

iClaim Application Modified Screens

Modified Screen #1 Birth and Citizenship information

The screenshot shows the Social Security Administration's iClaim application interface. At the top right, there are links for "Text Size" and "Accessibility Help". The Social Security Administration logo and name are on the left. The main heading is "Benefit Application". Below this is a navigation bar with tabs: "Identification", "General", "Other Benefits", "Remarks", "Review & Submit", and "Next Steps". The "Identification" tab is selected. The main content area is titled "Birth and Citizenship Information for Jane Public". It contains the following fields and options:

- Place of Birth:** A label with a question mark icon and a "More Info" link. Below it is the instruction: "Provide place of birth as it was known *at the time* of your birth." A red circle with the number "1" is next to this instruction.
- U.S. or U.S. Territory:** A radio button option.
- Other:** A radio button option, which is currently selected.
- City/Town:** A text input field.
- Country:** A dropdown menu with "--" selected.
- Are you a U.S. citizen?:** A label with a question mark icon and a "More Info" link. Below it are radio button options for "Yes" and "No".
- Country of Citizenship:** A dropdown menu with "--" selected.

On the right side, there is a sidebar titled "In this section..." with a list of navigation items:


- Initial Information
- Applicant Identification (checked)
- Contact Information (checked)
- Birth and Citizenship (selected)
- Medicare Information
- Application Number
- Additional Information

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

Modified Screen #2

Legal Resident Information

Text Size Accessibility Help

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Benefit Application

Identification General Other Benefits Remarks Review & Submit Next Steps

Birth and Citizenship Information for Jane Public

1 **Place of Birth:** [More Info](#)
Provide place of birth as it was known *at the time* of your birth.

U.S. or U.S. Territory Other

City/Town Country

Are you a U.S. citizen? [More Info](#)
 Yes No

Country of Citizenship:

2 **Are you a legal resident of the United States?** [More Info](#)
 Yes No

Please provide your Permanent Resident Card number (Optional):

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

In this section...

- Initial Information
- Applicant Identification
- Contact Information
- Birth and Citizenship
- Medicare Information
- Application Number
- Additional Information

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.

Modified Screen #3 Military and Diplomatic Postal Addresses



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:

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

ZIP Code:

Does Jane Public live at this address?

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 p.m.

In this section...

- Initial Information
- Applicant Identification
- Contact Information
- Birth and Citizenship
- Medicare Information
- Application Number
- Additional Information

Language Preferences

Language preferred for speaking:


English


Language preferred for reading:

English

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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Benefit Application

Identification General Other Benefits Remarks Review & SubmitNext Steps

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

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.			
<input type="button" value="Add"/>			

In this section...

- Family Details
- Marriage Information
- Prior Marriages
- Children
- Military Details
- Earnings Details
- When to Start Benefits

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.

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OISP/OAESP

Modified Screen#5 Supplemental information Screen

Text Size | Accessibility Help



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Benefit Application

Identification

General

Other Benefits

Remarks

Review & Submit

Next Steps

Supplemental Information for John Public

U.S. Presence

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

In this section...

Family Details

Military Details

Earning Details

Employer Details

Self Employment

Supplemental Information

Total Earnings

Other Pensions/Annuities

When to Start Benefits

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.

Modified Screen#6 Total Earnings Screen



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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

Were all of your earnings subject to U.S. Social Security tax?

Yes No

NEW

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

| Text Size ▼ | Accessibility Help



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Benefit Application

Identification General Other Benefits Remarks Review & SubmitNext 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

NextPreviousSave & Exit

In this section...

- Family Details
- Military Details
- Earning Details
- Employer Details
- Self Employment
- Supplemental Information
- Total Earnings
- Other Pensions/Annuities
- When to Start Benefits

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

Modified Screen #8

Reduced Benefits Screen

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](#)

- 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.

Modified Screen #9

Direct Deposit Details Section

Domestic Screen

| Text Size ▼ | Accessibility Help



Social Security

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Benefit Application

✔ Identification○ General○ Other Benefits○ Remarks○ Review & SubmitNext 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

⚠ When you apply for Social Security benefits, you must receive your payments electronically. If you do not have a bank account to use for direct deposit, you can still complete this claim online.

We will contact you to discuss your options. Many financial institutions have free bank accounts with direct deposit enrollment. In addition, the U.S. Department of the Treasury has a Direct Express debit card program that you can use to obtain your benefits electronically.

NextPreviousSave & Exit

In this section...

- ✔ Family Details
- ✔ Military Details
- ✔ Earnings Details
- When to Start Benefits
- ✔ Reduced Benefits
- ✔ When to Start Retirement Benefits
- Direct Deposit Details

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

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

1 Do you own or co-own a bank account that you can use for Direct Deposit? [More Info](#)

Yes No

In this section...

- Family Details
- Military Details
- Earnings Details
- When to Start Benefits

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

The screenshot shows the Social Security Administration's "Benefit Application" page for Jane Public. The page has a navigation bar with tabs: Identification (checked), General, Other Benefits, Remarks, Review & Submit, and Next Steps. The main content area is titled "Direct Deposit Details for Jane Public" and includes the text "Direct Deposit is Safe, Quick and Convenient". Below this, there are two questions with radio button options:

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-

At the bottom of the form are three buttons: "Next", "Previous", and "Save & Exit". On the right side, there is a sidebar titled "In this section..." with a list of sections: Family Details (checked), Military Details (checked), Earnings Details (checked), When to Start Benefits (unchecked), Reduced Benefits (checked), When to Start Retirement Benefits (checked), and Direct Deposit Details (unchecked).

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).

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"

Austria

Bank Name:
Type your bank name below.

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)

International Direct Deposit ×
Certain countries throughout the world have an agreement with us, which allow your benefits to be automatically deposited into our growing number of participating international banks.

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

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.

New Screen #1

International Direct Deposit (IDD) Screen

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.

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

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

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.

New Screen #2 Canadian Direct Deposit 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 a Canadian address. Would you like to use Canadian Direct Deposit?

Yes No, use a U.S. bank

2 Bank / Financial Institution:

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

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 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).

New Screen #2 Canadian Direct Deposit 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 a Canadian address. Would you like to use Canadian Direct Deposit?

Yes No, use a U.S. bank

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

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

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


In this section...

- Benefit Information
- Benefit Information
- Health Insurance

We added “current” to the existing question for clarification purposes.

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

Group Health Plan Information for Joan Public

Are you covered under a Group Health Plan? [More Info](#)

Yes No

1 Are you covered under a Group Health Plan through your own *current* employment?

Yes No

2 Are you covered under a Group Health Plan through another person's *current* employment?

Yes No

In this section...

- Benefit Information
- Benefit Information
- Health Insurance

Next Previous Save & Exit

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.

Modified Screen#11

Overall Summary Screen

Text Size | Accessibility Help



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Benefit Application

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

Electronic Signature & Submission for Jane Public

Congratulations, you're just about ready to complete your application for retirement benefits.

Please read and accept the following statements to finish the application. If you are helping someone to complete the application, then that person needs to read and accept the statements.

1 I agree to notify the Social Security Administration promptly if I abandon my U.S. residence status OR if the Department of Homeland Security notifies me that my resident status has been revoked or abandoned.

2 I understand that if I am a U.S. resident, my worldwide income is subject to U.S. income tax in the same way as the income of a person living in the U.S.

I agree to notify the Social Security Administration promptly if I (or any person for whom I receive benefits) become employed or self-employed while outside the United States, change citizenship, or go (for 30 days or more) to any country other than the residence address I have entered in this application.

I agree to return any payments which are not due.

I understand and agree that my application will be signed electronically when I select the check box below. I also understand that my electronic signature means that I intend to apply for benefits and have provided the Social Security Administration with accurate information. I declare under penalty of perjury that I have examined all the information on this application and it is true and correct to the best of my knowledge. I understand that anyone who knowingly gives a false or misleading statement about a material fact in this electronic application, or causes someone else to do so, commits a crime and may be sent to prison or may face other penalties, or both.

When you select "Submit Now" below, you will be sending your completed information electronically to the Social Security Administration. You will no longer be able to change your information.

I agree with the Electronic Signature & Submission Agreement above. I wish to submit my application electronically now.

Submit Now Previous Save & Exit

In this section...

✔ Overall Summary

○ Send This Application

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.