

OMB Document Updated

eAccess September 2022 Release

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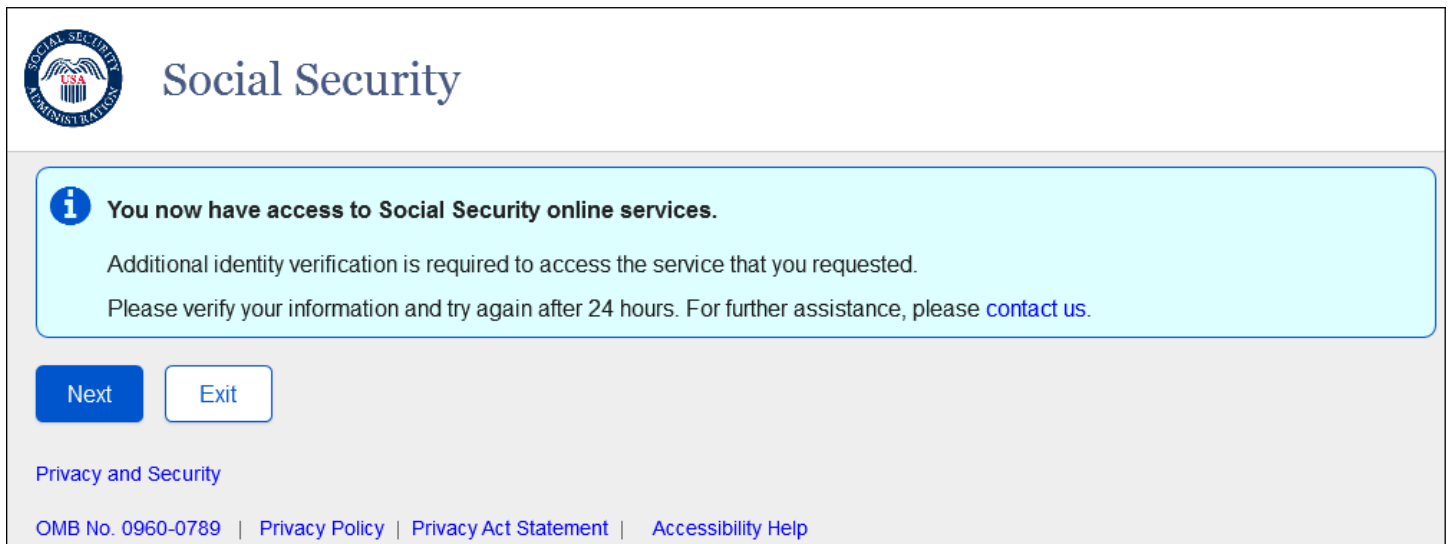
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1. eAccess

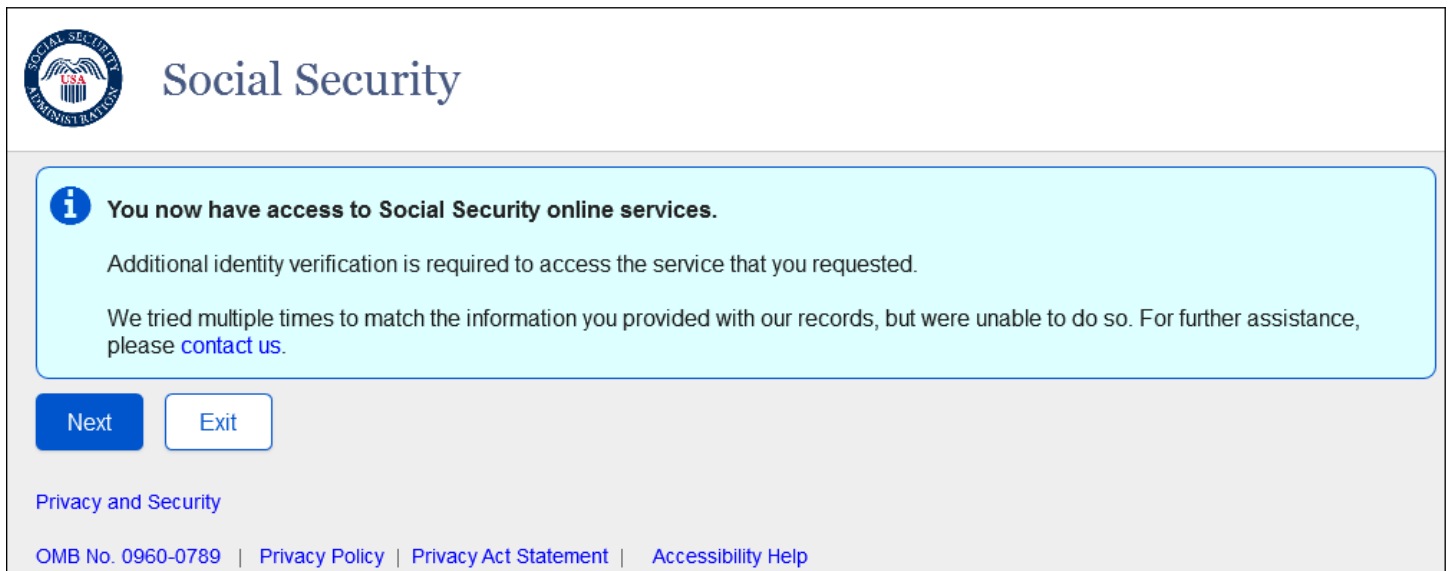
1.1 Confirmation *_Temporary Lock*



The screenshot shows the Social Security Administration's confirmation page for a temporary lock. At the top left is the Social Security Administration logo, and to its right is the text "Social Security". Below this is a light blue information box with a white border. Inside the box, on the left, is a blue circle with a white lowercase 'i'. To the right of this icon is the text: "You now have access to Social Security online services." Below this is a paragraph: "Additional identity verification is required to access the service that you requested. Please verify your information and try again after 24 hours. For further assistance, please [contact us](#)." Below the information box are two buttons: a blue "Next" button and a white "Exit" button with a blue border. Below the buttons is the text "Privacy and Security" in blue. At the bottom of the page are four links: "OMB No. 0960-0789", "Privacy Policy", "Privacy Act Statement", and "Accessibility Help", all in blue.

Confirmation page displayed for users with a temporary lock on the account who request advanced services about access to standard services and subsequent steps to upgrade to Advanced Services.

1.2 Confirmation *_Permanent Lock*



The screenshot shows the Social Security Administration's confirmation page for a permanent lock. At the top left is the Social Security Administration logo, and to its right is the text "Social Security". Below this is a light blue information box with a white border. Inside the box, on the left, is a blue circle with a white lowercase 'i'. To the right of this icon is the text: "You now have access to Social Security online services." Below this is a paragraph: "Additional identity verification is required to access the service that you requested. We tried multiple times to match the information you provided with our records, but were unable to do so. For further assistance, please [contact us](#)." Below the information box are two buttons: a blue "Next" button and a white "Exit" button with a blue border. Below the buttons is the text "Privacy and Security" in blue. At the bottom of the page are four links: "OMB No. 0960-0789", "Privacy Policy", "Privacy Act Statement", and "Accessibility Help", all in blue.

Confirmation page displayed for users with a permanent lock on the account who request advanced services about access to standard services and subsequent steps to upgrade to Advanced Services.

1.3 SUAS Step-Up At Service



Next Step

You need to verify your identity to access the requested service.

Continue

Exit

[Privacy and Security](#)

[OMB No. 0960-0789](#) | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

The screen displayed to the user who want to be offered the opportunity to step up to an advanced credential when attempting to access a service that requires advanced credentials.

1.4 VYIC_Verify Your Identity Choices_ "Step Up At Service" Scenario



Social Security

Please choose how to verify your ID

Please choose one of the following:

- Take Photos of your ID with a Smart phone**
 - Like depositing a check online.
 - No uploading or emailing is needed.
 - Photos are captured automatically.
- Input your ID & Financial Information**

You'll need one of the following:

 - Credit card (last 8 digits) - Visa, Mastercard, or Discover;
 - Social Security benefits amount;
 - W-2 tax form; or
 - 1040 Schedule SE tax form.

Don't have a valid ID? [Answer credit history questions instead.](#)

▼ [How does this help Social Security verify my identity?](#)

Next


Exit

[Privacy and Security](#)

OMB No. 0960-0789 | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

The "Skip" Button is removed for this use case.

1.5 Sign In Page (RIL)

 Social Security

Sign In

Accounts created **before** September 18, 2021 should enter a Username and Password.

Username

[Forgot Username?](#)

Password

[Forgot Password?](#)

[Sign In](#) [▶ Feedback](#)

[Sign in with !\[\]\(011567c4328a8da40aff7939c5abada1_img.jpg\) LOGIN.GOV](#)

[Sign in with !\[\]\(dc1e39313cf1a25c333452c7c64a2f33_img.jpg\) ID.me](#)

[Learn more](#)

[Create an account](#)

Are you now, or have you ever been a victim of domestic violence? Identity theft? Do you have other concerns?

You can [contact us](#) to block electronic access to your information at any time, for any reason.

[Privacy and Security](#)

OMB No. 0960-0789 | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

"Use an activation code" link has been removed.

1.6 (HVUC)_Updated



Social Security

Our records show we sent you an activation code

- This code is different from the security code you just verified.
- Activation codes may be received by text, voice, postal mail, or at an office.

Do you want to use your activation code now?

This code may begin with an A (Example: A-12345678) or a number (Example: 12345678).

Yes

No

Need a new Activation Code? [Request here](#)


Next

[Privacy and Security](#)

[OMB No. 0960-0789](#) | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

Addition of the supporting text and link "Need a new Activation Code? Request here" on the page to provide user the ability to request new upgrade code for Standard to Advanced user.

1.7 Sign In

 Social Security

Sign In

Accounts created **before** September 18, 2021 should enter a Username and Password.

Username

[Forgot Username?](#)

Password

[Forgot Password?](#)

[Sign In](#) [▶ Feedback](#)

[Sign in with !\[\]\(76797197189e9ae8ef1a654352b4eac4_img.jpg\) LOGIN.GOV](#)

[Sign in with !\[\]\(73db7566b2c84a73d9014101bf098e56_img.jpg\) ID.me](#)

[Learn more](#)

[Create an account](#)

Are you now, or have you ever been a victim of domestic violence? Identity theft? Do you have other concerns?

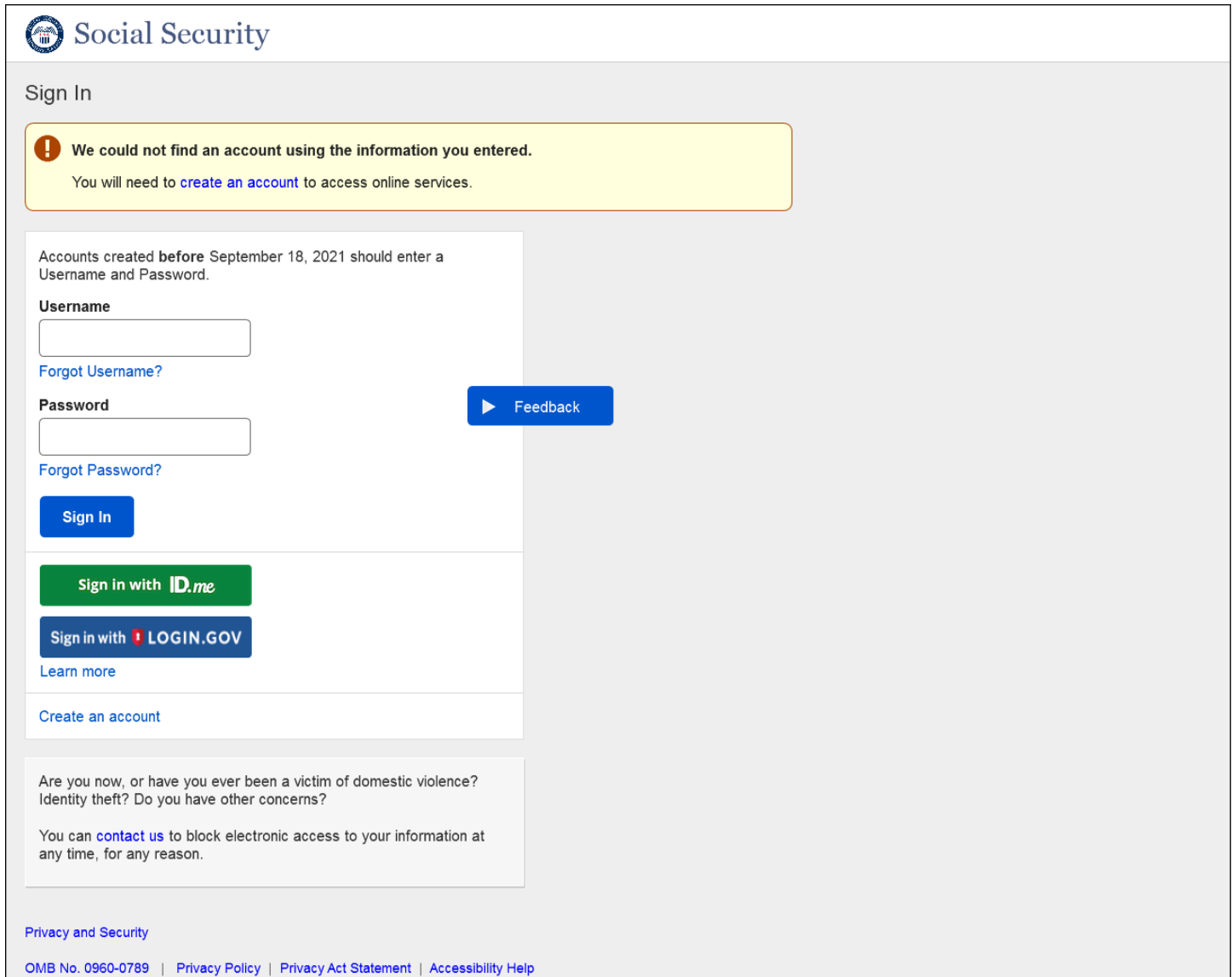
You can [contact us](#) to block electronic access to your information at any time, for any reason.

[Privacy and Security](#)

OMB No. 0960-0789 | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

“Learn more” link has been moved closer to the “Sign in with Login.gov” and “Sign in with ID.me” buttons.

1.8 Sign In Error _No Acc Found



The screenshot shows the Social Security Administration's sign-in page. At the top left is the Social Security logo. Below it, the text "Sign In" is displayed. A prominent yellow error box contains the message: "We could not find an account using the information you entered. You will need to [create an account](#) to access online services." Below the error box, a white box contains instructions: "Accounts created before September 18, 2021 should enter a Username and Password." This is followed by input fields for "Username" and "Password", each with a "Forgot" link. A blue "Sign In" button is positioned below the password field. To the right of the password field is a blue "Feedback" button. Below the sign-in section are two buttons: "Sign in with ID.me" (green) and "Sign in with LOGIN.GOV" (blue), with a "Learn more" link below them. A "Create an account" link is also present. At the bottom of the white box, there is a section with text about domestic violence and identity theft, including a "contact us" link. The footer contains links for "Privacy and Security", "OMB No. 0960-0789", "Privacy Policy", "Privacy Act Statement", and "Accessibility Help".


"Learn more" link has been moved closer to the "Sign in with Login.gov" and "Sign in with ID.me" buttons.

1.9 Sign In Error _Login.gov Username”

The screenshot shows the Social Security Administration's sign-in page. At the top left is the Social Security logo. Below it, the text "Sign In" is displayed. A prominent yellow warning box contains the message: "We do not accept email addresses as a username. You may have accessed online services using your email address with one of our partners. Please select the appropriate partner button to sign in." Below the warning, a white box contains instructions: "Accounts created before September 18, 2021 should enter a Username and Password." This is followed by input fields for "Username" and "Password", each with a "Forgot" link. A blue "Sign In" button is positioned below the password field. To the right of the input fields is a blue "Feedback" button. Below the sign-in section are two buttons: "Sign in with ID.me" (green) and "Sign in with LOGIN.GOV" (blue), with a "Learn more" link below them. At the bottom of the white box is a "Create an account" link. A separate white box at the bottom of the page contains a question about domestic violence and a "contact us" link. The footer includes a "Privacy and Security" link and a list of links: "OMB No. 0960-0789 | Privacy Policy | Privacy Act Statement | Accessibility Help".

“Learn more” link has been moved closer to the “Sign in with Login.gov” and “Sign in with ID.me” buttons.

1.10 Sign In Error _Account already exists

 Social Security

Sign In

! An account has already been created with the information you entered.
Please enter your username (not an email address) and password in the fields below to sign in to your account.

Accounts created **before** September 18, 2021 should enter a Username and Password.

Username

[Forgot Username?](#)

Password

[Forgot Password?](#)

[Feedback](#)

[Sign In](#)

[Sign in with ID.me](#)

[Sign in with LOGIN.GOV](#)

[Learn more](#)

[Create an account](#)

Are you now, or have you ever been a victim of domestic violence? Identity theft? Do you have other concerns?

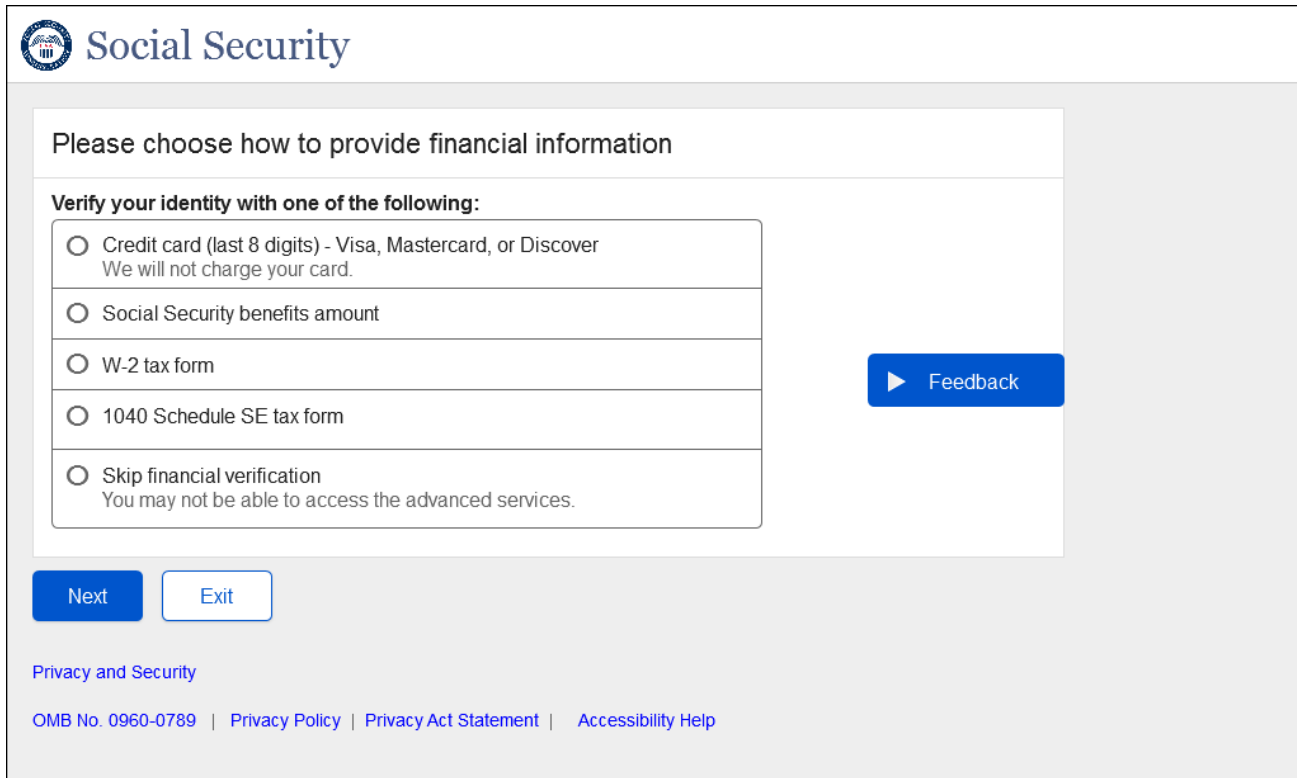
You can [contact us](#) to block electronic access to your information at any time, for any reason.

[Privacy and Security](#)

[OMB No. 0960-0789](#) | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

"Learn more" link has been moved closer to the "Sign in with Login.gov" and "Sign in with ID.me" buttons.

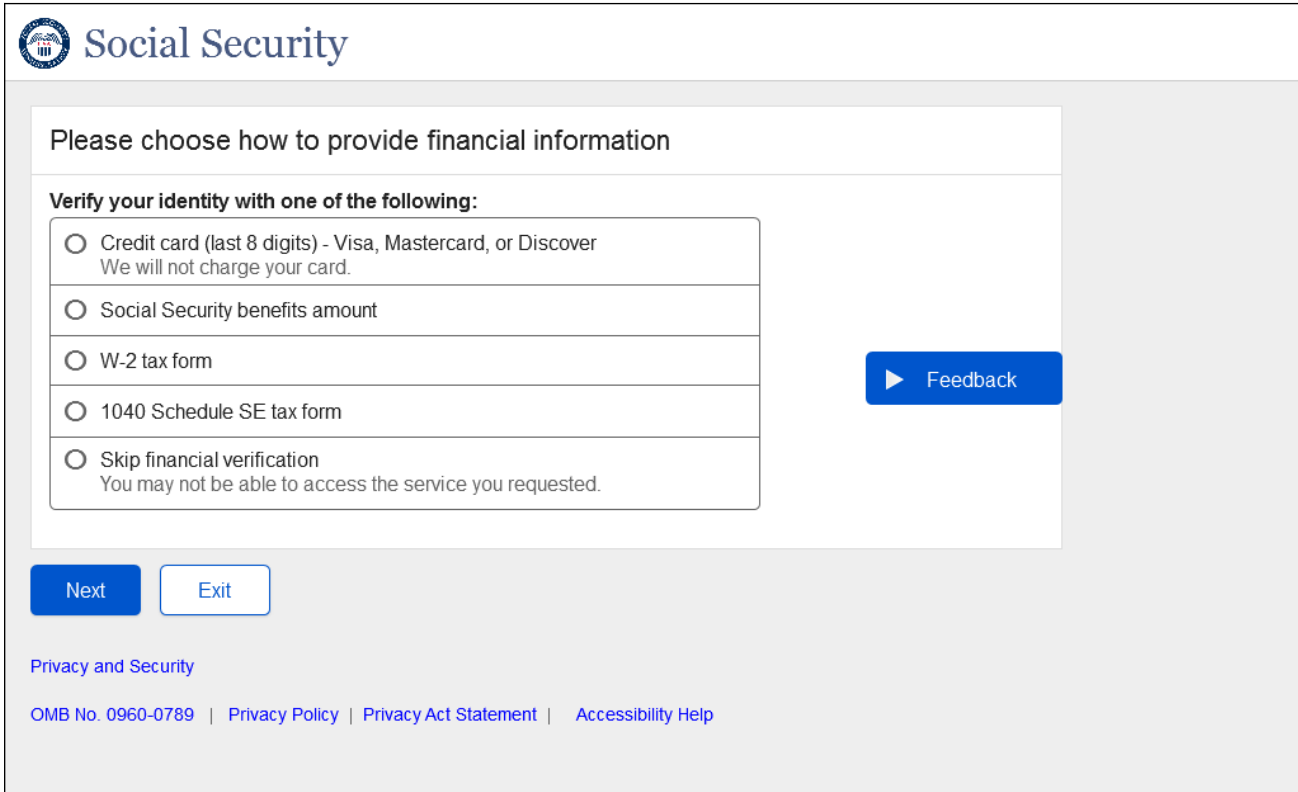
1.11 FIVRF_Skip Financial Verification_Normal Path



The screenshot shows a Social Security website interface. At the top left is the Social Security logo. The main heading is "Please choose how to provide financial information". Below this is a section titled "Verify your identity with one of the following:" which contains five radio button options: "Credit card (last 8 digits) - Visa, Mastercard, or Discover" (with subtext "We will not charge your card."), "Social Security benefits amount", "W-2 tax form", "1040 Schedule SE tax form", and "Skip financial verification" (with subtext "You may not be able to access the advanced services."). To the right of these options is a blue "Feedback" button with a play icon. At the bottom left are "Next" and "Exit" buttons. At the bottom left, there is a link for "Privacy and Security" and a footer with "OMB No. 0960-0789 | Privacy Policy | Privacy Act Statement | Accessibility Help".

Added a radio button "Skip financial verification" for users to skip financial verification to continue with registering a standard account.


1.12 FIVRF_Skip Financial Verification_SUAS_Path



The screenshot shows a Social Security website interface. At the top left is the Social Security logo. The main heading is "Please choose how to provide financial information". Below this is a section titled "Verify your identity with one of the following:" which contains five radio button options: "Credit card (last 8 digits) - Visa, Mastercard, or Discover" (with subtext "We will not charge your card."), "Social Security benefits amount", "W-2 tax form", "1040 Schedule SE tax form", and "Skip financial verification" (with subtext "You may not be able to access the service you requested."). To the right of these options is a blue "Feedback" button with a play icon. At the bottom left are "Next" and "Exit" buttons. At the bottom left, there is a link for "Privacy and Security" and a footer with "OMB No. 0960-0789 | Privacy Policy | Privacy Act Statement | Accessibility Help".

Added a radio button "Skip financial verification" for users to skip financial verification to continue with registering a standard account for step-up at service users.

1.13 CreateAccount_ToS



Social Security

Terms of Service

These terms of service apply to your creation of an account to use certain online services offered by the Social Security Administration. After creating an account, you may be asked to agree to added terms to use specific services.

You must be able to verify some information about yourself and:

- Have a valid email address;
- Have a Social Security number;
- Have a U.S. mailing address; and
- Be at least 18 years of age.

You may only create an account using your own personal information. Do not create an account using another person's information or identity, even if you have that person's written permission or are that person's representative payee or appointed representative.

For example, you cannot create an account for another person:

- With whom you have a business relationship;
- For whom you are a representative payee; or
- For whom you are an appointed representative.

You may obtain assistance with creating your account from someone you trust. However, by sharing your personal information with the person assisting you, you accept the risk that the person assisting you may misuse your personal information. A third party, including a representative payee or an appointed representative, may not create an account on your behalf, but you may ask your representative payee or appointed representative to assist you to create your account if you trust the individual.

In order to protect your privacy and prevent fraud, do not share your username and password.

What will we do with your information?

We use the information you give us to verify your identity against our records. We also use an external [Identity Services Provider](#) to verify your information against their records. They keep your information only for the period of time permitted by federal laws, regulations, or guidelines.

When you make a verification request to establish your account, our [Identity Services Provider](#) may use information from your credit report and/or wireless carrier to help verify your identity. As a result of using information from your credit report, you may see a "soft" inquiry entry on your credit report with the [Identity Services Provider](#), indicating that the Social Security Administration made an inquiry at your request and the date of that request. Soft inquiries do not affect your credit score, and you do not incur any charges related to them. Soft inquiries are displayed in the version of the credit report provided to a consumer and are not reported to lenders. Soft inquiries will not appear on your credit report from other providers. Soft inquiries are generally removed from your credit report after 12 months. Once you have registered for an online account, you will not generate additional soft inquiries by logging in to access our services.

You understand that by checking "I agree to the Terms of Service", you are providing written instructions to the Social Security Administration under the Fair Credit Reporting Act authorizing the Social Security Administration to obtain information from your personal credit profile or other information from Experian. You authorize the Social Security Administration to obtain such information solely to provide you access to personally identifiable information and prevent fraudulent transactions.

The Social Security Administration may need to verify mobile phone data through an external service provided by Boku, Inc. You authorize your wireless carrier to use or disclose information about your account and your wireless device, if available, to the Social Security Administration or its service provider for the duration of your business relationship, solely to help them identify you or your wireless device and to prevent fraud. See our [Privacy Policy](#) for how we treat your data.

What happens if you provide false information or misuse this service?

You may be subject to criminal or civil penalties, or both, if you provide false or misleading statements to sign in or create an account or engage in unauthorized use of this service.

Who is responsible if the device you are using is not adequately safeguarded?

You accept that the responsibility to properly protect any information provided to you by the Social Security Administration is yours and that you are the responsible party should any information on or from your computer or other device be improperly disclosed. You agree that the Social Security Administration is not responsible for the improper disclosure of any information that the Social Security Administration has provided to you, whether due to your own negligence or the wrongful acts of others.

By checking I agree to the Terms of Service, I acknowledge the following:

- I understand that I am accessing a U.S. Government system.
- I understand that my usage of this system may be monitored, recorded, and subject to audit.
- I understand that unauthorized or improper use of this system is prohibited and may result in administrative, civil, or criminal penalties and/or other actions.

I agree to the Terms of Service.

[Next](#) [Exit](#)

[Privacy and Security](#)

OMB No. 0960-0789 | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

CATS page designed with updated language.

1.14 General_SITOS



Social Security

General Terms of Service

The terms of service in this section apply to all Social Security online services. Depending on the specific Social Security online service you access, you may be asked to agree to added terms to use that service.

By checking I agree to the Terms of Service, I acknowledge the following conditions:

- I understand that I am accessing a U.S. Government system.
- I understand that my usage of this system may be monitored, recorded, and subject to audit.
- I understand that unauthorized or improper use of this system is prohibited and may result in administrative, civil, or criminal penalties and/or other actions.
- I understand that it is a federal crime to:
 - Give false or misleading statements to obtain information in Social Security records;
 - Give false or misleading information to obtain or alter Social Security benefits; or
 - Deceive the Social Security Administration about an individual's identity.
- I understand that the Social Security Administration may stop me from using Social Security online services if it finds or suspects fraud or misuse.
- I accept that I am responsible for properly protecting any information provided to me by the Social Security Administration.
- I agree that the Social Security Administration is not responsible for the improper disclosure of any information that the Social Security Administration has provided to me or any information that is on or from my computer or other device, whether due to my negligence or the wrongful acts of others.

I agree to the Terms of Service.

Next

Exit


[Privacy and Security](#)

[OMB No. 0960-0789](#) | [Privacy Policy](#) | [Privacy Act Statement](#) | [Accessibility Help](#)

SITOS designed with updated language.

2.RCS

2.1 Need External Verification (NEV)_ToS

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help

User Search

SSN or Email **User is:**
 on phone in person [? Help](#)

Search

ALEX Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** [? Help](#)

RCS [? Help](#) NEV

We cannot verify the address against our records.

“ **Please read the following to the customer:**

We were unable to verify this address against our records:


1 SAMPLER DR
BALTIMORE, MD 11111

We would like your permission to share your information with our Identity Services Provider to help us verify your identity. With your permission, the Identity Services Provider verifies the address against your credit report. You need to authorize SSA to access your credit report for these authentication purposes. Please confirm your authorization to access your credit report for these authentication purposes by stating "I agree."

Do you agree to allow us to share your information with the Identity Services Provider?
 Yes No

RXSNEV screen renamed to NEV. ToS on NEV should read "these authentication purposes". Current wording on screen says "this authentication purposes"

2.2 AXSNEV_ToS

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help

User Search

SSN or Email **User is:** on phone in person [Help](#)

Search

ALEX Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** [Help](#)

RCS [Help](#) AXSNEV

We cannot verify the address against our records.

“ **Please read the following to the customer:**

We were unable to verify this address against our records:

*1 SAMPLER DR
BALTIMORE, MD 11111*

We would like your permission to share your information with our Identity Services Provider to help us verify your identity. With your permission, the Identity Services Provider verifies the address against your credit report. You need to authorize SSA to access your credit report for these authentication purposes. Please confirm your authorization to access your credit report for these authentication purposes by stating "I agree."

Do you agree to allow us to share your information with the Identity Services Provider?

Yes No

Next

ToS on AXS NEV should read "these authentication purposes". Current wording on screen says "this authentication purposes"

2.3 SACC_ToS_Updated

Social Security • Registration and Customer Support (RCS) Text Size Accessibility Help

User Search

SSN: or Username: **User is:** on phone in person [? Help](#)

JOHN Q. PUBLIC SSN: 900-00-0000 DOB: 01/01/1970 [? Help](#)

RCS [? Help](#) SACC

Please use [eMailer](#) to send the [Privacy Act](#) or read aloud.

Collect Contact Information

“ Please read the following to the customer:

We verify the information you give us against our records. If we cannot match your information in our records, we will use an external data source to attempt to match your information.

In order to verify your identity, you need to authorize SSA to access your credit report for authentication purposes. Additionally, if you have a wireless device, you need to authorize your wireless carrier to use or disclose information about your account and your wireless device, if available, to SSA, or our service provider, to help SSA identify you or your wireless device and to prevent fraud. Please confirm your authorization to access your credit report and, if applicable, mobile phone data for these authentication purposes by stating "I agree."

In order to verify your identity, we will need to send a confirmation code via text message or letter.

A letter will take 15-20 business days to arrive.

Do you agree to these Terms of Service ?

The customer agrees to the Terms of Service.

How would you like to receive your confirmation code?

Text Message

Mailing Address

Enter Mailing Address (Required)

Mailing Address

Street Line 1:

Street Line 2:

City/Town State/Territory ZIP Code:

Checkbox added to capture customer agreement stated in ToS.

2.4 RCS_ACMGMT - Standard to Advanced Step Up

Social Security • Registration and Customer Support (RCS) Text Size Accessibility Help

User Search

SSN or Username **User is:**
 on phone in person **Search** [Help](#)

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: [Show](#) [Help](#)

Account Summary [Transaction History](#)

RCS ACMGMT

Account Summary [Help](#)

Account Type: **Standard**

Password Created At: **Login.gov**

Email: **test@ssa.gov**

Account Status: **Active**

Last Login: **September 17, 2019 13:43**

Sample Customer Internet Screens

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

- [Sign In - SSA](#)
- [Sign In - Login.gov](#)
- [Create Account - Login.gov](#)
- [Create Account - Verify Your Identity and I.D.](#)
- [Create Account - Identity Verification Options](#)
- [Create Account - Capture Your Photo Instructions](#)
- [Create Account - Capture Your Photo Completion](#)
- [Create Account - I.D. Type](#)
- [Create Account - Activation Code Delivery Options](#)
- [Create Account - Enter Your Activation Code](#)
- [Create Account - Financial Verification](#)
- [Finish Setting Up Your Account - Verify Your Identity](#)
- [Add Extra Security](#)
- [Get Your Security Code - Text Message or Email](#)
- [Get Your Security Code - Security Has Improved](#)
- [Verify Cell Phone Number](#)
- [Verify Email](#)
- [Enter Security Code - Text Message](#)
- [Enter Security Code - Email](#)
- [Get Reset Code - Provide Address Information](#)
- [Do You Have... Reset Code Letter?](#)
- [Get Temporary Password - Provide Address Information](#)

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Notices listed below are for general reference. For a full list of notices, please see:

- [OA 00250.000 - Electronic Access Notices - Table of Contents](#)
- [Created an account online](#)
- [Created an account online - Email notice](#)
- [Create an account online - Emailed activation code](#)
- [Create an account online - Mailed activation code](#)
- [Create an account online - Voice activation code](#)
- [Added extra security online](#)
- [Request to reset security code online](#)
- [Created a standard account in person](#)
- [Created an account in person \(with extra security\)](#)
- [Upgraded account in person](#)
- [Request to reset security code in person](#)
- [Identity Verification \(on phone\) - Mailed Confirmation Code](#)
- [Identity Verification \(on phone\) - SMS Confirmation Code](#)
- [Identity Verification \(on phone\) - Emailed Confirmation Code](#)

Added a button (Upgrade to Advanced) to the ACMGMT screen (those with a standard account) to initiate the step up (activation) process. Button should route the technician to TAVISU (Tiered Authentication Verify Identity Step Up) page.

2.5 TAVISU

Social Security • Registration and Customer Support (RCS) Text Size Accessibility Help

User Search

SSN or Email **User is:**
 on phone in person Help

Search Clear Search

ALEX Q. PUBLIC SSN: **987-65-4321** DOB: **01/01/1970** Help

RCS Help TAVISU

Terms of Service

“ **Please read the following to the customer:**

We would like your permission to share your information with our Identity Services Provider to help us verify your identity. With your permission, the Identity Services Provider verifies the address against your credit report. You need to authorize SSA to access your credit report for these authentication purposes. Please confirm your authorization to access your credit report for these authentication purposes by stating "I agree."

Do you agree to allow us to share your information with the Identity Services Provider?
 Yes No

Upgrade to Advanced: Verify Address

Proof of Identity (must be current):
 State Driver's License or identity card
 U.S. passport or passport card
 U.S. military identification card
 U.S. government employee identification card

Home Address:
Street Line 1:
Street Line 2:

City/Town: **State/Territory:** **ZIP Code:**

Does this address appear on the identity document shown above?
 Yes No

Primary Phone (optional):


10-digit Number

Next Cancel

- Add the ability to issue an activation code and navigate the technician to the TAMAC if only the physical address verifies and the address is not on the ID.
- Add the ability to issue an activation code and navigate the technician to the ENROLLC page if only the physical address verifies and the address is on the ID.

- Add the ability to issue an activation code and navigate the technician to the TAFODAC if only the digital address verifies.
- Add the ability to issue an activation code and navigate the technician to the ACDC screen if both physical and digital addresses pass and the address is on the ID.
- Add the ability to issue an activation code and navigate the technician to the TASAC screen if both addresses pass and the address is not on the ID

2.6 TAVISU_ w/ Error Message

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help


User Search

SSN or Email **User is:** on phone in person [? Help](#)

Search

ALEX Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** [? Help](#)

RCS [? Help](#) TAVISU

 **We were unable to verify the information below.**

Please confirm that the information is correct. Update the information if needed and try again. If we cannot verify the customer's information after this attempt, we will be unable to complete the process.

Upgrade to Advanced: Verify Address

Proof of Identity (must be current):

State Driver's License or identity card

U.S. passport or passport card

U.S. military identification card

U.S. government employee identification card

Home Address:

Street Line 1:

Street Line 2:

City/Town: **State[/Territory]:** **ZIP Code:**

Does this address appear on the identity document shown above?

Yes No

Primary Phone (optional):

10-digit Number

Next

Error message when information does not verify.

2.7 TAVITU_Terms of Service

Social Security • Registration and Customer Support (RCS) Text Size Accessibility Help

User Search

SSN or Email **User is:** on phone in person [? Help](#)

ALEX Q. PUBLIC SSN: 987-65-4321 DOB: 01/01/1970 Username: [Show](#) [? Help](#)

RCS [? Help](#) TAVITU

Terms of Service

“ Please read the following to the customer:

We would like your permission to share your information with our Identity Services Provider to help us verify your identity. With your permission, the Identity Services Provider verifies the address against your credit report. You need to authorize SSA to access your credit report for these authentication purposes. Please confirm your authorization to access your credit report for these authentication purposes by stating "I agree."

Do you agree to allow us to share your information with the Identity Services Provider?
 Yes No

Upgrade to Advanced: Verify Address

Proof of Identity (must be current):

- State Driver's License or identity card
- U.S. passport or passport card
- U.S. military identification card
- U.S. government employee identification card

Home Address:

Street Line 1:

Street Line 2:

City/Town: **State[Territory]:** **ZIP Code:**


Does this address appear on the identity document shown above?
 Yes No

Primary Phone (optional):

10-digit Number

The Screen Name has changed from TAVISU to TAVITU (Tiered Authentication – Verify Identity to Upgrade). No other changes have been made.

2.8 TAVITU_Terms of Service w/Error

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help


User Search

SSN or Email **User is:** on phone in person [? Help](#)

Search

ALEX Q. PUBLIC SSN: 987-65-4321 DOB: 01/01/1970 Username: [Show](#) [? Help](#)

RCS [? Help](#) TAVITU

 **We were unable to verify the information below.**

Please confirm that the information is correct. Update the information if needed and try again. If we cannot verify the customer's information after this attempt, we will be unable to complete the process.

Upgrade to Advanced: Verify Address


Proof of Identity (must be current):

- State Driver's License or identity card
- U.S. passport or passport card
- U.S. military identification card
- U.S. government employee identification card

Home Address:

Street Line 1:

Street Line 2:

City/Town: **State/Territory]:**  **ZIP Code:**

Does this address appear on the identity document shown above?

Yes No

Primary Phone (optional):

10-digit Number

Next

The Screen Name has changed from TAVISU to TAVITU (Tiered Authentication – Verify Identity to Upgrade). No other changes have been made.

2.9 TACUTA – Unverified Address

The screenshot displays the Social Security Registration and Customer Support (RCS) application. At the top, it shows the title "Social Security • Registration and Customer Support (RCS)" and utility links for "Text Size" and "Accessibility Help". The main section is titled "User Search" and contains search fields for "SSN" and "Username", along with radio buttons for "User is:" (on phone or in person), a "Search" button, and a "Clear Search" button. Below the search fields, user information is displayed: "JOHN Q. PUBLIC", "SSN: 987-65-4321", "DOB: 01/01/1970", and "Username: Show". A yellow warning box with an exclamation mark icon contains the message: "We cannot verify the customer's address. The customer cannot upgrade to advanced account at this time." Below this, a section titled "Upgrade to Advanced Account" features a quote: "Please read the following to the customer: We were unable to verify the address you provided. We cannot upgrade your account to advanced at this time. If you recently moved, you can try again later." At the bottom of the interface, there is a blue "Done" button.

New screen.

Version 1 is displayed is the address does not verify after two attempts on TAVITU.

The technician can gracefully exit the RCS application by selecting "done" on the TACUTA screen.

2.10 TACUTA _ Unverified Account


The screenshot displays the Social Security Registration and Customer Support (RCS) interface. At the top, it shows the title "Social Security • Registration and Customer Support (RCS)" and utility links for "Text Size" and "Accessibility Help". Below this is a "User Search" section with input fields for "SSN" and "Username", radio buttons for "User is:" (on phone or in person), and "Search" and "Clear Search" buttons. A "Help" link is also present. The search results for "JOHN Q. PUBLIC" are shown, including "SSN: 987-65-4321", "DOB: 01/01/1970", and "Username: Show". Below the search results, the text "RCS" and "TACUTA" are visible, along with another "Help" link. A prominent yellow warning box states: "We cannot upgrade the customer's account. The customer cannot upgrade to advanced account at this time." Below this is a section titled "Upgrade to Advanced Account" with a quote: "Please read the following to the customer: We cannot upgrade your account to advanced at this time. If you choose in the future to allow us to share your information with the Identity Services Provider, we can try again to upgrade your account." At the bottom of the interface, there is a blue "Done" button.

New screen.

Version 2 is displayed is the customer does not agree to the Terms of Service on TAVITU.

The technician can gracefully exit the RCS application by selecting "done" on the TACUTA screen.

2.11RCS_ACMGMT - Standard to Advanced Upgrade FIS Username

Social Security • Registration and Customer Support (RCS) Text Size  | Accessibility Help

User Search

SSN or Username User is:
 on phone in person **Search** Clear Search ? Help

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: [Show](#) ? Help

Account Summary [Transaction History](#)

RCS ACMGMT

Account Summary ? Help

Account Type: **Standard**
[Upgrade to Advanced](#)

Password Created At: **Login.gov**

Email: **test@ssa.gov**
[Change Email](#)


Account Status: **Active**

Last Login: **September 17, 2019 13:43**

[Reset Account](#) [Block Access](#)

Add a Show/Hide option to toggle between showing the username or hiding it.

2.12 RCS_ACMGMT - Standard to Advanced Upgrade Hide FIS Username

Social Security • Registration and Customer Support (RCS) Text Size  | Accessibility Help

User Search

SSN or Username **User is:**
 on phone in person **Search** Clear Search [? Help](#)

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: **Hide**
Abcd1234567891 [? Help](#)

Account Summary [Transaction History](#)

RCS ACMGMT

Account Summary [? Help](#)

Account Type: **Standard**
[Upgrade to Advanced](#)

Password Created At: **Login.gov**

Email: **test@ssa.gov**
[Change Email](#)


Account Status: **Active**

Last Login: **September 17, 2019 13:43**

[Reset Account](#) [Block Access](#)

Add a Show/Hide option to toggle between showing the username or hiding it.

2.13 IPXSFV (In Person Extra Security Failed External Address Verification_mail Password Letter

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help


User Search

SSN or Username **User is:**
 on phone in person [Help](#)

Search

JOHN Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** **Username: ROMETEST123** [Help](#)

RCS [Help](#) IPXSFV

 **The temporary password letter will be mailed.**

Temporary Password Letter

“ Please read the following to the customer:

We were unable to verify the address you provided. We will mail a temporary password letter to you at the following address:


**1234 SAMPLER DR
BALTIMORE, MD 12345**

You will receive the letter within 15 - 20 days. Please follow the directions to finish changing your password. If you request for us to cancel your temporary password prior to entering it, then disregard the temporary password letter.

Print Receipt

Update the name of the IPL3FXV screen in RCS to IPXSFV, so that the RCS screen names reflect updated terminology/condition (IPXSFVX - In Person Extra Security Failed External Address Verification) for mailing Temporary password letter.

2.14 IPXSFXV (In Person Extra Security Failed External Address Verification)_Print Password Letter


Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help

User Search

SSN or Username **User is:**
 on phone in person **Search** [Help](#)

JOHN Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** **Username: ROMETEST123** [Help](#)

RCS [Help](#) IPXSFXV

 **The receipt was sent to the printer.**

Temporary Password Letter

“ **Please read the following to the customer:**

We were unable to verify the address you provided. We will mail a temporary password letter to you at the following address:


*1234 SAMPLER DR
BALTIMORE, MD 12345*

You will receive the letter within 15 - 20 days. Please follow the directions to finish changing your password. If you request for us to cancel your temporary password prior to entering it, then disregard the temporary password letter..

Print Receipt

Update the name of the IPL3FXV screen in RCS to IPXSFXV, so that the RCS screen names reflect updated terminology/condition (IPXSFXV - In Person Extra Security Failed External Address Verification) for print Temporary password letter.

2.15 IPXSFV (In Person Extra Security Failed External Address Verification) mail Reset Code

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help


User Search

SSN or Username **User is:**
 on phone in person [Help](#)

Search

JOHN Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** **Username: ROMETEST123** [Help](#)

RCS [Help](#) IPXSFV

 **The reset code letter will be mailed.**

Reset Code Letter

“ Please read the following to the customer:


We were unable to verify the address you provided. We will mail a reset code letter to you at the following address:

**1234 SAMPLER DR
BALTIMORE, MD 12345**

*You will receive the letter within 15 - 20 days. Please follow the directions to finish changing where you receive security codes before the date shown in your letter. You will not be able sign in to your **my Social Security** account until you receive your reset code.*

Update the name of the IPL3FXV screen in RCS to IPXSFV, so that the RCS screen names reflect updated terminology/condition (IPXSFVX - In Person Extra Security Failed External Address Verification) for mail reset code.

2.16 IPXSFV (In Person Extra Security Failed External Address Verification) print Reset Code

Social Security • Registration and Customer Support (RCS) Text Size  Accessibility Help


User Search

SSN or Username **User is:**
 on phone in person [Help](#)

Search

JOHN Q. PUBLIC **SSN: 987-65-4321** **DOB: 01/01/1970** **Username: ROMETEST123** [Help](#)

RCS [Help](#) IPXSFV

 **The receipt was sent to the printer.**

Reset Code Letter

“ Please read the following to the customer:

We were unable to verify the address you provided. We will mail a reset code letter to you at the following address:

*1234 SAMPLER DR
BALTIMORE, MD 12345*

*You will receive the letter within 15 - 20 days. Please follow the directions to finish changing where you receive security codes before the date shown in your letter. You will not be able sign in to your **my Social Security** account until you receive your reset code.*

Update the name of the IPL3FXV screen in RCS to IPXSFV, so that the RCS screen names reflect updated terminology/condition (IPXSFVX - In Person Extra Security Failed External Address Verification) for print reset code.

2.17 eAccess_ACMGMT - Standard Account Summary Locked Account _w/ pending extra security

Social Security • Registration and Customer Support (RCS)
Text Size ▾ Accessibility Help

User Search

SSN or Username User is: on phone in person [Help](#)

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: ROMETEST123 [Help](#)

Account Summary [Transaction History](#)

RCS ACMGMT

Account Summary [Help](#)

Account Type: **Standard (Extra Security Pending)**

Security Codes Sent by: **Text Message**

Last 4 Digits of Cell Phone: **7663**

Email: **test@ssa.gov**

Account Status: **Locked**

Last Login: **September 17, 2019 13:43**
 Lockout Type: **[Lockout Event]**
 Lockout Date: **September 18, 2019 14:00**

Sample Customer Internet Screens

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

[Sign In - SSA](#)
[Sign In - Login.gov](#)

[Create Account - Login.gov](#)
[Create Account - Verify Your Identity and I.D.](#)
[Create Account - Identity Verification Options](#)
[Create Account - Capture Your Photo Instructions](#)
[Create Account - Capture Your Photo Completion](#)
[Create Account - I.D. Type](#)
[Create Account - Activation Code Delivery Options](#)
[Create Account - Enter Your Activation Code](#)
[Create Account - Financial Verification](#)

[Finish Setting Up Your Account - Verify Your Identity](#)

[Add Extra Security](#)

[Get Your Security Code - Text Message or Email](#)
[Get Your Security Code - Security Has Improved](#)

[Verify Cell Phone Number](#)
[Verify Email](#)

[Enter Security Code - Text Message](#)
[Enter Security Code - Email](#)

[Get Reset Code - Provide Address Information](#)
[Do You Have... Reset Code Letter?](#)

[Get Temporary Password - Provide Address Information](#)

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Notices listed below are for general reference. For a full list of notices, please see:

[OA 00250.000 - Electronic Access Notices - Table of Contents](#)

[Created an account online](#)
[Created an account online - Email notice](#)
[Create an account online - Emailed activation code](#)
[Create an account online - Mailed activation code](#)
[Create an account online - Voice activation code](#)
[Added extra security online](#)

[Request to reset security code online](#)

[Created a standard account in person](#)
[Created an account in person \(with extra security\)](#)
[Upgraded account in person](#)

[Request to reset security code in person](#)

[Identity Verification \(on phone\) - Mailed Confirmation Code](#)
[Identity Verification \(on phone\) - SMS Confirmation Code](#)
[Identity Verification \(on phone\) - Emailed Confirmation Code](#)

Removed the "Add Extra Security" button from the ACMGMT screen for customers with a locked legacy account, so that technicians will unlock the accounts prior to issuing an activation code

Page 32

2.18 eAccess_ACMGMT - Standard Account Summary Locked Account _w/o pending extra security

Social Security • Registration and Customer Support (RCS)
Text Size ▾ Accessibility Help

User Search

SSN or Username User is: on phone in person [Help](#)

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: ROMETEST123 [Help](#)

Account Summary [Transaction History](#)

RCS ACMGMT

Account Summary [Help](#)

Account Type: **Standard**

Security Codes Sent by: **Text Message**

Last 4 Digits of Cell Phone: **7663**

Email: **test@ssa.gov**

Account Status: **Locked**

Last Login: **September 17, 2019 13:43**
 Lockout Type: **[Lockout Event]**
 Lockout Date: **September 18, 2019 14:00**

Sample Customer Internet Screens

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

[Sign In - SSA](#)
[Sign In - Login.gov](#)

[Create Account - Login.gov](#)
[Create Account - Verify Your Identity and I.D.](#)
[Create Account - Identity Verification Options](#)
[Create Account - Capture Your Photo Instructions](#)
[Create Account - Capture Your Photo Completion](#)
[Create Account - I.D. Type](#)
[Create Account - Activation Code Delivery Options](#)
[Create Account - Enter Your Activation Code](#)
[Create Account - Financial Verification](#)

[Finish Setting Up Your Account - Verify Your Identity](#)

[Add Extra Security](#)

[Get Your Security Code - Text Message or Email](#)
[Get Your Security Code - Security Has Improved](#)

[Verify Cell Phone Number](#)
[Verify Email](#)

[Enter Security Code - Text Message](#)
[Enter Security Code - Email](#)

[Get Reset Code - Provide Address Information](#)
[Do You Have... Reset Code Letter?](#)

[Get Temporary Password - Provide Address Information](#)

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

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[Create an account online - Mailed activation code](#)
[Create an account online - Voice activation code](#)
[Added extra security online](#)

[Request to reset security code online](#)

[Created a standard account in person](#)
[Created an account in person \(with extra security\)](#)
[Upgraded account in person](#)

[Request to reset security code in person](#)

[Identity Verification \(on phone\) - Mailed Confirmation Code](#)
[Identity Verification \(on phone\) - SMS Confirmation Code](#)
[Identity Verification \(on phone\) - Emailed Confirmation Code](#)

Removed the "Add Extra Security" button from the ACMGMT screen for customers with a locked legacy account, so that technicians will unlock the accounts prior to issuing an activation code.

2.19 RCS_ACMGMT - Advanced Account Pending_Locked

Social Security • Registration and Customer Support (RCS) Text Size Accessibility Help

User Search

SSN or Username User is:
 on phone in person Help

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: Show Help

Account Summary Transaction History

RCS ACMGMT

⚠ The customer has a pending activation code. This code upgrades their Account Type from Standard to Advanced.

If the customer's Account Status is Locked, select the Unlock Account button so they can use the code. If the customer no longer has access to the previously issued code, they can request a new one.

Account Summary Help

Account Type: **Standard (Advanced Account Pending)**

Password Created At: **Login.gov**

Email: **test@ssa.gov**

Account Status: **Locked**

Last Login: **September 17, 2019 13:43**

Sample Customer Internet Screens

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

- [Sign In - SSA](#)
- [Sign In - Login.gov](#)
- [Create Account - Login.gov](#)
- [Create Account - Verify Your Identity and I.D.](#)
- [Create Account - Identity Verification Options](#)
- [Create Account - Capture Your Photo Instructions](#)
- [Create Account - Capture Your Photo Completion](#)
- [Create Account - I.D. Type](#)
- [Create Account - Activation Code Delivery Options](#)
- [Create Account - Enter Your Activation Code](#)
- [Create Account - Financial Verification](#)
- [Finish Setting Up Your Account - Verify Your Identity](#)
- [Add Extra Security](#)
- [Get Your Security Code - Text Message or Email](#)
- [Get Your Security Code - Security Has Improved](#)
- [Verify Cell Phone Number](#)
- [Verify Email](#)
- [Enter Security Code - Text Message](#)
- [Enter Security Code - Email](#)
- [Get Reset Code - Provide Address Information](#)
- [Do You Have... Reset Code Letter?](#)
- [Get Temporary Password - Provide Address Information](#)

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Notices listed below are for general reference. For a full list of notices, please see:

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- [Create an account online - Emailed activation code](#)
- [Create an account online - Mailed activation code](#)
- [Create an account online - Voice activation code](#)
- [Added extra security online](#)
- [Request to reset security code online](#)
- [Created a standard account in person](#)
- [Created an account in person \(with extra security\)](#)
- [Upgraded account in person](#)
- [Request to reset security code in person](#)
- [Identity Verification \(on phone\) - Mailed Confirmation Code](#)
- [Identity Verification \(on phone\) - SMS Confirmation Code](#)
- [Identity Verification \(on phone\) - Emailed Confirmation Code](#)

Added a label (Advanced Account Pending) to the Account Type field that displays when a customer has an upgrade code with account locked.

2.20 RCS_ACMGMT - Advanced Pending Code_Active

Social Security • Registration and Customer Support (RCS) Text Size Accessibility Help

User Search

SSN or Username User is: on phone in person Help

John Q. PUBLIC SSN: 900-00-0001 DOB: 01/01/1970 Username: Show Help

Account Summary Transaction History

RCS ACMGMT

⚠ The customer has a pending activation code. This code upgrades their Account Type from Standard to Advanced.

If the customer's Account Status is Locked, select the Unlock Account button so they can use the code. If the customer no longer has access to the previously issued code, they can request a new one.

Account Summary Help

Account Type: **Standard (Advanced Account Pending)**

Password Created At: **Login.gov**

Email: **test@ssa.gov**

Account Status: **Active**

Last Login: **September 17, 2019 13:43**

Sample Customer Internet Screens

Ask the customer for the title of the screen he or she is having trouble with. Look below for the link that matches that title.

[Sign In - SSA](#)
[Sign In - Login.gov](#)

[Create Account - Login.gov](#)
[Create Account - Verify Your Identity and I.D.](#)
[Create Account - Identity Verification Options](#)
[Create Account - Capture Your Photo Instructions](#)
[Create Account - Capture Your Photo Completion](#)
[Create Account - I.D. Type](#)
[Create Account - Activation Code Delivery Options](#)
[Create Account - Enter Your Activation Code](#)
[Create Account - Financial Verification](#)

[Finish Setting Up Your Account - Verify Your Identity](#)

[Add Extra Security](#)

[Get Your Security Code - Text Message or Email](#)
[Get Your Security Code - Security Has Improved](#)

[Verify Cell Phone Number](#)
[Verify Email](#)

[Enter Security Code - Text Message](#)
[Enter Security Code - Email](#)

[Get Reset Code - Provide Address Information](#)
[Do You Have... Reset Code Letter?](#)

[Get Temporary Password - Provide Address Information](#)

Sample Notices

If the customer has questions about a notice he or she received, you can identify the situation and view the appropriate notice.

Notices listed below are for general reference. For a full list of notices, please see:

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[Create an account online - Emailed activation code](#)
[Create an account online - Mailed activation code](#)
[Create an account online - Voice activation code](#)
[Added extra security online](#)

[Request to reset security code online](#)

[Created a standard account in person](#)
[Created an account in person \(with extra security\)](#)
[Upgraded account in person](#)

[Request to reset security code in person](#)

[Identity Verification \(on phone\) - Mailed Confirmation Code](#)
[Identity Verification \(on phone\) - SMS Confirmation Code](#)
[Identity Verification \(on phone\) - Emailed Confirmation Code](#)

Add a label (Advanced Account Pending) to the Account Type field that displays when a customer has an upgrade code with account active.