

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 a account. 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 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 to speak 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 years	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	P1009 (This will be an update to 1009)

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	OMB, Privacy Act, Paperwork Act	<p>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 and the Privacy Act or Paperwork Reduction Act say more information. Otherwise, say continue.</p> <p>[pause]</p> <p>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.</p> <p>Would you like to continue?</p> <p>If yes, go to IVR-1099-7, if no, say "hold on while I get someone to help you.</p>	
IVR-1099-7		<p>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.</p> <p>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.</p> <p>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</p>	

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		<p>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.</p> <p>Do you agree with giving your authorization to access your credit report and mobile data for these authentication purposes?</p> <p>Please say Yes or No</p> <p>If yes, go to IVR-1099-8, If no, go to IVR-1099-9</p>	
IVR-1099-8	Attestation=Yes	<p>Please note that any person who makes a false representation in an effort to alter or obtain information from the Social Security Administration may be punished by a fine or imprisonment or both. Do you understand and agree to these terms?</p> <p>If yes, go to IVR-1099-10, If no, go to IVR-1099-9</p>	P1010
IVR-1099-9	Attestation= No	<p>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.</p>	P1022
IVR-1099-10	Attestation=Yes Asks caller for PII to be-authenticated.	<p>All right. Thanks. Let's keep going. First, please say your Social Security number one digit at a time.</p>	P1011
IVR-1099-11	SSN confirmation	<p>Just to make sure, your social security number is 123456789, Right?</p> <p>If yes, go to IVR-1099-12, If no, go to IVR-1099-11A</p>	P1012

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IVR-1099-11A	SSN Re ask	My mistake. Let's try again. Please say or enter your 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, day and year you were born. For example, say June 8th 1945 or 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-1099-19 If no or no input, go IVR-1099-20	

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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 deceased person'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?	P1012

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		If yes go to IVR-1099-29, If no go to IVR-1099-25	
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	P1326

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		to go to IVR-1099-36A	
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 no apartment.	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	

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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	<p>Do you need a s s a 1099 or s s a 1042 replacement for [tax year(s)]?</p> <p>All right....</p> <p>If successful go to IVR-1099-45 (for self) or IVR-1099-46 (for deceased), if unsuccessful go to IVR-1099-47</p>	IVR needs to say each previous year separately.
IVR – 1099-45	Authorization Confirmation for self	<p>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.</p> <p>Go to IVR-1099-48</p>	P1036
IVR – 1099-46	Authorization Confirmation for deceased	<p>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.</p> <p>Go to IVR-1099-48.</p>	P1024

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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