Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #1

Third party helpers who entered the internet disability application and indicated the claimant wants to file for SSI will receive the following questions as part of their path.

We ask applicants to let us know if they are students to evaluate if some of the income reported can be excluded (when applicable). We only collect their "yes" or "no" response.

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #2

We are requesting immigration status as we are expanding the online services to non-US citizen claimants. This information is part of the SSI eligibility requirements.

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information 2 Provide Disability Information 3 Sign Medical Release 4 Confirmation

| ✓ Identification | ✓ General | ✓ Other Benefits | SSI | Remarks & Options | Review & Sign |

Immigration Status for John Public

Country of Citizenship:
Australia

This information is propagated from their prior response on the identification screen

What date did John Public become a citizen of Australia?
If they were a citizen at birth, provide their birth date

[-- ▾] [ ] [ ]
Month   Day   Year

Select John Public's immigration status within the United States:
- ○ Alien with deportation withheld
- ○ Amerasian immigrant
- ○ Asylee
- ○ Battered alien or alien with a battered parent or child
- ○ Canadian-born American Indian
- ○ Conditional entrant
- ○ Cuban or Haitian entrant
- ○ Iraqi or Afghan special immigrant
- ○ Lawful permanent resident
- ○ Non-U.S. citizen member of a federally recognized Indian tribe
- ○ Parolee (one year or more)
- ○ Refugee
- ○ Victim of severe forms of trafficking (VSFT)
- ○ Other
- ○ Not lawfully present

In this section...
- ✓ Attending Classes
- **Immigration Status**
- Living Arrangements
- Income Overview
- Gross Wages
- Sick Pay
- Income Sources
- Resources Overview
- Resources
- Additional Resources

We added this question for Operational purposes as a short-term solution until backend systems' modifications are completed

[Next] [Previous] [Save & Exit]

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #3

We added this question to determine their living arrangement as is part of the SSI eligibility factors which technicians can review, and process as needed e.g., send claim for medical determination, or seek further clarification when applicable.

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #4

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information **2** Provide Disability Information **3** Sign Medical Release **4** Confirmation

| ✓ Identification | ✓ General | ✓ Other Benefits | SSI | Remarks & Options | Review & Sign |

Income Overview

> ℹ **The amount of the applicant's income is one of the factors that determines whether they are eligible for SSI.**
>
> Income, for the purposes of SSI includes:
> - Money earned from work;
> - Money received from other sources, such as Social Security benefits, worker's compensation, unemployment benefits, the Department of Veterans Affairs (VA), friends, or relatives; and
> - Anything else they receive in cash or in kind that they use to meet your needs for food or shelter.
>
> We do not count all income for SSI, but the income that we count reduces their SSI payment amount or may make them ineligible to receive SSI.
>
> The next set of questions collects income types and their amounts that the applicant received or expects to receive in April 2023. They may find it helpful to find any statements, paystubs, etc. to answer these income questions.

In this section...
- ✓ Attending Classes
- ✓ Immigration Status
- ✓ Living Arrangements
- **Income Overview**
- Gross Wages
- Sick Pay
- Income Sources
- Resources Overview
- Resources
- Additional Resources

[Next] [Previous] [Save & Exit]

We added this informational page to explain what is considered income and provide guidance to individuals about what information may be needed.

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #5

The month of filing is propagated so applicants can provide information only one month

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information **2** Provide Disability Information **3** Sign Medical Release **4** Confirmation

| ✔ Identification | ✔ General | ✔ Other Benefits | SSI | Remarks & Options | Review & Sign |

Gross Wages for John Public

How much does John Public expect their gross wages will be for the following employer(s) in April 2023?
Gross wages are the amount of pay before anything is taken out. For example: taxes, health insurance. Provide their known wages or a best estimate.

Walmart:
$ [   ]

Burger King:
$ [   ]

Payco Billing:
$ [   ]

We leverage the disability application responses about employment, collected in the "General" section, by populating all employers associated with the month in question.

In this section...
- ✔ Attending Classes
- ✔ Immigration Status
- ✔ Living Arrangements
- ✔ Income Overview
- **Gross Wages**
- Sick Pay
- Income Sources
- Resources Overview
- Resources
- Additional Resources

[Next] [Previous] [Save & Exit]

Screen #6

We added questions about wages and sick page to determine if they meet the basic eligibility requirements for SSI.

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information **2** Provide Disability Information **3** Sign Medical Release **4** Confirmation

| ✔ Identification | ✔ General | ✔ Other Benefits | SSI | Remarks & Options | Review & Sign |

Sick Pay for John Public

Is John Public receiving, or does John Public expect to receive sick pay in April 2023?
◉ Yes ○ No

What is the gross amount of John Public's sick pay?
Gross sick pay is the amount of pay before anything is taken out. For example: taxes, health insurance. Provide their known sick pay or a best estimate.

$ [   ]

In this section...
- ✔ Attending Classes
- ✔ Immigration Status
- ✔ Living Arrangements
- ✔ Income Overview
- ✔ Gross Wages
- **Sick Pay**
- Income Sources
- Resources Overview
- Resources
- Additional Resources

[Next] [Previous] [Save & Exit]

5

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen # 7

This screen is a continuation of the income resources information to determine basic eligibility requirements for SSI.

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information **2** Provide Disability Information **3** Sign Medical Release **4** Confirmation

| ✓ Identification | ✓ General | ✓ Other Benefits | SSI | Remarks & Options | Review & Sign |

Income Sources for John Public

Select the income source(s) John Public received or expects to receive in April 2023:

☑ Alimony
Enter the amount:
$ [   ]

☐ Child support
☐ Gambling winnings or prizes
☐ Gifts
☑ Monthly cash from family or friends
Enter the amount:
$ [   ]

☐ Pensions or other retirement
☐ Settlements
☐ State disability insurance
☐ State or local assistance
☐ Temporary Assistance for Needy Families (TANF)
☐ Unemployment compensation
☐ Veterans Affairs (VA) benefits
☑ Workers' compensation
Enter the amount:
$ [   ]

☐ Other
☐ None of the above

In this section...
- ✓ Attending Classes
- ✓ Immigration Status
- ✓ Living Arrangements
- ✓ Income Overview
- ✓ Gross Wages
- ✓ Sick Pay
- **Income Sources**
- Resources Overview
- Resources
- Additional Resources

[Next] [Previous] [Save & Exit]

Screen# 8

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information   **2** Provide Disability Information   **3** Sign Medical Release   **4** Confirmation

| ✓ Identification | ✓ General | ✓ Other Benefits | SSI | Remarks & Options | Review & Sign |

Resources Overview

In this section...
- ✓ Attending Classes
- ✓ Immigration Status
- ✓ Living Arrangements
- ✓ Income Overview
- ✓ Gross Wages
- ✓ Sick Pay
- ✓ Income Sources
- **Resources Overview**
- Resources
- Additional Resources

ℹ **The value of the applicant's resources is one of the factors that determines whether they are eligible for SSI.**

Examples of resources we may need to consider include:
- Cash;
- Bank Accounts;
- Stocks, mutual funds, and U.S. savings bonds;
- Real Estate;
- Vehicles;
- Personal Property;
- Life insurance; or
- Anything else they own that could be converted to cash and used for food and shelter.

We do not count all of the things they own as a resource. To get SSI, their resources that we do count must be worth less than $2,000.

The next set of questions collects the types of resources the applicant may own and their values. If they have any of those resources, they may find it helpful to have documents or statements that have the value of the resource with them when answering these questions.

[Next]   [Previous]   [Save & Exit]

We added this informational page to explain what is considered resources and provide guidance to individuals about what information may be needed.

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #9

We added questions on screens #9 and #10 about resources to determine if the individual meets the basic eligibility requirements for SSI.

Screen #10

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

1 Provide Background information   **2** Provide Disability Information   **3** Sign Medical Release   **4** Confirmation

| ✓ Identification | ✓ General | ✓ Other Benefits | SSI | Remarks & Options | Review & Sign |

Additional Resources for John Public

Is John Public the owner or beneficiary of any trusts as of April 1, 2023?
This includes, but is not limited to, special needs or pooled trusts, or any other trust where funds are being held for their benefit. ❓ More Info
○ Yes   ○ No

How many vehicles does John Public have in their name as of April 1, 2023?
Examples of vehicles: automobiles, trucks, motorcycles, campers, or boats. Include those secured by loan or lease.
[-- ▾]

Not counting the home where John Public lives, does John Public own any real estate or property, either alone or with other people, as of April 1, 2023?
This includes land, buildings, and homes in the U.S. or a foreign country.
○ Yes   ○ No

Does John Public own any life insurance policies as of April 1, 2023?
○ Yes   ○ No

Does John Public own anything else that could be turned into cash and used to pay for food and shelter as of April 1, 2023?
Do not count household goods (such as furniture, appliances, electronic devices) or personal items (such as clothes, personal jewelry, pets).
◉ Yes   ○ No

What is the total value of these items that could be turned into cash?
If you do not know the exact amount, provide your best estimate.
$ [_____]

Since April 1, 2020, has John Public sold, transferred title, or given away any money or property?
❓ More Info
○ Yes   ○ No

In this section...
- ✓ Attending Classes
- ✓ Immigration Status
- ✓ Living Arrangements
- ✓ Income Overview
- ✓ Gross Wages
- ✓ Sick Pay
- ✓ Income Sources
- ✓ Resources Overview
- ✓ Resources
- **Additional Resources**

[-- ▾]
| -- |
| None |
| 1 |
| 2 or more |

[Next]   [Previous]   [Save & Exit]

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #11

We added language to the "Review Information" page which will display the answers to the SSI questions*. The language informs applicants that the information will be used for both applications (DIB and SSI). Under the same page, we also updated the section about electronic signatures to provide relevant information about the signature for the SSI application.

Social Security
The Official Website of the U.S. Social Security Administration

Apply for Benefits

| 1 Provide Background Information | 2 Provide Disability Information | 3 Sign Medical Release | 4 Confirmation |

✓ Identification ✓ General ✓ Other Benefits ✓ Remarks & Options Review & Sign

Review Information for John Public
We will use the information for John Public's Disability and Supplemental Security Income (SSI) applications. Please review your answers provided and select the "Edit" button if changes are needed.

In this section...
Overall Summary

Identification

[Edit] ✓ Applicant Identification

Name: **John Public**
Social Security Number: ***–**–**0005**
Date of Birth: **April 2, 2004**
Gender: **Male**
Blind or low vision: **No**
Disabled: **Yes**
Start Date of Disability: **July 8, 2020**
Denied Benefits in Last 60 days: **No**
Diagnosed with condition that is expected to end in death: **No**

[Edit] ✓ Applicant's Contact Information

Contact Information
Mailing Address: **401 Rosemont Ave, Frederick, Maryland, 21701**
Reside at this address: **Yes**
Phone: **(301) 555-1234 Home**
Email Address:
Confirm Email Address:

Ability to Communicate in English
Speak English: **Yes**

* Please note this is just an example, the length of the summary depends on the number of questions applicants answer depending on their unique situation (e.g., married or not, number of employers, etc.,)

Screen #11 Continuation

Edit ✓ Immigration Status

Date became a citizen of Australia: **April 2, 2004**

Immigration status: **Lawful permanent resident**

Edit ✓ Living Arrangements

Description of address: **Institution**

Admission date to institution: **July 10, 2022**

Edit ✓ Gross Wages

Gross wages for the following employers in April 2023:

Walmart: **$200**
Burger King: **$250**
Payco Billing: **$2,300**

Edit ✓ Sick Pay

Receiving or expect to receive sick pay in April 2023: **Yes**

Gross amount of sick pay for April 2023? **$96**

Edit ✓ Income Sources

Income source(s) received or expect to receive in April 2023: **Alimony, Money from family or friends, Workers' compensation**

Alimony amount: **$430**

Money from family or friends amount: **$150**

Worker's compensation amount: **$96**

Edit ✓ Resources

Items owned as of April 1, 2023: **Cash, Financial institution accounts**

Value of cash: **$35**

Value of financial institution accounts: **$2,000**

Edit ✓ Additional Resources

Owner or beneficiary of trusts as of April 1, 2023: **Yes**

How many vehicles in name as of April 1, 2023: **1**

Own any real estate as of April 1, 2023: **No**

Own any life insurance policies as of April 1, 2023: **No**

Own other things that can be turned into cash as of April 1, 2023: **Yes**

Value of these items: **$200**

Sold, transferred title, given away money or property since April 1, 2020: **No**

Remarks & Options

Screen #11 Continuation

Electronic Agreement

Please read and accept the following statement before continuing the disability process.

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.

⚠ **You will no longer be able to change this information once you continue to the next step.**

When you select **"Accept & Continue"** below, this information will be sent electronically to Social Security. The applications will be mailed to **John Public** for their signature and the applications must be submitted to a Social Security office before processing can begin.

You have not completed the application process yet. You can continue by selecting **"Accept & Continue"** below. Once you receive the confirmation page, you can print a receipt that covers the information you provided during this application process.

[Accept & Continue] [Previous] [Save & Exit]

We revised the term application by making it plural to reflect the completion of a Disability application and an SSI application.

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #12

Social Security
Official Website of the U.S. Social Security Administration

Apply for Benefits

| ✓ Identification | ✓ General | Other Benefits | Remarks & Options | Review & Sign |

Supplemental Security Income (SSI) for John Public

The SSI program pays benefits to people age 65 and older or blind or disabled adults under 65 who have limited income and resources. ❓ More Info

In this section...
- **Benefit Information**
- Abilty to Work
- Disability Payments
- Dependents

Does John Public intend to apply for Supplemental Security Income?
◉ Yes ○ No

ℹ️ **Supplemental Nutrition Assistance Program (SNAP)**

If they meet certain conditions, SNAP benefits may be available to help buy food. For more information about SNAP benefits, read Supplemental Nutrition Assistance Program Facts (Publication No. 05-10101) or visit https://www.fns.usda.gov/snap/state-directory.

How to Apply

If all members of the household where John Public lives are receiving or applying for SSI, they can apply in person or by telephone at their local Social Security office and an employee will help them complete their SNAP application. ❓ More Info

Find a local office at: https://secure.ssa.gov/ICON/main.jsp

Other ways to apply include:
- Online – Visit https://www.fns.usda.gov/snap/state-directory
- Mail – Complete a state's application and mail it to the local SNAP office. Download the state's application by visiting https://www.fns.usda.gov/snap/state-directory or the local Social Security office.
- At any local SNAP office.

🖨️ Print this Information

Previous Application for Medicare, Social Security Benefits or Supplemental Security Income (SSI) for Joan Public

Has John Public previously applied for Medicare, Social Security, or Supplemental Security Income (SSI) benefits?
◉ Yes ○ No

Which type(s) of benefits?
Please select all that apply
☐ Medicare benefits
☐ Social Security benefits
☐ Supplemental Security Income benefits

Did you previously apply on your own Social Security Number?
○ Yes ◉ No

Please provide the Social Security Number and name of the person on whose record John Public previously applied.
For example, please provide a parent's name and Social Security Number if an application for a child's benefits was filed.

1st Person's Name:
[ ] *First [ ] Middle [ ] *Last [-- ▾] Suffix

1st Person's Social Security Number (SSN):
[ ]

2nd Person's Name:
[ ] *First [ ] Middle [ ] *Last [-- ▾] Suffix

2nd Person's Social Security Number (SSN):
[ ]

[Next] [Previous] [Save & Exit]

We moved the OMB No. 0960-0444 from this page to the Welcome Page.

We removed the question "Is everyone in your household receiving or applying for Supplemental Security Income?"

We updated the information about SNAP to provide one message that applies to all SSI applicants.

Third Party Internet Claim (iClaim) Screens for SSI Application

Screen #13

Social Security
The Official Website of the U.S. Social Security Administration

We're sorry...

⚠️ **We cannot process your request.**

We are sorry for the inconvenience, but we cannot process your request online.

If you live within the U.S., our territories or commonwealths, you may call our toll-free number, **1-800-772-1213**. If you are deaf or hard of hearing, call our toll-free "TTY" number, **1-800-325-0778**. Representatives are available Monday through Friday from 8 a.m. to 7 p.m.

Outside the United States
We offer a variety of servicing options for those living abroad. For more information, visit Service Around the World.

Exit

We updated this message to eliminate language regarding the number of attempts that can be made before an error stops the online process, and requires contact with SSA.