

## Social Security

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# Program Operations Manual System (POMS)

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**TN 23 (11-10)**

## **GN 00203.016 iAppointments (iAppt)**

### **A. Background**

iAppt is an online appointment-scheduling tool that allows claimants to schedule telephone or in-office appointments with a Social Security Administration (SSA) field office (FO). In November 2010, iAppt became available to certain claimants who unsuccessfully attempted to use the Internet Claim (iClaim) application. iAppt allows these claimants, who failed the iClaim verification checks, the option to schedule a future appointment with an FO electronically.

### **B. Process for entering and using iAppt**

The only entry point to iAppt is from iClaim. After a claimant fails the verification checks twice in one session, an online error message provides an option to schedule a telephone or in-office appointment with an FO of his or her choice.

**NOTE:** A claimant fails verification in iClaim for many reasons. For iClaim verification checks, see GN 00204.055B.1. and GN 00204.059B.1.

#### **1. Eligibility to use iAppt**

Claimants who entered iClaim by selecting the radio button labeled "I am applying for myself" or "I am helping someone who wants to apply for benefits and is with me," on the iClaim Welcome page, will be displayed the iAppt link.

If the claimant entered iClaim as a third party (by selecting "I am helping someone who is not with me, and therefore cannot sign the application at this time"), iClaim returns the appropriate online error message directing him or her to contact SSA for assistance. For iAppt purposes, this applies to third parties who established an intent-to-file for benefits

on a claimant's behalf by attempting to complete the iClaim application as indicated in the first sentence of GN 00204.055B.

Not all claimants who fail iClaim verification are eligible to use iAppt. Claimants in the following categories are not able to access iAppt:

- have a Celebrity Indicator (Individuals of Extraordinary National Prominence [IENP]);
- have a Master Beneficiary Record (MBR) in current payment status or a pending Modernized Claims System (MCS) claim on their Social Security number (SSN);
- have an electronic block present on that SSN (for more information on the electronic block, see OA 00101.050 – Block All Electronic Access to Online Services and MSOM EVID 001.006E.16-D); or
- are individuals who live outside of the United States.

For these claimants, iAppt returns an online error message directing these individuals to contact Social Security for assistance.

## **2. Required information**

The claimant's SSN, name, date of birth (DOB), and gender propagate from iClaim to iAppt. The claimant cannot change the SSN. However, he or she has the ability to update the name, DOB, and gender. In addition, iAppt requires the claimant provide his or her mailing address and telephone number (if a telephone appointment is indicated), and select the type of appointment. The claimant also has the option of providing an email address so iAppt can email a confirmation notice.

## **3. Appointment calendar**

Local management establishes available appointments for the FO on a fifth calendar screen of the 800# Appointment Referral System. This screen is for iAppt use only, and is not available for FO or Teleservice Center (TSC) appointment scheduling.

A calendar appears displaying all available appointments for the related servicing FO, and the claimant has the opportunity to select the most convenient time and date. iAppt provides the claimant the option of entering a new zip code to search for an appointment in another FO if he or she cannot find an acceptable appointment in the servicing FO. Upon successfully scheduling an appointment, iAppt generates an online "confirmation" page, providing details of the scheduled appointment, including the protective filing closeout date(s).

## 4. Help screens

If claimants need detailed information, "More Info" links are available throughout iAppt to provide assistance.

## 5. Protective filing closeout in iAppt

Protective filing closeout language and the closeout period ending date(s) appear on the iAppt confirmation page. The FO should **not send any protective filing closeout notice because** the online language closes out the:

- Title II protective filing issue;
- Title XVI protective filing established when the claimant responds "Yes" to the "Would you also be interested in Supplemental Security Income (SSI)" question on iAppt; and
- Title XVI oral inquiry when the claimant indicates there is no intent to file for SSI.

## 6. Transmitting and storing application data

After a claimant acknowledges reading the "Important Information" page (which contains closeout language and dates) on the "About You" segment of iAppt and selects the "Next" button, the information on that segment transmits to the 800# Appointment Referral System. The Worksheet (WKSH) screen in the 800# Appointment Referral System contains the issue of UNVER to document that iAppt used "unverified" data to create the appointment. For more information about the UNVER issue, see MSOM APPTS 001.014.E21-M.

## C. Internal functionality

iAppt collects all data necessary to establish an appointment in the 800# Appointment Referral System as well as establish a protective filing. This data is not used to update the Integrated Client Database (ICDB—also known as CLIENT) until it is verified. For more information about verifying the information, see GN 00203.016D.2. in this section. The WKSH screen in the 800# Appointment Referral System contains the issue of UNVER to document that iAppt used "unverified" data to create the protective filing. Until the information is verified, corrected where applicable, and the pending issue is "receipted in," this "unverified" data remains isolated from CLIENT. For more information on resolving data discrepancies between ICDB and the Internet, see GN 00204.055G.5.

## 1. Appointment types

The 800# Appointment Referral System identifies protective filings established through iAppt on the Leads/Protective Filing Worksheet by displaying these claim types:

- Retirement or Medicare only (iRIB);  
**IMPORTANT:** In a future release, iAppt will create a separate appointment type for Internet Medicare only (iHISMI) requests.
- Disability (iDIB);
- Supplemental Security Income Disabled Individual (iSSIDI); and
- Supplemental Security Income Aged Individual (iSSIAI).

## 2. 800 Number Appointment Referral System appointment confirmation notices

The 800# Appointment Referral System suppresses appointment confirmation notices for appointments made through iAppt to prevent unauthorized disclosure of Personally Identifiable Information (PII). **Do not send any manual notices until the UNVER issue is properly resolved.** For more information about verifying the information see GN 00203.016D.2. in this section.

## 3. Appointment rescheduling

If the claimant wishes to reschedule an appointment originally made using iAppt, he or she will contact SSA. Appointments cannot be rescheduled using iAppt. The first four-appointment calendar pages in the 800# Appointment Referral System offers new appointments, not the fifth calendar. iAppt is the only access to the fifth calendar. The process of cancelling or rescheduling an appointment on the other calendar pages automatically restores the fifth calendar page's appointment slots.

## 4. Language preferences

If the language preference is not English, iAppt places a remark on the RMRK screen in 800# Appointment Referral System (\*\*LEP: [*language selected*] Interpreter Needed\*\*). If the language selected is American Sign Language (ASL), then a different remark will be generated on the RMRK screen indicating the user requires an ASL interpreter (\*\*Deaf/Hard of Hearing: Sign Language Assistance Needed\*\*). In addition, the selection of ASL will generate an email to the FO mailbox indicating the need to schedule an

interpreter for the appointment. If the FO email is undeliverable, iAppt sends an email to the appropriate Area Director's Office mailbox to ensure the FO is notified of the need to schedule an interpreter for the appointment.

## **D. Processing instructions for claims**

At the time of the appointment, take the following steps **before** establishing the claim in MCS or the Modernized Supplemental Security Income Claims System (MSSICS).

### **1. Pre-application**

Follow pre-application actions in GN 00203.002 or, if applicable, pre-application considerations in telephone interviewing in GN 00203.015C.1.

### **2. Verify information in the 800 Number Appointment Referral System**

#### **a. SSN on Lead/Protective Filing screens belongs to the claimant**

If the SSN on the Lead/Protective Filing screens in the 800# Appointment Referral System belongs to the claimant, correct any erroneous information on the Lead/Protective Filing screens if necessary. After all information is verified, "receipt in" (by entering the current date in the receipt [REC] field) the UNVER issue on the WKSH screen to acknowledge verification of the correct appointment information. This allows the previously isolated "unverified" data to become part of the CLIENT database. Then follow normal claims-taking procedures in GN 00203.004. For more information on the WKSH screen, see MSOM APPTS 001.014.

#### **b. SSN on Lead/Protective Filing screens does not belong to the claimant**

If the SSN on the Lead/Protective Filing screens does not belong to the claimant, print the Lead/Protective Filing screens so that you can transcribe any correct information from the "unverified" screens to the claim manually. Review the 800# Appointment Referral System for possible earlier protective filing dates under the correct SSN, and determine whether they are relevant (e.g., still within the protective filing closeout period). Then follow normal claims-taking procedures in GN 00203.004.

Document the claim with the correct protective filing date from the Lead/Protective Filing screens. **After the interviewer documents the claim with the correct protective filing date per GN 00204.007**, refer the protective filing with the incorrect SSN to management personnel to delete it from the 800# Appointment Referral System.

**NOTE:** Only local FO management can delete these erroneous protective filings. For instructions on deleting protective filings, see MSOM APPTS 001.015.

## E. References

- GN 00204.055 Internet Claim (iClaim) Application
- GN 00204.059 Internet Claim (iClaim) Medicare-only Application
- SI 00601.040 Protective Filing Closeout Notices
- GN 00202.020 Processing Leads
- GN 00204.010 Protective Filing
- GN 00204.012 How to Dispose of a Protective Writing
- SI 00601.037 Closing Out Leads and Protective Filings
- GN 00203.020 Identity of Claimants
- SI 00601.062 Verifying Claimant Identity

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*To Link to this section - Use this URL:*

<http://policy.ssa.gov/poms.nsf/lnx/0200203016>

*GN 00203.016 - iAppointments (iAppt) - 02/22/2013*

*Batch run: 02/22/2013*

*Rev:02/22/2013*



