iClaim Application Modified Screens

Modified Screen #1
Birth and Citizenship information

We are adding "Provide place of birth as it was known at the time of your birth" (#1) for clarification purposes.

We are adding "Are you a legal resident of the United States?" (#2) to the existing screen. If the applicant answers "Yes," then a free format box appears instructing the applicant to provide their "Permanent Resident Card" number as an optional field.

| Text Size 🔽 | Accessibility Help

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Benefit Application

○ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps

Contact Information for Jane Public

Mailing Address:

Country:

United States or U.S. Territory ▼

Street Address:

Street Line 1: [   ]

Street Line 2: [   ] ➕ Add More Lines

City/Town: **State/Territory:**   **ZIP Code:**

① [   ]   [--   ▼]   [   ]

| -- |
| Armed Forces Africa (AE) |
| Armed Forces Americas (AA) |
| Armed Forces Canada (AE) |
| Armed Forces Europe (AE) |
| Armed Forced Middle East (AE) |
Armed Forces Pacific (AP)
Alabama
Alaska
American Samoa
Arizona
Arkansas
California
Colorado
Connecticut
Delaware
District of Columbia

Does Jane Public live at this add

◎ Yes   ◎ No

Daytime Telephone Number:

◎ U.S.   ◎ International

[   ]   [--   ▼]

10-digit Number   Phone Type

What is the best time to call?

◎ 9 a.m. to Noon   ◎ Noon to 5   and 5 p.m.

Language Preferences

Language preferred for speaking:

English ▼

Language preferred for reading:

English ▼

In this section...

○ Initial Information

✓ Applicant Identification

○ **Contact Information**

○ Birth and Citizenship

○ Medicare Information

○ Application Number

○ Additional Information

1. We added APO, FPO, and DPO selections in the State/Territory dropdown list (#1).

2. We removed the Email Address fields for Third Party applicants (currently below "What is the best time to call?" question).

Modified Screen #4
Prior Marriages Screen

| Text Size ▾ | Accessibility Help

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Prior Marriages for Jane Public

Did you have any prior marriages? ❓ More info
◉ Yes   ○ No

Did you have any prior marriage that lasted at least 10 years?
○ Yes   ◉ No

Did you have any prior marriage that ended due to your spouse's death?
◉ Yes   ○ No

In this section...
○ Family Details
✔ Marriage Information
   Prior Marriages
   ○ Children
○ Military Details
○ Earnings Details
○ When to Start Benefits

Details of Prior Marriages

① Please provide information about the prior marriages for which you answered "yes." List your most recent marriage first (regardless of how long it lasted), and work backwards. If you are not sure of the marriage date, please enter your best guess and explain in the **Remarks** page near the end of the application.

Spouse Name	Date of Birth or Age	Date of Marriage	Actions
No Prior Marriages have been added.			

[Add]

[Next] [Previous] [Save & Exit]

We are adding the wording in parenthesis "regardless of how long it lasted" to capture the last marriage information regardless of the duration of the marriage. We have modified the first sentence slightly for clarification purposes.

Modified Screen#5
Supplemental information Screen

Text Size ▾ | Accessibility Help

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| ✓ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Supplemental Information for John Public

U.S. Presence

In this section...
- ✓ Family Details
- ✓ Military Details
- ○ Earning Details
- ✓ Employer Details
- ✓ Self Employment
- **Supplemental Information**
- ○ Total Earnigs
- ○ Other Pensions/Annuities
- ○ When to Start Benefits

① **Have you been inside the United States for 30 consecutive days or longer?** ❓ More Info
◉ Yes   ○ No

Please provide the dates you were in the United States for 30 consecutive days or more.

Start of Most Recent Occurrence:
Estimate if not sure.

| -- ▾ | | |
| Month | Day | Year |

End of Most Recent Occurrence:
Estimate if not sure.

| -- ▾ | | |
| Month | Day | Year |

Do you have a second recent occurrence?
○ Yes   ○ No

NEW

Foreign Social Security

Did you ever work outside the United States? ❓ More Info
○ Yes   ○ No

Did your spouse or prior spouse work outside the United States? ❓ More Info
○ Yes   ○ No

Social Security Statement

Do you agree with your earnings history as shown on your Social Security Statement? ❓ More Info
○ Yes
○ No
○ Not sure or I do not have a statement

We added this question to the current iClaim screen to determine U.S residency. If the applicant answers "Yes," the system generates a dropdown field to allow the applicant to input the dates of U.S. residency. The applicant can provide up to four occurrences. If the applicant answers "No," the system does not generate anything, but allows the applicant to go to the next question.

| Text Size ▾ | Accessibility Help

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Benefit Application

| ✓ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Total Earnings for John Public

Total Earnings for 2011

Show the total of all wages and tips earned in 2011. ❓ More Info
Include net income from self-employment. Estimate if necessary.

$ [   ]

(XXXXXX)

Did you earn more than $3140 a month in wages and tips in every month of 2011? ❓ More Info
○ Yes ◉ No

If no, select the months in which you earned $3140 or less. ❓ More info
☐ **Select All Months**

☑ January
☑ February
☐ March
☐ April
☐ May
☐ June
☐ July
☐ August
☐ September
☐ October
☐ November
☐ December

1 ▸ **Did you work outside the United States for salary, wages, or self-employment in 2011?**
◉ Yes ○ No

NEW

Were all of your earnings subject to U.S. Social Security tax?
○ Yes ◉ No

In this section...
- ✓ Family Details
- ✓ Military Details
- ○ Earning Details
- ✓ Employer Details
- ✓ Self Employment
- ✓ Supplemental Information
- ○ **Total Earnings**
- ○ Other Pensions/Annuities
- ○ When to Start Benefits

Select all the months in which you worked 45 hours or more.

☐ **Select All Months**

☐ January
☐ February
☑ March
☑ April
☐ May
☐ June
☐ July
☐ August
☐ September
☐ October
☐ November
☐ December

NEW

The iClaim application currently collects domestic wage information. However, we added new questions to capture foreign work since foreign work is determined by the hours worked instead of money amount. The questions apply to past, present and future years.

Modified Screen #7
Other Pensions/Annuities Screen

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Benefit Application

| ✓ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Other Pensions/Annuities for Jane Public

Work Not Covered By Social Security

1 Did you ever work in a job where U.S. Social Security taxes were not deducted or withheld? ❓ More Info

○ Yes ○ No

Railroad Employment

Did you work for the Railroad 5 years or more? ❓ More Info

○ Yes ○ No

Did your spouse or prior spouse work for the Railroad 5 years or more? ❓ More Info

○ Yes ○ No

In this section...
- ✓ Family Details
- ✓ Military Details
- ○ Earning Details
- ✓ Employer Details
- ✓ Self Employment
- ✓ Supplemental Information
- ✓ Total Earnings
- ○ **Other Pensions/Annuities**
- ○ When to Start Benefits

[Next] [Previous] [Save & Exit]

We are adding "U.S." to the current question for clarification purposes.

| Text Size ▼ | Accessibility Help

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Benefit Application

| ✓ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Reduced Benefits for Jane Public

Reduced Benefits: ❓ More Info

1 ○ I want the earliest month possible without a permanent age-related reduction

○ I will accept an age-related reduction

[Next] [Previous] [Save & Exit]

In this section...
- ✓ Family Details
- ✓ Military Details
- ✓ Earnings Details
- ○ When to Start Benefits
- ○ **Reduced Benefits**
- ○ When to Start Retirement Benefits
- ○ Direct Deposit Details

We are adding "permanent" to the current statement for clarification purposes.

Modified Screen #9
Direct Deposit Details Section
Domestic Screen

| Text Size ▾ | Accessibility Help

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Benefit Application

| ✔ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Direct Deposit Details for Jane Public
Direct Deposit is Safe, Quick and Convenient

(1) Do you own or co-own a bank account that you can use for Direct Deposit? ❓ More Info
◉ Yes   ○ No

(2) **Account Information:** ❓ Where can I find this?
Warning: Providing incorrect information may result in a delayed payment.

| -- ▾ | | |
| Account Type | Routing Number | Account Number |

[Next] [Previous] [Save & Exit]

In this section...
✔ Family Details
✔ Military Details
✔ Earnings Details
○ When to Start Benefits
✔ Reduced Benefits
✔ When to Start Retirement Benefits
○ **Direct Deposit Details**

1. Adding the new conditional question (#1) for clarity when domestic users own or co-own a bank account for Direct Deposit.
2. Adding the "warning" language (#2) for clarification.

If the domestic applicant answers "No," the system generates the "Alert" message (yellow box) to inform the applicant about the new electronic payment mandate.

This new conditional question appears for applicants with foreign addresses also. If the applicant answers "No" then no subsequent questions appear, allowing the applicant to continue to the next screen.

New Screen #1
International Direct Deposit (IDD) Screen

| Text Size ▼ | Accessibility Help

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Benefit Application

| ✓ Identification | ○ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Direct Deposit Details for Jane Public
Direct Deposit is Safe, Quick and Convenient

Do you own or co-own a bank account that you can use for Direct Deposit? ❓ More Info
◉ Yes ○ No

① **You provided us with an address outside the United States. Would you like to use a bank from a country that participates in International Direct Deposit (IDD)?**
◉ Yes ○ No, use a U.S. bank

Bank Country:
If bank country is not listed, select "Not Listed"

-Select- ▼

In this section...
- ✓ Family Details
- ✓ Military Details
- ✓ Earnings Details
- ○ When to Start Benefits
- ✓ Reduced Benefits
- ✓ When to Start Retirement Benefits
- ○ **Direct Deposit Details**

[Next] [Previous] [Save & Exit]

We incorporated new functionality to identify applicants who indicate having a bank account for direct deposit who provided us with an address outside the United States. We then present a new section (#1) to collect International Direct Deposit (IDD).

If the applicant answers "Yes," the system generates a conditional drop down for the applicant to select the "Bank Country." Depending on the country selected, the system then generates two to four entry fields to collect the account information. Many of the countries have different entry requirements; therefore the entry fields are conditional.

We also included a screen "pop up" to assist the applicant to understand what is considered IDD. The "pop up" appears when the applicant hovers the mouse over the "IDD" segment.

1. International Standard (IBAN) or National Standard (All Codes)

Account Information: ❓ Where can I find this?
Warning: Providing incorrect information may result in a delayed payment.
○ International Standard (IBAN)   ○ National Standard

[-- ▼]   [_____]
Account Type   International Bank Account Number (IBAN)

Or

Account Information: ❓ Where can I find this?
Warning: Providing incorrect information may result in a delayed payment.
○ International Standard (IBAN)   ○ National Standard

[-- ▼]   [_____]   [_____]   [_____]
Account Type   Bank Code   Branch Code   Account Number

2. International Standard (IBAN) or National Standard (No Bank Code)

Account Information: ❓ Where can I find this?
Warning: Providing incorrect information may result in a delayed payment.
◉ International Standard (IBAN)   ○ National Standard

[-- ▼]   [_____]
Account Type   International Bank Account Number (IBAN)

Or

Account Information: ❓ Where can I find this?
Warning: Providing incorrect information may result in a delayed payment.
○ International Standard (IBAN)   ◉ National Standard

[-- ▼]   [_____]   [_____]
Account Type   Branch Code   Account Number

Depending on the country selected, the system generates two to four entry fields to collect the account information. Many of the countries have different entry requirements; therefore the entry fields are conditional.

If the foreign applicant's response is "No, use a U.S. Bank," the system generates the current bank fields for a "domestic" bank account.

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Benefit Application

| ✓ Identification | ◯ General | ◯ Other Benefits | ◯ Remarks | ◯ Review & Submit | Next Steps |

Direct Deposit Details for Jane Public
Direct Deposit is Safe, Quick and Convenient

Do you own or co-own a bank account that you can use for Direct Deposit? ❓ More Info
◯ Yes ⦿ No

(1) **You provided us with a Canadian address. Would you like to use Canadian Direct Deposit?**
⦿ Yes ◯ No, use a U.S. bank

Bank / Financial Institution:
(2)

[   ] [--   ▾]
Bank Name   Currency

Account Information: ❓ Where can I find this?
Warning: Providing incorrect information may result in a delayed payment.

[--   ▾] [   ] [   ] [   ]
Account Type   Branch/Transit Number   Bank Code   Account Number

In this section...
- ✓ Family Details
- ✓ Military Details
- ✓ Earnings Details
- ◯ When to Start Benefits
- ✓ Reduced Benefits
- ✓ When to Start Retirement Benefits
- ◯ Direct Deposit Details

[Next] [Previous] [Save & Exit]

We incorporated new functionality to identify applicants who indicate having a bank account for direct deposit and provided us with a Canadian address (#1). We then present a new section to collect bank account and currency information (#2).

If the Canadian applicant's response is "No, use a U.S. Bank," the system generates the current bank fields for a "domestic" bank account.

Modified Screen #10
Health Insurance Screen

| Text Size ▾ | Accessibility Help

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Benefit Application

| ✓ Identification | ✓ General | ○ Other Benefits | ○ Remarks | ○ Review & Submit | Next Steps |

Health Insurance for Jane Public

In this section...
- ○ Benefit Information
- ✓ Benefit Information
- ○ **Health Insurance**

Medicare Coverage

Are you already enrolled in Medicare Part B? ❓ More Info
○ Yes   ○ No

Other Health Insurance Coverage

Are you receiving Medicaid (state health insurance)? ❓ More Info
○ Yes   ○ No

1 ▶ **Are you covered under a Group Health Plan through your own current employment?**
○ Yes   ○ No

[Next]   [Previous]   [Save & Exit]

We added "current" to the existing question for clarification purposes.

If the applicant answers "No" to the first modified question (#1) the subsequent question appears. We added "current" to the existing second question (#2) for clarification purposes.

At the end of the application, the system currently presents language explaining the electronic signature and submission agreement. However, we are adding language specifically related to U.S residency and foreign work. The language will appear when the system identifies the applicant as living outside the U.S or as a legal resident.

If applicant answers "Yes" to the legal resident question, they will see the language in bracket #1 on this page. All other applicants except Medicare - Only, will see the language in bracket #2.