



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.

<i>Version Number</i>	<i>Date</i>	<i>Content Revisions</i>	<i>Page #</i>	<i>Revised by</i>
1.0 (First Release)	April 5, 2022	Original		
1.1 (First Revision)	May 31, 2022			
1.2 (Second Revision)				

1. ESS Public Interface Walkthrough

1.1. Create Appointment – Self-scheduling

Customer completes the appropriate form in oSSNAP. The customer receives a link to ESS, and the link directs the customer to log in via Login.Gov 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 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.

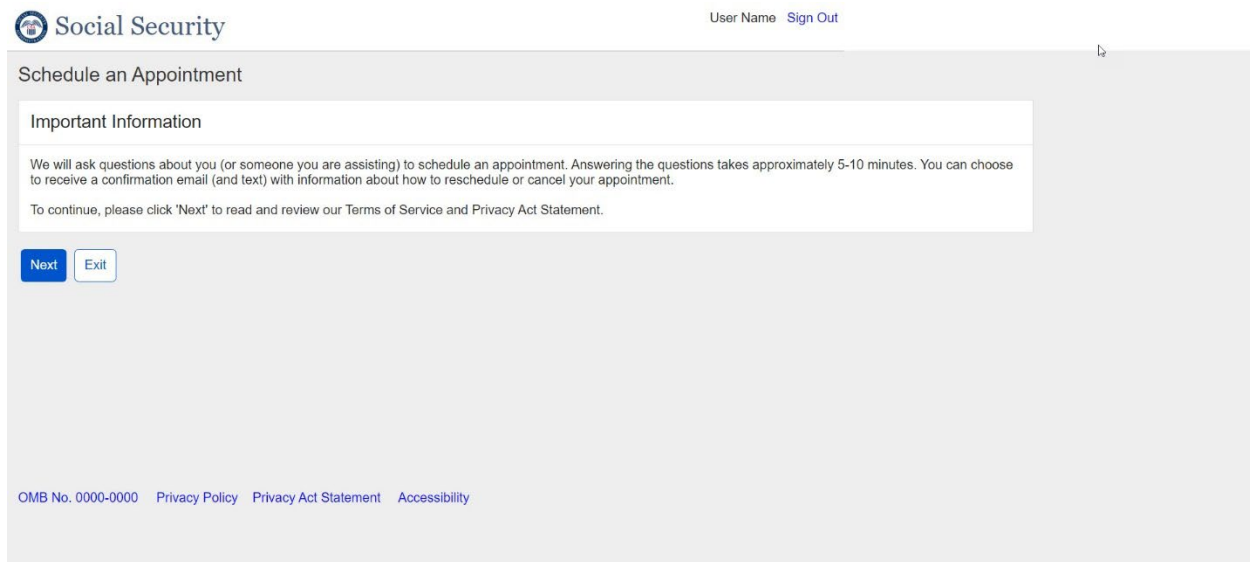


Figure 1 ESS Customer Home Page

Design Specifications Document – ESS Screen Package

Social Security User Name 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, SSA.gov. Our Internet Privacy Policy explains our online information practices.

Next Exit

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.

Social Security User Name Sign Out

Schedule an Appointment

Privacy Act Statement

Sections 202, 205, 223, 226, 806, 1611(c), 1616, 1631(d) and (e), 1634(a), and 1837 of the Social Security Act, as amended, allow us to collect this information. Furnishing us this information is voluntary. However, failing to provide all or part of the information may prevent us from scheduling an appointment.

We will use the information you submit to schedule an appointment. We may also share your information and the information you submit on behalf of a potential claimant for the following purposes, called routine uses:

- To third party contacts (e.g., employers and private pension plans) in situations where the party to be contacted has, or is expected to have, information relating to the individual's capability to manage his or her benefits or payments, or his or her eligibility for or entitlement to benefits or eligibility for payments, under the Social Security program when: (a) The individual is unable to provide information being sought; OR (b) the data is necessary to establish the validity of evidence or to verify the accuracy of information presented by the individual; and
- To contractors, cooperative agreement awardees, State agencies, Federal agencies and Federal congressional support agencies for research and statistical activities that are designed to increase knowledge about present or alternative Social Security programs; are of importance to the Social Security program or the Social Security beneficiaries; or are for an epidemiological project that relates to the Social Security program or beneficiaries. We will disclose information under this routine use pursuant only to a written agreement with us.

In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person's eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.

A list of additional routine uses is available in our Privacy Act System of Records Notice (SORN) 60-0089, entitled Claims Folders System, as published in the Federal Register (FR) on October 31, 2019 at 84 FR 58422. Additional information, and a full listing of all of our SORNs, is available on our website at www.ssa.gov/privacy.

Start Exit

Figure 3 ESS Customer Privacy Act Statement

The customer clicks “Start” to continue.

ESS asks for the reason for the appointment that is “original or replacement social security card.”

Social Security

User Name [Sign Out](#)

Schedule an Appointment

Reason for Appointment

* Indicates required information

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

☐ Original Social Security Card
I have never had a Social Security number

☒ Replacement Social Security Card
I need a replacement Social Security card

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

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. ESS prefills the ZIP code field with the ZIP code from oSSNAP.

The screenshot shows the 'Social Security' logo at the top left and 'User Name Sign Out' at the top right. The main heading is 'Schedule an Appointment'. Below it is a light blue information box with an 'i' icon, stating 'In person appointments only' and 'We are only scheduling in person appointments for this service.' The next section is 'Find Available Appointments', which includes a note '*Indicates required information' and a bolded '*Enter ZIP Code' section. Below this, it says 'Let us find an office in your area' and shows a text input field containing '55808'. At the bottom of this section are 'Next' and 'Previous' buttons. The footer contains links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 5 ESS Customer Enter ZIP Code

The customer can change the ZIP code. If the customer changes the ZIP code to one that is not initially supported by ESS, ESS displays a message:

This screenshot shows the same 'Schedule an Appointment' screen as Figure 5, but with a modal dialog box open. The dialog box is titled 'Enter Another Zip Code' and contains the text: 'Online scheduling is not yet available in Wisconsin. Please enter a Zip code in Minnesota.' and 'We are working to make this service available in additional states.' There is an 'OK' button at the bottom of the dialog. In the background, the 'Find Available Appointments' section now shows the text input field with '21047' and the 'Next' button is highlighted.

Figure 6 ESS Customer Enter Another ZIP Code

The customer clicks Next to continue.

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

Design Specifications Document – ESS Screen Package

The screenshot shows the 'Social Security' website header with a 'User Name' and 'Sign Out' link. The main heading is 'Schedule an Appointment'. Below it is a 'Select Appointment' section. The location is listed as '230 W Superior St, Ste 500, Duluth, MN 55808'. Under 'Available appointment times:', the 'Earliest available appointment' is highlighted in green as '8:00 AM on Tuesday, April 19, 2022'. There are three buttons: 'Select another time on Tuesday, April 19, 2022', 'Select another date at this location', and 'Select Another Location'. A 'Previous' button is at the bottom left. The footer contains 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 7 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.

This screenshot shows the same 'Schedule an Appointment' screen as Figure 7, but with a 'Confirm Appointment' modal dialog box open. The dialog asks, 'Are you sure you want to book the following appointment:'. It lists the 'Location' as '230 W Superior St, Ste 500, Duluth, MN 55808' and the 'Date/Time' as '8:00 AM on Tuesday April 19, 2022'. At the bottom of the dialog are 'Yes' and 'No' buttons. The background appointment selection interface is dimmed.

Figure 8 ESS Customer Confirm Appointment

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

 Social Security

User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

[Select another date at this location](#) [Select Another Location](#)

Available appointment start times for Tuesday, April 19, 2022
Shown in Eastern DST Time zone

8:00 AM

8:15 AM

8:30 AM

8:45 AM

9:00 AM

9:15 AM

9:30 AM

9:45 AM

10:00 AM

10:15 AM

10:30 AM

10:45 AM

11:00 AM

11:15 AM

11:30 AM

12:00 PM

12:15 PM

12:30 PM

12:45 PM

1:00 PM

[Show more times](#)

[Previous](#)

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

Figure 9 ESS Customer Show Other Times on Same Date at Same Location


Social Security

User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

230 W Superior St
 Ste 500
 Duluth, MN 55808

[Select another date at this location](#)
[Select Another Location](#)

Available appointment start times for Tuesday, April 19, 2022
 Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM
1:15 PM	1:30 PM	1:45 PM	2:00 PM	2:15 PM	2:30 PM	2:45 PM	3:00 PM	3:15 PM	3:30 PM
3:45 PM	4:00 PM	4:15 PM	4:30 PM						

Show less times

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[Privacy Policy](#)
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[Accessibility](#)

Figure 10 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.

The screenshot shows the Social Security 'Schedule an Appointment' interface. The main page displays the office address (230 W Superior St, Ste 500, Duluth, MN 55808) and available appointment times. A modal titled 'Select Another Date at This Location' is open, showing a list of available dates for the same office. The modal includes a 'Cancel' button and a 'Select' button.

Social Security User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

Available appointment times:

Earliest available appointment

8:00 AM on Tuesday, April 19, 2022

Select another time on Tuesday, April 19, 2022

[Previous](#)

Select Another Date at This Location ✕

Select another date at this office
We are only showing you days with available appointments

Wednesday, April 20, 2022	Thursday, April 21, 2022
Friday, April 22, 2022	Monday, April 25, 2022
Tuesday, April 26, 2022	Wednesday, April 27, 2022
Thursday, April 28, 2022	Friday, April 29, 2022

[Cancel](#)

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

Figure 11 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. The customer selects the desired date by clicking the date button.

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

Design Specifications Document – ESS Screen Package

Social Security User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

[Select another date at this location](#) [Select Another Location](#)

Available appointment start times for Wednesday, April 20, 2022
Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM

[Show more times](#)

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Figure 12 ESS Customer Select Appointment Time

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

Social Security User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

Available appointment times:

Earliest available appointment

8:00 AM on Tuesday, April 19, 2022

[Select another time on Tuesday, April 19, 2022](#) [Select a](#)

[Previous](#)

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

Select Another Location

Find offices near this Zip code

55808 [Find](#)

Select office:

- 332 Minnesota St, St. Paul, MN, 55101
- 3280 Northway Dr, Brooklyn Center, MN, 55429
- 6161 American Blvd W, Bloomington, MN, 55438
- 1122 E 25th St, Hibbing, MN, 55746

[Cancel](#)

Figure 13 ESS Customer Select Another Location

ESS displays a list of other offices in the same district for the ZIP code. The customer can select one of the listed offices by clicking the button associated with it. The customer can search a

new ZIP code by entering it and clicking Find. ESS will show offices in the district for the entered ZIP code.

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

Social Security

User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

332 Minnesota St
St. Paul, MN, 55101

[Select another date at this location](#) [Select Another Location](#)

Available appointment start times for Tuesday, April 19, 2022
Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM

[Show more times](#)

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Figure 14 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.

Design Specifications Document – ESS Screen Package

The screenshot shows the 'Social Security' website header with 'User Name' and 'Sign Out' links. The main heading is 'Schedule an Appointment'. Below it, the address '332 Minnesota St, St. Paul, MN, 55101' is displayed. A modal window titled 'Confirm Appointment' is open, asking 'Are you sure you want to book the following appointment:'. It lists the 'Location' as '3435A Box Hill Corporate Center Dr, Abingdon, MD 21009' and the 'Date/Time' as '8:15 AM on Tuesday March 8, 2022'. The modal has 'Yes' and 'No' buttons. In the background, the 'Select Appointment' section shows a grid of available appointment times for Tuesday, with a 'Previous' button at the bottom left.

Figure 15 ESS Customer Confirm Appointment

Customer clicks Yes to continue.

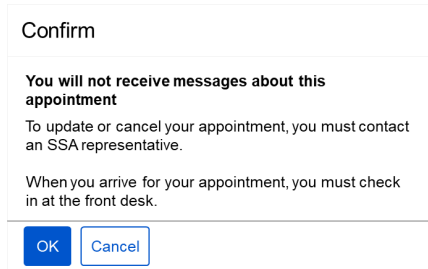
ESS asks for the customer's name and consent to messaging.

The screenshot shows the 'Social Security' website header with 'User Name' and 'Sign Out' links. The main heading is 'Schedule an Appointment'. Below it, the 'Personal Information' form is displayed. It includes a legend for required information (marked with an asterisk). The 'Your Name' section has four fields: 'First' (John), 'Middle' (Quincy), 'Last' (Smith), and 'Suffix' (a dropdown menu). A light blue information box states: '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."' Below this is a checkbox labeled 'I consent to receive electronic messages from SSA about this appointment (message and data rates may apply)'. At the bottom of the form are 'Next' and 'Previous' buttons. The footer contains 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility' links.

Figure 16 ESS Customer Personal Information Before Consenting to Messaging

Customer's first and last name are required. Middle name and suffix are optional.

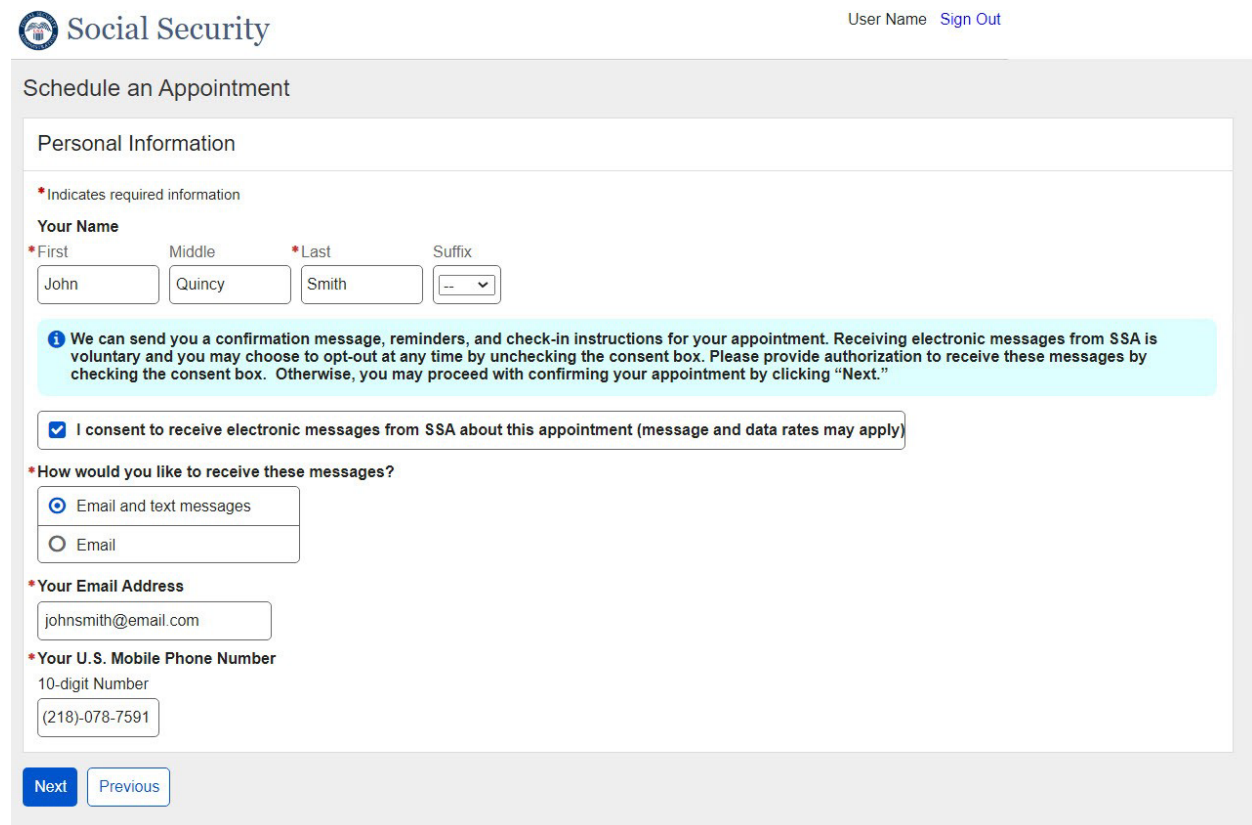
Customer can consent to receive electronic messages from SSA by clicking the check box. If customer does not check the Consent check box and clicks Next, a message appears to inform the customer that SSA will not send messages and explain what the customer must do to change, update, or cancel the appointment,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



A modal dialog box titled "Confirm". The text inside reads: "You will not receive messages about this appointment. To update or cancel your appointment, you must contact an SSA representative. When you arrive for your appointment, you must check in at the front desk." At the bottom are two buttons: "OK" and "Cancel".

Figure 17 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 "Social Security" header with a "Sign Out" link. The main heading is "Schedule an Appointment". The "Personal Information" section includes a legend for required fields (*). The "Your Name" section has four input fields: "First" (John), "Middle" (Quincy), "Last" (Smith), and "Suffix" (a dropdown menu). A light blue informational box explains that electronic messages are voluntary and can be opted out of. Below this is a checked checkbox for "I consent to receive electronic messages from SSA about this appointment (message and data rates may apply)". The "How would you like to receive these messages?" section has two radio button options: "Email and text messages" (selected) and "Email". The "Your Email Address" field contains "johnsmith@email.com". The "Your U.S. Mobile Phone Number" field is labeled "10-digit Number" and contains "(218)-078-7591". At the bottom are "Next" and "Previous" buttons.

Figure 18 ESS Customer Personal Information After Consent to Messaging – Email and Text Messaging

If the customer's oSSNAP application was completed on behalf of someone else, this page shows the Individual's name, which cannot be edited.

 Social Security

johnsmith@email.com [Sign Out](#)

Schedule an Appointment

Personal Information

* Indicates required information

You are scheduling an appointment for:
Jane Allison Smith

Your Name

* First	Middle	* Last	Suffix
John	Quincy	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 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)

Next

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

Figure 19 ESS Customer Personal Information Before Consenting to Messaging – Appointment For Someone Else

The customer must select from Email or Email and text messages.

By default, ESS selects Email and text messages. The customer's email address and phone number are prefilled.

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


Social Security
User Name [Sign Out](#)

Schedule an Appointment

Personal Information

* Indicates required information

Your Name

*First

Middle

*Last

Suffix

John

Quincy

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 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

johnsmith@email.com

Next

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Figure 20 ESS Customer Personal Information After Consent to Messaging – Email

Customer clicks Next to continue.

ESS asks for the customer's language preferences.


Social Security
User Name [Sign Out](#)

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?

English

*Written language preference?

English

Next

Previous

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Figure 21 ESS Customer Language Preference

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

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 22 ESS Customer Review and Submit

Customer reviews and can edit the information on this page.

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 to complete the scheduling process. ESS will 'remember' the customer's personal information and language preferences, but these can be changed, as well.

Select 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 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 displays the 'Schedule an Appointment' page on the Social Security website. At the top, the Social Security logo is on the left, and 'User Name Sign Out' is on the right. The main heading is 'Schedule an Appointment'. Below this is a 'Review and Submit' section with the text: '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 review section is divided into four items, each with a green checkmark and an 'Edit' button:

- Schedule New Appointment**
 - Reason for Appointment**: What can we help you with: **Replacement Social Security Card**
 - Select 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**
 - Individual's Name: **Jane Allison Smith**
 - 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**
 - What language do you prefer speaking: **English**
 - What language do you prefer reading: **English**

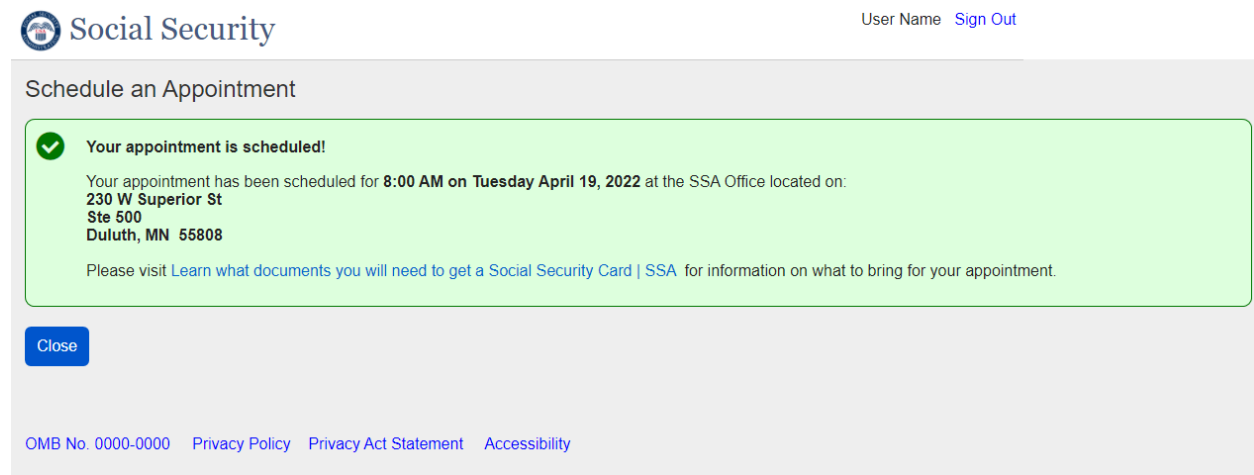
At the bottom of the review section are 'Submit' and 'Previous' buttons. Below the entire form is a footer with links: 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 23 ESS Customer Review and Submit – Appointment for Someone Else

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

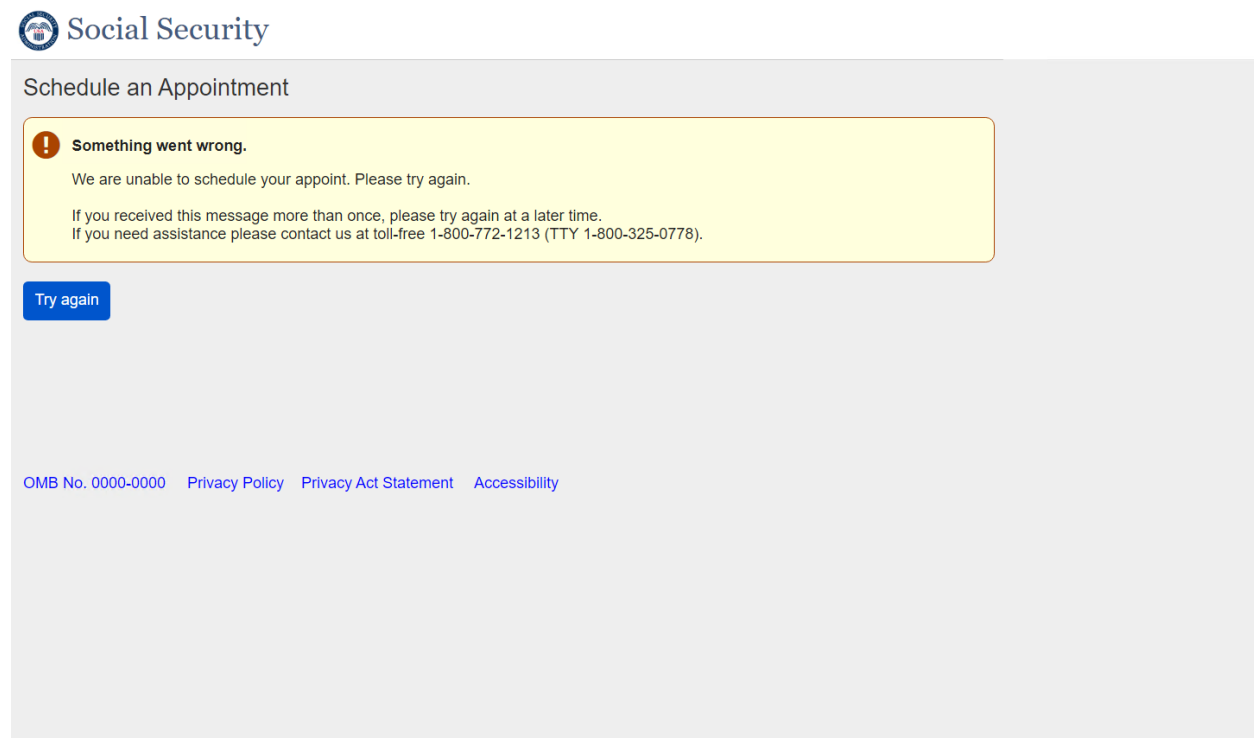
Customer clicks Submit to schedule the appointment.



The screenshot shows the 'Social Security' header with a logo on the left and 'User Name Sign Out' on the right. Below the header is a section titled 'Schedule an Appointment'. A green success message box contains the text: 'Your appointment is scheduled!' followed by 'Your appointment has been scheduled for 8:00 AM on Tuesday April 19, 2022 at the SSA Office located on: 230 W Superior St Ste 500 Duluth, MN 55808'. Below this, it says 'Please visit Learn what documents you will need to get a Social Security Card | SSA for information on what to bring for your appointment.' A blue 'Close' button is at the bottom left of the message box. At the bottom of the page, there are links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 24 ESS Customer Appointment Scheduled Success

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



The screenshot shows the 'Social Security' header with a logo on the left and 'User Name Sign Out' on the right. Below the header is a section titled 'Schedule an Appointment'. A yellow error message box contains the text: 'Something went wrong.' followed by 'We are unable to schedule your appoint. Please try again.' Below this, it says 'If you received this message more than once, please try again at a later time. If you need assistance please contact us at toll-free 1-800-772-1213 (TTY 1-800-325-0778).' A blue 'Try again' button is at the bottom left of the message box. At the bottom of the page, there are links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 25 ESS Customer Appointment Scheduled Failure

1.2. Reschedule an Appointment

Customer receives an electronic message from SSA via email or via email and text, based on the customer's selection, with a link to ESS. 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 with Login.gov. 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 26 ESS Customer Enter OTP

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

The screenshot displays the Social Security website's 'Schedule an Appointment' page. At the top left is the Social Security logo. At the top right, there is a 'User Name' label and a 'Sign Out' link. The main heading is 'Schedule an Appointment'. Below this is a white box titled 'Important Information' containing the following text: 'We will ask questions about you (or someone you are assisting) to schedule an appointment. Answering the questions takes approximately 5-10 minutes. You can choose to receive a confirmation email (and text) with information about how to reschedule or cancel your appointment.' and 'To continue, please click 'Next' to read and review our Terms of Service and Privacy Act Statement.' Below the text are two buttons: a blue 'Next' button and a white 'Exit' button. At the bottom of the page, there is a footer with links: 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 27 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.


Social Security

johnsmith@email.com [Sign Out](#)

Appointment Details

Review 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](#)
[Cancel Appointment](#)

Office Address
 Street Address: **230 W Superior St, Ste 500**
 City/Town: **Duluth**
 State/Territory: **Minnesota**
 ZIP Code: **55808**
 Appointment date: **May 31, 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**

[Log Out](#)

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

Figure 28 ESS Customer Review Appointment Details

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

Select 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 the selection by clicking on the chosen appointment start time, ESS returns to the Appointment Details and shows the updated information.

Design Specifications Document – ESS Screen Package

 Social Security

johnsmith@email.com [Sign Out](#)

Schedule an Appointment

 Your appointment was scheduled for **8:00 AM on Tuesday, May 31, 2022** at the SSA Office located at:
**230 W Superior St
Ste 500
Duluth, MN 55808**

Select Appointment

**230 W Superior St
Ste 500
Duluth, MN 55808**
Available appointment times:
Earliest available appointment
8:15 AM on Tuesday, May 31, 2022
[Select another time on Tuesday, May 31, 2022](#) [Select another date at this location](#) [Select Another Location](#)

[Previous](#)

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

Figure 29 ESS Customer Reschedule Enter ZIP Code

 Social Security

User Name [Sign Out](#)

Schedule an Appointment

Select Appointment

**230 W Superior St
Ste 500
Duluth, MN 55808**
[Select another date at this location](#) [Select Another Location](#)
Available appointment start times for Tuesday, April 19, 2022
Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM
1:15 PM	1:30 PM	1:45 PM	2:00 PM	2:15 PM	2:30 PM	2:45 PM	3:00 PM	3:15 PM	3:30 PM
3:45 PM	4:00 PM	4:15 PM	4:30 PM						

[Show less times](#)

[Previous](#)

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

Confirm Appointment

Are you sure you want to book the following appointment:
Location:
230 W Superior St
Ste 500
Duluth, MN 55808
Date/Time: 2:45 PM on Tuesday April 19, 2022
[Yes](#) [No](#)

Figure 30 ESS Customer Confirm Appointment


Social Security
johnsmith@email.com [Sign Out](#)

Appointment Details

Review 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
Edit

✓
Appointment information updated. Please select "Submit" button to finalize changes.

Office Address

Street Address: **230 W Superior St, Ste 500**

City/Town: **Duluth**

State/Territory: **Minnesota**

ZIP Code: **55808**

Appointment date: **May 31, 2022**

Appointment time: **2:45 PM**

✓
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

Spoken language preference: **English**

Written language preference: **English**

Submit
Cancel

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

Figure 31 ESS Customer Review Existing Appointment Details Showing Updates

Personal Information Update button takes the customer to the Personal Information page. Clicking Next returns the Customer to the Appointment Details page.


Social Security
User Name [Sign Out](#)

Schedule an Appointment

Personal Information

* Indicates required information

Your Name

*First

Middle

*Last

Suffix

John

Quincy

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 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**

johnsmith@email.com

***Your U.S. Mobile Phone Number**

10-digit Number

(218)-078-7591

Next

Previous

Figure 32 ESS Customer Update Personal Information

Language Preference Update button takes the customer to the Language Preference page. Clicking Next returns the Customer to the Appointment Details page.

 Social Security

User Name [Sign Out](#)

Schedule an Appointment

Language Preference

* Indicates required information

 **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

Next

Previous

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

Figure 33 ESS Customer Update Language Preferences

Any changes are reflected on the Review and Submit page.


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 34 ESS Customer Review Existing Appointment Details Showing Updates

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

1.3. Cancel an Appointment

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

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

ESS shows Review Your Appointment Details

Social Security johnsmith@email.com [Sign Out](#)

Appointment Details

Review 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: **May 31, 2022**
Appointment time: **2:45 PM** [Cancel Appointment](#)

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**

[Log Out](#)

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

Figure 35 ESS Customer Review Existing Appointment Details

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

The screenshot shows the 'Appointment Details' page on the Social Security website. The page header includes the Social Security logo and the user's email 'johnsmith@email.com' with a 'Sign Out' link. The main heading is 'Appointment Details'. Below it, a section titled 'Review Appointment Details' states: 'The details for your existing appointment are below. You may make changes to your existing appointment or cancel your existing appointment.'

The 'Appointment Details' section is divided into four expandable sections, each with a green checkmark icon:

- Reason for Appointment:** 'What can we help you with: Replacement Social Security Card'. To the right are buttons for 'Reschedule Appointment' and 'Cancel Appointment'.
- Appointment Options:** Displays office address (230 W Superior St, Ste 500, Duluth, Minnesota, ZIP 55808), appointment date (May 31, 2022), and time (2:45 PM). To the right is an 'Update' button.
- Personal Information:** Displays user name (John Quincy Smith), consent to receive electronic messages, preferred communication method (Email and text messages), email address (johnsmith@email.com), and U.S. Mobile Phone Number ((218) 078-7591). To the right is an 'Update' button.
- Language Preference:** Displays spoken and written language preferences (English). To the right is an 'Update' button.

A modal dialog titled 'Cancel appointment' is open in the center. It asks 'Are you sure you want to cancel your appointment?' and has 'Yes' and 'No' buttons.

At the bottom left is a 'Log Out' button. At the bottom are links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Figure 36 ESS Customer Cancel Appointment Confirmation

If Yes, ESS displays successful cancellation message.

The screenshot shows the 'Appointment Details' page after a successful cancellation. The page header is the same as Figure 36. A green success message banner at the top of the main content area reads: 'Your appointment has been cancelled!'. Below the banner is a blue 'Close' button. The footer links remain the same.

Figure 37 ESS Customer Cancel Appointment Success

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

2. ESS Technician Scheduling Interface Walkthrough

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 from the oSSNAP application . 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.

Enterprise Scheduling Solution [User Name] ▾

Home 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

Next Previous

Figure 38 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 (SSN is an optional field). If the caller is a proper applicant for someone else and wants to schedule an appointment, the technician asks the name and DOB (SSN is an optional field) of the number holder or original number applicant as well as the caller’s name. Since the caller may be making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required.

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

First: Middle: Last: Suffix:

* **For whom are you scheduling this appointment?**

☒ Self

☐ Someone Else

Individual's Social Security Number (SSN)

* **Individual's Date of Birth**

Month Day Year

Month: Day: Year:

Next Previous

Figure 39 ESS Technician Personal Information for Self

Enterprise Scheduling Solution
[User Name]

Home
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 40 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), 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.

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

Schedule an Appointment

Personal Information

Individuals's Social Security Number (SSN)

Individual's Name
John Quincy Smith

Individual's Date of Birth
April 15, 1980

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

Date/Time ▾	Location	Reason	Scheduler	Actions
04/19/2022 8:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Replacement Social Security Card	John Quincy Smith	Open
05/11/2022 10:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Medicare Benefits	Jane Smith	Open

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

Figure 41 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.

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

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

Schedule an Appointment

Personal Information

Individuals's Social Security Number (SSN)

Individual's Name
John Quincy Smith

Individual's Date of Birth
April 15, 1980

No appointments found for this individual.

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

Figure 42 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.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

Schedule an Appointment

Reason for Appointment

* Indicates required information

* What can I help you with?

Social Security Card ▾

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

☒ Original Social Security Card
You have never had a Social Security number

☐ Replacement Social Security Card
You need a 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 43 ESS Technician Reason for Appointment

The reason for an appointment is either to obtain a new/original SSN or a replacement Social Security card. In both 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.

The technician clicks Next.

ESS next asks for a ZIP code, so it can find an available appointment at the caller's local field office.

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

Schedule an Appointment

i In person appointments only
We are only scheduling in person appointments for this service.

Find Available Appointments

* Indicates required information

***Enter ZIP Code**
Let us find an office in your area

Next Previous

Figure 44 ESS Technician Enter ZIP Code

If the technician enters a ZIP code that ESS does not support, ESS displays a message:

Enter Another ZIP Code

Online scheduling is not yet available in Wisconsin.
Please enter a ZIP Code in Minnesota.

We are working to make this service available in additional states.

OK

Figure 45 ESS Technician Enter Another ZIP Code

The technician reads the message to the caller and asks for a ZIP code that ESS supports. If the customer cannot complete their application in a supported field office, then the technician advises the customer of their other service options.

The technician clicks Next to continue.

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

Design Specifications Document – ESS Screen Package

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there's a header with 'Enterprise Scheduling Solution' on the left and '[User Name]' on the right. Below the header is a navigation bar with 'Appointments' and 'Admin' tabs. The main section is titled 'Schedule an Appointment'. It contains a 'Select Appointment' box with the address '230 W Superior St, Ste 500, Duluth, MN, 55802'. Below the address, it says 'Available appointment times:'. A green box highlights 'Earliest available appointment'. Below this, a button shows '8:00 AM on Tuesday, April 19, 2022'. There are three more buttons: 'Select another time on Tuesday, April 19, 2022', 'Select another date at this location', and 'Select Another Location'. At the bottom left, there is a 'Previous' button.

Figure 46 ESS Technician Earliest Available Appointment

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

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.

The screenshot shows the same 'Schedule an Appointment' screen as Figure 46, but with a 'Confirm Appointment' dialog box overlaid. The dialog box has a title 'Confirm Appointment' and a message: 'Are you sure you want to book the following appointment:'. Below the message, it lists the 'Location: 230 W Superior St, Ste 500, Duluth, MN, 55802' and the 'Date/Time: 8:00 AM on Tuesday March 8, 2022'. At the bottom of the dialog box are two buttons: 'Yes' and 'No'.

Figure 47 ESS Technician Confirm Appointment

The technician clicks Yes to continue.

For a review of the interfaces involved in finding an appointment location, date, and time, please refer to pages 9 to 21. 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.

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)

Next Previous

Figure 48 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.

Confirm

You will not receive messages about this appointment

To Update or cancel your appointment, you must contact us at toll-free 1-800-772-1213 (TTY 1-800-325-0778)...

OK

Figure 49 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.

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

Schedule an Appointment

Consent to Messaging

• Indicates required information

Your Name
John Smith

Consent: 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 50 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

Next
Previous

Figure 51 ESS Technician Consent to Messaging After Consent, Email and text messages, Yes to OTP

Design Specifications Document – ESS Screen Package

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

• 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 52 ESS Technician Consent to Messaging After Consent, Email only, No to OTP

Design Specifications Document – ESS Screen Package

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

• 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 53 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 Solution' interface. At the top, there's a header with 'Enterprise Scheduling Solution' on the left and '[User Name]' on the right. Below the header is a navigation bar with 'Appointments' and 'Admin' tabs. The main section is titled 'Schedule an Appointment'. Under this, there's a 'Language Preference' section. It includes a note: '* Indicates required information'. A light blue box contains an information icon and text: '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 dropdown menus: '* Spoken language preference' and '* Written language preference', both currently set to 'English'. At the bottom of the form are 'Next' and 'Previous' buttons.

Figure 54 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. 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 Solution' interface. At the top, there's a header with 'Enterprise Scheduling Solution' on the left and '[User Name]' on the right. Below the header is a navigation bar with 'Appointments' and 'Admin' tabs. The main section is titled 'Schedule an Appointment'. Under this, there's a 'Remarks' section. It includes a question: 'Is there anything else we should know before your appointment?' followed by '(2500 characters maximum)'. Below this is a text area containing 'oSSNAP Online Control Number: 022500043215'. At the bottom of the text area, it says 'Characters remaining: 2500'. At the bottom of the form are 'Next' and 'Previous' buttons.

Figure 55 ESS Technician Remarks

The technician clicks Next.

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

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

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.

Appointment Details

✓ **Personal Information** [Edit](#)

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** [Edit](#)

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): No
Online Control Number: N/A

✓ **Appointment Details** [Edit](#)

Office Address
Street Address: 230 W Superior St, Ste 500
City/Town: Duluth
State/Territory: Minnesota
ZIP Code: 55802
Appointment date: May 31, 2022
Appointment time: 8:00 AM

✓ **Consent to Messaging** [Edit](#)

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
Would you like to provide a One Time Password (OTP) or PIN to modify this appointment online?: Yes
One Time Password/PIN: 123456

✓ **Language Preference** [Edit](#)

Spoken language preference: English
Written language preference: English

✓ **Remarks** [Edit](#)

Remarks: Remarks entered here by technician.

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

Figure 56 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.

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. The technician will use the same interfaces 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.

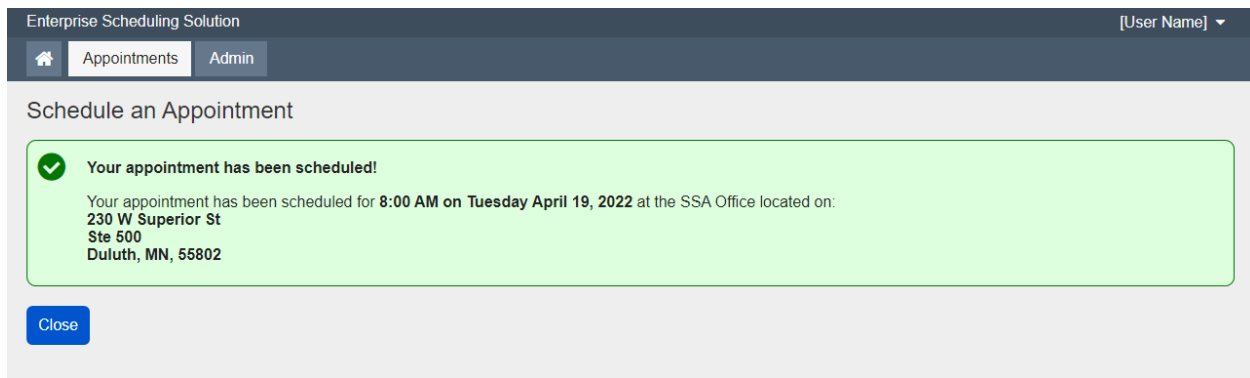


Figure 57 ESS Technician Appointment Scheduled Success

2.2. Reschedule, Modify, or Cancel an Appointment

Rescheduling, modifying, and cancelling appointments start with the technician verifying the caller is the proper applicant from oSSNAP.

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

Enterprise Scheduling Solution [User Name] ▼

Home 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 Date of Birth

Month Day Year

Next Previous

Figure 58 ESS Technician Personal Information for Scheduling for Self

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

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 and DOB. Since the caller may be making an appointment for an original SSN, the technician is not required to collect the SSN. DOB is required.

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 59 ESS Technician Personal Information for Someone Else

If the caller wants to reschedule, modify, or cancel an appointment for someone else, the technician asks for that individual's SSN (not required), name (first and last required), and DOB. The technician clicks Next. If the technician does not 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 Solution

[User Name] ▾

Home

Appointments

Admin

Schedule an Appointment

Personal Information

Individuals's Social Security Number (SSN)

Individual's Name

John Quincy Smith

Individual's Date of Birth

April 15, 1980

Multiple Appointments for this Individual

Open an appointment record to view, update, reschedule, or cancel it

Date/Time ▾	Location	Reason	Scheduler	Actions
04/19/2022 8:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Replacement Social Security Card	John Quincy Smith	Open
05/11/2022 10:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Medicare Benefits	Jane Smith	Open

Create Appointment

Previous

Figure 60 ESS Technician Scheduled Appointments Found

To reschedule, modify, or cancel, the technician must locate and open the appointment record. The appointment record looks similar to the Review and Submit page from the scheduling process, except instead of Edit buttons, there are Update buttons and a Reschedule button.

Enterprise Scheduling Solution

[User Name] ▾

Appointments

Admin

Appointment Details

Review 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

✓

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

Update

✓

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 (oSSNAP): Yes

Do you have your application Online Control Number (oSSNAP): No

Online Control Number: N/A

Reschedule Appointment

Cancel Appointment

✓

Appointment Details

Office Address

Street Address: 230 W Superior St, Ste 500

City/Town: Duluth

State/Territory: Minnesota

ZIP Code: 55802

Appointment date: May 31, 2022

Appointment time: 8:00 AM

✓

Consent to Messaging

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

Update

✓

Language Preference

Spoken language preference: English

Written language preference: English

Update

✓

Remarks

Remarks: Remarks entered here by technician.

Update

Log Out

Figure 61 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. The technician will use the same interfaces to find a new appointment location, date, and time for the individual.

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

Schedule an Appointment

i **In person appointments only**
We are only scheduling in person appointments for this service.

Find Available Appointments

* Indicates required information

***Enter ZIP Code**
Let us find an office in your area

55802

Next Previous

Figure 62 ESS Technician Enter ZIP Code

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

Schedule an Appointment

i Your appointment was scheduled for 8:00 AM on Tuesday, May 31, 2022 at the SSA Office located at:
230 W Superior St
Ste 500
Duluth, MN 55808

Select Appointment

230 W Superior St
Ste 500
Duluth, MN, 55802

Available appointment times:

Earliest available appointment

8:45 AM on Tuesday, May 31, 2022

Select another time on Tuesday, May 31, 2022 Select another date at this location Select Another Location

Previous

Figure 63 ESS Technician Earliest Available Appointment

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▾

Home

Appointments

Admin

Schedule an Appointment

i

Your appointment was scheduled for 8:00 AM on Tuesday, May 31, 2022 at the SSA Office located at:
230 W Superior St
Ste 500
Duluth, MN 55808

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

Select another date at this location

Select Another Location

Available appointment start times for Tuesday, May 31, 2022
Shown in Eastern DST Time zone

8:00 AM

8:15 AM

8:30 AM

8:45 AM

9:00 AM

9:15 AM

9:30 AM

9:45 AM

10:00 AM

10:15 AM

10:30 AM

10:45 AM

11:00 AM

11:15 AM

11:30 AM

12:00 PM

12:15 PM

12:30 PM

12:45 PM

1:00 PM

Show more times

Previous

Figure 64 ESS Technician Select Another Appointment on Same Date at Same Location

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▼

Appointments

Admin

Schedule an Appointment

i

Your appointment was scheduled for 8:00 AM on Tuesday, May 31, 2022 at the SSA Office located at:
230 W Superior St
Ste 500
Duluth, MN 55808

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

Select another date at this location

Select Another Location

Available appointment start times for Tuesday, May 31, 2022
Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM	1:00 PM
1:15 PM	1:30 PM	1:45 PM	2:00 PM	2:15 PM	2:30 PM	2:45 PM	3:00 PM	3:15 PM	3:30 PM
3:45 PM	4:00 PM	4:15 PM	4:30 PM						

Show less times

Previous

Figure 65 ESS Technician Show More Times

Design Specifications Document – ESS Screen Package

The screenshot displays the 'Enterprise Scheduling Solution' web application. At the top, there is a header bar with the application name on the left and a user profile icon labeled '[User Name]' on the right. Below the header, a navigation bar contains 'Appointments' and 'Admin' tabs. The main content area is titled 'Schedule an Appointment'. A teal-colored notification box at the top of this section states: 'Your appointment was scheduled for 8:00 AM on Tuesday, May 31, 2022 at the SSA Office located at: 230 W Superior St, Ste 500, Duluth, MN 55808'. Below this, the 'Select Appointment' section shows the same address and a grid of available appointment times for Tuesday, May 31, 2022. A modal dialog titled 'Confirm Appointment' is overlaid on the screen, asking 'Are you sure you want to book the following appointment.' and displaying the appointment details: Location (230 W Superior St, Ste 500, Duluth, MN 55808) and Date/Time (2:45 PM on Tuesday, May 31, 2022). The dialog has 'Yes' and 'No' buttons. At the bottom of the page, there is a footer with links for 'OMB No. 0000-0000', 'Privacy Policy', 'Privacy Act Statement', and 'Accessibility'.

Enterprise Scheduling Solution [User Name]

Appointments Admin

Schedule an Appointment

i Your appointment was scheduled for 8:00 AM on Tuesday, May 31, 2022 at the SSA Office located at:
230 W Superior St
Ste 500
Duluth, MN 55808

Select Appointment

230 W Superior St
Ste 500
Duluth, MN 55808

Select another date at this location Select

Available appointment start times for Tuesday, May 31, 2022
Shown in Eastern DST Time zone

8:00 AM	8:15 AM	8:30 AM	8:45 AM	9:00 AM	9:15 AM	9:30 AM	9:45 AM	10:00 AM	10:15 AM
10:30 AM	10:45 AM	11:00 AM	11:15 AM	11:30 AM	11:45 AM	12:00 PM	12:15 PM	12:30 PM	12:45 PM
1:00 PM	1:15 PM	1:30 PM	1:45 PM	2:00 PM	2:15 PM	2:30 PM	2:45 PM	3:00 PM	3:15 PM
3:30 PM	3:45 PM	4:00 PM	4:15 PM	4:30 PM					

Show less times

Previous

OMB No. 0000-0000 Privacy Policy Privacy Act Statement Accessibility

Confirm Appointment

Are you sure you want to book the following appointment:

Location:
230 W Superior St
Ste 500
Duluth, MN 55808

Date/Time: 2:45 PM on Tuesday, May 31, 2022

Yes No

Figure 66 ESS Technician Confirm Appointment

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▾

Home

Appointments

Admin

Appointment Details

Review 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

✓ 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

Edit

✓ 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 (oSSNAP): Yes
Do you have your application Online Control Number (oSSNAP): No
Online Control Number: N/A

Edit

✓ Appointment Details

Appointment information updated. Please select "Submit" button to finalize changes.

Office Address
Street Address: 230 W Superior St, Ste 500
City/Town: Duluth
State/Territory: Minnesota
ZIP Code: 55802
Appointment date: May 31, 2022
Appointment time: 2:45 PM

Edit

✓ Consent to Messaging

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

Edit

✓ Language Preference

Spoken language preference: English
Written language preference: English

Edit

✓ Remarks

Remarks: Remarks entered here by technician.

Edit

Submit

Figure 67 ESS Technician Review Appointment Details Showing Updates

Design Specifications Document – ESS Screen Package

The screenshot shows the top navigation bar of the Enterprise Scheduling Solution with the title "Enterprise Scheduling Solution" and a user dropdown menu labeled "[User Name]". Below the navigation bar, there are tabs for "Appointments" and "Admin". The main heading is "Schedule an Appointment". A green success message box contains a checkmark icon and the text: "Your appointment details have been updated! Your appointment has been scheduled for 2:45 PM on Tuesday April 19, 2022 at the SSA Office located on: 230 W Superior St Ste 500 Duluth, MN, 55802". At the bottom of the message box is a blue "Close" button.

Figure 68 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 "Schedule an Appointment" page with a "Personal Information" section. It includes a legend: "* Indicates required information". The "Your Name" section asks for the person requesting the appointment, with fields for First, Middle, Last, and a Suffix dropdown. The "For whom are you scheduling this appointment?" section has two radio buttons: "Self" and "Someone Else", with "Someone Else" selected. Below this is the "Individual's Social Security Number (SSN)" field. The "Individual's Name" section asks for the person being scheduled, with fields for First, Middle, Last, and a Suffix dropdown. The "Individual's Date of Birth" section has dropdowns for Month, Day, and Year. At the bottom are "Next" and "Previous" buttons.

Figure 69 ESS Technician Personal Information for Someone Else

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▾

Home

Appointments

Admin

Schedule an Appointment

Personal Information

Individuals's Social Security Number (SSN)

Individual's Name

John Quincy Smith

Individual's Date of Birth

April 15, 1980

Multiple Appointments for this Individual

Open an appointment record to view, update, reschedule, or cancel it

Date/Time ▾	Location	Reason	Scheduler	Actions
04/19/2022 8:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Replacement Social Security Card	John Quincy Smith	Open
05/11/2022 10:00 AM	230 W Superior St, Ste 500, Duluth, MN, 55802	Medicare Benefits	Jane Smith	Open

Create Appointment

Previous

Figure 70 ESS Technician Scheduled Appointments Found

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▾

Appointments

Admin

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

✓ 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

Update

✓ 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 (oSSNAP): Yes
Do you have your application Online Control Number (oSSNAP): N/A
Online Control Number: N/A

Update

✓ Appointment Details

Office Address
Street Address: 230 W Superior St, Ste 500
City/Town: Duluth
State/Territory: Minnesota
ZIP Code: 55802
Appointment date: May 31, 2022
Appointment time: 2:45 PM

Reschedule Appointment

Cancel Appointment

✓ Consent to Messaging

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

Update

✓ Language Preference

Spoken language preference: English
Written language preference: English

Update

✓ Remarks

Remarks: Remarks entered here by technician.

Update

Submit

Figure 71 ESS Technician Review Appointment Details

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Appointments Admin

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

✓ 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 Update

What can I help you with: Social Security
Which of these best describes the reason for your appointment: [REDACTED]
Have you started your online application (or do you have your application Online Control Number): [REDACTED]
Do you have your application Online Control Number: N/A

✓ Appointment Details Reschedule Appointment
Cancel Appointment

Office Address
Street Address: 230 W Superior St, Ste 500
City/Town: Duluth
State/Territory: Minnesota
ZIP Code: 55802
Appointment date: May 31, 2022
Appointment time: 2:45 PM

✓ Consent to Messaging Update

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

✓ Remarks Update

Remarks: Remarks entered here by technician.

Submit

Figure 72 ESS Technician Cancel Appointment Confirmation

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a header bar with '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'. A green success message box with a checkmark icon contains the text 'Your appointment has been cancelled!'. Below this message is a blue 'Close' button.

Figure 73 ESS Technician Cancel Appointment Success

2.3. Schedule Appointment for Someone Else

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a header bar with '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'. Below this title is a section titled 'Personal Information'. Inside this section, there is a red asterisk followed by the text '* Indicates required information'. The first section is '* Your Name' with the subtext 'This is the person requesting the appointment'. It contains four input fields: 'First' (John), 'Middle' (Qunicy), '* Last' (Smith), and 'Suffix' (a dropdown menu). The second section is '* For whom are you scheduling this appointment?' with two radio buttons: 'Self' and 'Someone Else' (selected). The third section is 'Individual's Social Security Number (SSN)' with an empty input field. The fourth section is 'Individual's Name' with the subtext 'This is the person for whom you are scheduling the appointment'. It contains four input fields: '* First' (Jane), 'Middle' (Allison), '* Last' (Smith), and 'Suffix' (a dropdown menu). The fifth section is '* Individual's Date of Birth' with three dropdown menus: 'Month' (1 - January), 'Day' (27), and 'Year' (2006). At the bottom of the form are two buttons: 'Next' (blue) and 'Previous' (light blue).

Figure 74 ESS Technician Personal Information for Someone Else

Design Specifications Document – ESS Screen Package

The screenshot shows the 'Enterprise Scheduling Solution' interface. The top navigation bar includes a home icon, 'Appointments', and 'Admin' tabs. The page title is 'Schedule an Appointment'. The main form area is titled 'Personal Information' and contains the following fields:

- Individuals's Social Security Number (SSN)**: (Empty)
- Individual's Name**: Jane Allison Smith
- Individual's Date of Birth**: January 27, 2006

A yellow message box with an exclamation mark icon states: **No appointments found for this individual.**

At the bottom, there are two buttons: 'Create Appointment' (blue) and 'Previous' (white with blue border).

Figure 75 ESS Technician No Scheduled Appointment Found

The screenshot shows the 'Enterprise Scheduling Solution' interface. The top navigation bar includes a home icon, 'Appointments', and 'Admin' tabs. The page title is 'Schedule an Appointment'. The main form area is titled 'Reason for Appointment' and contains the following sections:

- * Indicates required information**
- * What can I help you with?**: A dropdown menu with 'Social Security Card' selected.
- * Which of these best describes the reason for your appointment?**: Two radio button options:
 - ☐ Original Social Security Card
You have never had a Social Security number
 - ☒ Replacement Social Security Card
You need a replacement Social Security card
- * Have you started your online application (oSSNAP)?**: Three radio button options:
 - ☒ Yes
 - ☐ No
 - ☐ Doesn't know
- * Do you have your application Online Control Number (oSSNAP)?**: Three radio button options:
 - ☐ Yes
 - ☐ No
 - ☒ Doesn't know
- Online Control Number**: (Empty text input field)

At the bottom, there are two buttons: 'Next' (blue) and 'Previous' (white with blue border).

Figure 76 ESS Technician Reason for Appointment

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The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a dark header bar with the title 'Enterprise Scheduling Solution' on the left and a user dropdown menu '[User Name] ▼' on the right. Below the header is a navigation bar with three tabs: a home icon, 'Appointments', and 'Admin'. The main content area is titled 'Schedule an Appointment'. A light blue information box contains an 'i' icon and the text: 'In person appointments only' and 'We are only scheduling in person appointments for this service.' Below this is a section titled 'Find Available Appointments'. It includes a note '* Indicates required information' and a red asterisk followed by 'Enter ZIP Code' and the instruction 'Let us find an office in your area'. A text input field contains the value '55808'. At the bottom of this section are two buttons: 'Next' (highlighted in blue) and 'Previous'.

Figure 77 ESS Technician Enter ZIP Code

The screenshot shows the 'Enterprise Scheduling Solution' interface at the 'Select Appointment' step. The header and navigation bar are identical to the previous figure. The main content area is titled 'Schedule an Appointment'. Below the title is a section titled 'Select Appointment'. It displays the address: '230 W Superior St', 'Ste 500', 'Duluth, MN, 55802'. Below the address, it says 'Available appointment times:'. A green box highlights the text 'Earliest available appointment'. Below this, a button shows '8:00 AM on Tuesday, April 19, 2022'. At the bottom of the appointment selection area are three buttons: 'Select another time on Tuesday, April 19, 2022', 'Select another date at this location', and 'Select Another Location'. At the bottom of the main content area is a 'Previous' button.

Figure 78 ESS Technician Earliest Available Appointment

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution [User Name] ▾

Home 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

Confirm Appointment

Are you sure you want to book the following appointment:

Location:
230 W Superior St
Ste 500
Duluth, MN, 55802

Date/Time: 8:00 AM on Tuesday April 19, 2022

Yes No

Figure 79 ESS Technician Confirm Appointment

Enterprise Scheduling Solution [User Name] ▾

Home Appointments Admin

Schedule an Appointment

Consent to Messaging

* Indicates required information

Your Name
John Smith

Individual's Name
Jane Allison 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)

Next Previous

Figure 80 ESS Technician Consent to Messaging (Someone Else) Before Consent

Confirm

You will not receive messages about this appointment

To Update or cancel your appointment, you must contact us at toll-free 1-800-772-1213 (TTY 1-800-325-0778)...

OK

Figure 81 ESS Technician No Consent to Messaging Message

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▼

Appointments

Admin

Schedule an Appointment

Consent to Messaging

* Indicates required information

Your Name John Smith	Individual's Name Jane Allison 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 Password (OTP) or PIN 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 Password/PIN

Enter 4 to 6 Characters

Next

Previous

Figure 82 ESS Technician Consent to Messaging (Someone Else) After Consent

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a dark blue header with the text 'Enterprise Scheduling Solution' on the left and '[User Name] ▼' on the right. Below the header is a navigation bar with three tabs: 'Home' (with a house icon), 'Appointments' (selected), and 'Admin'. The main content area is titled 'Schedule an Appointment'. Below this title is a section titled 'Language Preference'. Inside this section, there is a note: '* Indicates required information'. Below the note is a light blue information box with an 'i' icon and the text: 'This is the language used during your appointment with a representative. We can arrange for an interpreter at no cost to you'. Below the information box are two required fields: '* Spoken language preference' and '* Written language preference'. Both fields are dropdown menus currently set to 'English'. At the bottom of the section are two buttons: 'Next' (blue) and 'Previous' (white with blue border).

Figure 83 ESS Technician Language Preference

The screenshot shows the 'Enterprise Scheduling Solution' interface. At the top, there is a dark blue header with the text 'Enterprise Scheduling Solution' on the left and '[User Name] ▼' on the right. Below the header is a navigation bar with three tabs: 'Home' (with a house icon), 'Appointments' (selected), and 'Admin'. The main content area is titled 'Schedule an Appointment'. Below this title is a section titled 'Remarks'. Inside this section, there is a question: 'Is there anything else we should know before your appointment?' followed by '(2500 characters maximum)'. Below the question is a large text area for entering remarks. At the bottom of the text area, it says 'Characters remaining: 2500'. At the bottom of the section are two buttons: 'Next' (blue) and 'Previous' (white with blue border).

Figure 84 ESS Technician Remarks

Design Specifications Document – ESS Screen Package

Enterprise Scheduling Solution

[User Name] ▾

Appointments

Admin

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.

Appointment Details

✓ Personal Information

Edit

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

Edit

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): No
Online Control Number: N/A

✓ Appointment Details

Edit

Office Address
Street Address: 230 W Superior St, Ste 500
City/Town: Duluth
State/Territory: Minnesota
ZIP Code: 55802
Appointment date: May 31, 2022
Appointment time: 8:45 AM

✓ Consent to Messaging

Edit

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
Would you like to provide a One Time Password (OTP) or PIN to modify this appointment online?: Yes
One Time Password/PIN: 123456

✓ Language Preference

Edit

Spoken language preference: English
Written language preference: English

✓ Remarks

Edit

Remarks: Remarks entered here by technician.

Submit

Previous

Figure 85 ESS Technician Review and Submit

Design Specifications Document – ESS Screen Package

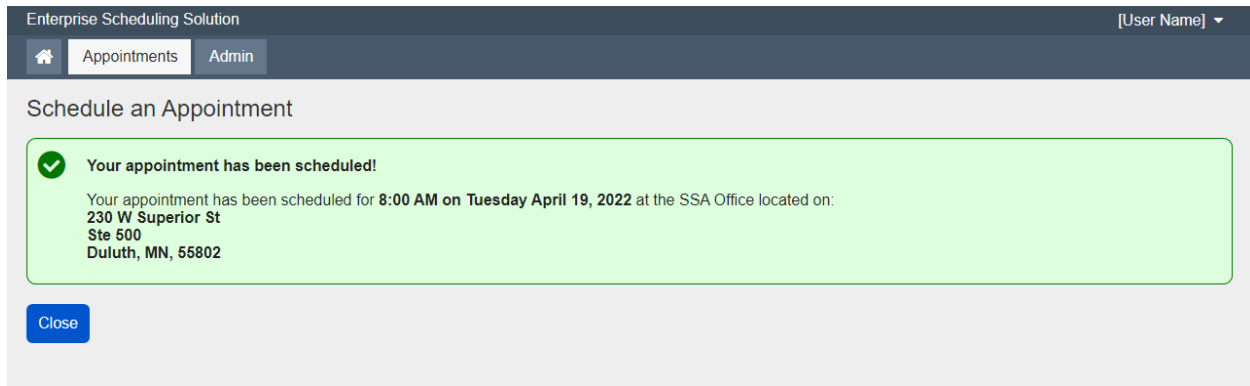


Figure 86 ESS Technician Appointment Scheduled Success

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.***

Original screen did not display contact type for the appointment.

Appointment Details

Review 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

Cancel Appointment

Office Address

Street Address: **230 W Superior St, Ste 500**
City/Town: **Duluth**
State/Territory: **Minnesota**
ZIP Code: **55808**
Appointment date: **May 31, 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**

Log Out

New display will list the contact type of the appointment; either 'In Office' or 'Video' read only.

Appointment Details

Review 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** **Contact Type: Video**

✓ Appointment Options

Reschedule Appointment

Cancel Appointment

Office Address

Street Address: **230 W Superior St, Ste 500**
City/Town: **Duluth**
State/Territory: **Minnesota**
ZIP Code: **55808**
Appointment date: **May 31, 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**

Log Out

The original email listed 'In Office' for all appointments (outlined in red)

ESS email-

From: <no-reply@ssa.gov>
Date: Thu, Jul 20, 2023, 2:19 PM
Subject: Appointment Confirmation
To: <nahreen.ferdous.snl@gmail.com>

Thank you for contacting the Social Security Administration. You scheduled an in-office appointment with us. This is confirmation of the date and time of your appointment.

Date of Appointment: Friday, July 21, 2023
Time of Appointment: 09:00 AM

If you need to cancel or reschedule your appointment or would like to opt out of electronic messages, please click the following link: <https://secureval.ssa.gov/ess/customer-ui/reschedule/RzIRHglr4E>

The new email will list either 'In Office' as it currently exists, or 'Video' for appointments scheduled by a technician that the customer requests as 'Video' as the contact type (outlined in red).

ESS email-

From: <no-reply@ssa.gov>
Date: Thu, Jul 20, 2023, 2:19 PM
Subject: Appointment Confirmation
To: <nahreen.ferdous.snl@gmail.com>

Thank you for contacting the Social Security Administration. You scheduled a Video appointment with us. This is confirmation of the date and time of your appointment.

Date of Appointment: Friday, July 21, 2023
Time of Appointment: 09:00 AM

If you need to cancel or reschedule your appointment or would like to opt out of electronic messages, please click the following link: <https://secureval.ssa.gov/ess/customer-ui/reschedule/RzIRHglr4E>

Original Screen with passive non consent to electronic messaging, original informational banner for electronic messaging, and text message information presented to all users.

Customer Scheduling

Schedule an Appointment

Consent To Messaging

* Indicates required information

Your Name
John Customer

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 More information About Text Messages

- For help, text "HELP"
- To stop, text "STOP" or change your notification preferences by navigating back to the Personal Information page through the re-schedule link you receive
- Text message notifications may not work with all carriers
- Message and data rates may apply
- Message frequency varies

You can view our terms and conditions and privacy policy at <https://public.govdelivery.com/accounts/USSSA/text-message>

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

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

Next

Previous

New screen with 'Yes' and 'No' options to consent to messaging and updated informational electronic messaging banner.

Schedule an Appointment

Personal Information

* Indicates required information

Your Name
John Quincy Smith

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

(218) 445 - 5698

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

Original screen with U.S. Mobile Phone Number collection

*** 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

New screen display when user selects 'Yes' to receive text messages and to display 'More Information About Text Messages' after a customer consents to receive text messages.

*** 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 More Information About Text Messages

- For help, text "HELP"
- To stop, text "STOP" or change your notification preferences by navigating back to the Personal Information page through the re-schedule link you receive
- Text message notifications may not work with all carriers
- Message and data rates may apply
- Message frequency varies

You can view our terms and conditions and privacy policy at <https://public.govdelivery.com/accounts/USSSA/text-message>

Next Previous

Original screen display in update path when the checkmark box is unselected and pop-up message displays.

Schedule an Appointment

Consent To Messaging

* Indicates required information

Your Name

John Public

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 More information About Text Messages

- For help, text "HELP"
- To stop, text "STOP" or change your notification preferences by navigating back to the Personal Information page through the re-schedule link you receive
- Text message notifications may not work with all carriers
- Message and data rates may apply
- Message frequency varies

You can view our terms and conditions and privacy policy at <https://public.govdelivery.com/accounts/USSSA/text-message>

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

Confirm

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.

Ok

Cancel

New screen display for update path when a customer changes their response from 'Yes' to 'No' for consent to messaging.

* 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

! **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.

Additionally, please be aware that you will not receive **ANY** text messages from SSA at this U.S. Mobile Phone Number moving forward. This includes text messages related to other appointments or transactions you may currently have with SSA.

Done