

**Justification for Non-Substantive Changes for Form SSA-1, SSA-2 and SSA-16
Application for Retirement Insurance Benefits, Application for Wife's or Husband's
Insurance Benefits, Application for Disability Insurance Benefits
20 CFR 404.310-404.311, 404.315-404.322, 404.330-404.333, 404.601-404.603,
404.1501-404.1512
OMB No. 0960-0618**

Background

As part of the IT Modernization project, the Social Security Administration (SSA) created the Consolidated Claims Experience (CCE) System which will serve as a new collection tool for different Information Collections (ICs) for Title II benefits and will eventually replace the current Modernized Claims System (MCS). SSA provides Retirement (RIB) benefits to members of the public who meet the required eligibility criteria, and who file an application (as per Sections 202(b)-(c) of the *Social Security Act (Act)* and Sections 20 CFR 404.310-404.311, and 404.601-404.603 of the *Code of Federal Regulations*). The public can apply for RIB benefits using one of three modalities: 1) filling out a paper application; 2) an interview with a technician (in person or by phone via CCE or MCS); or 3) filing online via internet (i.e., iClaim). Third parties can also use any of these modalities to apply on behalf of an individual who meets the required eligibility criteria and needs assistance filing an application.

In addition, we are making a minor language change to the Electronic Signature Agreement page for the iClaim screens to remind respondents to submit disability information and sign the medical release. While this information appears several times on earlier iClaim screens (including at the beginning of the process), we are adding this language on the signature page to remind the respondents of these requirements as they sign and submit the main iClaim pathing so the respondents will understand they are not done with the process, yet. iClaim will continue to use dynamic pathing to move the respondent to the next required screen (submission of disability information), once they electronically sign and submit the initial iClaim screens.

For this request, we are making the following changes:

Revisions to the SSA-1:

- **Change #1:** We are adding the CCE screens as a new collection tool for individuals residing within the US and filing for reduced Retirement only (62 to age 64 & 6 months) through an interview (in-person or phone).

Justification #1: We will limit the first release of the CCE screens to take claims from individuals between the ages of 62 to age 64 & 6 months filing for RIB. Also, only fourteen Field Offices from the Boston, Seattle and Denver Regions will use CCE for this type of claim. This will provide additional time to assess CCE functionality and make further modifications prior to a national rollout.

- **Change #2:** Identity core information (i.e., name, date of birth, place of birth, and citizenship) from individuals residing within the US and filing for reduced Retirement only (62 to age 64 & 6 months). The information will be used only for comparison with the

already proven information previously stored in the individual Social Security Numident (SSN) record.

Justification #2: We are making this modification as we will no longer enter the information will into the MCS. Instead, we will leverage the proven information from the Numident and if the information does not match the already proven information, we will ask the individual to update their SSN record as described in OMB No. 0960-0066.

- **Change #3:** We are adding a screen alert for the Retirement Internet version, specifically on the “When to Start Retirement Benefits” page.

Justification #3: We are adding the alert to direct applicants to click on the “More Info” link before selecting the month they want to receive benefits. The goal in directing applicants to the link is to ensure that applicants learn about their options and personal factors that they should take into consideration when making their decision.

Revisions to the SSA-16:

- **Change #1:** We are adding language to the signature page for disability applications.
- **Justification #1:** We are adding language to inform applicants of the importance of providing information on the following section and to provide SSA with as much information as possible to assist in processing their claim.

Revisions to the iClaim Electronic Signature Agreement Screen:

- **Change #1:** We are updating the warning box, entitled “You will no longer be able to change this information once you continue,” to include the following reminder to the respondents:

New Language: “You completed Step 1, but you are not done yet. Completing Step 2 (provide disability information) and Step 3 (sign a medical release) will give us the information we need to process your claim. Failure to provide this information will delay processing your claim.”

Justification #1: We are adding this new language to the warning box on the Electronic Signature Agreement screen, which reminds respondents about the importance of completing additional steps for the iClaim process, as it will help SSA process claims received via iClaim, without requiring SSA technicians to recontact the respondents.

SSA will implement the changes to this IC upon OMB approval.

These updates do not affect the reported public burden as we are collecting the same data reported in already the approved Information Collections (IC).