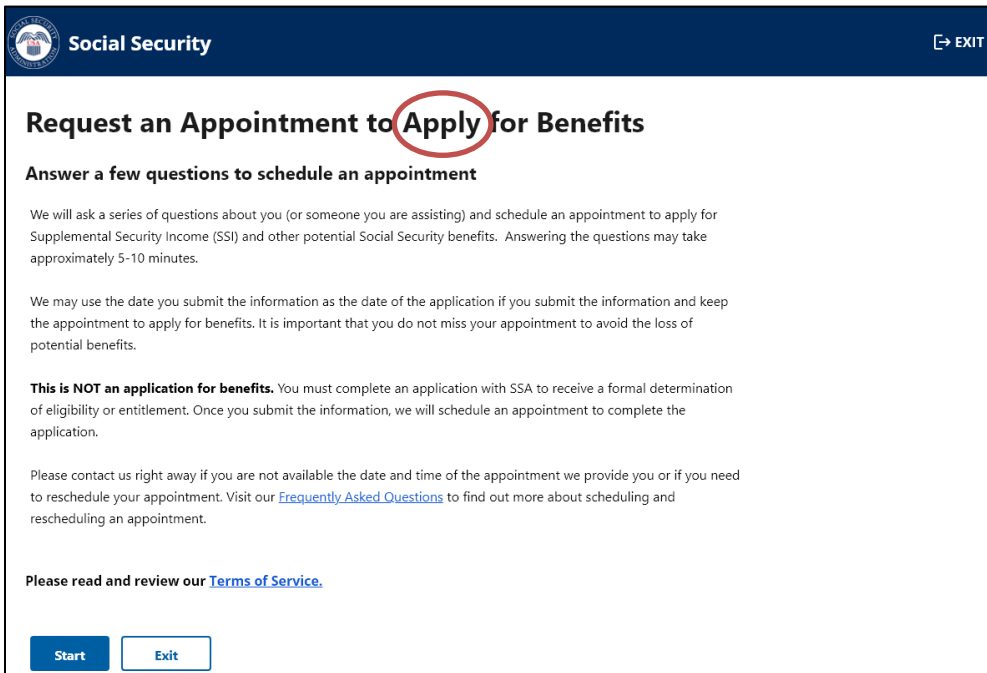


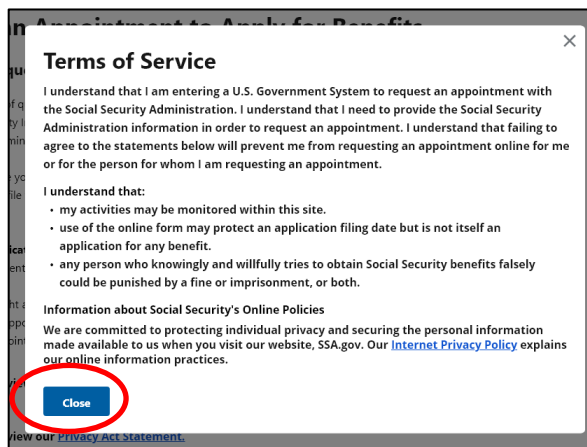
Important - The Third-Party Path follows the identical flow and screen description as the path for first-party users, except for an additional screen (screen # 8 part of this package). The additional screen requests contact information of the individual providing the information for the potential claimant.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



This is the “Welcome Page” where individuals receive information about the process. We revised the headers of this tool to replace “File” with “Apply” as suggested by public comments received during the emergency OMB clearance. We also made the same changes within the pages based on the appropriate context of the statement.

Terms of Service (ToS) link



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. The pop-up message also provides a direct link to SSA’s Internet Privacy

Policy that explains the agency’s online information practices.

We removed the “Back” and “Exit” button options and replaced them with a single “Close” option at the bottom of this screen to simplify the screen as both options led to the same result: a return to the welcome page. Once individuals close the ToS pop-up message, they can select the “Start” button to proceed in the tool.

Screen #2 - Privacy Act (PA) Statement page

Social Security EXIT

Request an Appointment to Apply for Benefits

Privacy Act Statement: Collection and Use of Information

Sections 202, 205, 223, 226, 806, 1611(c), 1616, 1631(d) and (e), 1634(a), and 1837 of the Social Security Act, as amended, allow us to collect this information. Furnishing us this information is voluntary. However, failing to provide all 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 for benefits. We may also share your information and the information you submit on behalf of a potential claimant 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 contacted has, or is expected to have, information relating to the individual’s capability to manage his or her benefits or payments, or his or her eligibility for or entitlement to benefits or eligibility for payments, under the Social Security program when: (a) The individual is unable to provide information being sought; OR (b) the data is necessary to establish the validity of evidence or to verify the accuracy of information presented by the individual; and
- To contractors, cooperative agreement awardees, State agencies, Federal agencies and Federal congressional support agencies for research and statistical activities that are designed to increase knowledge 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 Social Security program or beneficiaries. We will disclose information under this routine use pursuant only to a written agreement with us.

In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person’s eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.

A list of additional routine uses is available in our Privacy Act System of Records Notice (SORN) 60-0089, entitled Claims Folders System, as published in the Federal Register (FR) on October 31, 2019 at 84 FR 58422. Additional information, and a full listing of all of our SORNs, is available on our website at www.ssa.gov/privacy.

Next Exit

Due to 508 compliance issues, we converted the link for the PA Statement into a single page so mobile users can read and review it. The prior link included within the welcome page generated a pop-up message, which produced issues reports.

Screen #3 - Selecting path for users (Who is Scheduling)

The screenshot shows the Social Security website interface. At the top left is the Social Security logo and the text 'Social Security'. At the top right is an 'EXIT' button with a right-pointing arrow. The main heading is 'Request an Appointment to Apply for Benefits'. Below this is a progress indicator showing '1 of 9 Who is scheduling'. A note states '* Indicates required information'. The question is '* Who are you answering these questions about?'. There are five radio button options: 'Yourself', 'A minor child (including your own) for whom you are a caretaker or for whom a court has appointed you the legal representative', 'An incompetent adult whose care you are responsible for or for whom a court has appointed you the legal representative', 'Your spouse', and 'Someone else who is with you as you answer these questions'. The 'An incompetent adult...' option is highlighted with a red border. The 'Someone else who is not with you but has a good reason why they cannot sign their own SSI application at this time' option is selected with a blue dot. At the bottom are 'Next' and 'Exit' buttons.

We ask individuals to indicate who they are answering the questions about. If they select the “Yourself” option or the “Someone else who is with you as you answer these questions” option, individuals will continue on the path for “First-Party” users.

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 Assistor (Third-Party) path. Although individuals making the request for their child or for an incompetent adult whose care they are responsible for are considered “First-Party users” in some contexts because 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 Path” screen package as it follows the same pathing for questions and format.

Based on public comments submitted during the emergency OMB clearance, we revised this screen to separate “An incompetent adult whose care you are responsible for or for whom a court has appointed you the legal representative” into its own standalone radio button option.

Note: 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

Social Security EXIT

Request an Appointment to Apply for Benefits

2 of 9 **Personal Information**

*Indicates required information

For the person you are assisting...

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

i Their phone number and address are being collected so we have a number to contact them about the appointment and an address where we can send an appointment confirmation. Please provide the most reliable phone number and mailing address.

*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

i We will also send their appointment confirmation electronically if an email is provided below.

Email: johndoe@mail.com

Next **Previous** **Exit**

Individuals must provide their personal contact information (name, phone number, and mailing address) 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. Based on a public comment about the contact information, we split the prior information message into two new informational messages to inform users about the importance of the information and why we are collecting a phone number, mailing address, and optional email address.

Individuals not entering the required information or selecting “Exit” receive the following alerts:

2 of 8 **Personal Information**

▲ Please correct the following information:

- Error: First name
- Error: Last name
- Error: Phone number
- Error: Mailing address

*Indicates required information

*First name: Please enter a first name. Middle name: Last name: Please enter a last name. Suffix: Select one...

i 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. Please provide the most reliable phone number and mailing address.

*Phone type
 U.S.
 International

*Phone number
Please enter 10 digits (Example: 999-999-9999)
12-345-6789

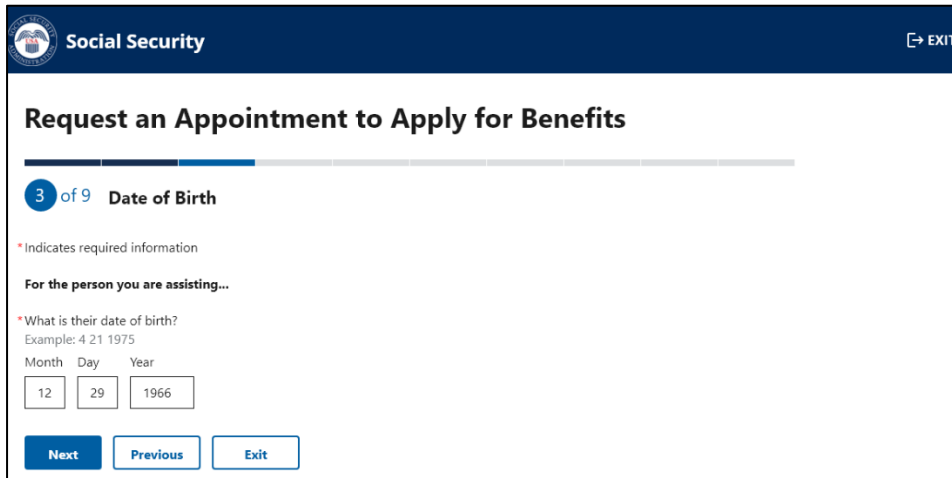
*Mailing address
The entered ZIP Code must match the street address, city and state entered.

Are you sure you want to exit?

You have entered information that will be lost if not submitted.

Exit without submitting **Go back**

Screen #5 - Date of Birth and #6 Social Security Number



Social Security [EXIT]

Request an Appointment to Apply for Benefits

3 of 9 **Date of Birth**

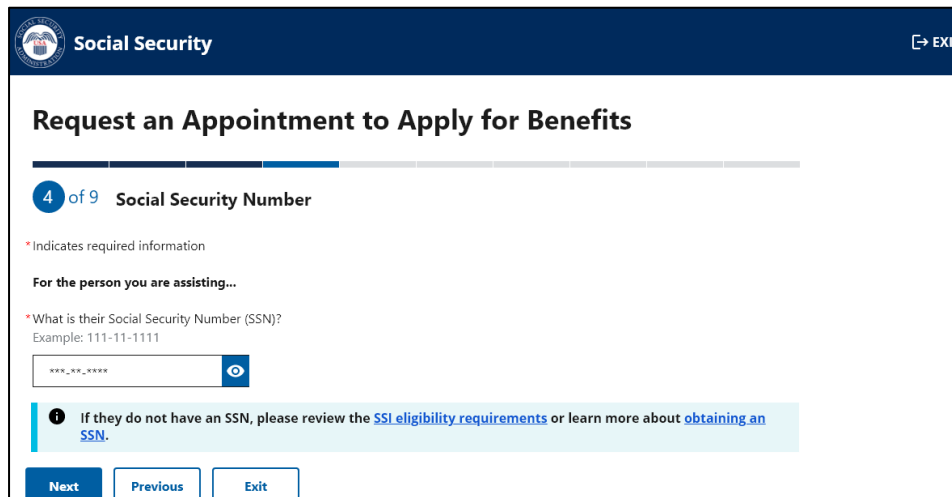
*Indicates required information

For the person you are assisting...

*What is their date of birth?
Example: 4 21 1975

Month	Day	Year
12	29	1966

Next **Previous** **Exit**



Social Security [EXIT]

Request an Appointment to Apply 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

xxx-xx-xxxx [Eye icon]

i If they do not have an SSN, please review the [SSI eligibility requirements](#) or learn more about [obtaining an SSN](#).

Next **Previous** **Exit**

Upon entering the personal contact information for the potential claimant who they are assisting and selecting “Next,” the individual is asked to provide the date of birth and Social Security number of the potential claimant. 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 Apply 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?

Yes
 No

* What date did the physical or mental disabling condition begin?

i 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

i 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**

We request individuals to indicate if the person they are assisting has a disability or if they are blind. If they select “Yes” to the first question, the system presents a 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 requirements. 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.

i Please review your answers before clicking next. To be eligible for SSI benefits, you must be disabled, blind, or over the age of 65.

i There are several ways to receive information from us if you are blind or have a visual impairment. You can request special notice options at the conclusion of this request for an appointment.

Next **Previous** **Exit**

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

The screenshot shows a web form titled "Request an Appointment to Apply for Benefits" under the Social Security logo. It is step 6 of 9, labeled "Your Information". A progress bar at the top shows 6 steps completed. The form includes several fields: "First name" (Robert), "Middle initial" (J), "Last name" (Doe), and "Suffix" (a dropdown menu). Below these are radio buttons for "Phone type" (U.S. selected, International unselected) and a "Phone number" field (123-456-7890). An "Email" field contains "thirdpartyhelper@mail.com". A light blue information bar states: "We will use your email address to send you an appointment request receipt." At the bottom are three buttons: "Next" (highlighted), "Previous", and "Exit".

This screen is to collect information about the third-party assistor using the tool. We request this information to contact the individual that requested the appointment (if needed), and evaluate if they are the parent or caretaker of a child or legal representative or caretaker of an incompetent adult. Their response helps us to determine to whom the mailed appointment confirmation notices should be addressed and who should attend the appointment (e.g., parent, legal guardian, etc.).

Screen #9 - Language Preference

The screenshot shows the Social Security website interface for requesting an appointment. The header includes the Social Security logo and the text 'Social Security' on the left, and a '[EXIT]' button on the right. The main heading is 'Request an Appointment to Apply for Benefits'. Below this is a progress bar with 9 steps, where step 7 is highlighted. The step is labeled '7 of 9 Language Preference'. A note indicates that an asterisk (*) denotes required information. The section is titled 'For the person you are assisting...'. The first question is '*What language do they prefer for speaking?' with a dropdown menu currently set to 'English'. Below this is an informational message in a light blue box with a red border: 'This is the language they will use to communicate with us at their appointment to apply for benefits. We can arrange for an interpreter at no cost to them.' The second question is '*What language do they prefer for reading?' with a dropdown menu also set to 'English'. At the bottom, there are three buttons: 'Next' (highlighted in dark blue), 'Previous', and 'Exit'.

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.

For consistency purposes throughout the tool, we revised the language in the informational message to explain to the user that the language selected helps us to communicate with them in the appointment to apply for benefits

Screen #10 - Special Circumstances

Social Security EXIT

Request an Appointment to Apply for Benefits

8 of 9 Special Circumstances

* Indicates required information

For the person you are assisting...

* 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 (Notices in braille, data compact disc (CD), audio compact disc (CD), large print, follow-up telephone call)**
- 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.

Based on a public comment provided during the OMB emergency clearance, we added language to the “Need visual accommodation” checkbox to include a list of available options to the user.

Screen #11 - Review and Submit

Social Security EXIT

Request an Appointment to Apply for Benefits

9 of 9 **Review and Submit**

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 **john.doe@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**

1 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.

1 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**

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. Individuals receive the following alert if the electronic signature agreement box is not checked.

Select all life circumstances that apply to them **None**

1 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.

Please click the Electronic Signature Agreement to continue.

I agree with the Electronic Signature Agreement above.

1 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**

Screen #12 - Appointment Request Received

Social Security EXIT

Request an Appointment to Apply for Benefits

✔ Appointment Request Received

What can I expect next?
We will schedule an appointment for you to apply for SSI and any other benefits John Doe might be eligible to receive. We will send the date and time of the appointment in 7-14 business days to the address you provided for John Doe.

What will happen at the appointment?
We will help you figure out if John Doe is eligible for any benefits from Social Security, including SSI. Because our applications can be complicated, our goal is to use the meeting to help you understand and complete the application that applies to John Doe's situation.

Is there anything else I should know?
We can't make a determination until you submit an application for benefits. We want to make sure John Doe receives the most benefits possible. **One of the ways we can help do that is by using today—MM DD YYYY—as the application date.** For us to do that, though, you need to submit a signed application by a certain date. For SSI, you must apply by MM2 DD2 YYYY2. For other Social Security benefits, you must apply by MM3 DD3 YYYY3.
If any of these dates fall on a weekend or federal holiday, we must receive the signed application by the following business day.

How can I prepare for my appointment?
To help prepare for John Doe's appointment, you may use our [Child Disability Starter Kit](#) to get answers to commonly asked questions about applying for SSI. You may also complete the [Child Disability Report](#) online.

Special notice options are available for people who are blind or visually impaired to receive notices and other communications from Social Security in formats other than standard print. You can request [Special Notice Options](#) that meet your needs.

Print Exit

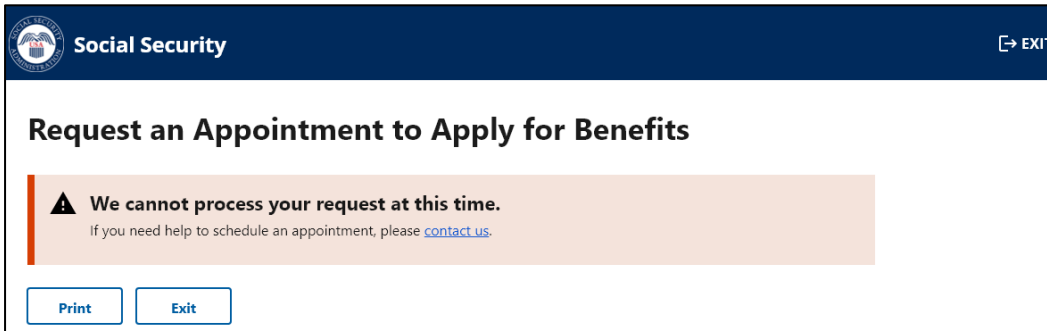
After the individual submits the requested information, and the information passes certain internal checks, the system displays this screen to inform the individual that SSA has received the information. This screen also provides the specific date the individual submitted the appointment request and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

For consistency within the tool and other related publications, we updated the language on this screen as follows:

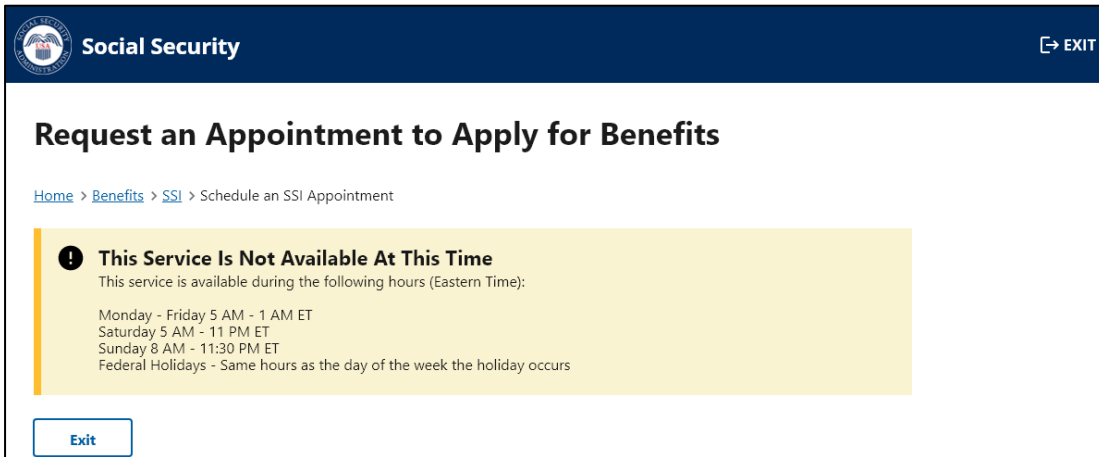
- Replaced all occurrences of the word “file” with “apply” or “submit” based on the appropriate context of the statement.
- Added “other Social Security benefits” where applicable.
- Revised the last sentence on the screen to read “Special notice options are available for people who are blind or visually impaired to receive notices and other communications from Social Security in formats other than standard print. You can request Special Notice Options that meet your needs.”
- Added the new section: “**How can I prepare for my appointment?**” to provide additional information about the medical portion of the process. The information on this section is dynamic and is displayed based on the information provided (e.g., date of birth, disabled, etc.).

Screen #13 - Alerts

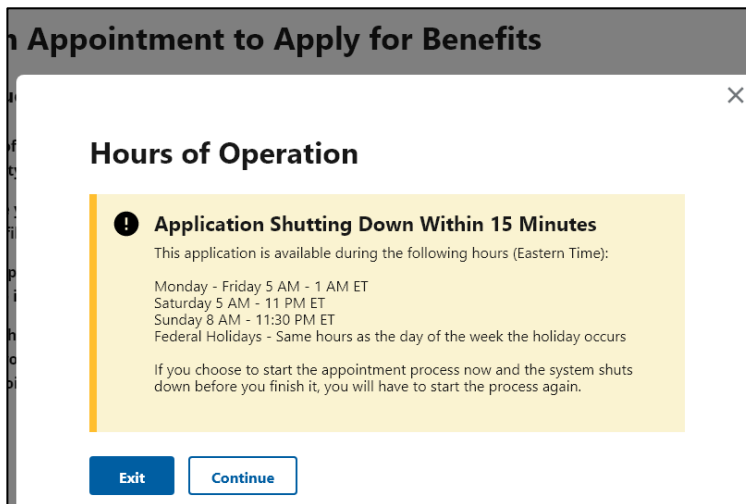
If the information provided does not pass the internal checks, the system provides the following alert informing the individual that we cannot process the request and they can call us.



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 below.

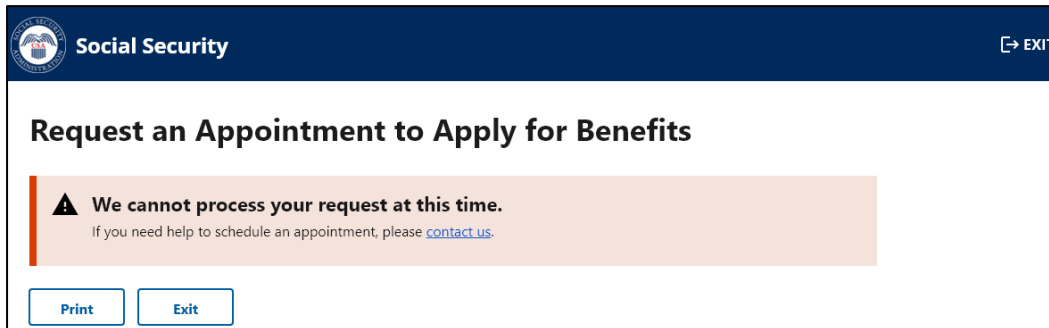


Individuals attempting to use this online tool within 15 minutes of the “downtime” will receive the screen below to alert them about the system interruption.



Screen #13 – Alerts cont.

To improve the functionality of the tool, avoid duplicative efforts, and expedite the process for individuals requesting appointments, we updated the system to identify individuals already receiving benefits. Individuals already receiving benefits will receive an alert to contact us.



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 submit a signed application by a certain date. For Supplemental Security Income (SSI), you must apply by MM2 DD2 YYYY2. For other Social Security benefits, you must apply 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, third-party assistors will receive an email confirmation with the information shown above.

For consistency, we updated the language from “file” to “apply” or “submit” based on the appropriate context of the statement.

The system will also email (if an email address was provided) 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 submit a signed application at your appointment or by the dates we will provide if you do not apply 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.