**Updated Call Flow**

| ID | Step/Condition | Language (IVR) | Notes |
| --- | --- | --- | --- |
| IVR-1099-1 | Play online marketing prompt | Did you know you can view, print, save or request a copy of your s s a 10 99 or s s a 1042 s by going online and using your my s s aaccount. Go to w w w dot social security dot g o v and select Sign In. | P1004 |
| IVR-1099-2 | Ask if caller wants Replacement for Current Year  | Are you calling to get a replacement s s a 1099 or s s a 1042' for the... <current year> tax year? If yes, go to IVR-1099-3 (non-active period) or IVR-1099-6 (active period)If no, go to IVR-1099-5 | P1005 |
| IVR-1099-3 |  Current Year =Yes: Non-active Period (Application is disabled Dec. 15-Jan. 31). | SSA provides Social Security beneficiaries with their 's s s a 1099 or s s a 1042' statement by the end of January showing benefits, they received in… <current closed tax year>Go to IVR-1099-4 | P1023 |
| IVR-1099-4 | Ask if caller wants replacement card for other years | Are you calling to get a replacement s s a 1099 or s s a 1042 for any of the prior 5 years? If yes, go to IVR-1099-6 If no, go to IVR-1099-5 |  |
| IVR-1099-5 | Current Year and previous 5 years=No | To get a s s a 1099 or s s a 1042 for any other years you need tospeak to an agent, hold on while I get someone to help you. | P1013 (This will be an update to 1013) |
| IVR-1099-6 | Current Year =Yes (Active Period Feb 1 – Dec 14) or previous 5 yearsOMB, Privacy Act, Paperwork Act | All right. Before I can access your records, I'll need to ask a question or two to verify who you are. Social Security is allowed to collect this information under the Social Security Act and the collection meets the requirements of the Paperwork Reduction Act under OMB numbers 09600596 and 09600583. To hear detailed information about this an~~d~~ the Privacy Act or Paperwork Reduction Act say more information. Otherwise, say continue. [pause]Be advised, to complete this process you’ll need to have a mobile phone available to receive a verification code. Text and data rates may apply.Would you like to continue? If yes, go to IVR-1099-7, if no, say “hold on while I get someone to help you. | P1009 (This will be an update to 1009) |
| IVR-1099-7 |  | We verify the information you give us against our records. If we cannot match your information in our records, we will use external data sources to attempt to match your information.By using this service, you understand that you will be authorizing SSA to obtain information from your personal credit profile or other information from Experian under the Fair Credit Reporting Act. You authorize SSA to obtain such information solely to help identify you and prevent fraud. SSA may need to verify mobile phone data through an external service provided by Twilio. You authorize your mobile phone carrier to use or disclose information about your account and your mobile phone to SSA or its service provider for the duration of your business relationship, solely to help them identify you or your mobile phone and to prevent fraud. Do you agree with giving your authorization to access your credit report and mobile data for these authentication purposes?Please say Yes or NoIf yes, go to IVR-1099-8, If no, go to IVR-1099-9 |  |
| IVR-1099-8 | Attestation=Yes | Please note that any person who makes a false representation in an effort to alter or obtain information from the Social SecurityAdministration may be punished by a fine or imprisonment or both. Do you understand and agree to these terms?If yes, go to IVR-1099-10, If no, go to IVR-1099-9 | P1010 |
| IVR-1099-9 | Attestation= No | Without your agreement, I won′t be able to help you with anything that requires access to personal information. Hold on while I get someone to help you. | P1022 |
| IVR-1099-10 | Attestation=Yes Asks caller for PII to beauthenticated. | All right. Thanks. Let's keep going. First, please say your Social Security number one digit at a time. | P1011 |
| IVR-1099-11 | SSN confirmation | Just to make sure, your social security number is 123456789, Right?If yes, go to IVR-1099-12, If no, go to IVR-1099-11A | P1012 |
| IVR-1099-11A | SSN Re ask | My mistake. Let’s try again. Please say or enteryour nine-digit Social Security number, one digit at a time | P1011d |
| IVR-1099-12 | DOB | Now, what's your date of birth?  | P1030 |
| IVR-1099-12A | DOB Re ask | My mistake. Please say or enter the month, dayand year you were born. For example, say June 8th 1945or enter 06081945. | P1030d |
| IVR-1099-13 | DOB Confirm | That was --------- Right? If yes go to IVR-1099-14, If no go to IVR-1099-12A | P1031 |
| IVR 1099-14 | Calling from mobile phone? | Are you currently calling from your mobile phone? If yes, go to IVR-1099-18, if no, go to IVR-1099-15 |  |
| IVR-1099 -15 | Mobile phone number | All right. Please say your 10-digit mobile phone number starting with the area code or use your keypad to enter the digits, followed by the pound key |  |
| IVR 1099-16 | Mobile phone confirmation | Your mobile phone number is 123-456-7890 right? If no go to IVR-1099-15 if yes go to IVR-1099-18 |  |
| IVR-1099-17 | Authentication = Fail | Sorry, I am having trouble processing your request. Hold on while I get someone to help you. | P9011 |
| IVR 1099-18 | Ask if caller received ACC code | All right. We have sent a verification code to your mobile phone number. Did you receive your verification code?If yes, go to IVR-1099-19If no or no input, go IVR-1099-20 |  |
| IVR-1099-19 | Yes=User provides ACC code | All right. Please say the verification code one digit at a time or use your phone’s keypad to enter the digits. |  |
| IVR 1099-20 | ACC Verification = Fail  | Sorry, I am having trouble processing your request. Hold on while I get someone to help you. | P9011 |
| IVR-1099-21 | ACC Verification = Pass, Date of last access | All right, we're all set.  Just so you know, the last time you accessed your account was on <Date>.  |  |
| IVR-1099-22 | Replacement for Self | Do you need a replacement s s a 1099 or s s a 1042 for yourself? If yes, go to IVR-1099-40 If no go to IVR-1099-23 | P1034 (This will be updated as IVR-1099-21 is split out into a new prompt) |
| IVR-1099-23 | Person Living | Is the person it's for LIVING?  | P1038 |
| IVR-1099-24 | Living =Yes  | To request a statement for someone else. You will need to speak to an agent. | P1039 |
| IVR – 1099 25 | Living = No | Okay, please tell me the deceasedperson's social security number or say I don’t have it.If provided go to IVR-1099-28, if unknown go to IVR-1099-26 | P1040 |
| IVR- 1099- 26 | Unknown SSN | Sounds like you don't know their Social Security number. Is that right? If caller says right or yes, go to next step, if they say they know it, go back to IVR-1099-25 |  |
| IVR 1099-27 | Unknown SSN  | If you don't know the Social Security number, you'll need to speak with an agent. Hold on while I get someone to help you.  | P1128 |
| IVR-1099-28 | Deceased SSN confirmation | Just to make sure, that Social Security number is {123456789}. Right?If yes go to IVR-1099-29, If no go to IVR-1099-25 | P1012 |
| IVR – 1099-29 | Related to deceased | Are you a child, spouse or parent of the deceased?If yes, go to, IVR-1099-40, if no, go to IVR-1099-30 |  |
| IVR – 1099- 30 | Related to deceased = no | Is your address in the United States?If yes, go to IVR-1099-32, If no, go to IVR-1099-31 |  |
| IVR – 1099-31 | United States Address = No | Sorry, I am having trouble processing your request. Hold on while I get someone to help you. | P9011 |
| IVR- 1099-32 | US. Address= Yes, Ask for zip code | Please tell me your five-digit zip code now. | P1306 |
| IVR – 1099-33 | Zip code confirmation | You entered {$.Zipcode}, right?If yes go to IVR-1099-34, If no go to IVR-1099-32 | P1308 |
| IVR-1099-33A | Invalid Zip Code | That is an invalid zip code. Let's try again, please tell me your five-digit zip code now. | P1306c |
| IVR-1099-34 | City – State Confirmation | Okay. I got the city and state information from the zip code as ($.City). ($.State). Right?If yes go to IVR-1099-35, If no go to next step | P1324 |
| IVR-1099-34A | Incorrect City - State | My mistake. Let's try again, please tell me your five-digit zip code. | P1306d |
| IVR – 1099-35 | Street Address | Okay. Now I just need the street address, P O Box or Rural Route Number. For example, you'd say 123 Main Street West or PO Box 12345. Go ahead and say the address. | P1321 |
| IVR-1099-36 | Street Address Confirmation | Okay. Your street address is{$.AddressLine1}. Right?If yes go to IVR-1099-37, If no go to go to IVR-1099-36A | P1326 |
| IVR-1099-36A | Incorrect Street Address | My mistake. Let's try again, please say your street address, PO Box or Rural Route Number. For example, you'd say 123 Main Street West or P O Box 12345. Go ahead and say the address. | P1321d |
| IVR – 1099-37 | Apartment Number or Unit | If there's an apartment number or unit number, please say it now. Otherwise, say noapartment. | P1322 |
| IVR-1099-38 | Apartment Number or Unit Confirmation | You said {$.AddressLine2}, Right?If yes go to IVR-1099-39, If no go to IVR-1099-38A | P1323 |
| IVR-1099-38A | Incorrect Apartment or Unit Number | My mistake. Let's try again. Please tell me your apartment number or unit number now, Otherwise, say no apartment. | P1323d |
| IVR – 1099-39 | Complete Address Confirmation | Thanks. Let me make sure everything is correct. I have {$.Address}. Right?If yes go to IVR-1099-40, If no go to IVR-1099-39A | P1325 |
| IVR-1099-39A | Incorrect Complete Address | My mistake. Let's try again, please say your street address, P O Box or Rural Route Number. For example, you'd say 123 Main Street West or P O Box 12345. Go ahead and say the address. | P1321d |
| IVR-1099-40 | Authorization = Yes |  Just a moment while I process your request... For 1099 for self, go to IVR-1099-41, for deceased (related) go to IVR-1099-41. For deceased (not related) go to IVR-1099-46. | P1035 |
| IVR – 1099-41 | Date of the last address change | The last time you changed your address was on <Date>. Have you moved since that date?If yes, go to IVR-1099-42, If no, go to IVR-1099-43 |  |
| IVR-1099-42 | Move = Yes | You will be transferred to an agent |  |
| IVR-1099-43 | Move=No | All right… |  |
| IVR-1099-44 | If previous year = yes | Do you need a s s a 1099 or s s a 1042 replacement for [tax year(s)]? All right….If successful go to IVR-1099-45 (for self) or IVR-1099-46 (for deceased), if unsuccessful go to IVR-1099-47 | IVR needs to say each previous year separately. |
| IVR – 1099-45 | Authorization Confirmation for self | Your replacement s s a 1099 or s s a 1042 for {current tax year} or previous 5 years will be sent to YOUR address on record. If you live in the United States or a U.S. territory, you should receive it by {current date + 14 days}, Otherwise, if you live outside the United States, you should receive it by {current date + 40 days}. If you haven’t received it by then, please call us back.Go to IVR-1099-48 | P1036 |
| IVR – 1099-46 | Authorization Confirmation for deceased | The deceased’s replacement s s a 1099 or s s a 1042 for {current tax year} or previous 5 years will be sent to YOUR address on record. If you live in the United States or a U.S. territory, you should receive it by {current date + 14 days}, Otherwise, if you live outside the United States, you should receive it by {current date + 40 days}. If you haven't received it by then, please call us back.Go to IVR-1099-48. | P1024 |
| IVR-1099-47 | Authorization= No | Sorry, I am having trouble processing your request. Hold on while I get someone to help you. | P9011 |
| IVR – 1099-48 | Finish | If you're finished, feel free to hang up. Otherwise...  | P1021 |
|  |  |  |  |