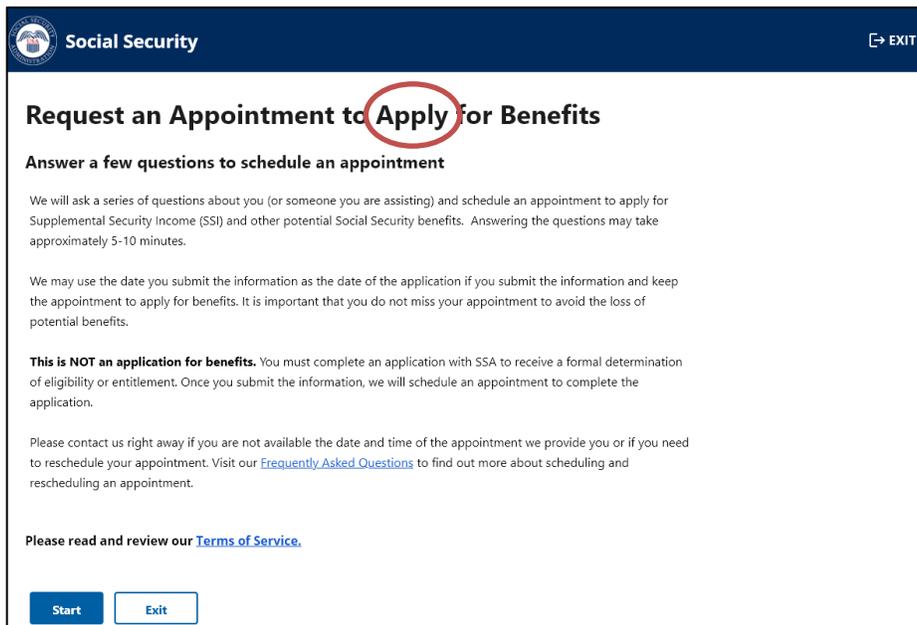
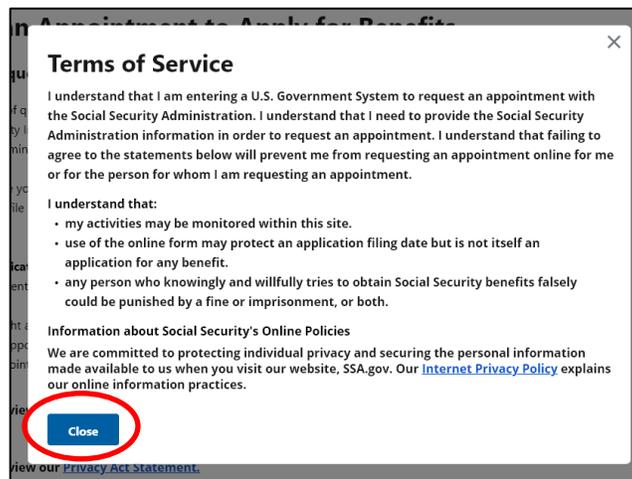


Screen #1 - Welcome Page Screen



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 generated issues reports.

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

Social Security EXIT

Request an Appointment to Apply for Benefits

1 of 8 **Who is scheduling**

* Indicates required information

* Who are you answering these questions about?

- Yourself
- A minor child (including your own) whose care you are responsible for 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
- Someone else who is with you as you answer these questions
- Someone else who is not with you but has a good reason why they cannot sign their own SSI application at this time

Next Exit

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 8 **Personal Information**

*Indicates required information

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

1 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
444-444-4444

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

2 We will also send your 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) 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.

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

1 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

This screenshot shows the 'Date of Birth' step (3 of 8) of the 'Request an Appointment to Apply for Benefits' process. The header includes the Social Security logo and 'EXIT' link. A progress bar indicates the current step. The main heading is '3 of 8 Date of Birth'. Below this, there are instructions: '* Indicates required information' and '* What is your date of birth? Example: 4 21 1975'. A form with three input fields is shown: 'Month' (7), 'Day' (24), and 'Year' (1966). At the bottom, there are three buttons: 'Next', 'Previous', and 'Exit'.

This screenshot shows the 'Social Security Number' step (4 of 8) of the 'Request an Appointment to Apply for Benefits' process. The header includes the Social Security logo and 'EXIT' link. A progress bar indicates the current step. The main heading is '4 of 8 Social Security Number'. Below this, there are instructions: '* Indicates required information' and '* What is your Social Security Number (SSN)? Example: 111-11-1111'. A text input field is shown with a placeholder '###-##-####' and a magnifying glass icon. Below the input field, there is a light blue informational box with a question mark icon: 'If you do not have an SSN, please review the [SSI eligibility requirements](#) or learn more about [obtaining an SSN](#).' At the bottom, there are three buttons: 'Next', 'Previous', and 'Exit'.

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.

This screenshot shows an error message on the 'Request an Appointment to Apply for Benefits' page. The header includes the Social Security logo and 'EXIT' link. The main heading is 'Request an Appointment to Apply for Benefits'. Below this, there is a light orange error box with a warning triangle icon: 'We cannot process your request at this time. If you need help to schedule an appointment, please [contact us](#).' At the bottom, there are two buttons: 'Print' and 'Exit'.

Screen #7 - Disability Information

The screenshot shows the Social Security website interface. At the top left is the Social Security logo. At the top right is an 'EXIT' button. The main heading is 'Request an Appointment to Apply for Benefits'. Below this is a progress bar with 8 steps, and the current step is '5 of 8 Disability'. A legend indicates that an asterisk (*) denotes required information. The first question is: 'Do you have a physical or mental disabling condition that has lasted or can be expected to last at least 12 months or result in death?' with radio buttons for 'Yes' and 'No'. The second question is: 'Are you blind or do you have low vision even with glasses or contacts?' with radio buttons for 'Yes' and 'No'. A light blue information box contains the text: '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.' At the bottom are three buttons: 'Next' (highlighted in dark blue), 'Previous', and 'Exit'.

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 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.

The screenshot shows an alert message box with a yellow background. The text reads: 'Please review your answers before clicking next. To be eligible for SSI benefits, you must be disabled, blind, or over the age of 65.' Below this is a light blue information box with the text: '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.' At the bottom are three buttons: 'Next' (highlighted in dark blue), 'Previous', and 'Exit'.

Screen #8 - 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 an 'EXIT' button on the right. The main heading is 'Request an Appointment to Apply for Benefits'. Below this is a progress bar with 8 steps, and the current step is '6 of 8 Language Preference'. A red asterisk indicates required information. The first question is '*What language do you prefer for speaking?' with a dropdown menu showing 'English'. Below this is a light blue informational message box with a red border: 'This is the language you will use to communicate with us at your appointment to apply for benefits. We can arrange for an interpreter at no cost to you.' The second question is '*What language do you prefer for reading?' with a dropdown menu also showing 'English'. At the bottom are three buttons: 'Next' (solid blue), 'Previous' (outline blue), and 'Exit' (outline blue).

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.

Final 5-23-22 1st Party screens
Screen #9 - Special Circumstances

Social Security EXIT

Request an Appointment to Apply 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 (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 #10 - Review and Submit

 Social Security EXIT

Request an Appointment to Apply for Benefits

8 of 8 Review and Submit

Your Information

Are you answering these questions about yourself? **Yes**

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 your Date of Birth? **07/26/1966**

What is your Social Security Number (SSN)? *****-**-****** [Show SSN](#)

Do you 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**

Are you blind or do you have low vision even with glasses or contacts? **No**

What date did the physical or mental disabling condition begin? **04/21/1975**

Appointment Information

What language do you prefer for speaking? **English**

What language do you prefer for reading? **English**

Select all life circumstances that apply to you **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 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 you **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.

✘ 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](#)

Screen #11 - Appointment Request Received

Social Security EXIT

Request an Appointment to Apply for Benefits

✔ Appointment Request Received

Message for John Doe:

What can I expect next?
We will schedule an appointment for you to apply for SSI and any other benefits you might be eligible to receive. You will receive the date and time of the appointment by mail (and email, if provided) in 7-14 business days.

What will happen at the appointment?
We will help you figure out if you are 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 your 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 you receive the most benefits possible. **One of the ways we can help do that is by using today—MM DD YY—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 a 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.).

How can I prepare for my appointment?

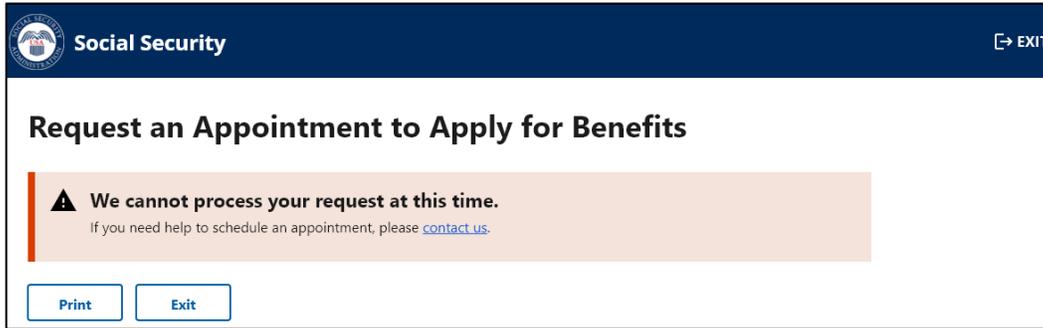
To help prepare for your appointment, you may use our [Adult Disability Starter Kit](#) to get answers to commonly asked questions about applying for SSI.

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.

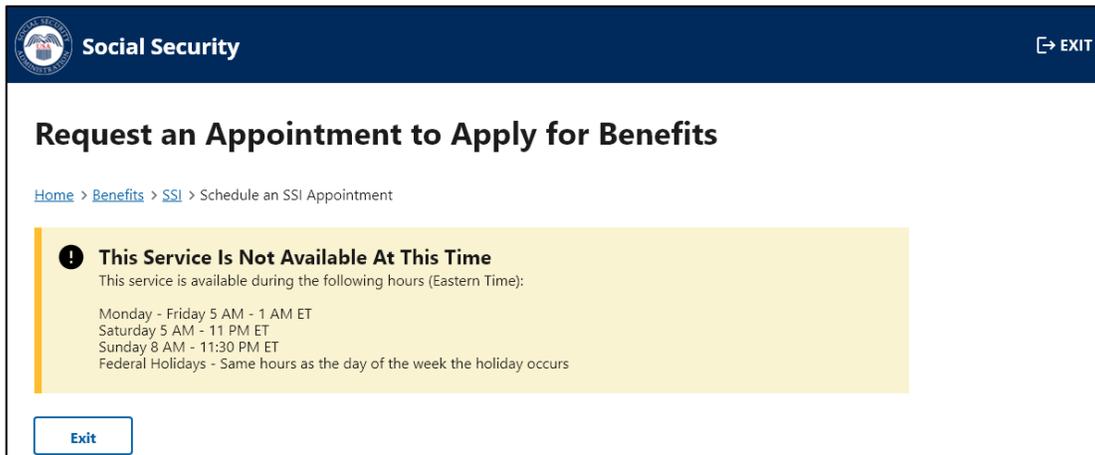
Print Exit

Screen #12 - Alerts

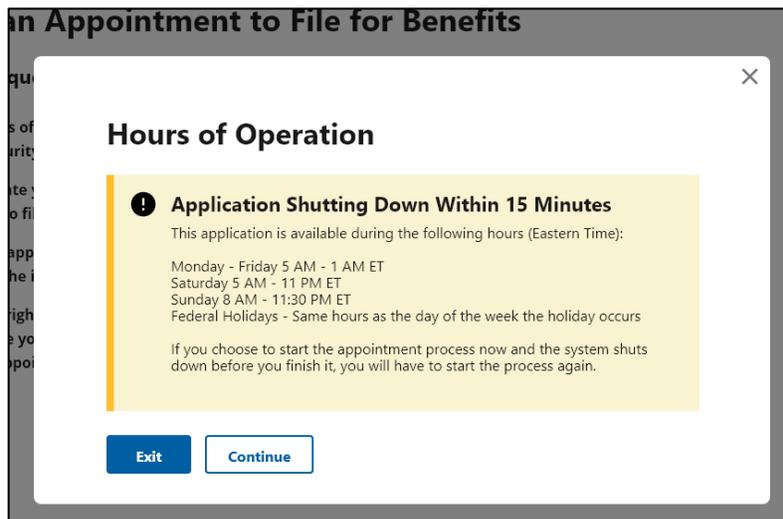
If the information provided does not pass the internal checks, the system provides the following alert informing the individual that we cannot process the request and they can call us.



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.

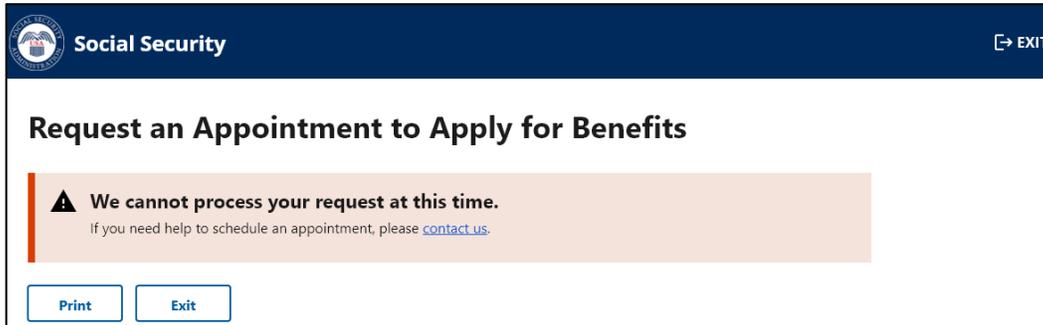


Individuals attempting to use this online tool within 15 minutes of the “downtime” will receive the screen below to alert them about the system interruption.



Screen #12 – 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 #13 - 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 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, individuals 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.