



**DESIGN SPECIFICATIONS DOCUMENT**

**ENTERPRISE SCHEDULING SYSTEM (ESS)**

**SCREEN PACKAGE**



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## Design Specification Document Version Information

The first release of this design specifications document as a project deliverable is numbered 1.0.

Subsequent revisions are numbered 1.1, 1.2, 1.3, etc. Content revisions are listed below with corresponding page numbers.

<b>Version Number</b>	<b>Date</b>	<b>Content Revisions</b>	<b>Page #</b>	<b>Revised by</b>
1.0 (First Release)	April 5, 2022	Original		
1.1 (First Revision)				
1.2 (Second Revision)				

# 1. ESS Public UI Walkthrough

## 1.1. Create Appointment – Self-scheduling

The customer completes the appropriate form in oSSNAP, or the online questionnaire, which helps the customer determine the need for a post-entitlement appointment, and the customer receives a link to ESS, which directs the customer to log in via Login.Gov or ID.me (this provides low-level ROME credentialing) to use ESS to self-schedule an appointment. Once the customer is logged in, ESS presents a brief description of what the customer can expect from ESS. The customer must view the Terms of Service and Privacy Act Statement to continue. The customer clicks “Next” to advance to the Terms of Service and Privacy Act Statement. If the customer does not want to continue, they can click “Exit” to exit ESS.

Because the user is logged in, the user’s name appears in the top banner along with a Sign Out control.

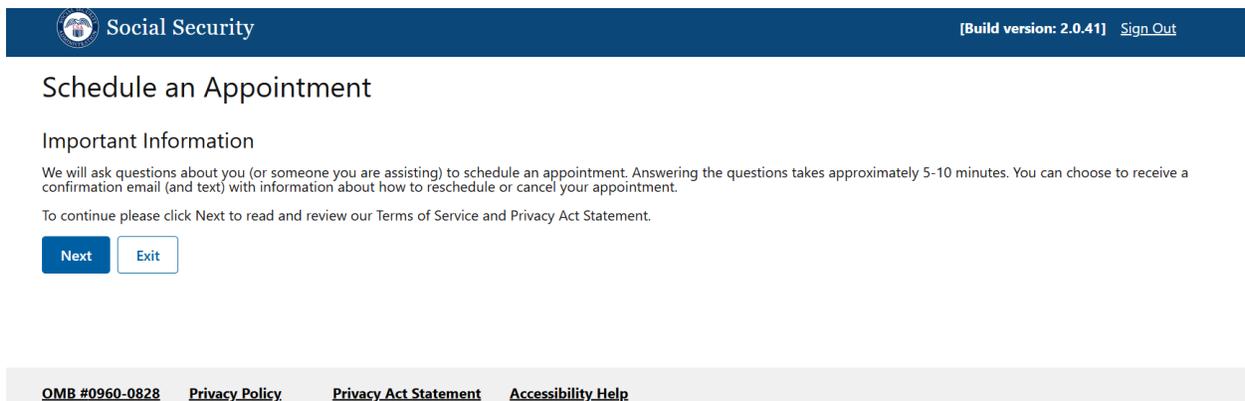


Figure 1 ESS Customer Home Page



### Terms of Service

- I understand that ssa.gov contains U.S. Government information.
- I consent to the monitoring and recording of my use of Social Security online services, including any electronic communications.
- 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 unauthorized use of Social Security online services is a misrepresentation of my identity to the federal government and could subject me to criminal or civil penalties, or both.
- I understand that the Social Security Administration may stop me from using Social Security online services online if it finds or suspects misuse.
- I accept that the responsibility to properly protect any information provided to me by the Social Security Administration is mine and that I am the responsible party should any information on or from my computer or other device be improperly disclosed.

I agree to the Terms of Service

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

[Privacy and Security](#)

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



[Build version: 2.0.41] [Sign Out](#)

## Schedule an Appointment

### Terms of Service

I understand that I am entering a U.S. Government System to schedule an appointment with the Social Security Administration.  
I understand that I need to provide the Social Security Administration information in order to request an appointment.  
I understand that failing to agree to the statements below will prevent me from requesting an appointment online for me or for the person for whom I am requesting an appointment.

**I understand that:**

- my activities may be monitored within this site.
- any person who knowingly and willfully tries to obtain Social Security benefits falsely could be punished by a fine or imprisonment, or both.

**Information about Social Security's Online Policies**

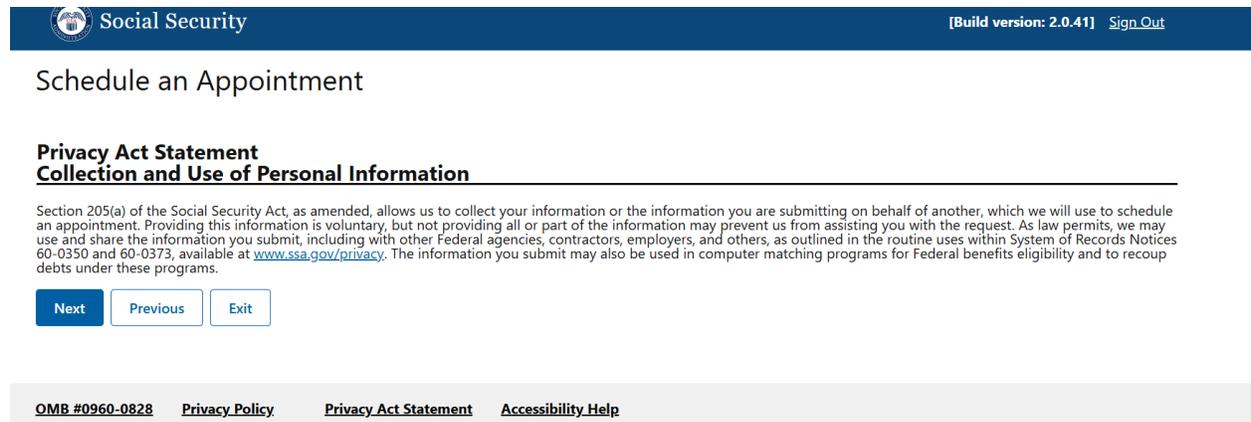
We are committed to protecting individual privacy and securing the personal information made available to us when you visit our website, [www.ssa.gov](http://www.ssa.gov). Our Internet Privacy Policy explains our online information practices.

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

[OMB #0960-0828](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility Help](#)

Figure 2 ESS Customer Terms of Service

The customer clicks “Next” to advance to the Privacy Act Statement or “Exit” if they want to exit ESS.



**Figure 3 ESS Customer Privacy Act Statement**

The customer clicks “Next” to continue.

ESS asks for the reason for the appointment that is “original or replacement social security card or Post-Entitlement (PE).” For an enumeration appointment the ‘answer’ is passed in from oSSNAP based on the type of SSN application the customer completed there. In the event the incorrect reason is selected in oSSNAP (since oSSNAP is unauthenticated), the customer can change the reason. The selection of original and replacement reasons leads to the same outcome. For a PE appointment the ‘answer’ is passed in from the online PE questionnaire.



Figure 4 ESS Customer Reason for Appointment

The customer clicks “Next” to continue.

ESS asks the customer for a ZIP code, so it can find an available appointment nearby. The customer must also select their preferred contact type. ESS presents three options, in-office, phone or video.

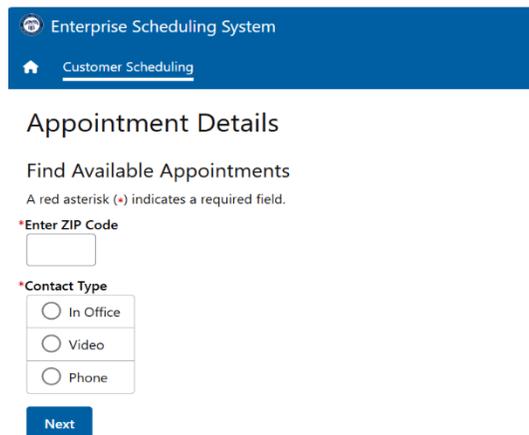
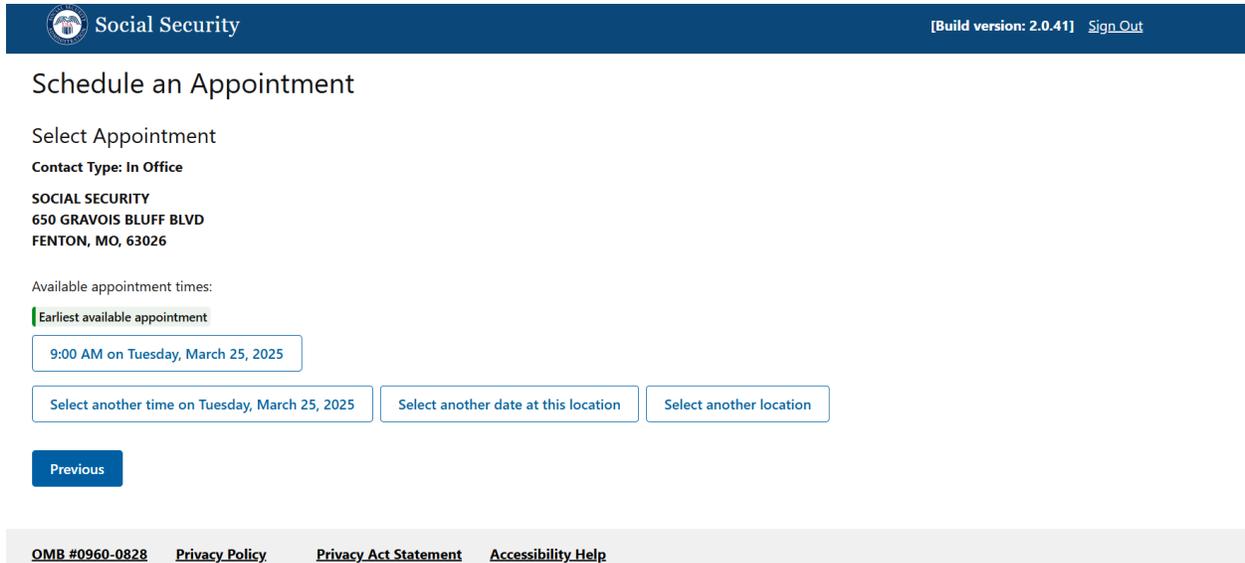


Figure 5 ESS Customer Enter ZIP Code and Contact Type

The customer can change the ZIP code to choose an office outside their servicing area. Customers that are within the servicing area of a Social Security Card Center are only able to self-schedule with those specific offices.

The customer enters the zip code, selects their preferred contact type and clicks Next to continue.

ESS displays the first available appointment at the local servicing office associated with the ZIP code.



**Figure 6 ESS Customer Earliest Available Appointment**

If the customer finds the time and date acceptable, the customer clicks the button with the time and date on it and confirms the appointment selection.

Note: that during this scheduling process, the selected appointment location, date, and time has been reserved for the individual, and is unavailable for other callers or users in the online scheduling application.

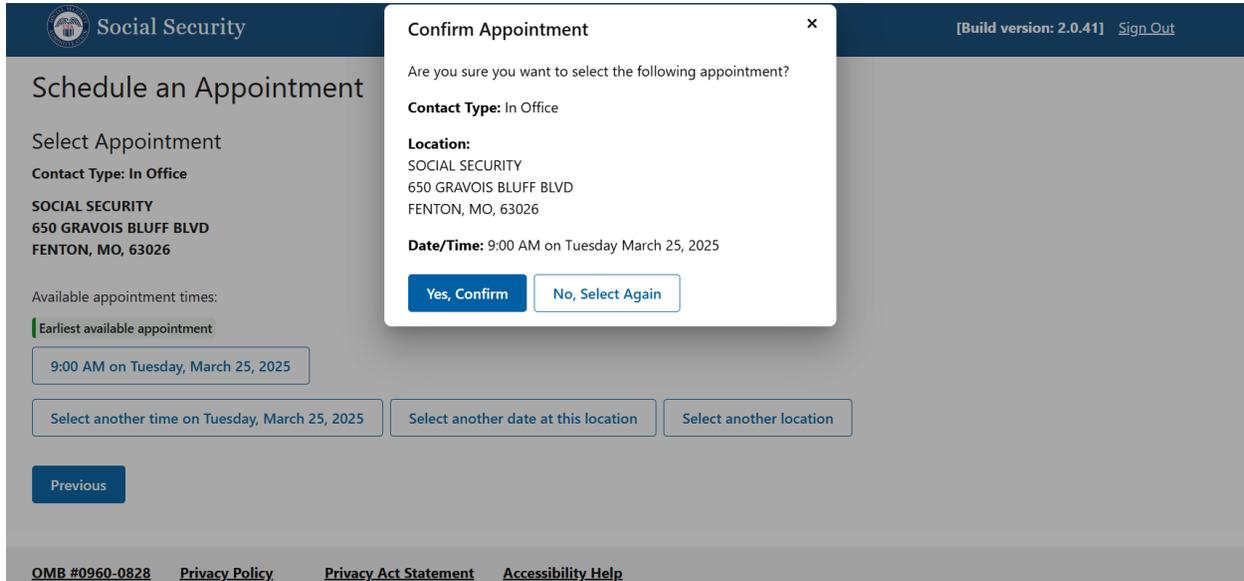


Figure 7 ESS Customer Confirm Appointment

If the customer accepts the date, but not the time, the customer can click on “Select Another Time on...”

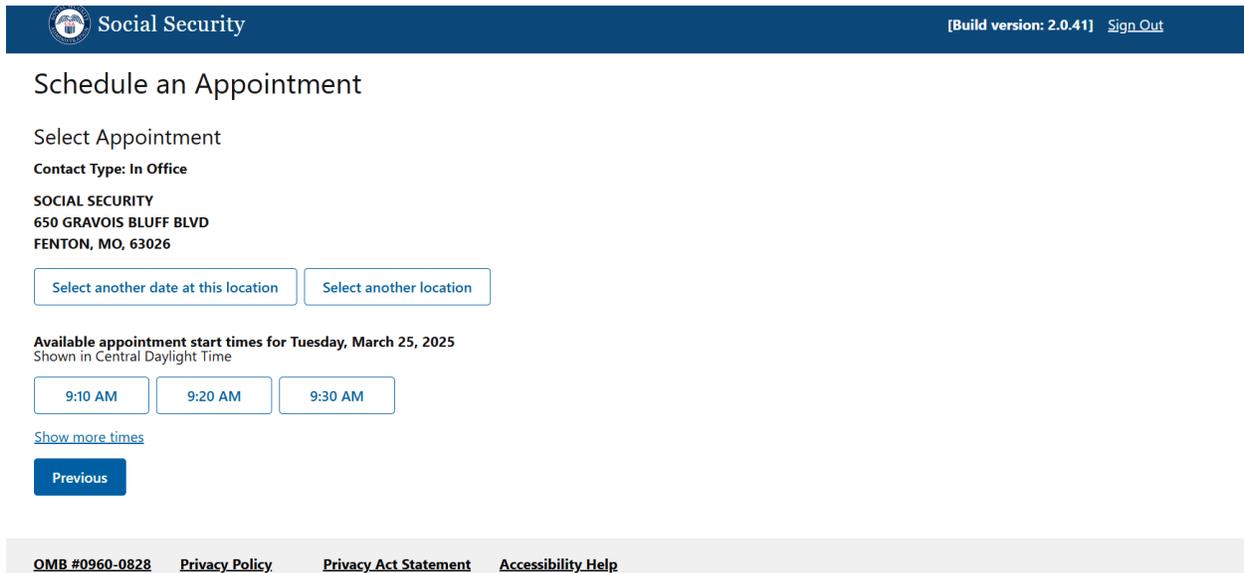


Figure 8 ESS Customer Show Other Times on Same Date at Same Location

Social Security [Build version: 2.0.41] Sign Out

### Schedule an Appointment

Select Appointment

Contact Type: In Office

SOCIAL SECURITY  
650 GRAVOIS BLUFF BLVD  
FENTON, MO, 63026

Select another date at this location Select another location

Available appointment start times for Tuesday, March 25, 2025  
Shown in Central Daylight Time

9:10 AM	9:20 AM	9:30 AM	9:40 AM	9:50 AM	10:00 AM	10:10 AM	10:20 AM	10:30 AM
10:40 AM	10:50 AM	11:00 AM	11:10 AM	11:20 AM	11:30 AM	11:40 AM	11:50 AM	12:00 PM
12:10 PM	12:20 PM	12:30 PM	12:40 PM	12:50 PM	1:00 PM	1:10 PM	1:20 PM	1:30 PM
1:40 PM	1:50 PM	2:00 PM	2:10 PM	2:20 PM	2:30 PM	2:40 PM	2:50 PM	3:00 PM
3:10 PM	3:20 PM	3:30 PM	3:40 PM	3:50 PM				

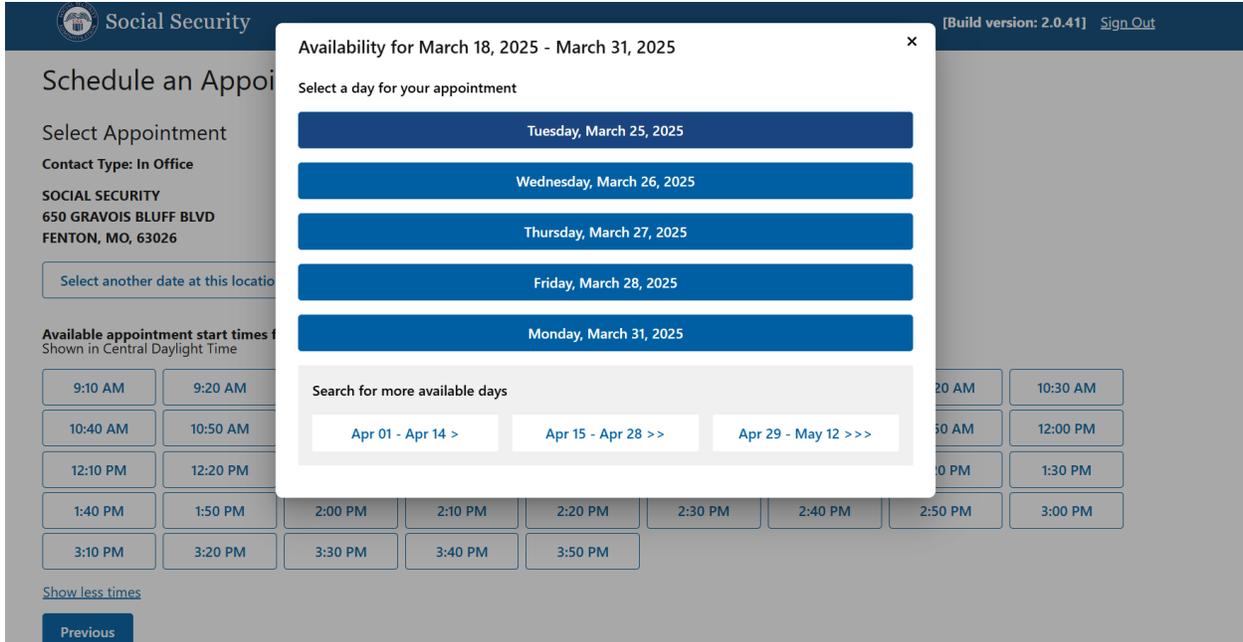
[Show less times](#)

Previous

Figure 9 ESS Customer Show More Times

ESS presents other available appointment times on the same date. ESS displays some of the available times. The customer can click “Show more times” to view additional start times. If the customer finds a time and date acceptable, the customer clicks the button with the time on it and confirms the appointment selection.

If the customer accepts the office location, but not the date, the customer can click Select Another Date at this Location.



**Figure 60 ESS Customer Select Another Date at This Location**

ESS presents other dates at the same office. ESS shows only those dates where the office has at least one available appointment based on the contact type selected. The number of dates that ESS shows may exceed the modal box size. In this case, date options are paginated to allow access to all the dates. The customer selects the desired date by clicking the date button.

ESS presents appointment times on the selected date at the same office location.

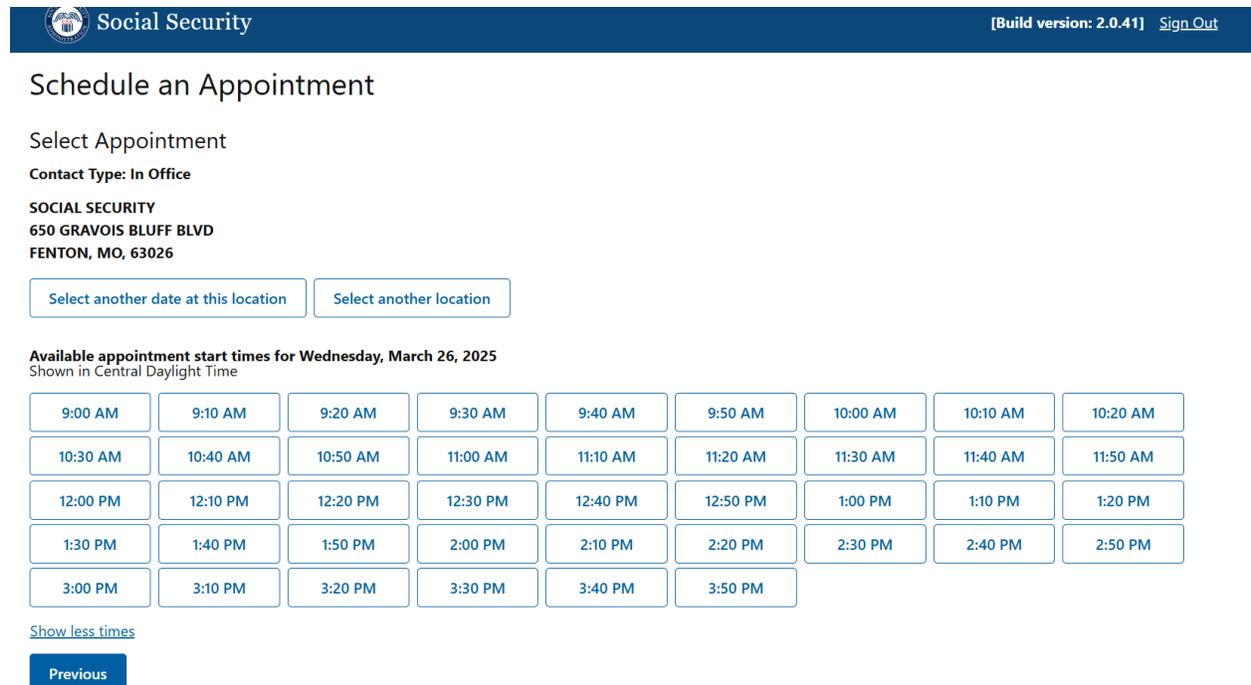


Figure 71 ESS Customer Select Appointment Time

If the customer does not accept the location, the customer can click on Select Another Location.

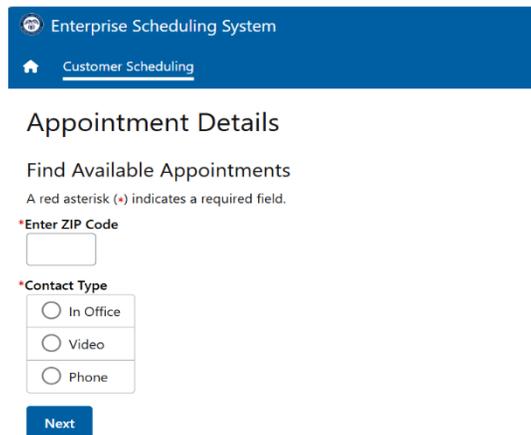


Figure 12 ESS Customer Select Another Location and Preferred Contact Type

ESS displays the primary servicing office for the ZIP code. The customer can search a new ZIP code by entering it, their preferred contact type and clicking Next. ESS will refresh the modal, showing the office assigned for the entered ZIP code.

ESS presents appointment times on the selected date at the newly selected office location.

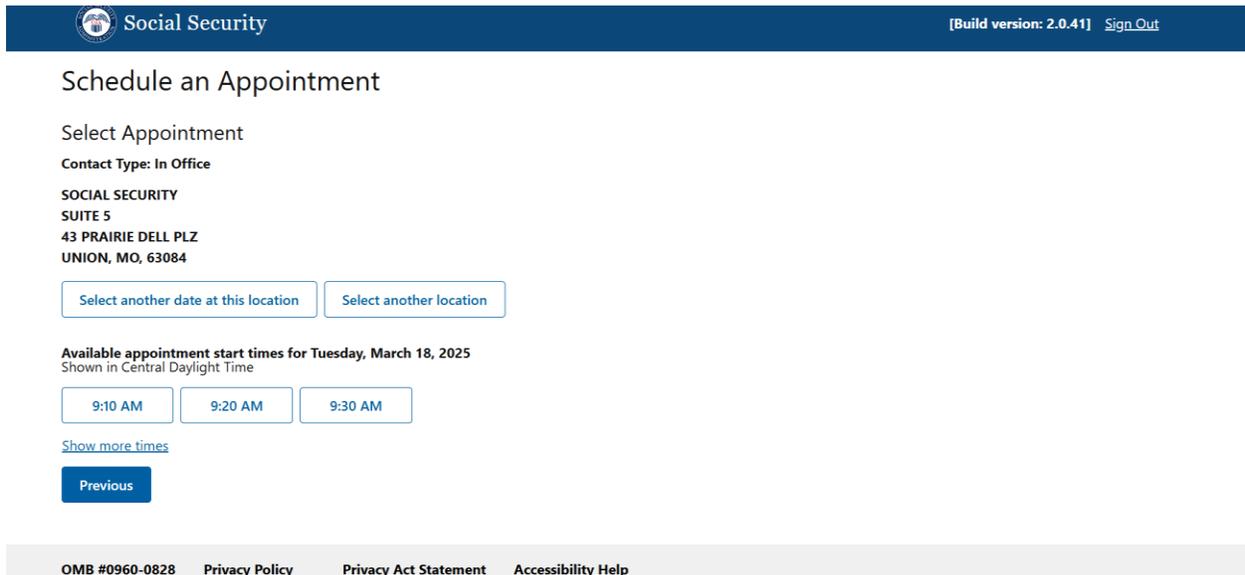


Figure 13 ESS Customer Select Appointment Time

When the customer finds an acceptable appointment date, time, and location, the customer clicks the button with the date and time on it. A confirmation message appears.

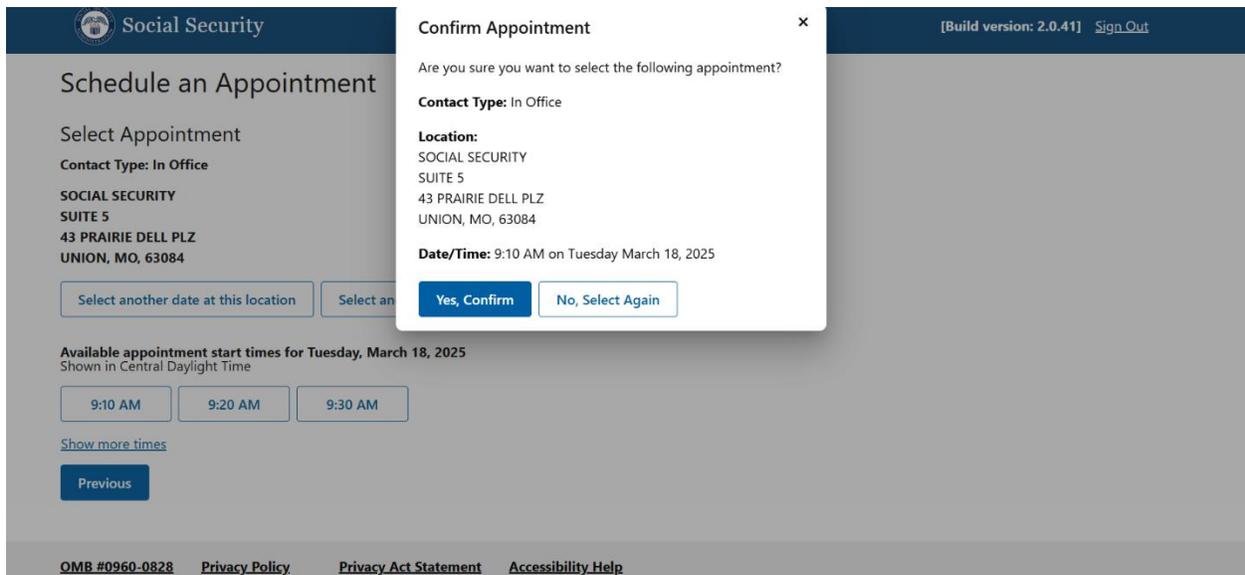


Figure 8 ESS Customer Confirm Appointment

Customer clicks Yes, Confirm to continue.

ESS asks for the customer’s name, if the appointment is for the customer or someone else, as well as the SSN and date of birth of the individual for whom the appointment is being scheduled.

The screenshot shows the 'Enterprise Scheduling System' interface. The top navigation bar includes 'Enterprise Scheduling System', 'Customer Scheduling', and user information: 'TEST ONLY - CHANGE PROFILE [Build version: 2.0.123] Marcus Holmes Sign Out'. The main heading is 'Schedule an Appointment'. Below it is the 'Personal Information' section with a note: 'A red asterisk (\*) indicates a required field.' The 'Your Name' section includes a sub-note: 'This is the person requesting the appointment.' and four input fields: 'First', 'Middle', 'Last', and 'Suffix'. The 'First', 'Last', and 'Suffix' fields are marked with a red asterisk. Below the name fields is a question: '\*For whom are you scheduling this appointment?' with two radio button options: 'Myself' (selected) and 'Someone Else'. The 'Individual's Social Security Number (SSN)' field is marked with a red asterisk. The 'Individual's Date of Birth' section has three dropdown menus for 'Month', 'Day', and 'Year', all marked with a red asterisk. At the bottom are 'Next' and 'Previous' buttons.

**Figure 15 ESS Customer Personal Information Before Consenting to Messaging**

The customer’s first and last name are required. Middle name and suffix are optional. The customer must indicate if they are scheduling the appointment personally or for someone else and the respective date of birth. For enumeration appointments SSN is optional. For PE appointments SSN is required.

Customer Scheduling

## Schedule an Appointment

### Consent To Messaging

A red asterisk (\*) indicates a required field.

**Your Name**  
John Quincy Smith

**Your Phone Number**  
You may receive a phone call regarding any matters related to your appointment  
(218) 078-7591

**i We can send you messages to confirm, remind, and provide instructions for your appointment.**  
It's your choice whether you want to receive these electronic messages. If you don't want them, simply select "No, I do not consent" to opt out. If you do want to receive the messages, select "Yes, I consent" to authorize us to send them to you.  
You can change your mind by revisiting this page.

**\*Do you consent to receive electronic messages from SSA?**

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**Next** Previous

Figure 16 ESS Consent to Messaging

The customer can consent to receive electronic messages from SSA by clicking the check box. If the customer does not check the Consent check box and clicks Next, a message appears to inform the customer that SSA will not send messages and explain what the customer must do to change update or cancel the appointment and what the customer must do upon arrival at the appointment.

**i You will not receive messages about this appointment.**  
To update or cancel your appointment, you must contact us toll-free at 1-800-772-1213 (TTY 1-800-325-0778).  
When you arrive for your appointment, you must check in at the kiosk.

**Next** Previous

Figure 97 ESS Customer User Does Not Consent to Messaging

When checked, ESS asks how the customer would like to receive the messages.

The screenshot shows the 'Schedule an Appointment' page on the Social Security website. At the top, there is a header with the Social Security logo and the text 'Social Security' on the left, and '[Build version: 2.0.41] Sign Out' on the right. Below the header, the page title 'Schedule an Appointment' is displayed. The main content area is titled 'Personal Information' and includes a note: 'A red asterisk (\*) indicates a required field.' The form contains several sections: 'Your Name' with the value 'John Quincy Smith'; 'Your Phone Number' with the value '(218) 078-7591' and a sub-note 'You may receive a phone call regarding any matters related to your appointment.'; a consent section for electronic messages from SSA with 'Yes, I consent' selected; 'Your Email Address' with the value 'johnsmith@email.com'; a section for text messages with 'Yes' selected; and 'Your U.S. Mobile Phone Number' with the value '(218) 078-7591'. There are two informational callouts: one explaining the choice of electronic messages and another detailing the terms of text messaging. At the bottom of the form are 'Next' and 'Previous' buttons. The footer contains 'OMB #0960-0828', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility Help'.

Figure 108 ESS Customer Personal Information After Consent to Messaging – Email and Text Messaging

If the customer’s oSSNAP application or appointment request is completed on behalf of someone else (at this time, this can be a proper applicant, e.g., parent or legal guardian, and not a third-party assistor/helper), this page shows the Individual’s name.

An official website of the United States government. [Here's how you know](#)

**Social Security** [Build version: 2.0.41] [Sign Out](#)

## Schedule an Appointment

**Personal Information**  
A red asterisk (\*) indicates a required field.

You are scheduling an appointment for:  
John Quincy Smith

**Your Name**  
Jane Allison Smith

**Your Phone Number**  
You may receive a phone call regarding any matters related to your appointment.  
(218) 078-7591

**i We can send you messages to confirm, remind, and provide instructions for your appointment.**  
It's your choice whether you want to receive these electronic messages. If you don't want them, simply select "No, I do not consent" to opt out. If you do want to receive the messages, select "Yes, I consent" to authorize us to send them to you.  
You can change your mind by revisiting this page.

**\*Do you consent to receive electronic messages from SSA?**

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**\*Your Email Address**  
You will receive messages about this appointment at this address

**\*Would you also like to receive text messages?**

Yes  No

**Done**

[OMB #0960-0828](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility Help](#)

**Figure 11 ESS Customer Personal Information Before Consenting to Messaging – Appointment For Someone Else**

The customer selects whether they consent to electronic messaging. If the customer consents, they can enter their email address or phone number.

The customer's email address and phone number are prefilled if they completed an oSSNAP application. If the customer is requesting an appointment, they must complete those fields.

If the customer does not want to receive text messages, he or she must select the Email option.

An official website of the United States government. [Here's how you know](#)

**Social Security** [Build version: 2.0.41] [Sign Out](#)

## Schedule an Appointment

**Personal Information**  
A red asterisk (\*) indicates a required field.

You are scheduling an appointment for:  
John Quincy Smith

**Your Name**  
Jane Allison Smith

**Your Phone Number**  
You may receive a phone call regarding any matters related to your appointment.  
(218) 078-7591

**i We can send you messages to confirm, remind, and provide instructions for your appointment.**  
It's your choice whether you want to receive these electronic messages. If you don't want them, simply select "No, I do not consent" to opt out. If you do want to receive the messages, select "Yes, I consent" to authorize us to send them to you.  
You can change your mind by revisiting this page.

**\*Do you consent to receive electronic messages from SSA?**

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**\*Your Email Address**  
You will receive messages about this appointment at this address  
johnsmith@email.com

**\*Would you also like to receive text messages?**

Yes  No

**Next** Previous

OMB #0960-0828 [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility Help](#)

**Figure 12 ESS Customer Personal Information After Consent to Messaging – Email**

The customer clicks Next to continue.

ESS asks for the customer's language preferences.

### Schedule an Appointment

#### Language Preference

\* Indicates required information

**i** This is the language used during your appointment with a representative  
We can arrange for an interpreter at no cost to you

\* Spoken language preference?

\* Written language preference?

[Next](#) [Previous](#)

**Figure 13 ESS Customer Language Preference**

ESS asks for both spoken and written language preferences. Both default to English, but the customer can select another language.

The customer clicks Next to continue.

ESS presents the Review and Submit summary page.

**Social Security** User Name [Sign Out](#)

### Schedule an Appointment

**Review and Submit**  
 These are all the answers you've provided. If you need to make any changes, please select "Edit" to return to that part of the application.

**Schedule New Appointment**

**Reason for Appointment** [Edit](#)

What can we help you with: **Replacement Social Security Card**

**Select Appointment** [Edit](#)

**Office Address**  
 Street Address: **230 W Superior St, Ste 500**  
 City/Town: **Duluth**  
 State/Territory: **Minnesota**  
 ZIP Code: **55808**  
 Appointment date: **April 19, 2022**  
 Appointment time: **8:00 AM**

**Personal Information** [Edit](#)

Your Name: **John Quincy Smith**  
 I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
 How would you like to receive these messages: **Email and text messages**  
 Your Email address: **johnsmith@email.com**  
 Your U.S. Mobile Phone Number: **(218)-078-7591**

**Language Preference** [Edit](#)

What language do you prefer speaking: **English**  
 What language do you prefer reading: **English**

[Submit](#) [Previous](#)

[OMB No. 0000-0000](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 14 ESS Customer Review and Submit**

The customer reviews and can edit the information on this page.

The Reason for Appointment Edit button takes the customer to the Reason for Appointment page. If the customer changes the reason, a new appointment date/time and location must be selected. The customer will traverse the pages in order to complete the scheduling process. ESS will ‘remember’ the customer’s personal information and language preferences, but these can be changed, as well.

Selecting the Appointment Edit button takes the customer to the Find Available Appointments – Enter ZIP Code page. ESS prefills the ZIP Code with the ZIP Code of the previously selected appointment location. The customer will traverse the pages in order to complete the scheduling process. ESS will ‘remember’ the customer’s personal information and language preferences, but these can be changed, as well.

Personal Information Edit button takes the customer to the Personal Information page. ESS does not change the appointment date/time or location. The customer continues to language preference. ESS ‘remembers’ the language preferences.

If the appointment was made on behalf of someone else, the individual’s name appears in the Personal Information section.

The screenshot shows the 'Review and Submit' stage of an appointment scheduling process on the Social Security website. At the top left is the Social Security logo, and at the top right are links for 'User Name' and 'Sign Out'. The main heading is 'Schedule an Appointment'. Below this is a 'Review and Submit' section with a message: 'These are all the answers you've provided. If you need to make any changes, please select "Edit" to return to that part of the application.' The main content area is titled 'Schedule New Appointment' and contains four sections, each with a green checkmark icon and an 'Edit' button:

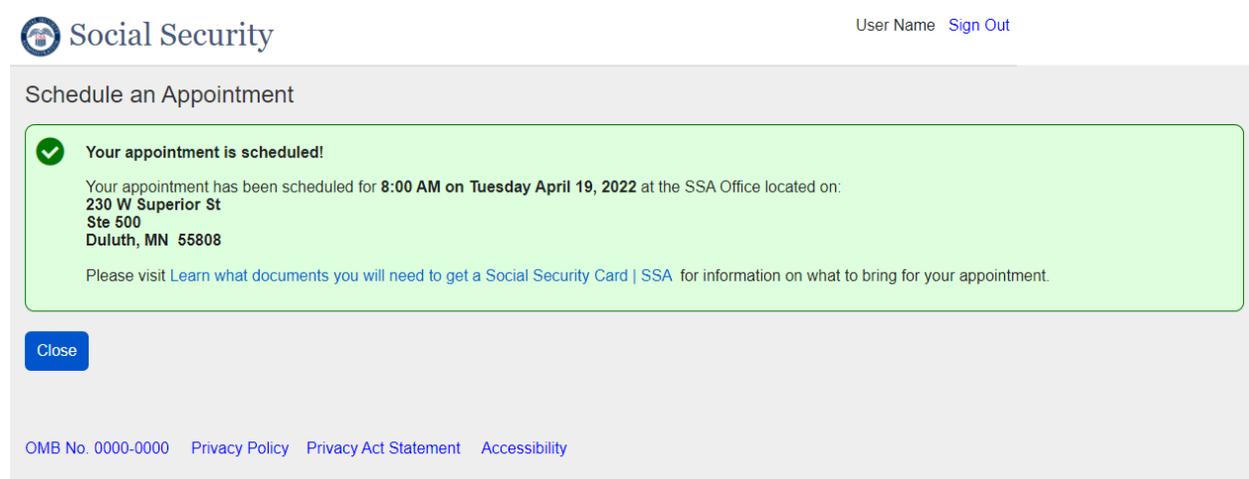
- Reason for Appointment:** The reason is 'Replacement Social Security Card'.
- Select Appointment:** Office Address: 230 W Superior St, Ste 500, Duluth, Minnesota, ZIP Code: 55808. Appointment date: April 19, 2022. Appointment time: 8:00 AM.
- Personal Information:** Individual's Name: Jane Allison Smith. Your Name: John Quincy Smith. Consent to receive electronic messages: Yes. How would you like to receive these messages: Email and text messages. Your Email address: johnsmith@email.com. Your U.S. Mobile Phone Number: (218)-078-7591.
- Language Preference:** What language do you prefer speaking: English. What language do you prefer reading: English.

At the bottom of the form are 'Submit' and 'Previous' buttons. Below the form are links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 15 ESS Customer Review and Submit – Appointment for Someone Else

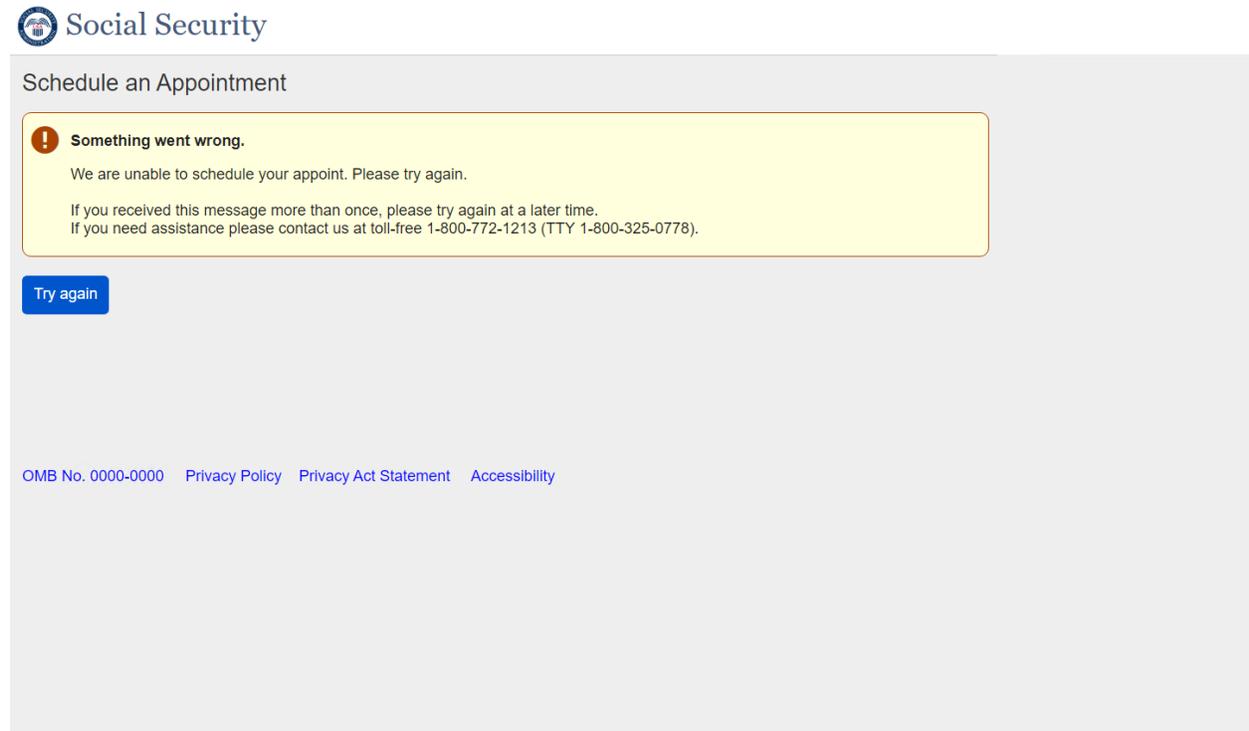
Language Preference Edit button takes the customer to the Language Preference page.

The customer clicks Submit to schedule the appointment.



**Figure 16 ESS Customer Appointment Scheduled Success**

If ESS is unable to schedule the appointment (including for technical reasons), a message appears indicating that something went wrong and asks the customer to try again. Try Again repeats the Submit action.



**Figure 17 ESS Customer Appointment Scheduled Failure**

## 1.2. Reschedule an Appointment

The customer receives an electronic message from SSA either via email or via email and text, based on the customer's selection, with a link to ESS. The customer must use this link to access the appointment record to modify, reschedule, or cancel the appointment online. If the customer opted to not receive electronic messages, the customer received a pop-up message that explains that the customer must contact SSA to make changes.

If the customer schedules the appointment with a technician, the technician offers the customer a chance to create a One Time Numerical Passcode (OTP) to be able to reschedule, modify, or cancel the appointment online. The customer receives a confirmation email and/or text and may use the link included within the message to access ESS. If the customer chooses to update the appointment using the link, the customer will first log in with existing credentials or register for a new account. At that point, the customer will enter the OTP to link the scheduled appointment with the customer's account.

 Social Security User Name [Sign Out](#)

### Schedule an Appointment

We could not find a scheduled appointment for you, based on your user name. If you scheduled the appointment with a Social Security representative, please enter your One Time Numerical Passcode (OTP) to get started.

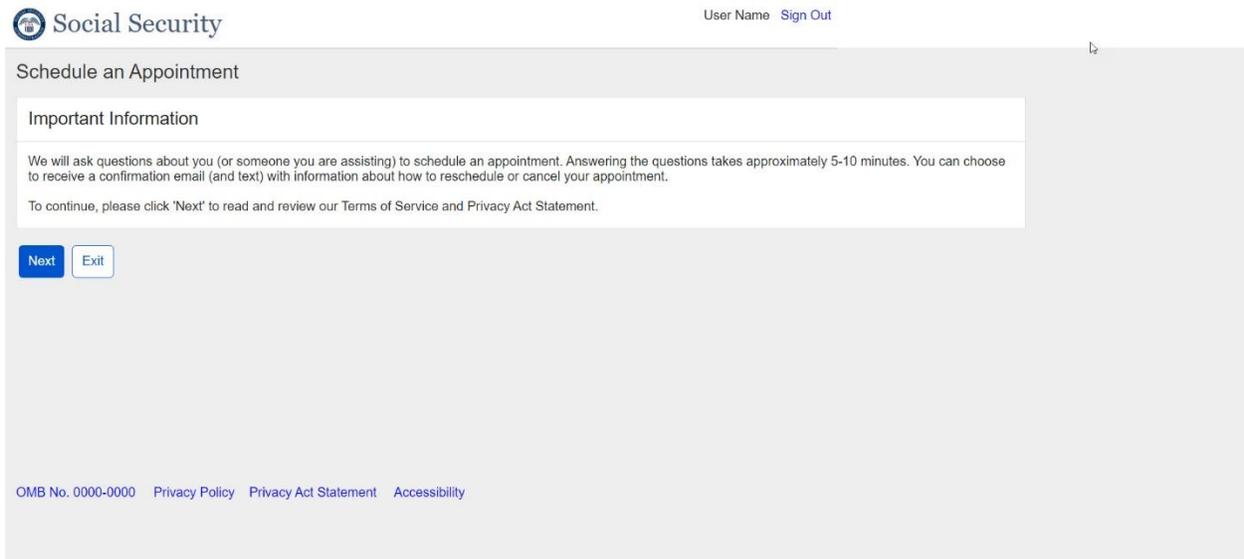
**\* Enter your One Time Numerical Passcode (OTP)**

[Continue](#) [Exit](#)

[OMB No. 0000-0000](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 18 ESS Customer Enter OTP**

Once accepted, the customer proceeds to the ESS Home Page.



**Figure 19 ESS Customer Home Page**

The customer must review the Terms of Service and the Privacy Act Statement to continue.

The customer clicks Start to begin.

ESS shows Review Your Appointment Details.

### Appointment Details

#### Review Existing Appointment Details

The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

Reason for Appointment

What can we help you with: **Replacement Social Security Card**

Appointment Options

[Reschedule Appointment](#)

Office Address  
 Street Address: **230 W Superior St, Ste 500**  
 City/Town: **Duluth**  
 State/Territory: **Minnesota**  
 ZIP Code: **55808**  
 Appointment date: **April 19, 2022**  
 Appointment time: **8:00 AM**

Personal Information

[Update](#)

Your Name: **John Quincy Smith**  
 I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
 How would you like to receive these messages: **Email and text messages**  
 Your Email address: **johnsmith@email.com**  
 Your U.S. Mobile Phone Number: **(218)-078-7591**

Language Preference

[Update](#)

Spoken language preference: **English**  
 Written language preference: **English**

[Submit](#) [Cancel Appointment](#)

**Figure 20 ESS Customer Review Appointment Details**

Type of Appointment cannot be changed without canceling and creating a new appointment.

Selecting the Reschedule Appointment button takes the customer to the Find Available Appointments – Enter ZIP Code page. ESS prefills the ZIP Code with the ZIP Code of the current appointment location. The customer may select a new time at the same location, a new date and time at the same location, or a new location, date, and time. When the customer makes his or her selection by clicking on the chosen appointment start time, ESS returns to the Appointment Details and shows the updated information.

The screenshot shows the top navigation bar with the logo and text "Enterprise Scheduling System" and "Customer Scheduling". Below this is the heading "Appointment Details" and the sub-heading "Find Available Appointments". A note states "A red asterisk (\*) indicates a required field." The form contains two required fields: "Enter ZIP Code" with an empty text input box, and "Contact Type" with three radio button options: "In Office", "Video", and "Phone". A blue "Next" button is positioned at the bottom of the form.

Figure 21 ESS Customer Reschedule Enter ZIP Code

The screenshot displays the "Social Security" logo and "Schedule an Appointment" header. The main content area shows appointment details for "230 W Superior St, Ste 500, Duluth, MN 55808". A modal dialog titled "Confirm Appointment" is overlaid, asking "Are you sure you want to book the following appointment:" and listing the "Location" and "Date/Time: 2:45 PM on Tuesday April 19, 2022". The dialog has "Yes" and "No" buttons. The background shows a grid of available appointment start times for Tuesday, ranging from 8:00 AM to 4:30 PM. A "Previous" button is visible at the bottom left, and footer text includes "OMB No. 0000-0000", "Privacy Policy", "Privacy Act Statement", and "Accessibility".

Figure 22 ESS Customer Confirm Appointment

### Appointment Details

#### Review Existing Appointment Details

The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

#### Appointment Details

Reason for Appointment

What can we help you with: **Replacement Social Security Card**

Appointment Options

[Reschedule Appointment](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **April 19, 2022**  
Appointment time: **2:45 PM** **UPDATED**

Personal Information

[Update](#)

Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218)-078-7591**

Language Preference

[Update](#)

Spoken language preference: **English**  
Written language preference: **English**

[Submit](#)

[Cancel Appointment](#)

**Figure 23 ESS Customer Review Existing Appointment Details Showing Updates**

The Personal Information Update button takes the customer to the Personal Information page. Your Name is read-only. Clicking Next returns the Customer to the Appointment Details page.

Schedule an Appointment

Personal Information

\* Indicates required information

**Your Name**

\* First  Middle  \* Last  Suffix

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by unchecking the consent box. Please provide authorization to receive these messages by checking the consent box. Otherwise, you may proceed with confirming your appointment by clicking "Next."

I consent to receive electronic messages from SSA about this appointment (message and data rates may apply)

\* How would you like to receive these messages?

Email and text messages  
 Email

\* Your Email Address

\* Your U.S. Mobile Phone Number  
10-digit Number

Figure 24 ESS Customer Update Personal Information

The Language Preference Update button takes the customer to the Language Preference page.

Schedule an Appointment

Language Preference

\* Indicates required information

**i** This is the language used during your appointment with a representative  
We can arrange for an interpreter at no cost to you

\* Spoken language preference?

\* Written language preference?

[OMB No. 0000-0000](#) [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

Figure 25 ESS Customer Update Language Preferences

Any changes are reflected on the Review and Submit page.

The screenshot shows the 'Appointment Details' page on the Social Security website. At the top left is the Social Security logo, and at the top right are links for 'User Name' and 'Sign Out'. The main heading is 'Appointment Details'. Below this is a section titled 'Review Existing Appointment Details' with a sub-heading 'Appointment Details' in a dark bar. The text states: 'Review Existing Appointment Details. The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.' The page is divided into several sections, each with a green checkmark icon and a title: 1. 'Reason for Appointment': Shows 'What can we help you with: Replacement Social Security Card' and a 'Reschedule Appointment' button. 2. 'Appointment Options': Lists office address (230 W Superior St, Ste 500, Duluth, Minnesota, ZIP 55808), appointment date (April 19, 2022), and time (2:45 PM) with an 'UPDATED' badge. Includes an 'Update' button. 3. 'Personal Information': Shows name (John Quincy Smith), consent to receive messages (Yes), preferred message type (Email and text messages), email address (johnsmith@email.com), and mobile number ((218)-078-7591). Includes an 'Update' button. 4. 'Language Preference': Shows spoken and written language preferences as English. Includes an 'Update' button. At the bottom left are 'Submit' and 'Cancel Appointment' buttons. At the bottom of the page are links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 26 ESS Customer Review Existing Appointment Details Showing Updates

After making changes, the customer clicks Submit to finalize the appointment.

Most of the UIs are the same as for the Schedule an Appointment path, except for the following changes:

- On Personal Information, Your Name is read-only.
- After making changes, an UPDATED badge appears next to the update information.

### 1.3. Cancel an Appointment

The customer receives an electronic message from SSA with a link to ESS. The customer must use this link to access the appointment record to modify, reschedule, or cancel the appointment online. If the customer opted to not receive electronic messages, the customer must contact SSA to make changes.

The customer must review the Terms of Service and Privacy Act Statement before proceeding.

ESS shows Review Your Appointment Details.

 Social Security User Name [Sign Out](#)

#### Appointment Details

Review Existing Appointment Details  
The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.

##### Appointment Details

Reason for Appointment

What can we help you with: **Replacement Social Security Card**

Appointment Options [Reschedule Appointment](#)

Office Address  
Street Address: **230 W Superior St, Ste 500**  
City/Town: **Duluth**  
State/Territory: **Minnesota**  
ZIP Code: **55808**  
Appointment date: **April 19, 2022**  
Appointment time: **2:45 PM** UPDATED

Personal Information [Update](#)

Your Name: **John Quincy Smith**  
I consent to receive electronic messages from SSA about this appointment (message and data rates may apply): **Yes**  
How would you like to receive these messages: **Email and text messages**  
Your Email address: **johnsmith@email.com**  
Your U.S. Mobile Phone Number: **(218)-078-7591**

Language Preference [Update](#)

Spoken language preference: **English**  
Written language preference: **English**

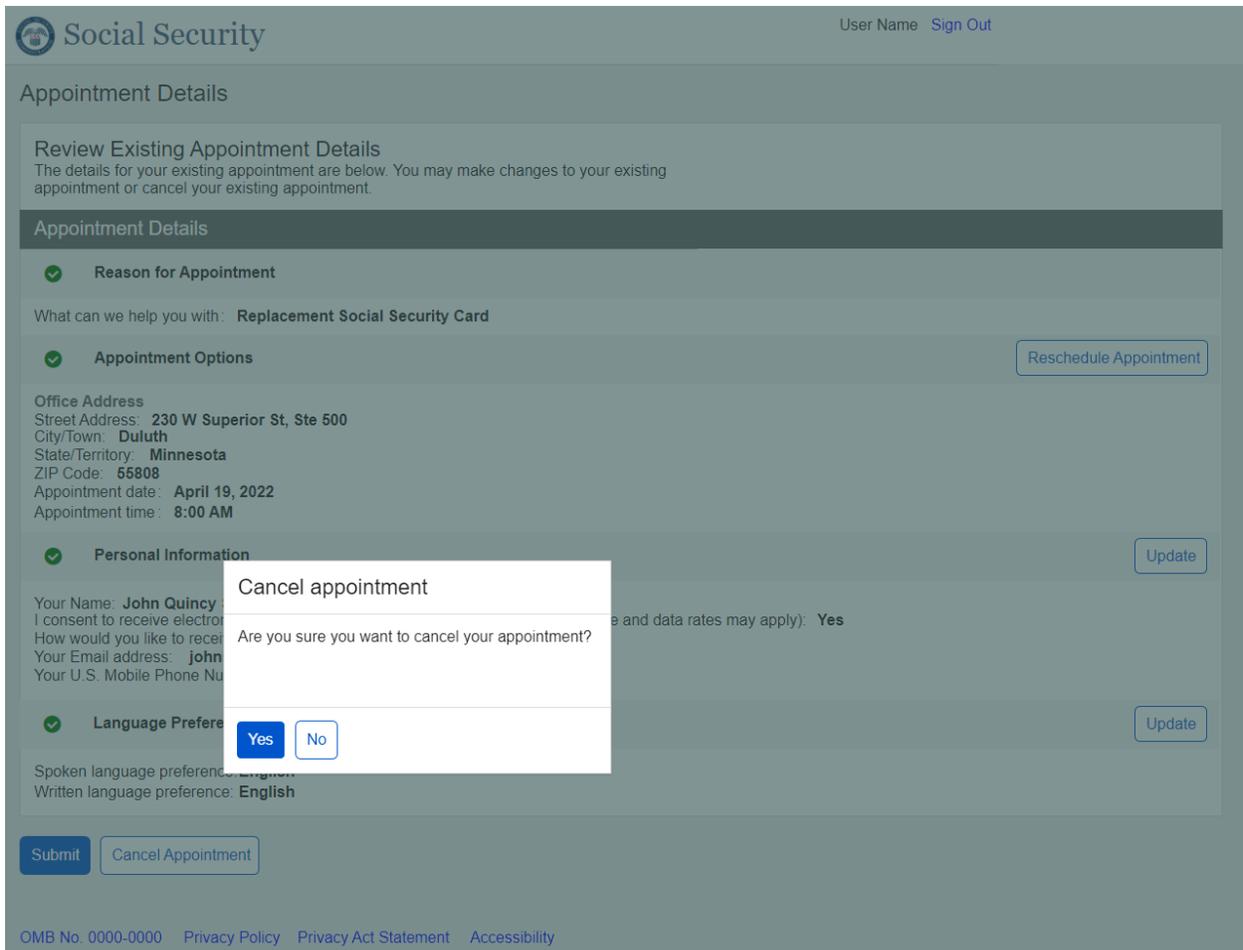
[Submit](#) [Cancel Appointment](#)

OMB No. 0000-0000 [Privacy Policy](#) [Privacy Act Statement](#) [Accessibility](#)

**Figure 27 ESS Customer Review Existing Appointment Details**

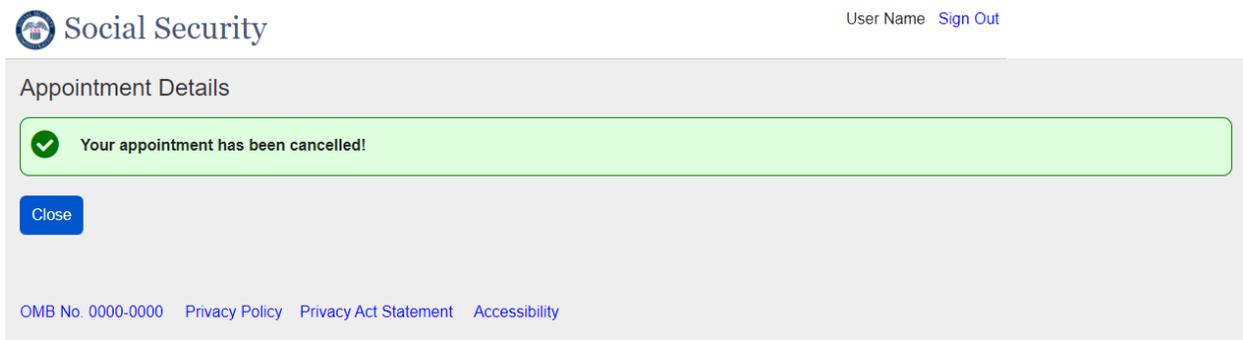
The customer clicks the Cancel Appointment button to cancel the appointment. ESS asks for confirmation.

# Design Specifications Document – ESS Screen Package



**Figure 28 ESS Customer Cancel Appointment Confirmation**

If Yes, ESS displays successful cancellation message.



**Figure 29 ESS Customer Cancel Appointment Success**

If no, ESS returns the customer to Review Your Appointment Details.

## 2. ESS Technician Scheduling UI Walkthrough

The UIs presented in this document are part of a larger application that continues to be developed. The functionality to allow technicians to schedule, reschedule, and cancel PE appointments is a part of the functionality for this expansion of the application. ESS includes administrative functionality for Managers to define technician availability and view calendars of appointments. These components are for administrative purposes only and do not alter the UI content contained in the following sections that technicians would use to schedule appointments for customers.

### 2.1. Schedule Appointment

The technician scheduling process begins with a phone call from a person wishing to make an appointment. The technician will verify the caller is the proper applicant as well as read the Privacy Act Statement. The technician will open the Appointment function in ESS and begin to gather information from the caller.

The technician first asks for the caller’s name. First and last name are required.

The screenshot shows a web application interface for scheduling appointments. At the top, there is a dark header with the text 'Enterprise Scheduling Solution' on the left and '[User Name] v' on the right. Below the header is a navigation bar with 'Appointments' and 'Admin' tabs. The main content area is titled 'Schedule an Appointment'. Underneath, there is a form titled 'Personal Information'. The form includes a legend: '\* Indicates required information'. The first section is '\* Your Name' with the instruction 'This is the person requesting the appointment'. It contains four input fields: 'First', 'Middle', '\* Last', and 'Suffix'. The 'Last' field is marked as required. Below this is a question '\* For whom are you scheduling this appointment?' with two radio button options: 'Self' and 'Someone Else'. At the bottom of the form area, there are two buttons: 'Next' (highlighted in blue) and 'Previous'.

Figure 30 ESS Technician Personal Information Startup

The technician then asks for whom the caller is scheduling an appointment. The proper applicant can call and schedule an appointment. If the caller wants to schedule their own appointment, the technician asks for the caller’s name and DOB. For enumeration appointments SSN is an optional field. For PE appointments, SSN is mandatory. If the caller is a proper applicant for someone else and wants to schedule an appointment, the technician asks the name and DOB of the number holder or original number applicant as well as the caller’s

name. If the caller is making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required. If the caller is making a PE appointment, SSN is required.

The screenshot shows a web application interface for scheduling an appointment. At the top, there is a header bar with the text 'Enterprise Scheduling Solution' on the left and '[User Name]' on the right. Below the header, there are two tabs: 'Appointments' (active) and 'Admin'. The main content area is titled 'Schedule an Appointment' and contains a form section titled 'Personal Information'. The form includes a legend: '\* Indicates required information'. The first section is '\* Your Name', with a sub-instruction 'This is the person requesting the appointment'. It contains four input fields: 'First', 'Middle', '\* Last', and 'Suffix'. The 'Last' field is marked as required. Below this is a section '\* For whom are you scheduling this appointment?' with two radio button options: 'Self' (selected) and 'Someone Else'. The next section is 'Individual's Social Security Number (SSN)' with an empty input field. The final section is '\* Individual's Date of Birth', with three dropdown menus for 'Month', 'Day', and 'Year'. At the bottom of the form, there are two buttons: 'Next' (highlighted in blue) and 'Previous'.

Figure 31 ESS Technician Personal Information for Self

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Personal Information

\*Indicates required information

**\*Your Name**  
This is the person requesting the appointment

\*First Middle \*Last Suffix

\*For whom are you scheduling this appointment?

Self

Someone Else

**Individual's Social Security Number (SSN)**

**Individual's Name**  
This is the person for whom you are scheduling the appointment

\*First Middle \*Last Suffix

**\*Individual's Date of Birth**

Month Day Year

Next Previous

**Figure 32 ESS Technician Personal Information for Someone Else**

If the caller wants to schedule an appointment for someone else, the technician asks for that individual's SSN (not required for enumeration only), name (first and last required), and DOB. The technician clicks Next.

ESS checks the ESS database to determine if any appointments exist for the person for whom the appointment is to be made. If ESS finds any appointments, it displays a list of the appointments. The technician can then determine if the individual already has an appointment scheduled.

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.123] Marcus Holmes Sign Out

Customer Scheduling

### Schedule an Appointment

**Personal Information**

Individual's Social Security Number (SSN)

Individual's Name  
*Not Answered*

Individual's Date of Birth  
*Not Answered Not Answered, Not Answered*

**Appointments for this Individual**  
Open an appointment record to view, update, reschedule, or cancel it

Date/Time	Location	Reason	Scheduler	Status	Actions
03/25/2025 9:00 AM	SOCIAL SECURITY 650 GRAVOIS BLUFF BLVD , FENTON, MO 63026	Replacement Social Security Card	Seabrook, Ifara S (Technician)	Scheduled	<a href="#">View</a>
03/24/2025 9:00 AM	SOCIAL SECURITY 2ND FLOOR 35 COURTLAND ST , BRIDGEPORT, CT 06604	Original Social Security Card	Holmes, Marcus Jermaine (Technician)	Scheduled	<a href="#">View</a>

[Create Appointment](#) [Previous](#)

**Figure 33 ESS Technician Scheduled Appointments Found**

If the person for whom the appointment is to be made already has an appointment scheduled for the same reason, the technician can open the appointment to view its details and make any required changes, including rescheduling the appointment. Some reasons why there may be multiple appointments may be:

- The person self-scheduled multiple times using ESS.
- The person has a name and DOB that are the same as another person(s) who have appointments with the SSA, which may happen if an SSN is not provided.

If no existing appointments are found, ESS displays the results page with a message indicating that no results were found.

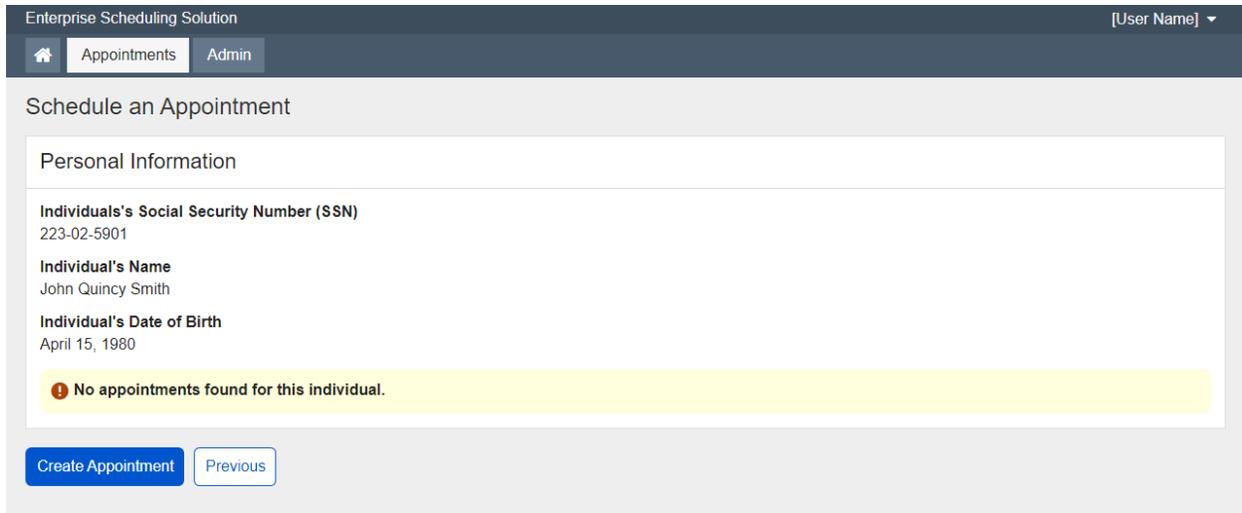


Figure 34 ESS Technician No Scheduled Appointments Found

Once the technician has gathered information about the person for whom the appointment is being made, the technician asks about the reason for the appointment.



Figure 35 ESS Technician Reason for Appointment

In this expansion of ESS, the reason for an appointment is either Enumeration or Post-Entitlement.

Enterprise Scheduling System

Customer Scheduling

## Schedule an Appointment

Reason for Appointment

A red asterisk (\*) indicates a required field.

\*What can I help you with?

Enumeration

\*Which of these best describes the reason for your appointment?

Original Social Security Card

Replacement Social Security Card

\*Have you started your online application (oSSNAP)?

Yes

No

Doesn't Know

\*Do you have your application Online Control Number (oSSNAP)?

Yes

No

Doesn't Know

\*Online Control Number

Next Previous

Figure 364 ESS Technician Reason for Appointment – Enumeration

In enumeration cases, the technician asks if the individual has started an online application in oSSNAP.

- If Yes, ESS asks if the individual has the Online Control Number associated with the application in oSSNAP.
  - If Yes, ESS asks for the Online Control Number.
- If No or Doesn't know, the technician may continue to the next step.

Note: Technicians will be able to select “Yes” that the customer has an Online Control number, not input the control number, and remind the customer to bring the number to their appointment if the customer does not have the number readily available.

If the customer is not attempting to obtain an SSN card, the technician asks the customer questions to identify their needs.

The screenshot shows the 'Enterprise Scheduling System' header with a home icon and 'Customer Scheduling' link. Below is the title 'Schedule an Appointment' and the section 'Reason for Appointment'. A note states: 'A red asterisk (\*) indicates a required field.' The form contains three required fields: 1. '\*What can I help you with?' with a dropdown menu showing 'Post Entitlement'. 2. '\*Which of these best describes the reason for your appointment?' with a dropdown menu showing 'Other'. 3. '\*Provide additional details about the appointment' with a list of radio button options: Medical CDR, Medicare Issues, Overpayment Issues, Rep Payee, SSI Limited Issues, SSI Living Arrangement, SSI Redetermination, Work CDR, and Other. At the bottom are 'Next' and 'Previous' buttons.

**Figure 45 ESS Technician Reason for Appointment – Post-Entitlement**

If the customer requires a PE appointment, the technician makes the corresponding selection in the What can I help you with? field. The technician will ask the customer additional questions to complete the required ‘Which of these best describes the reason for your appointment?’ field. The technician will be able to select from Title 2/Concurrent, Title 16, Medicare or Other. The technician will also use the information obtained from the conversation to select an option in the ‘Provide additional details about the appointment’ field.

The technician clicks Next.

ESS asks for a ZIP code and the customer’s preferred contact type, so it can find an available appointment at the caller’s local field office.

Enterprise Scheduling System

Customer Scheduling

## Schedule an Appointment

Find Available Appointments

A red asterisk (\*) indicates a required field.

\*Enter ZIP Code

\*Contact Type

In Office

Video

Next Previous

Figure 46 ESS Technician Enter ZIP Code

The technician enters the zip code and contact type provided by the customer and clicks Next to continue.

ESS displays the first available appointment at the local servicing office associated with the ZIP code.

Enterprise Scheduling Solution [User Name]

Appointments Admin

## Schedule an Appointment

### Select Appointment

230 W Superior St  
Ste 500  
Duluth, MN, 55802

Available appointment times:

Earliest available appointment

8:00 AM on Tuesday, April 19, 2022

Select another time on Tuesday, April 19, 2022 Select another date at this location Select Another Location

Previous

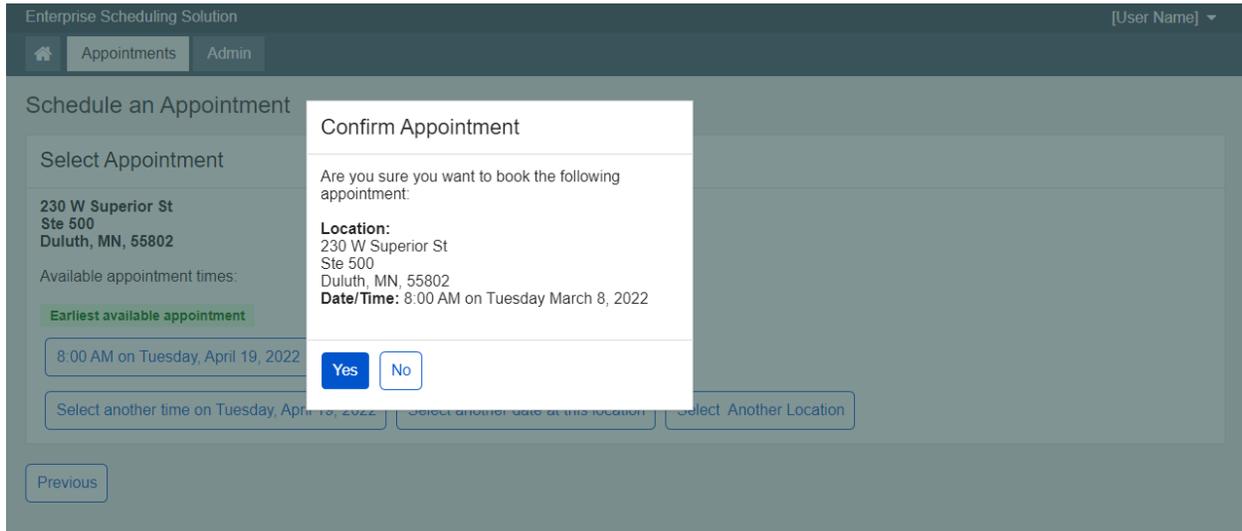
Figure 377 ESS Technician Earliest Available Appointment

The technician provides the proposed date and time to the caller (earliest date and time available).

## Design Specifications Document – ESS Screen Package

Note: that during this scheduling process, the selected appointment location, date, and time has been reserved for the individual, and is unavailable for other callers or users in the online scheduling application.

If the caller finds the time and date acceptable, the technician clicks the button with the time and date on it and confirms the appointment.

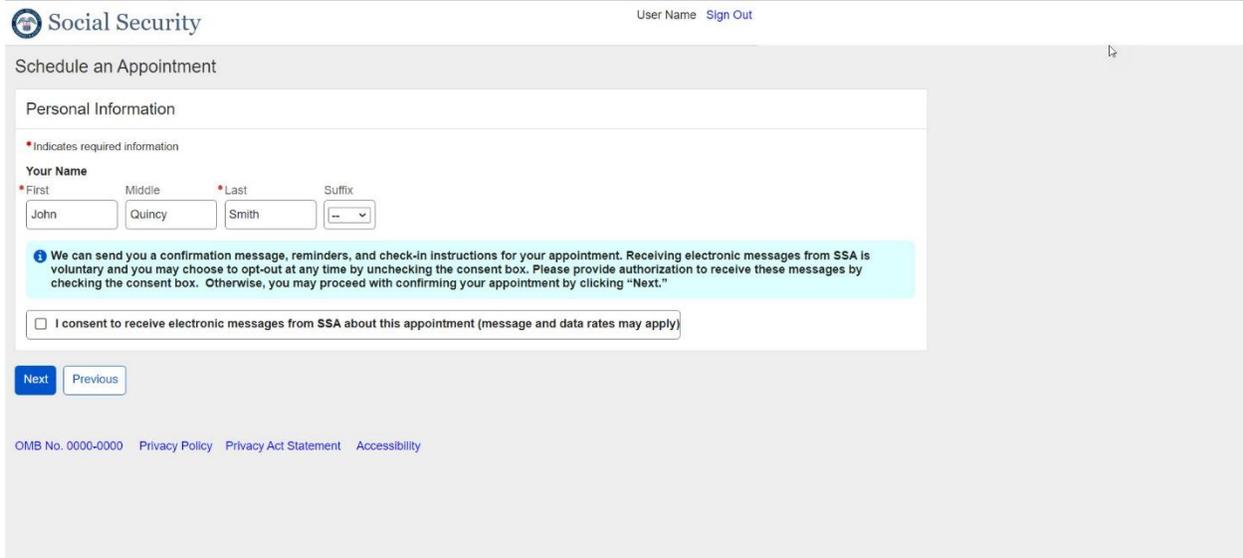


**Figure 388 ESS Technician Confirm Appointment**

The technician clicks Yes to continue.

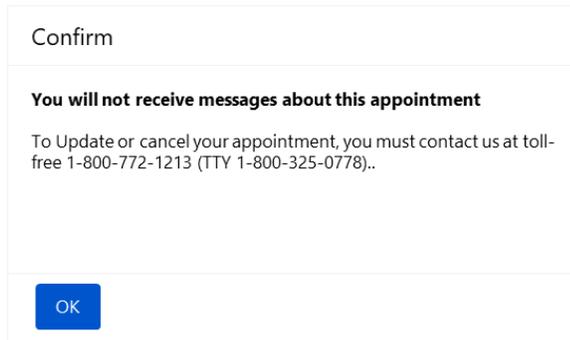
For a review of the UIs involved in finding an appointment location, date, and time, please refer to the [ESS Public UI Walkthrough](#) (starting on page 3). The Public and Technician applications share similar design concepts.

The technician informs the caller that SSA can send a confirmation message, reminders, and check-in instructions for the appointment by text and email, which the caller can opt out of at any time.



**Figure 399 ESS Technician Consent to Messaging Before Consent**

If the caller does not consent to receiving electronic messages, when the technician clicks Next, a message appears to remind the individual that he or she will not receive messages about this appointment. The technician reads this message to the caller.



**Figure 50 ESS Technician No Consent to Messaging Message**

If the caller agrees to receiving electronic messages, the technician checks the box indicating the caller’s consent to the electronic messages. The technician asks how the caller would like to receive messages:

- If the caller indicates Email, the technician asks for and enters the caller’s email address.
- If the caller indicates both Email and text messages, the technician asks for and enters the caller’s email address and mobile phone number.

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

• Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

• How would you like to receive these messages?

Email and text messages

Email

• Your Email Address

• Your U.S. Mobile Phone Number

10-digit Number

• Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes

No

Next Previous

**Figure 51 ESS Technician Consent to Messaging After Consent, Email and text messages, No to OTP**

If the caller consents to receiving electronic messages, the technician also asks the caller to create an OTP to modify the appointment online. The caller may decline. If the caller agrees, the technician asks for a four-to-six numerical passcode, which the technician documents.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

\*Indicates required information

**Your Name**  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

\*How would you like to receive these messages?

Email and text messages  
 Email

\*Your Email Address

\*Your U. S. Mobile Phone Number  
10-digit Number

\*Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes  
 No

\*One Time Numerical Passcode (OTP)  
Enter 4 to 6 Characters

Figure 52 ESS Technician Consent to Messaging After Consent, Email and text messages, Yes to OTP

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

• Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

• How would you like to receive these messages?

Email and text messages

Email

• Your Email Address

• Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes

No

Next Previous

Figure 53 ESS Technician Consent to Messaging After Consent, Email only, No to OTP

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

### Schedule an Appointment

#### Consent to Messaging

• Indicates required information

Your Name  
John Smith

**i** We can send you a confirmation message, reminders, and check-in instructions for your appointment. Receiving electronic messages from SSA is voluntary and you may choose to opt-out at any time by electronically accessing your appointment and unchecking the consent box. If you choose not to receive electronic messages at this time you will need to contact SSA to reschedule, cancel, or modify your appointment or opt-in for electronic messaging. Do you want to provide authorization to receive these messages?

John Smith consents to receive electronic messages from SSA about this appointment (message and data rates may apply)

• How would you like to receive these messages?

Email and text messages

Email

• Your Email Address

• Would you like to provide a One Time Numerical Passcode (OTP) to modify this appointment online?  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes

No

• One Time Numerical Passcode (OTP)  
Enter 4 to 6 Characters

Next Previous

Figure 54 ESS Technician Consent to Messaging After Consent, Email only, Yes to OTP

The technician clicks Next.

ESS asks for the individual’s language preferences.

The screenshot shows the 'Enterprise Scheduling System' interface. The page title is 'Schedule an Appointment'. Under 'Language Preference', there is a note: 'A red asterisk (\*) indicates a required field.' An information box states: 'This is the language used during your appointment with a representative. We can arrange for an interpreter at no cost to you.' Below this, there are two required fields: '\*Spoken language preference?' and '\*Written language preference?'. Both dropdown menus are currently set to 'English'. At the bottom, there are 'Next' and 'Previous' buttons.

Figure 55 ESS Technician Language Preference

ESS asks for both spoken and written language preferences. Both default to English, but the technician can select another language for the individual, as needed.

The technician clicks Next to continue.

ESS asks for any remarks from the caller, individual, and/or technician. The technician may enter up to 2,500 characters. For enumeration appointments, the oSSNAP Online Control Number will be added automatically to the Remarks if it was supplied in an earlier step. The remarks are locked after being entered by technicians and cannot be deleted or over keyed.

The screenshot shows the 'Enterprise Scheduling System' interface. The page title is 'Schedule an Appointment'. Under 'Remarks', there is a question: 'Is there anything else we should know before the appointment?' with an 'Add Remarks' button. Below this is a table with the following data:

Date/Time	SSA Employee	Remarks
3/17/2025 09:32 AM	Seabrook, Ifara S	Technician remarks.

At the bottom, there are 'Next' and 'Previous' buttons.

Figure 56 ESS Technician Remarks

The technician clicks Next.

ESS displays a review page, listing all the information provided about the appointment.

# Design Specifications Document – ESS Screen Package

The screenshot shows the 'Enterprise Scheduling System' interface. At the top, there is a blue header with the system name and user information: 'Enterprise Scheduling System', '[TEST ONLY - CHANGE PROFILE]', '[Build version: 2.0.111]', 'Hara Seabrook', and 'Sign Out'. Below the header, the page title is 'Customer Scheduling' and the main heading is 'Schedule an Appointment'.

The main content area is titled 'Review and Submit' and contains several sections, each with an 'Update' button:

- Personal Details:**
  - Personal Information:** Your Name: John Quincy Smith; For whom are you scheduling this appointment: Self; Individual's SSN: [Redacted]; Individual's Date of Birth: April 15, 1980.
  - Reason for Appointment:** What can I help you with: Social Security Card; Which of these best describes the reason for your appointment: Replacement Social Security Card; Have you started your online application (eSSNAP): Yes; Do you have your application Online Control Number (oSSNAP): No; Online Control Number: Not Answered.
- Appointment Details:**
  - Appointment Information:** Office Address: SOCIAL SECURITY, 2ND FLOOR, 35 COURTLAND ST, BRIDGEPORT, CT, 06604; Appointment Date: March 18, 2025; Appointment Time: 9:00 AM; Contact Type: In Office.
  - Consent to Messaging:** Your Name: John Quincy Smith; Your Phone Number: (218) 078-7591; Do you consent to receive electronic messages from SSA?: Yes, I consent; Your Email Address: johnsmith@email.com; Would you also like to receive text messages?: Yes; Your U.S. Mobile Phone Number: (218) 078-7591; Would you like to provide a One Time Passcode (OTP) to modify this appointment online?: Yes; One Time Passcode (OTP): 123456.
  - Language Preference:** Spoken language preference?: English; Written language preference?: English.
- Remarks:** A table with columns 'Date/Time', 'SSA Employee', and 'Remarks'. The first row shows: 3/17/2025 09:32 AM, Seabrook, Hara S, Technician remarks.

At the bottom left of the form, there is a blue 'Submit' button.

**Figure 57 ESS Technician Review and Submit**

The technician will review this page with the caller and edit as needed.

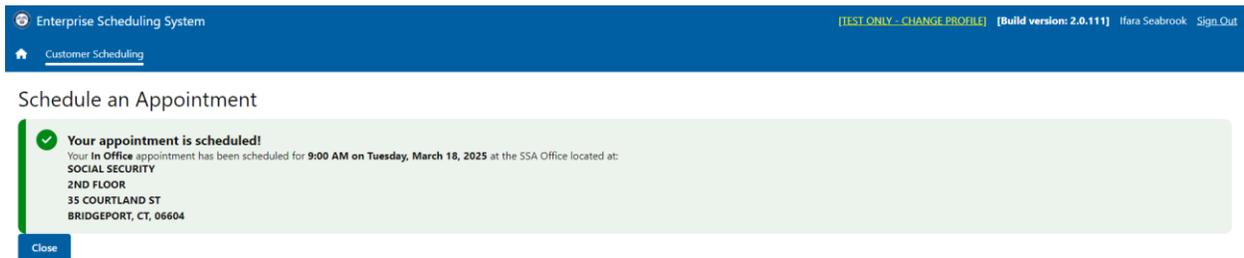
The Reason for Appointment Edit button returns to the Reason for Appointment step. If the technician changes the reason for the appointment, a new appointment location, date, and time, must be selected. The technician will then step through the Consent to Messaging, Language Preferences, and Remarks pages again, with the previously entered information still there.

## Design Specifications Document – ESS Screen Package

The Appointment Details Edit button returns to the Select Appointment – Enter ZIP Code page. ESS prefills the ZIP code with the ZIP code of the previously selected office location, and preferred contact type. The technician will use the same UIs to find a new appointment location, date, and time for the individual. The technician will then step through the Consent to Messaging, Language Preferences, and Remarks pages again, with the previously entered information still there.

The other Edit buttons return to their respective pages in the scheduling flow.

Once satisfied with the appointment details, the technician clicks Submit to schedule the appointment.



**Figure 58 ESS Technician Appointment Scheduled Success**

## 2.2. Reschedule, Modify, or Cancel an Appointment

Rescheduling, modifying, and cancelling appointments start with the technician verifying the caller is the proper applicant as well as reading the Privacy Act Statement.

The technician will open the Appointment function in ESS and begin to gather information from the caller.

The screenshot shows the Enterprise Scheduling System interface. At the top, there is a blue header with the system name and a home icon. Below the header, the main content area has a large heading 'Schedule an Appointment' and a sub-heading 'Search For Existing Appointment'. A note states 'A red asterisk (\*) indicates a required field.' There are two search options: 'Search by SSN' (selected) and 'Search by Name and DOB'. Below the 'Search by SSN' option, there is a text input field with a red asterisk and the label '\*Individual's Social Security Number (SSN)'. The input field contains two dashes. Below the input field are two buttons: 'Search' and 'Previous'.

Figure 59 ESS Technician Search for Existing Appointment by SSN

The technician then asks for whom the caller is scheduling an appointment. The caller can reschedule, modify, or cancel an appointment if the caller made the original appointment. If the caller wants to reschedule, modify, or cancel an appointment, the technician asks for the caller's SSN. If the caller has an appointment for an original SSN, the technician is not required to collect the SSN. Name and DOB are required. For PE appointments, SSN is required.

 Enterprise Scheduling System

 [Customer Scheduling](#)

## Schedule an Appointment

### Search For Existing Appointment

A red asterisk (\*) indicates a required field.

Search by SSN      **Search by Name and DOB**

---

**Individual's Name**

\*First      Middle      \*Last      Suffix

                 -- ▾

**Individual's Date of Birth**

\*Month      \*Day      \*Year

-- ▾      -- ▾      -- ▾

**Figure 60 ESS Technician Search for Existing Appointment by Name and DOB**

If the caller wants to reschedule, modify, or cancel an appointment for someone else, the technician asks for that individual's SSN, name (first and last required), and DOB. The technician clicks Search. If the technician does enter the required fields an error message will appear, and the technician will be unable to proceed to the next screen.

ESS checks whether other appointments have been scheduled for the person for whom the appointment was made. If ESS finds multiple appointments, it displays a list of the appointments. The technician can then determine which of the appointments is relevant to the caller.

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Ifara Seabrook Sign Out

Customer Scheduling Admin Dashboard Staff Actions Office Settings Appointment List Calendar Reports Feedback

### Appointment Details

Personal Information

Individual's Social Security Number (SSN)

Individual's Name  
John Quincy Smith

Individual's Date of Birth  
April 15, 1980

Appointments for this Individual  
Open an appointment record to view, update, reschedule, or cancel it

Date/Time	Location	Reason	Scheduler	Status	Actions
03/18/2025 9:00 AM	SOCIAL SECURITY 2ND FLOOR 35 COURTLAND ST., BRIDGEPORT, CT 06604	Replacement Social Security Card	Seabrook, Ifara S (Technician)	Scheduled	<a href="#">View</a>
03/28/2025 9:00 AM	SOCIAL SECURITY 2ND FLOOR 35 COURTLAND ST., BRIDGEPORT, CT 06604	Replacement Social Security Card	Seabrook, Ifara S (Technician)	Scheduled	<a href="#">View</a>

[Create Appointment](#) [Previous](#)

**Figure 61 ESS Technician Scheduled Appointments Found**

To reschedule, modify, or cancel, the technician must locate and open the appointment record. The appointment record looks much like the Review and Submit page from the scheduling process, except where there were Edit buttons, Update buttons and a Reschedule button now exist.

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] (Build version: 2.0.110) Ifara Seabrook Sign Out

Customer Scheduling Admin Dashboard Staff Actions Office Settings Appointment List Calendar Reports Feedback

### Appointment Details

**Review Existing Appointment Information**  
These are the answers you provided on your application for a Social Security Card.

**Personal Details**

**Personal Information**

Your Name:  
John Quincy Smith  
For whom are you scheduling this appointment:  
Someone Else  
Individual's Name:  
John Quincy Smith  
Individual's SSN:  
  
Individual's Date of Birth:  
April 15, 1980

**Reason for Appointment**

What can I help you with:  
Social Security Card  
Which of these best describes the reason for your appointment:  
Replacement Social Security Card  
Have you started your online application (eSSNAP):  
No  
Do you have your application Online Control Number (eSSNAP):  
No  
Online Control Number:  
Not Answered

The details for the existing appointment are below. You may make changes to the existing appointment or cancel the existing appointment.

**Appointment Details**

**Appointment Information** [Reschedule Appointment](#)  
[Cancel Appointment](#)

Office Address:  
SOCIAL SECURITY  
2ND FLOOR  
35 COURTLAND ST  
BRIDGEPORT, CT, 06604  
Appointment Date:  
March 18, 2025  
Appointment Time:  
9:00 AM  
Contact Type:  
In Office

**Consent to Messaging** [Update](#)

Your Name:  
John Quincy Smith  
Individual's Name:  
John Quincy Smith  
Your Phone Number:  
(218) 078-7591  
Do you consent to receive electronic messages from SSA?  
Yes, I consent  
Your Email Address:  
johnsmith@email.com  
Would you also like to receive text messages?  
Yes  
Your U.S. Mobile Phone Number:  
(218) 078-7591  
Would you like to provide a One Time Passcode (OTP) to modify this appointment online?  
Yes  
One Time Passcode (OTP):  
123456

**Language Preference** [Update](#)

Spoken language preference?  
English  
Written language preference?  
English

**Remarks** [Update](#)

Date/Time	SSA Employee	Remarks
3/17/2025 09:54 AM	Seabrook, Ifara S	Technician remarks.

[Return to Personal Information Page](#)

**Figure 62 ESS Technician Review Existing Appointment Details**

To update any of the information, the technician clicks the Update button to revisit that section of the scheduling process.

To reschedule the appointment, the technician clicks Reschedule Appointment, which revisits the Select Appointment – Enter ZIP Code page. As when editing the original appointment, ESS prefills the ZIP code with the ZIP code of the previously selected office location and the customer’s preferred contact type. The technician will use the same UIs to find a new appointment location, date, and time for the individual.

# Design Specifications Document – ESS Screen Package

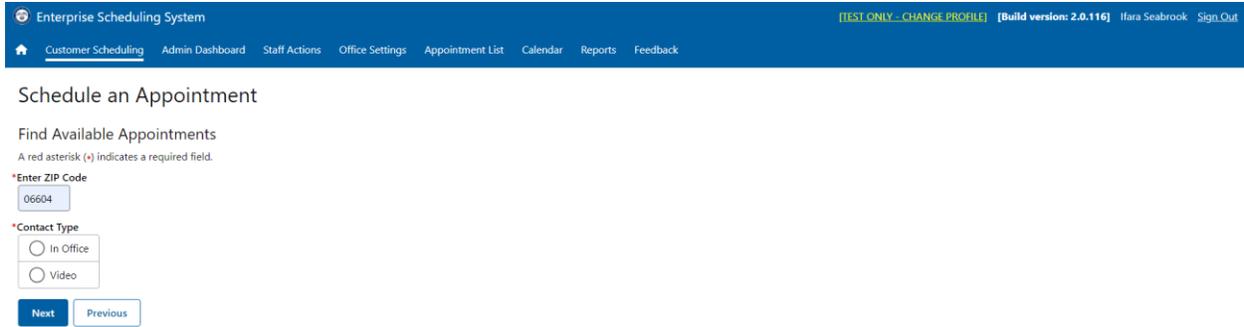


Figure 63 ESS Technician Enter ZIP Code

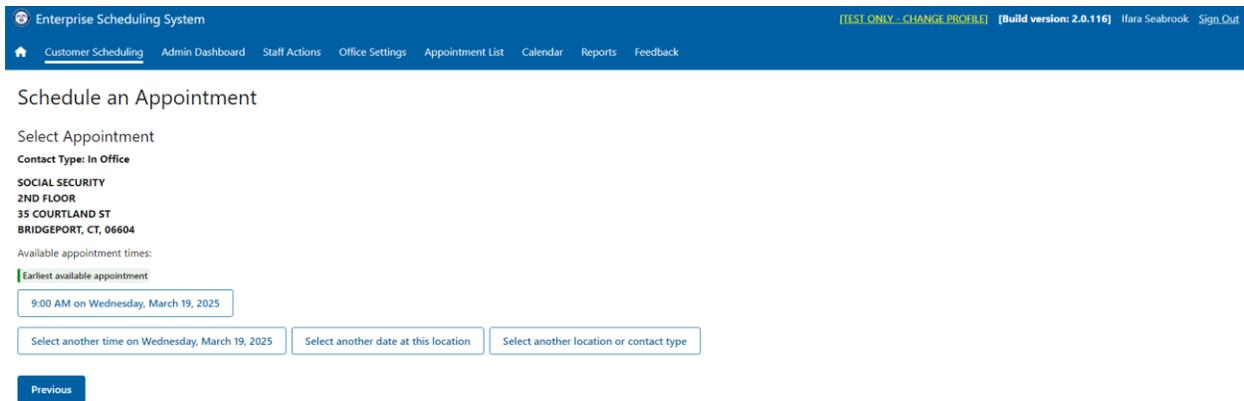


Figure 64 ESS Technician Earliest Available Appointment

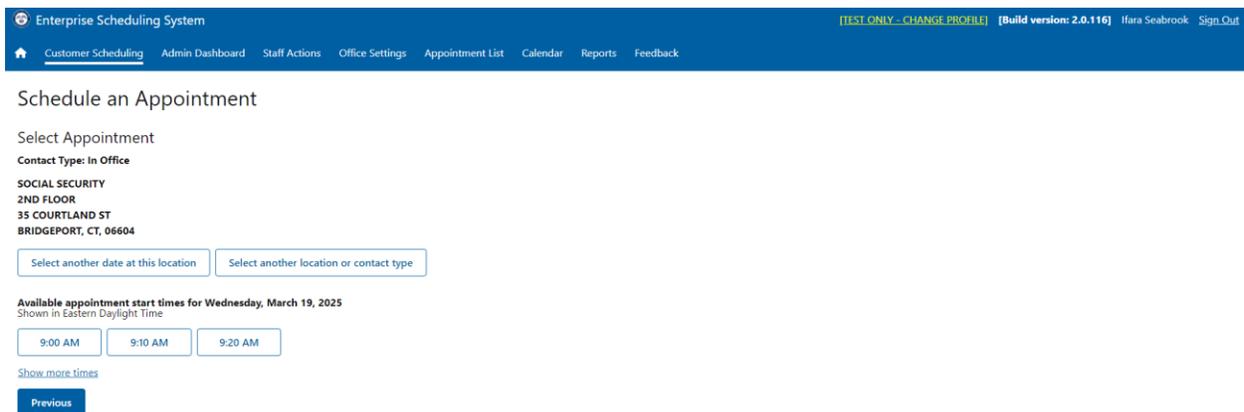


Figure 6540 ESS Technician Select Another Appointment on Same Date at Same Location

# Design Specifications Document – ESS Screen Package

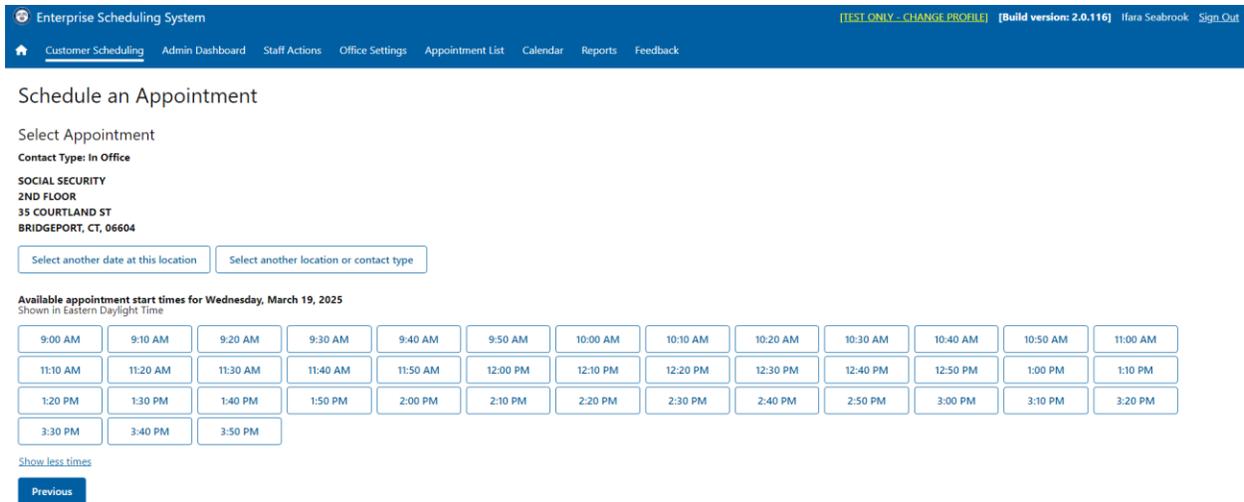


Figure 416 ESS Technician Show More Times

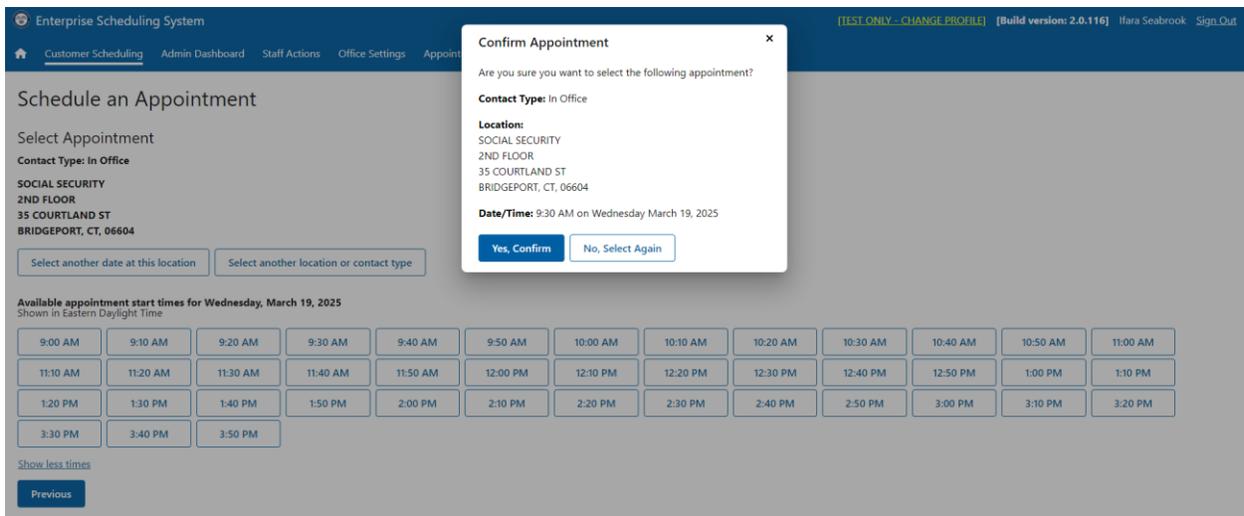


Figure 427 ESS Technician Confirm Appointment

# Design Specifications Document – ESS Screen Package

**Enterprise Scheduling System** [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Ifara Seabrook Sign Out

Customer Scheduling Admin Dashboard Staff Actions Office Settings Appointment List Calendar Reports Feedback

## Appointment Details

**Review Existing Appointment Information**  
These are the answers you provided on your application for a Social Security Card.

**Personal Details**

**Personal Information**

Your Name:  
John Quincy Smith  
For whom are you scheduling this appointment:  
Self  
Individual's SSN:  
Individual's Date of Birth:  
April 15, 1980

**Reason for Appointment**

What can I help you with:  
Social Security Card  
Which of these best describes the reason for your appointment:  
Replacement Social Security Card  
Have you started your online application (eSSNAP):  
No  
Do you have your application Online Control Number (eSSNAP):  
No  
Online Control Number:  
Not Answered

The details for the existing appointment are below. You may make changes to the existing appointment or cancel the existing appointment.

**Appointment Details**

**Appointment Information** [Reschedule Appointment](#)

**Appointment information updated. Please select "Submit" button to finalize changes.** [Cancel Appointment](#)

Office Address  
SOCIAL SECURITY  
2ND FLOOR  
35 COURTLAND ST  
BRIDGEPORT, CT, 06604  
Appointment Date  
March 21, 2025  
Appointment Time  
9:00 AM  
Contact Type  
In Office [Update](#)

**Consent to Messaging** [Update](#)

Your Name  
John Quincy Smith  
Your Phone Number  
(218) 079-7591  
Do you consent to receive electronic messages from SSA?  
Yes, I consent  
Your Email Address  
johnsmith@email.com  
Would you also like to receive text messages?  
Yes  
Your U.S. Mobile Phone Number  
(218) 079-7591  
Would you like to provide a One Time Passcode (OTP) to modify this appointment online?  
Yes  
One Time Passcode (OTP):  
123456

**Language Preference** [Update](#)

Spoken language preference?  
English  
Written language preference?  
English

**Remarks** [Update](#)

Date/Time	SSA Employee	Remarks
3/17/2025 09:54 AM	Seabrook, Ifara S	Technician remarks.

[Submit](#) [Exit Without Changes](#) [Return to Personal Information Page](#)

Figure 68 ESS Technician Review Appointment Details Showing Updates

**Enterprise Scheduling System** [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Ifara Seabrook Sign Out

Customer Scheduling Admin Dashboard Staff Actions Office Settings Appointment List Calendar Reports Feedback

## Appointment Details

**Your appointment details have been updated!**  
Your **In Office** appointment has been rescheduled for **9:00 AM on Friday, March 21, 2025** at the SSA Office located at:  
**SOCIAL SECURITY**  
**2ND FLOOR**  
**35 COURTLAND ST**  
**BRIDGEPORT, CT, 06604**

[Close](#)

Figure 69 ESS Technician Appointment Updated Success

To cancel the appointment, the technician clicks the Cancel Appointment button at the bottom of the page. ESS asks for confirmation and presents a successful cancellation message at the end.

The screenshot shows the top navigation bar of the Enterprise Scheduling System. The header is blue with a white home icon and the text 'Enterprise Scheduling System'. Below the header, the breadcrumb 'Customer Scheduling' is displayed. The main content area has a large heading 'Schedule an Appointment' and a sub-heading 'Search For Existing Appointment'. A note states: 'A red asterisk (\*) indicates a required field.' There are two search options: 'Search by SSN' (which is selected and underlined) and 'Search by Name and DOB'. Below the 'Search by SSN' option is a text input field with a red asterisk and the label '\*Individual's Social Security Number (SSN)'. The input field contains two dashes. Below the input field are two buttons: a blue 'Search' button and a white 'Previous' button with a blue border.

Figure 70 ESS Technician Search for Existing Appointment by SSN

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

## Appointment Details

Personal Information

Individual's Social Security Number (SSN)

Individual's Name  
John Quincy Smith

Individual's Date of Birth  
April 15, 1980

Appointments for this Individual  
Open an appointment record to view, update, reschedule, or cancel it

Date/Time	Location	Reason	Scheduler	Status	Actions
03/21/2025 9:00 AM	SOCIAL SECURITY 2ND FLOOR 35 COURTLAND ST , BRIDGEPORT, CT 06604	Replacement Social Security Card	Seabrook, Ifara S (Technician)	Rescheduled	<a href="#">View</a>
03/28/2025 9:00 AM	SOCIAL SECURITY 2ND FLOOR 35 COURTLAND ST , BRIDGEPORT, CT 06604	Replacement Social Security Card	Seabrook, Ifara S (Technician)	Scheduled	<a href="#">View</a>

[Create Appointment](#) [Previous](#)

**Figure 71 ESS Technician Scheduled Appointments Found**

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling System
[TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

## Appointment Details

**Review Existing Appointment Information**  
These are the answers you provided on your application for a Social Security Card.

**Personal Details**

**Personal Information**

Your Name:  
John Quincy Smith  
For whom are you scheduling this appointment:  
Self  
Individual's SSN:  
  
Individual's Date of Birth:  
April 15, 1980

**Reason for Appointment**

What can I help you with:  
Social Security Card  
Which of these best describes the reason for your appointment:  
Replacement Social Security Card  
Have you started your online application (eSSNAP):  
No  
Do you have your application Online Control Number (oSSNAP):  
No  
Online Control Number:  
Not Answered

The details for the existing appointment are below. You may make changes to the existing appointment or cancel the existing appointment.

**Appointment Details**

**Appointment Information** Reschedule Appointment

Office Address:  
SOCIAL SECURITY  
2ND FLOOR  
35 COURTLAND ST  
BRIDGEPORT, CT, 06604  
Appointment Date:  
March 21, 2025  
Appointment Time:  
9:00 AM  
Contact Type:  
In Office Cancel Appointment

**Consent to Messaging** Update

Your Name:  
John Quincy Smith  
Your Phone Number:  
(218) 078-7591  
Do you consent to receive electronic messages from SSA?  
Yes, I consent  
Your Email Address:  
johnsmith@email.com  
Would you also like to receive text messages?  
Yes  
Your U.S. Mobile Phone Number:  
(218) 078-7591  
Would you like to provide a One Time Passcode (OTP) to modify this appointment online?  
Yes  
One Time Passcode (OTP):  
123456

**Language Preference** Update

Spoken language preference?  
English  
Written language preference?  
English

**Remarks** Update

Date/Time	SSA Employee	Remarks
3/17/2025 09:54 AM	Seabrook, Iara S	Technician remarks.

[Return to Personal Information Page](#)

**Figure 432 ESS Technician Review Appointment Details**

# Design Specifications Document – ESS Screen Package

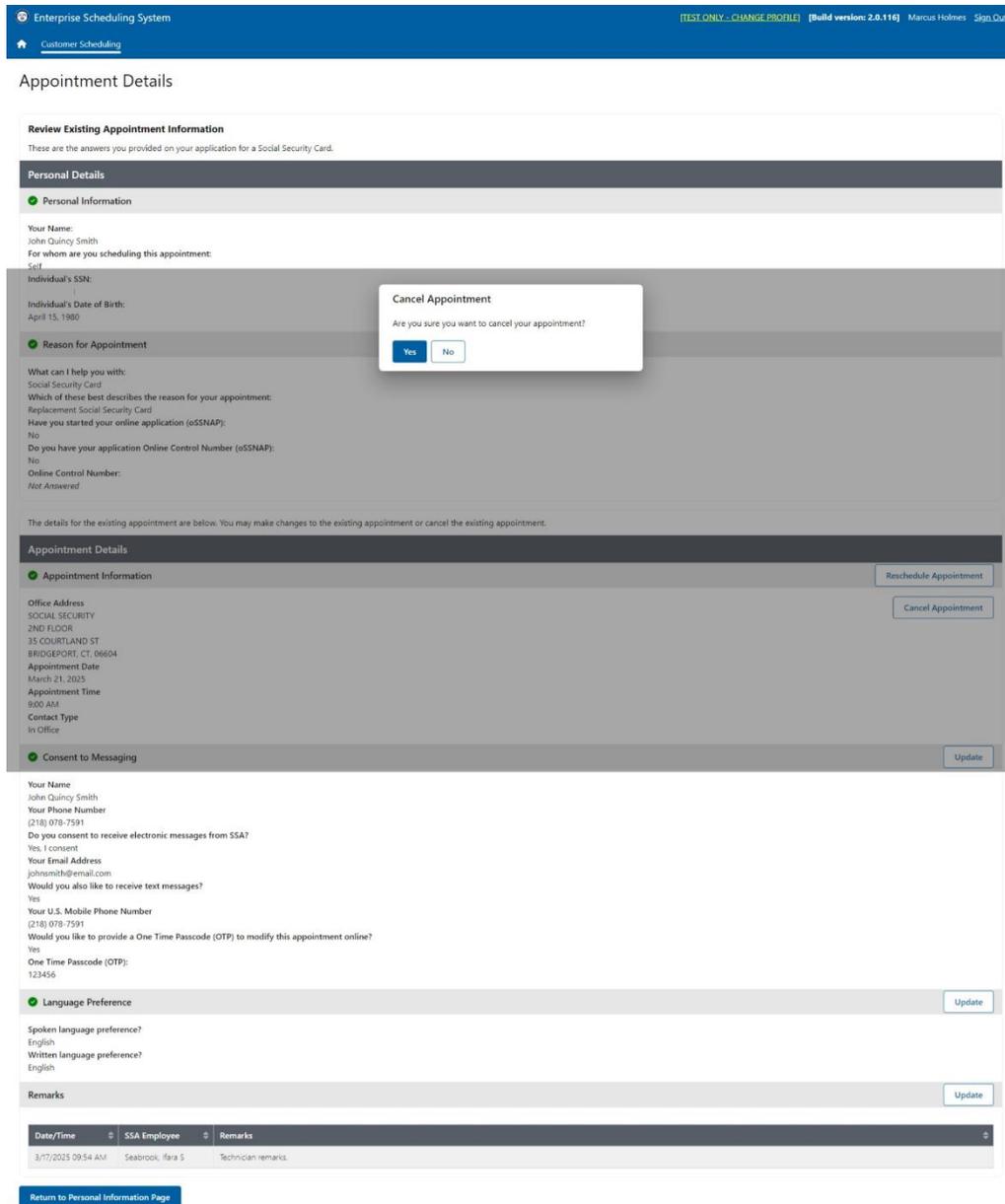


Figure 73 ESS Technician Cancel Appointment Confirmation



Figure 74 ESS Technician Cancel Appointment Success

### 2.3. Schedule Appointment for Someone Else

Enterprise Scheduling System [TEST ONLY...CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign\_Out

Customer Scheduling

#### Schedule an Appointment

Personal Information

A red asterisk (\*) indicates a required field.

**Your Name**  
This is the person requesting the appointment.

\*First: John Middle: Quincy \*Last: Smith Suffix: --

\*For whom are you scheduling this appointment?  
 Myself  
 Someone Else

**Individual's Social Security Number (SSN)**  
-- -- ----

**Individual's Name**  
This is the person for whom you are scheduling the appointment.

\*First: Jane Middle: Allison \*Last: Smith Suffix: --

**Individual's Date of Birth**

\*Month: January \*Day: 27 \*Year: 2006

Next Previous

Figure 75 ESS Technician Personal Information for Someone Else

Enterprise Scheduling System [TEST ONLY...CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign\_Out

Customer Scheduling

#### Schedule an Appointment

Personal Information

Individual's Social Security Number (SSN)

Individual's Name  
Jane Allison Smith

Individual's Date of Birth  
January 27, 2006

**No appointments found for this individual.**

Create Appointment Previous

Figure 76 ESS Technician No Scheduled Appointment Found

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

### Schedule an Appointment

Reason for Appointment  
A red asterisk (\*) indicates a required field.

\*What can I help you with?  
Enumeration

\*Which of these best describes the reason for your appointment?  
 Original Social Security Card  
 Replacement Social Security Card

\*Have you started your online application (oSSNAP)?  
 Yes  
 No  
 Doesn't Know

\*Do you have your application Online Control Number (oSSNAP)?  
 Yes  
 No  
 Doesn't Know

Next Previous

Figure 77 ESS Technician Reason for Appointment

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

### Schedule an Appointment

Find Available Appointments  
A red asterisk (\*) indicates a required field.

\*Enter ZIP Code  
06604

\*Contact Type  
 In Office  
 Video

Next Previous

Figure 448 ESS Technician Enter ZIP Code and Customer Preferred Contact Type

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

### Schedule an Appointment

Select Appointment  
Contact Type: In Office

SOCIAL SECURITY  
2ND FLOOR  
35 COURTLAND ST  
BRIDGEPORT, CT, 06604

Available appointment times:  
Earliest available appointment  
9:00 AM on Wednesday, March 19, 2025

Select another time on Wednesday, March 19, 2025 | Select another date at this location | Select another location or contact type

Previous

Figure 79 ESS Technician Earliest Available Appointment

# Design Specifications Document – ESS Screen Package

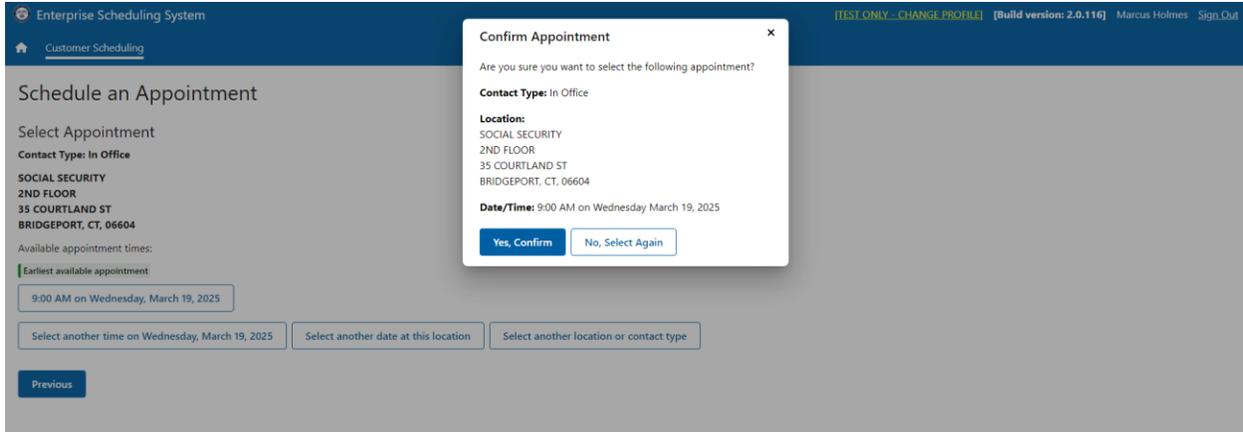


Figure 80 ESS Technician Confirm Appointment

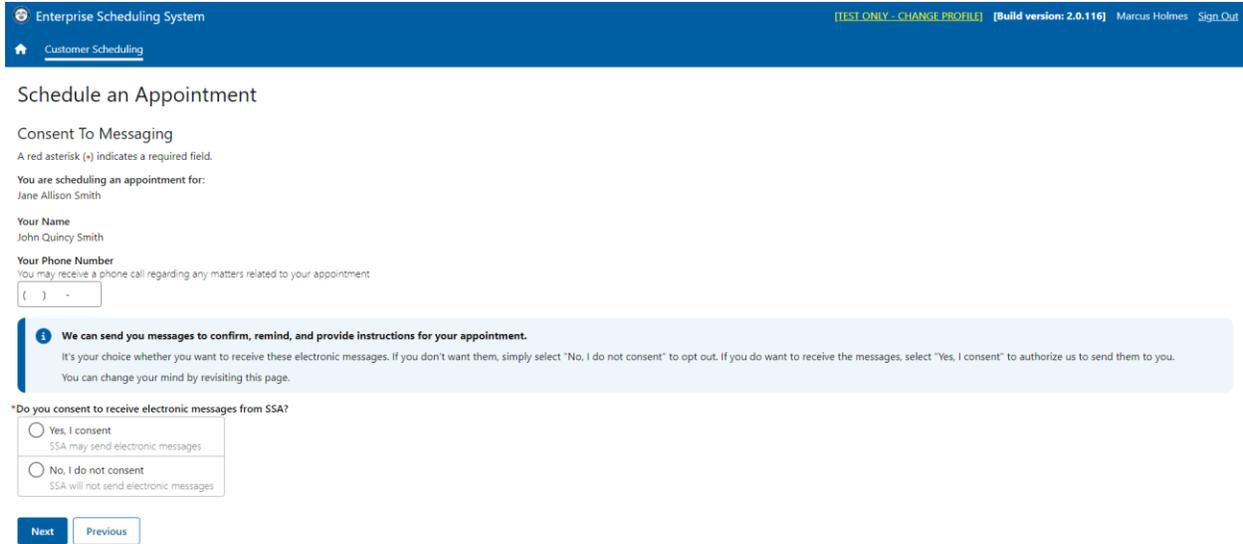


Figure 81 ESS Technician Consent to Messaging (Someone Else) Before Consent

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

### Schedule an Appointment

#### Consent To Messaging

A red asterisk (\*) indicates a required field.

You are scheduling an appointment for:  
Jane Allison Smith

Your Name  
John Quincy Smith

Your Phone Number  
You may receive a phone call regarding any matters related to your appointment

( ) -

**i We can send you messages to confirm, remind, and provide instructions for your appointment.**  
It's your choice whether you want to receive these electronic messages. If you don't want them, simply select "No, I do not consent" to opt out. If you do want to receive the messages, select "Yes, I consent" to authorize us to send them to you.  
You can change your mind by revisiting this page.

**\*Do you consent to receive electronic messages from SSA?**

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**i You will not receive messages about this appointment.**  
To update or cancel your appointment, you must contact us toll-free at 1-800-772-1213 (TTY 1-800-325-0778).  
When you arrive for your appointment, you must check in at the kiosk.

Next Previous

Figure 82 ESS Technician No Consent to Messaging Message

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

## Schedule an Appointment

### Consent To Messaging

A red asterisk (\*) indicates a required field.

You are scheduling an appointment for:  
Jane Allison Smith

Your Name  
John Quincy Smith

Your Phone Number  
You may receive a phone call regarding any matters related to your appointment.  
( ) -

**i We can send you messages to confirm, remind, and provide instructions for your appointment.**  
It's your choice whether you want to receive these electronic messages. If you don't want them, simply select "No, I do not consent" to opt out. If you do want to receive the messages, select "Yes, I consent" to authorize us to send them to you.  
You can change your mind by revisiting this page.

**\*Do you consent to receive electronic messages from SSA?**

Yes, I consent  
SSA may send electronic messages

No, I do not consent  
SSA will not send electronic messages

**\*Your Email Address**  
You will receive messages about this appointment at this address:

**\*Would you also like to receive text messages?**

Yes  No

**\*Your U.S. Mobile Phone Number**  
You will receive text messages about this appointment at this number:  
( ) -

**i By consenting to receive text messages from Social Security, you understand that:**

- You will receive electronic messages related to your Social Security business.
- Message frequency varies.
- You can text STOP to opt-out at any time.
- For help, text HELP.
- Message and data rates may apply.

You can view our terms and conditions and privacy policy at <https://www.ssa.gov/ensms>

**\*Would you like to provide a One Time Passcode (OTP) to modify this appointment online?**  
You will not be able to cancel or reschedule your appointment or opt-out of electronic messaging online without this OTP and must contact us at 1-800-772-1213 (TTY 1-800-325-0778) to complete these transactions.

Yes  
 No

Figure 83 ESS Technician Consent to Messaging (Someone Else) After Consent

Enterprise Scheduling System [TEST ONLY - CHANGE PROFILE] [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

## Schedule an Appointment

### Language Preference

A red asterisk (\*) indicates a required field.

**i This is the language used during your appointment with a representative.**  
We can arrange for an interpreter at no cost to you.

**\*Spoken language preference?**  
English

**\*Written language preference?**  
English

Figure 84 ESS Technician Language Preference

# Design Specifications Document – ESS Screen Package



**Figure 85 ESS Technician Remarks**

# Design Specifications Document – ESS Screen Package

Enterprise Scheduling System
[HLS] ONLY - CHANGE PROFILE [Build version: 2.0.116] Marcus Holmes Sign Out

Customer Scheduling

## Schedule an Appointment

**Review and Submit**  
 These are the answers you have provided for your appointment. If you need to make any changes, please select "Update" to return to that section.

**Personal Details**

● **Personal Information** Update

Your Name:  
John Quincy Smith

For whom are you scheduling this appointment:  
Someone Else

Individual's Name  
Jane Allison Smith

Individual's SSN:

Individual's Date of Birth:  
January 27, 2006

● **Reason for Appointment** Update

What can I help you with:  
Social Security Card

Which of these best describes the reason for your appointment:  
Replacement Social Security Card

Have you started your online application (oSSNAP):  
Yes

Do you have your application Online Control Number (oSSNAP):  
Doesn't Know

Online Control Number:  
Not Answered

These are the answers you have provided for your appointment. If you need to make any changes, please select "Update" to return to that section.

**Appointment Details**

● **Appointment Information** Update

Office Address  
SOCIAL SECURITY  
2ND FLOOR  
35 COURTLAND ST  
BRIDGEPORT, CT, 06604

Appointment Date  
March 19, 2025

Appointment Time  
9:00 AM

Contact Type  
In Office

● **Consent to Messaging** Update

Your Name  
John Quincy Smith

Individual's Name  
Jane Allison Smith

Your Phone Number  
(218) 078-7591

Do you consent to receive electronic messages from SSA?  
Yes, I consent

Your Email Address  
johnsmith@email.com

Would you also like to receive text messages?  
Yes

Your U.S. Mobile Phone Number  
(218) 078-7591

Would you like to provide a One Time Passcode (OTP) to modify this appointment online?  
Yes

One Time Passcode (OTP):  
123456

● **Language Preference** Update

Spoken language preference?  
English

Written language preference?  
English

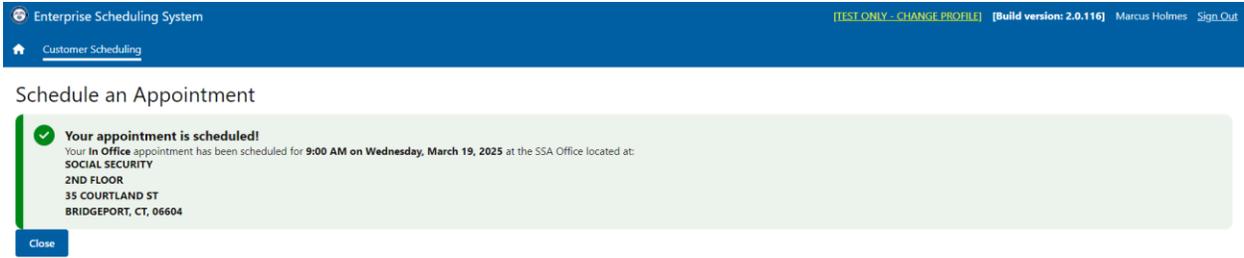
● **Remarks** Update

Date/Time	SSA Employee	Remarks
3/18/2025 07:55 AM	Holmes, Marcus Jermaine	Remarks entered here by Technician.

Submit

Figure 456 ESS Technician Review and Submit

# Design Specifications Document – ESS Screen Package



**Figure 467 ESS Technician Appointment Scheduled Success**

*SSA will insert the following PRA Statement into the form as soon as possible:*

**Paperwork Reduction Act Statement** - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. We estimate that it will take about 3 minutes to read the instructions, gather the facts, and answer the questions. *Send only comments regarding this burden estimate or any other aspect of this collection, including suggestions for reducing this burden to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.*