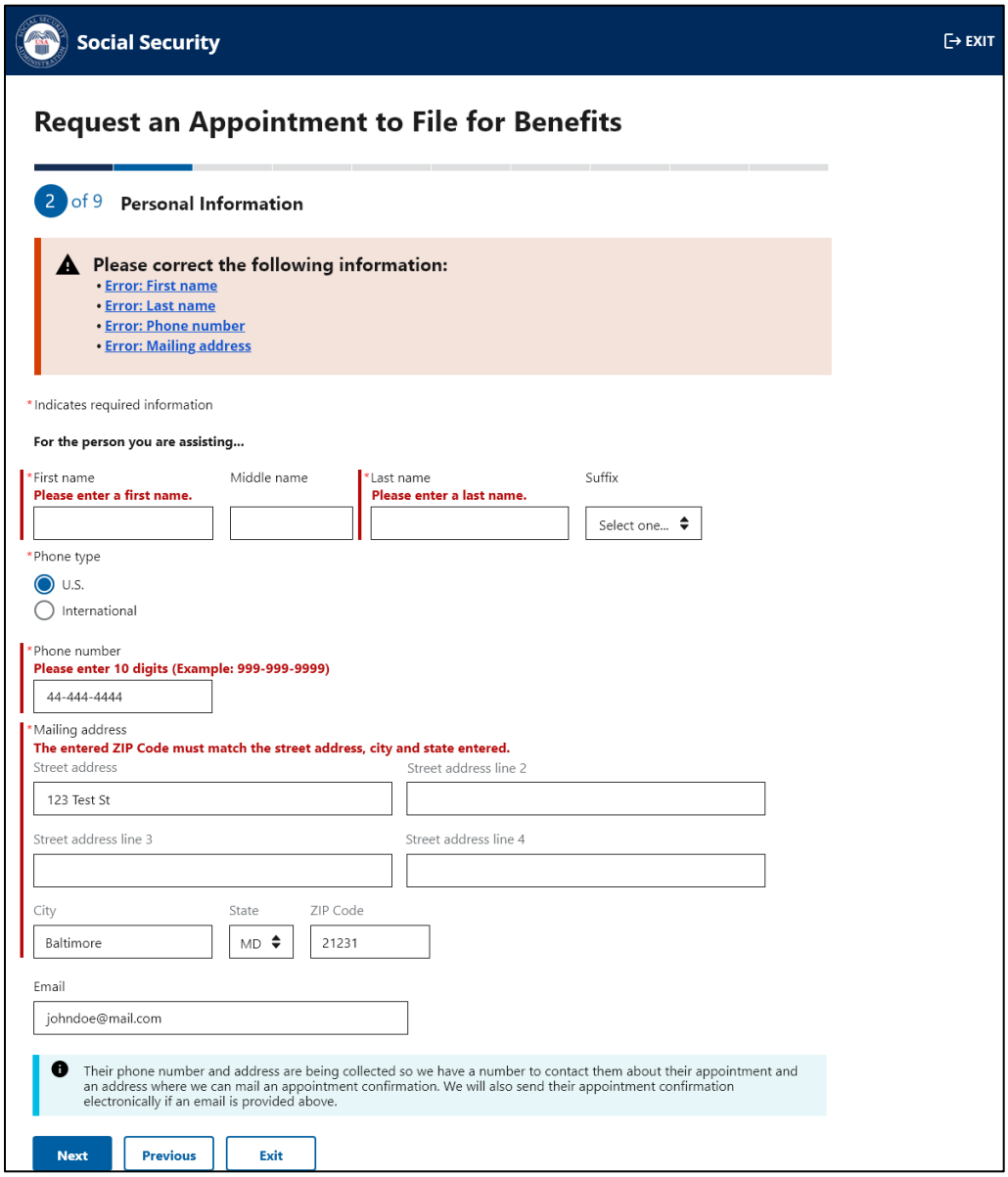
All fields with an asterisk (*) are mandatory fields and individuals must enter a response in order to proceed to the next screen. If an individual does not enter or select a response, the system provides an alert for individuals to take action and correct the information.

Screen #4 Personal Information

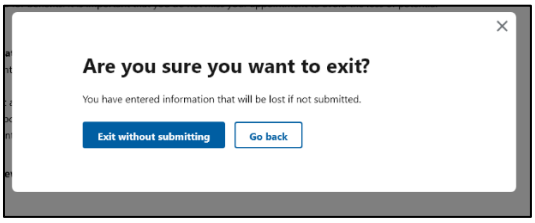


Individuals must provide the personal contact information (name, phone number, and mailing address) for the person they are assisting in order to submit their appointment request and receive an appointment confirmation via mail. If an individual voluntarily provides an email address, we will email the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

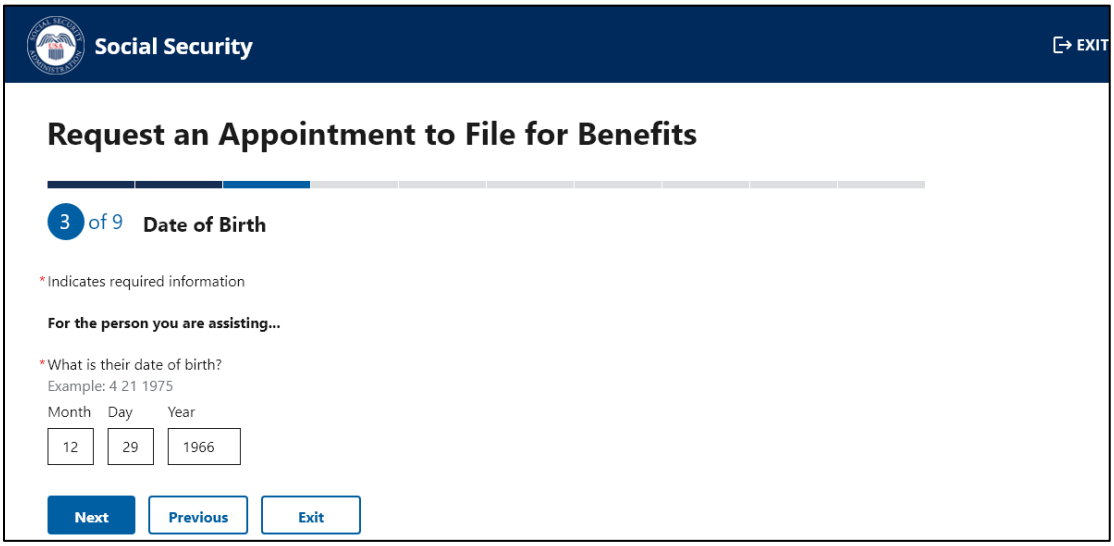
Screen #4 (Cont.) Personal Information

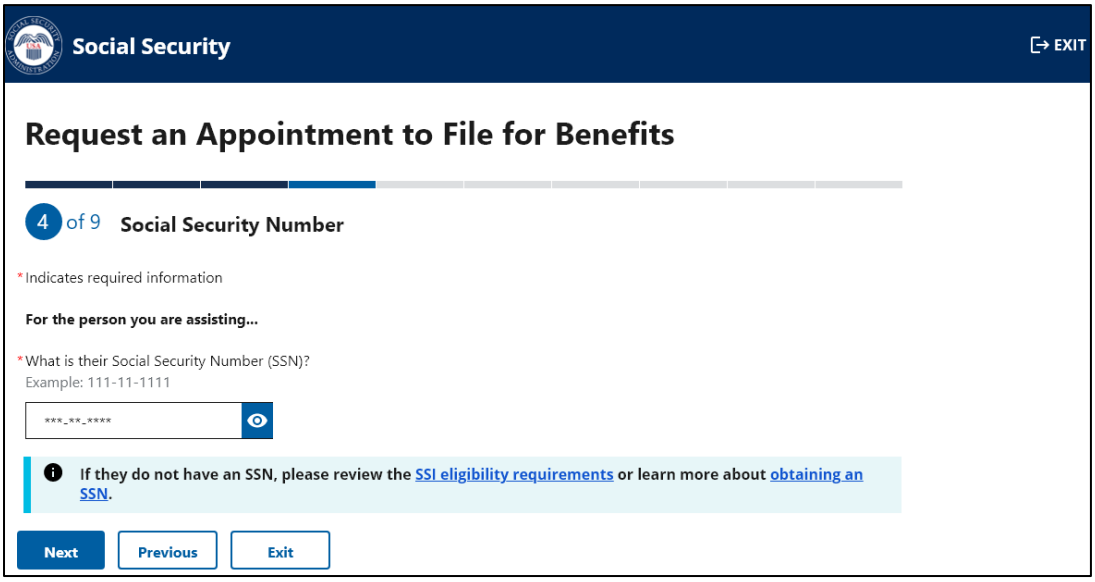


Individuals who do not provide all the required information will receive an alert prompting them to either enter the missing information or to enter the information in the proper format. For example, phone number must be numeric and 10 digits, and the zip code must match the city and state based on the 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.



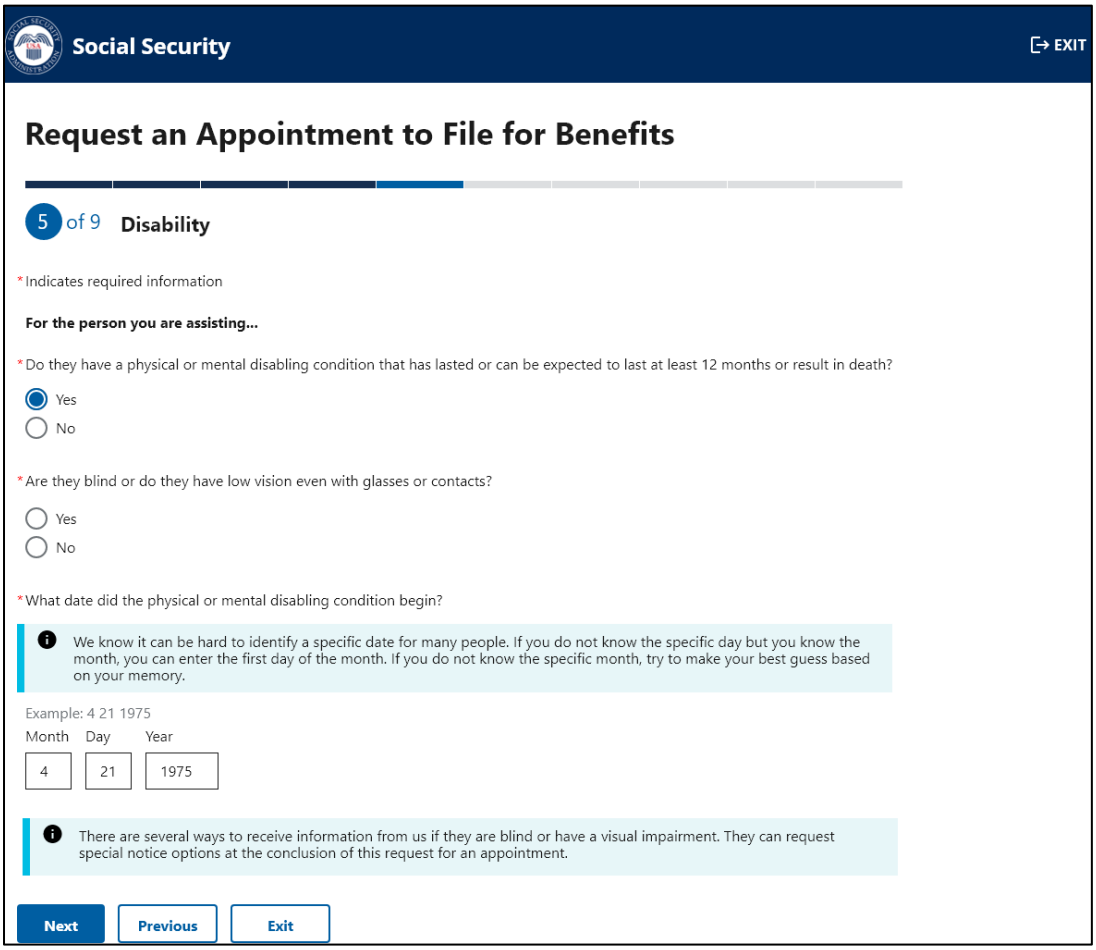
Screens #5 Date of Birth and #6 Social Security Number





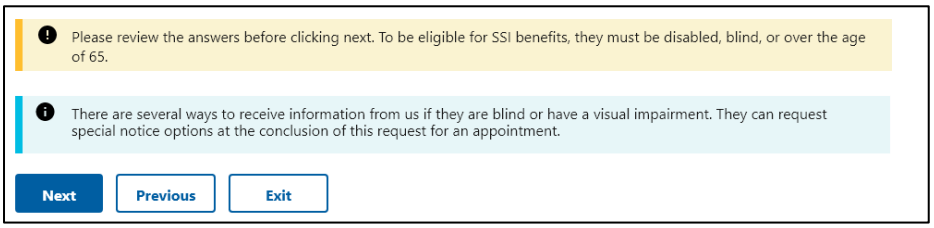
Upon entering the personal contact information for the person they are assisting and selecting next, the individual is asked to provide the date of birth and social security number of the person they are assisting. We require this information to establish the appointment under the correct record and to alert us if there are special internal indicators that need further evaluation.

Screen #7 Disability Information

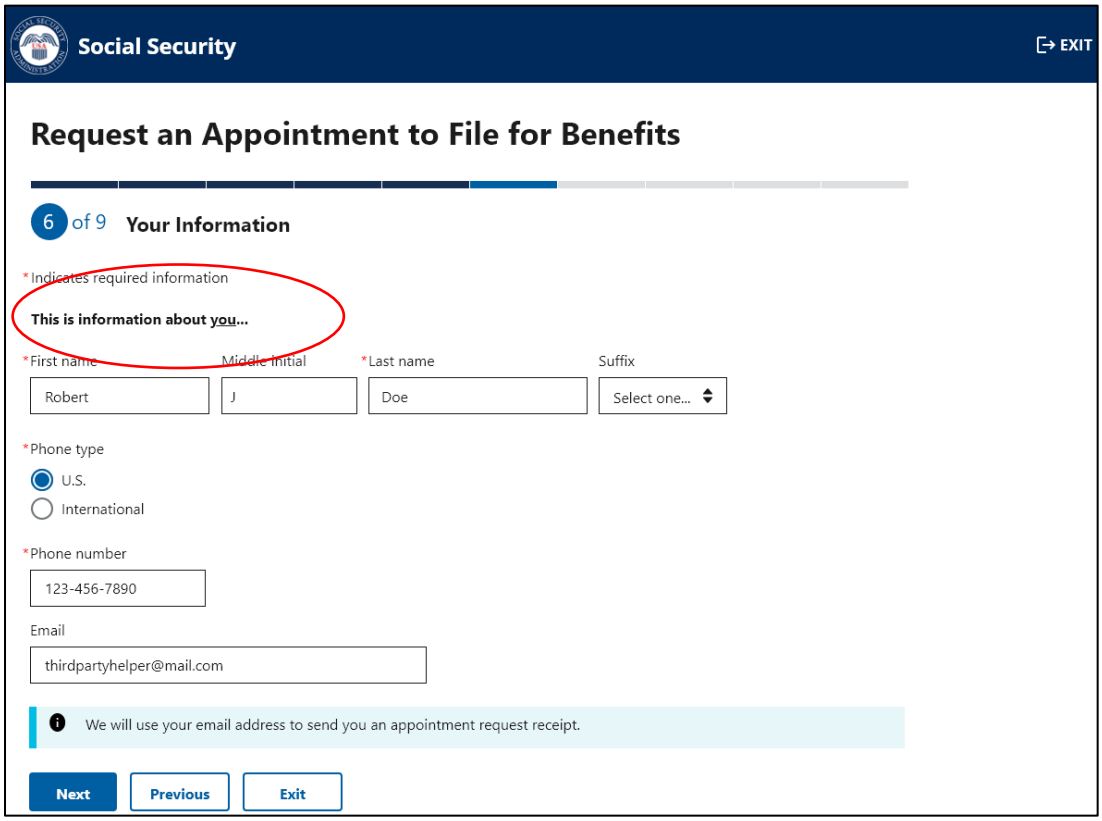


The Supplemental Security Income (SSI) program provides monthly payments to certain adults and children with a disability or blindness, and individuals age 65 and older without a disability. Therefore, we request individuals to indicate if they have a disability or if they are blind. If they select "Yes" 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

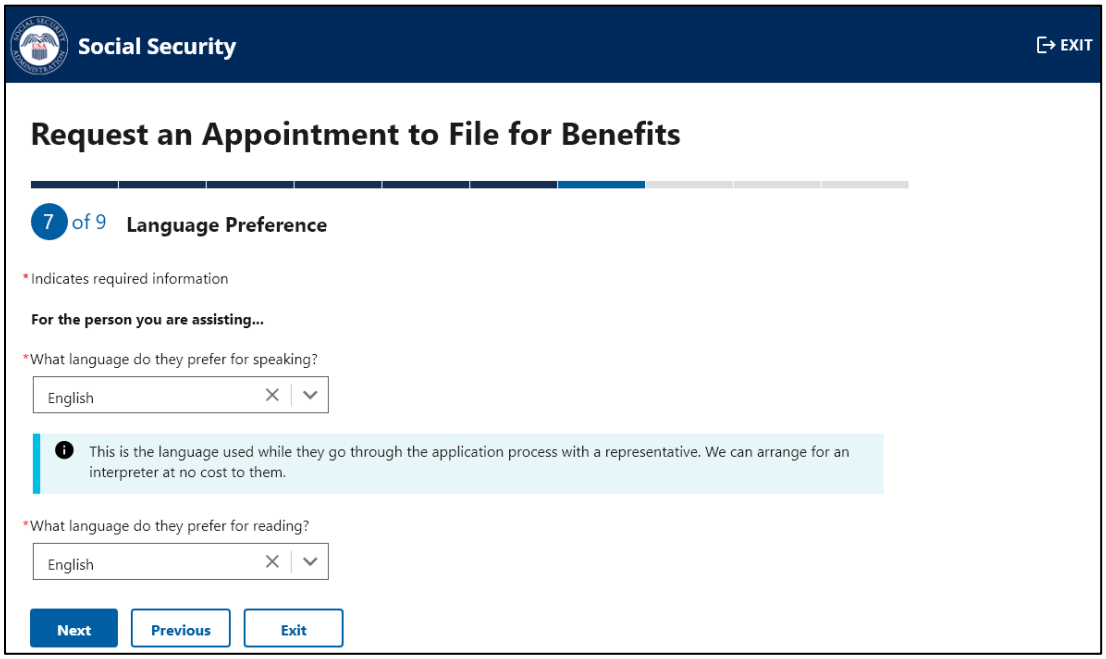


Screens #8 Information about You (Parent/Spouse/Someone Else)



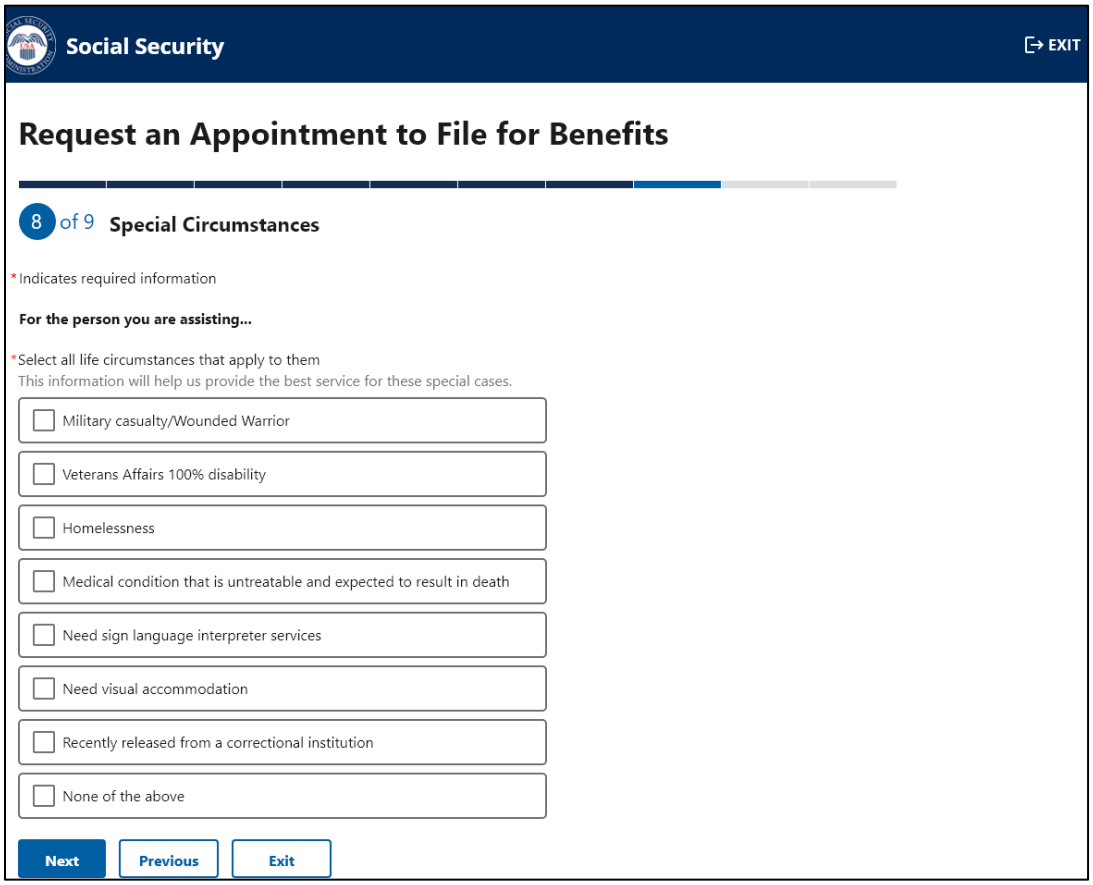
This screen is to collect information about the individual using the tool. We request this information to contact the individual that requested the appointment (if needed) and evaluate if they are the parent of a child or legal representative of an incompetent adult whose care they are responsible for. 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



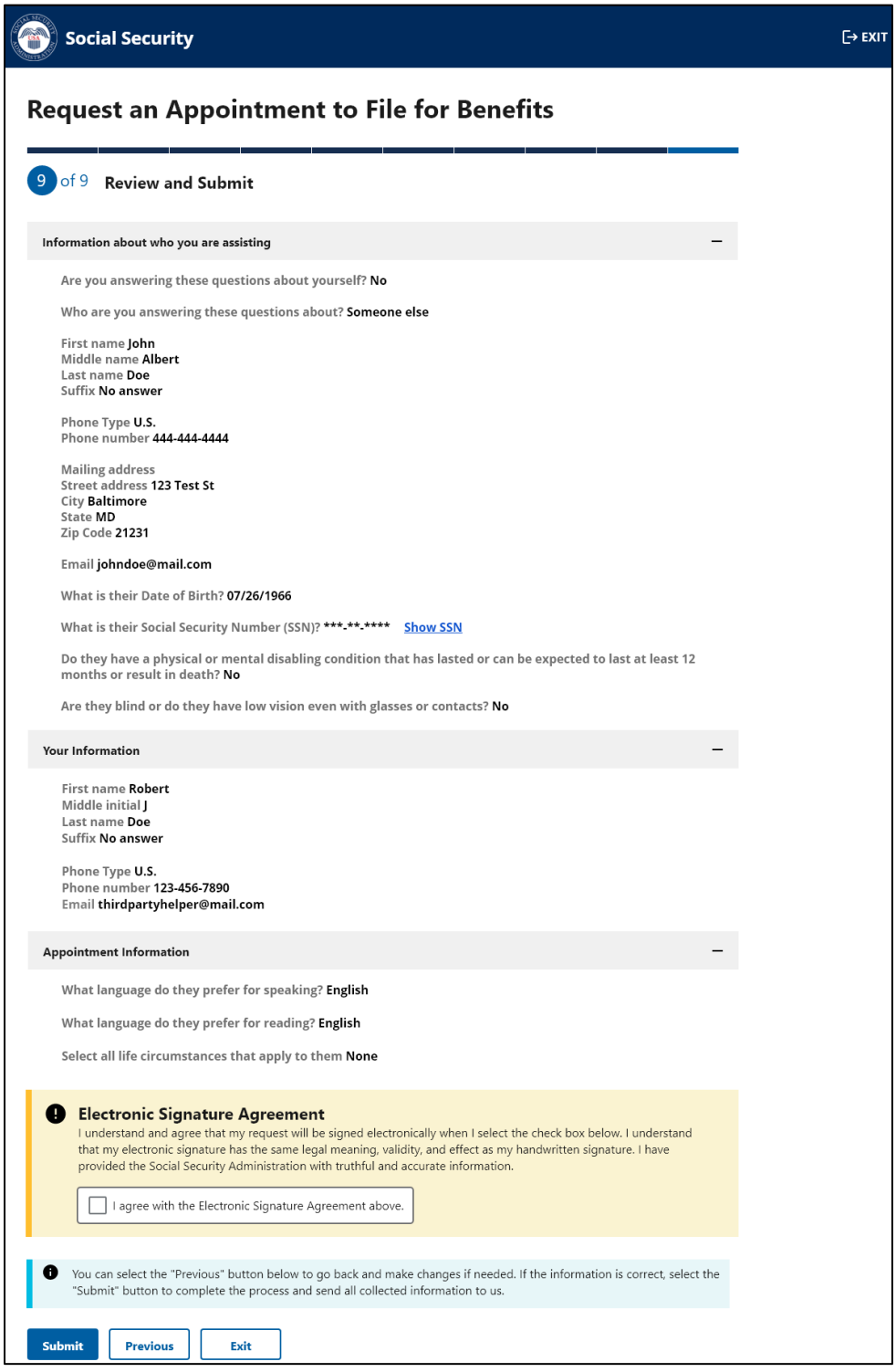
This screen provides a scroll down with 89 languages and an option for "other" for the individual to indicate the language preference for the person they are assisting. We use the information about the speaking language preference to provide interpreters during the appointment interview. We use the information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

Screen #10 Special Circumstances



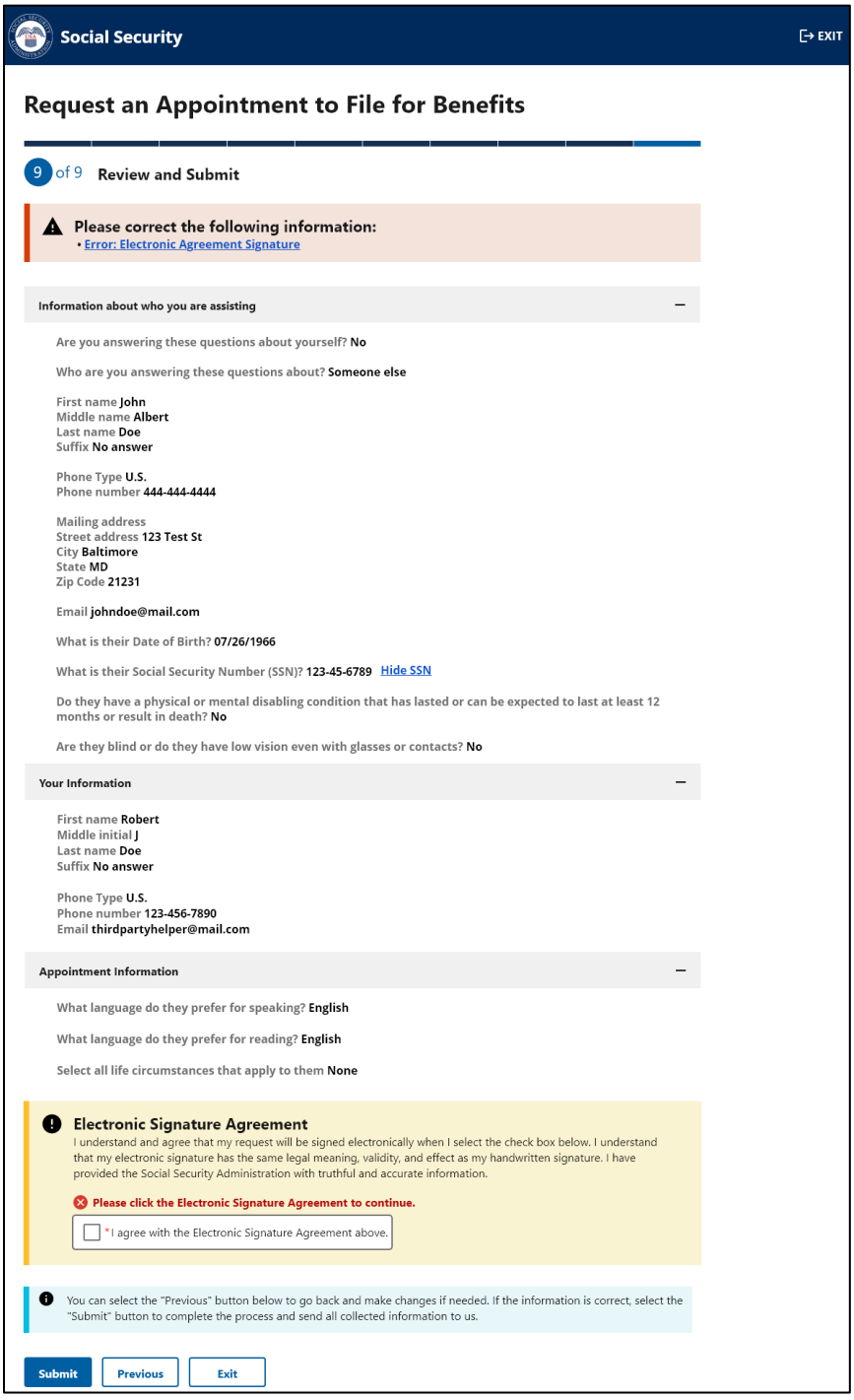
This screen offers the option for individuals to choose from a list of special circumstances that may apply to the person they are assisting. We use this information to provide either expedited appointments or additional assistance as needed during the appointment interview.

Screen #11 Review and Submit



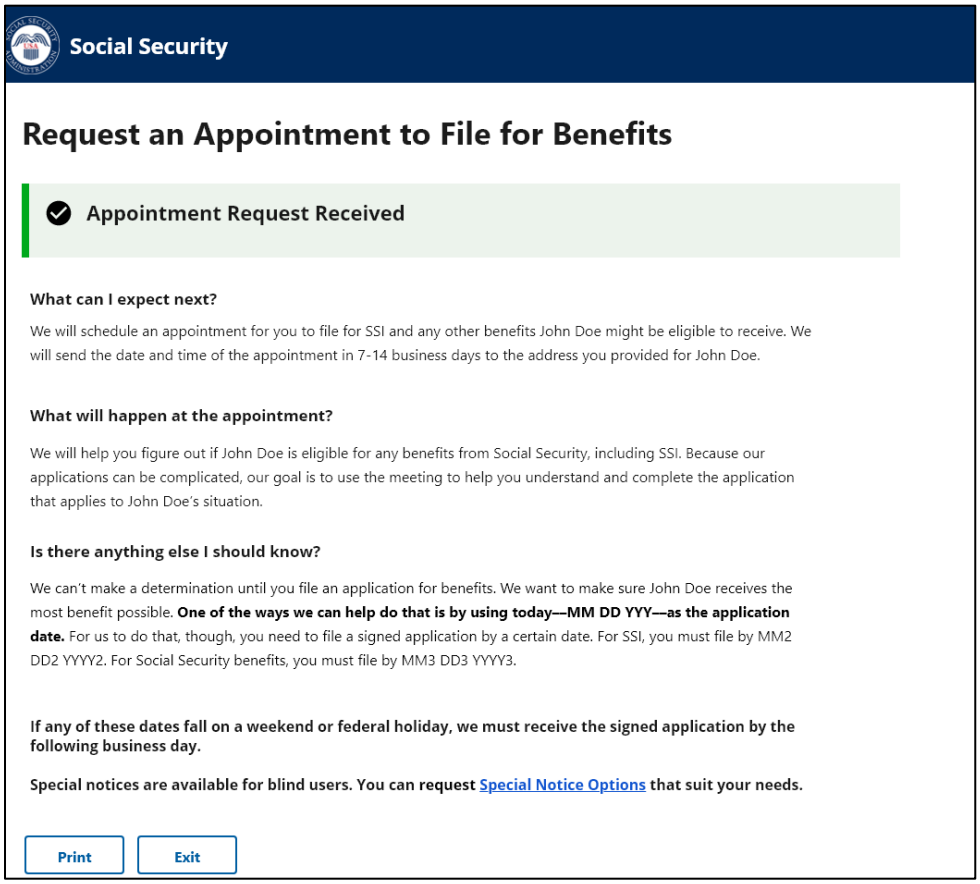
This screen provides the opportunity for the individual to review all the provided information prior to submission. If individuals need to correct any information, they can go back to the previous pages to edit the answers.

Screen #11 (Cont.) Review and Submit



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.

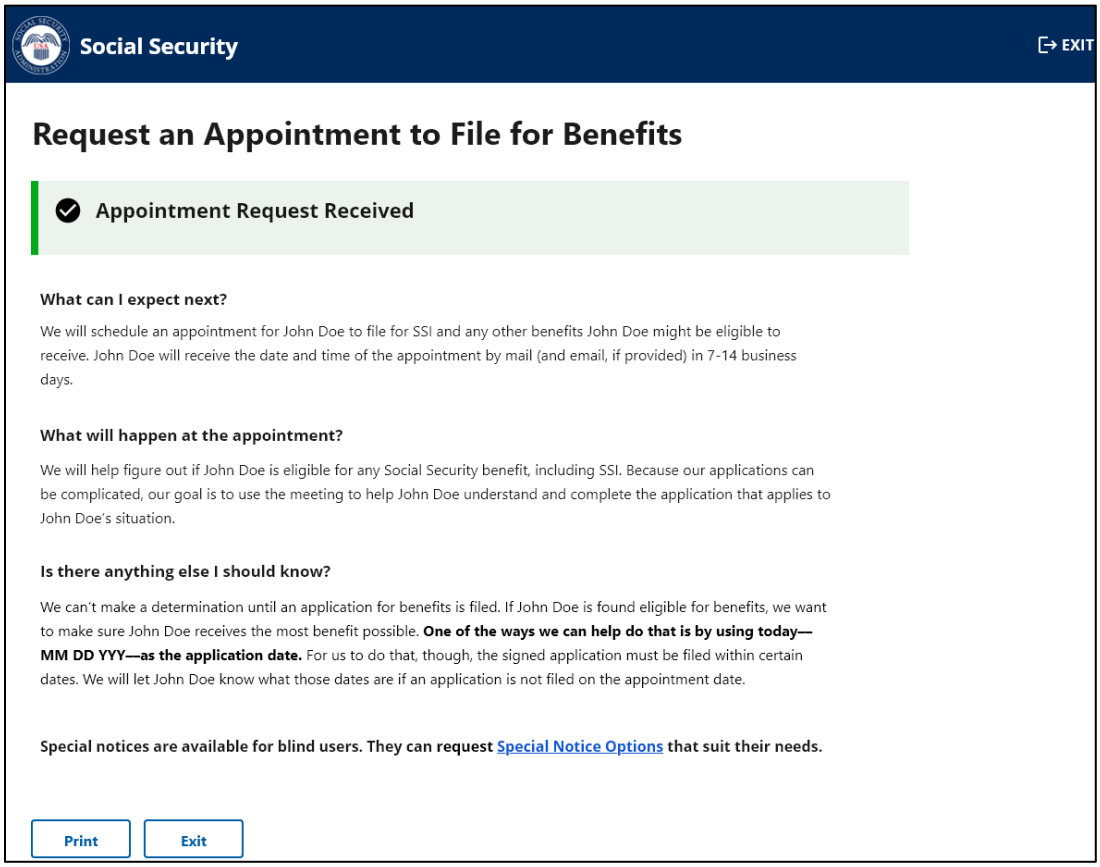
Screen #12 Information submitted and Alert



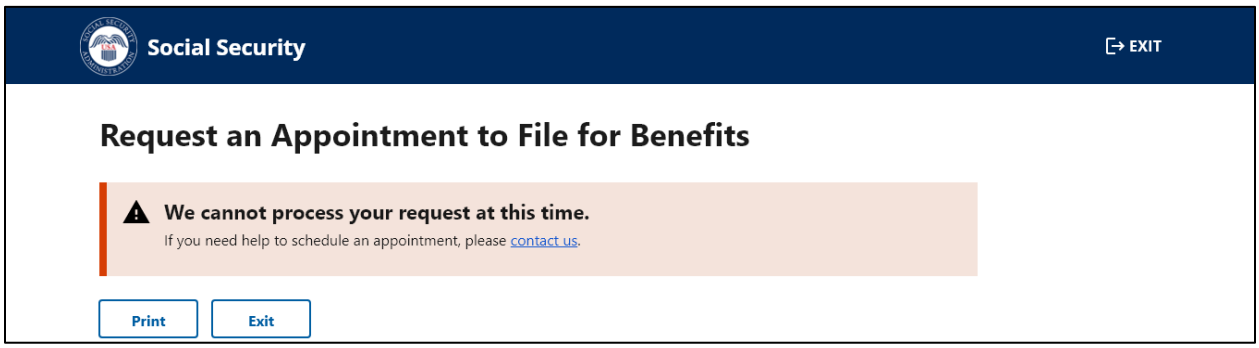
Individuals that selected the option #2 ("A minor child…" or "An incompetent adult whose care…") will receive the message above providing the specific dates that an application must be submitted by to avoid losing benefits.

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

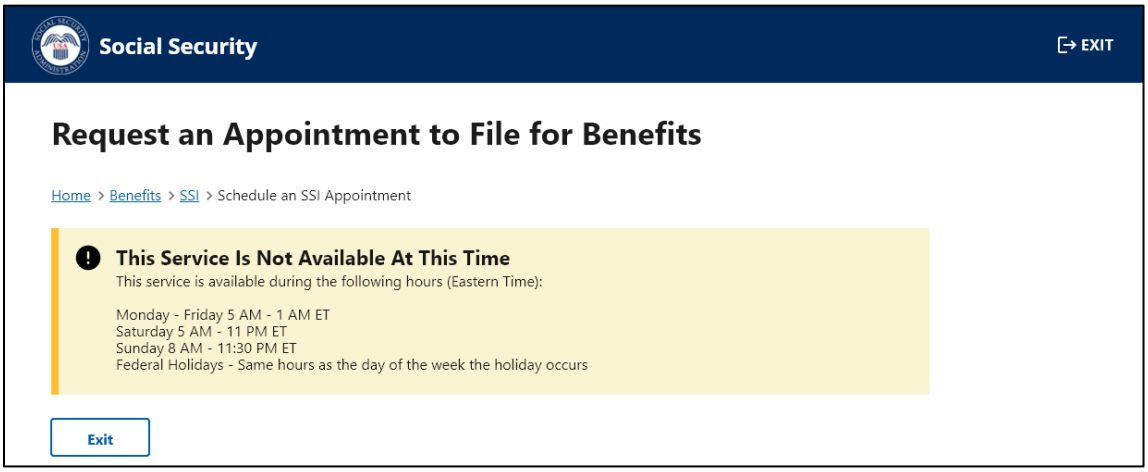
Screens #12 (Cont.) Information submitted and Alert



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.

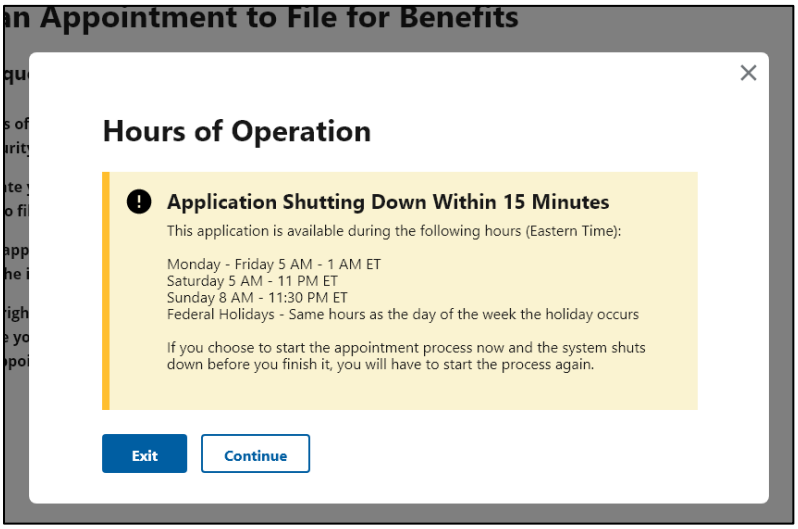


Screens #13 Alert –Online Tool Unavailable or Tool shutting down – 15 minutes



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.