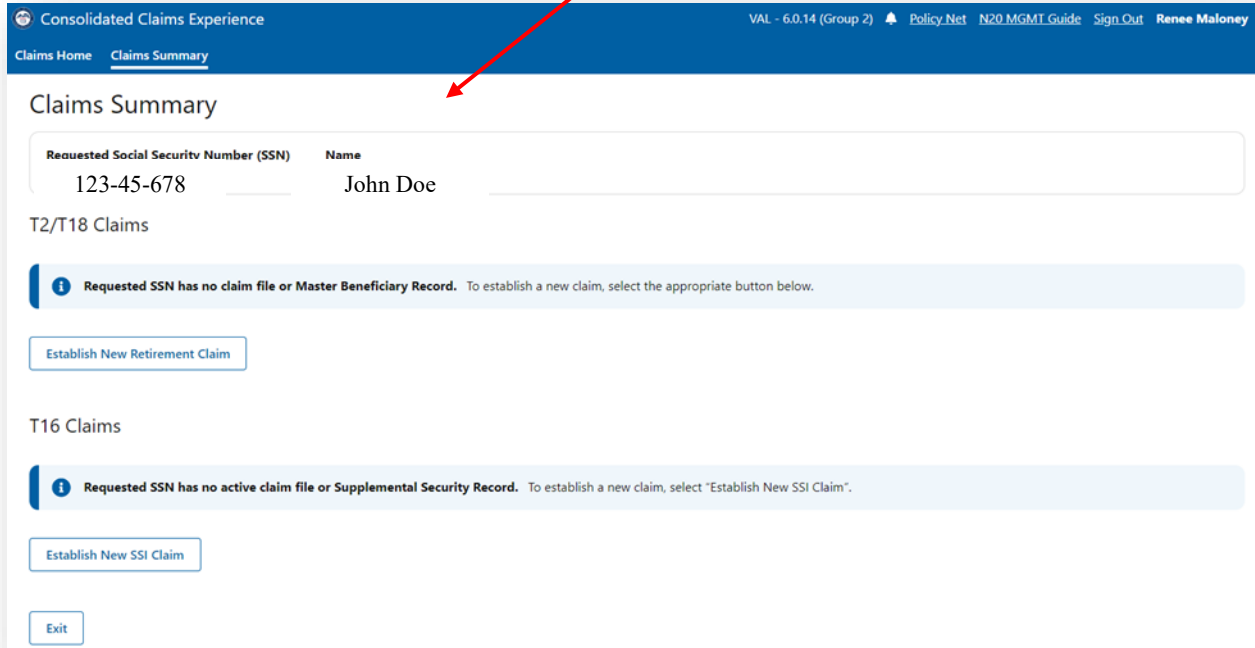# CCE Screens SSA-1 Reduced Retirement

After technicians verify the claimant's identity (e.g., SSN, Name, DOB, etc.), they will proceed to take the retirement application by entering the SSN and name into the Consolidated Claim Experience (CCE) system.

CCE Screens SSA-1 Reduced Retirement

Once the information is entered, the applicant information screen appears for the technician to indicate the "applicant type" to indicate if an individual is filing for themselves or if a proper applicant (e.g., court appointed guardian) is filing on their behalf. For this limited release, technicians will only utilize the CCE system for situations when an individual is filing for themselves. Technicians will continue to take all other retirement claims using MCS.

This page also allows the technician to indicate what modality are they using to collect the information (e.g., in person, phone, etc.) and provides the Privacy Act Statement for technicians to read to the claimant.

CCE Screens SSA-1 Reduced Retirement

Next, the technician collects the contact information for the claimant. If SSA collected this information prior to the claim's interview (e.g., when scheduling an appointment), the prior contact information will automatically be displayed into the path for technicians to verify or update the information. Similarly, the prior collected information for spoken and written language preference along special requested accommodations will be displayed.

*Indicates required information

*Address
Country
| United States or U.S. Territory ⌄ |

Street Address

Apartment, Suite, Building, Etc.

Line 3

Line 4

City/Town

State/Territory
| -- ⌄ |

ZIP Code

State and County Code

*Apply this address to all applicable purposes

- ☑ Select all
- ☑ T2/T18 Mailing
- ☑ T2/T18 Residence

Save Cancel

* Spoken Language Preference
| English ⌄ |

*Written Language Preference
| English ⌄ |

CCE Screens SSA-1 Reduced Retirement

Once that information is confirmed or updated, technicians will continue to the next CCE screen to collect the claimant marriage information.

If individuals answer "No" to both questions, then we do not collect any marriage information.

If individuals answer yes to any of these questions, then we proceed to collect the related information.

*Currently married or in a Non-Marital Legal Relationship (NMLR) ❓ More Info

( ) Yes   (○) No

*Prior marriage or NMLR that lasted at least 10 years or ended in death ❓ More Info

( ) Yes   (●) No

Marriage Information

Spouse Name	Spouse SSN	Spouse Birth Date/Age	Marriage Start Date	Marriage End Date	Reason Marriage Ended	Spouse Death Date	Actions
No Information Found							

[Add Marriage]

Spouse Name
*First
Spouse

Middle
Name

*Last
Here

Suffix
JR

Spouse Birth Date or Age
Birth Date is required. If Birth date is unknown, please enter age.

Birth Date
01/01/1964

Age

*Marriage/NMLR Start Date
12/31/2022

Place of Marriage/NMLR
[U.S.] [International]

*City/Town
San Francisco

California

*Marriage Type/NMLR Information ❓ More Info
Civil Union Marriage

--
Ceremonial
Civil Union
Common-Law (Non-Ceremonial) Marriage
Designated Beneficiary
Domestic Partnership
Indian Tribal or Custom Marriage
Reciprocal Beneficiary
Other

--
Deemed
Putative
Other

*Proof of Marriage/NMLR
(●) Yes   ( ) No

*Marriage/NMLR Ended
( ) Yes   (●) No

If the marriage ended, we asked how it ended.

--
Annulment
Converted to Marriage
Death
Divorce
Other Legal Action
Other

CCE Screens SSA-1 Reduced Retirement

Once that information is collected, we proceed to ask about any children the claimant has. We will only collect information about children if the claimatn answers "yes" to this question.

*Any children who are now or were unmarried and: ❓ More Info
- Under age 18
- Age 18 to 19 and attending elementary or secondary school (grade 12 or below) full-time
- Age 18 or older with a disability that began before age 22

⦿ Yes   ◯ No

Children

Name Type	First Name	Middle Name	Last Name	Suffix	Action
No Information Found					

Add Child

Next, we ask the individual if they have a disability condition and if they answer "yes", then the technician explain the option to file for both retirement and disability benefits. If the individual wants to file for both benefits, CCE will transfer the prior collected information into MCS, and technicians will finish taking both applications in MCS. Technicians will continue using CCE only if the individual only wants to file for retirement (i.e. answers "no" to filing for disability).

*Indicates required information

*Disabled in the last 14 months due to illness/injury/condition expected to last at least 12 months or result in death ❓More Info

⦿ Yes   ◯ No

*Blind or low vision even with glasses or contacts ❓More Info

⦿ Yes   ◯ No

*Alleged Onset Date ❓ More info

01/01/2023

*Applying for Disability benefits

◯ Yes   ⦿ No

ℹ️ **Attention.** Claimant alleges disability but is not applying. Document the reason claimant is not filing for disability using Person Remarks below.

⌃ Hide File Documentation Notes (printed)

Person Remarks
XXX characters maximum)

User documents Claimant's reason for not filing here.

CCE Screens SSA-1 Reduced Retirement

We also ask the individual to provide us with information about their work. These questions help us to determine if additional earnings should be included on their benefit computation and monthly payments.

*Worked under any other Social Security Number (SSN)

○ Yes   ○ No

If they answer yes, then another screen appears to collect the work information

*Worked last year or any time this year

○ Yes   ○ No

*Worked last year or any time this year
If the answer is yes, at least one earnings year is required

⦿ Yes   ○ No

Work Information

Type of Work	Employer Name/ Type of Business	Start Date	End Date	Unposted Lag Earnings	Actions

No Information Found

Add Work Information

*Type of Work

--
--
Wages
Self-Employment Income
Employee Reported Tips
Railroad Lag Earnings

Add Work Information

*Type of Work

Self-Employment Income

*Type of Business

*Net Earnings Over $400

⦿ Yes   ○ No

*Allege Unposted Lag Earnings for Self-Employment ❓ More Info

○ Yes   ⦿ No

Save   **Cancel**

CCE Screens SSA-1 Reduced Retirement

In addition of the employer information, we also ask for the yearly earnings amount and if there will be any months that they will not work at all.

Similarly, we also ask the claimant if they have worked outside the US.

CCE Screens SSA-1 Reduced Retirement

As the technician asks about the claimant's work, we also inquire about any foreign work that may be covered under Social Security benefits of other countries.

NOTE: If no spouse is listed in Marriage Information, then Spouse questions will not generate.

*Covered under foreign Social Security system ❓ More Info

⦿ Yes　　◯ No

*Country

| Australia | ⌄ |

*Filing for foreign Social Security benefits

⦿ Yes　　◯ No

* Spouse covered under Social Security benefits of other country

⦿ Yes　　◯ No

*Country

| Australia | ⌄ |

*Filing for foreign Social Security benefits

⦿ Yes　　◯ No

If the individual answers "yes" to this question, the CCE system will automatically transfer all the information to MCS to continue collecting all other information there.

W also ask about work from the Railroad.

A red asterisk (✳) indicates a required field.

*Worked in railroad industry for 5 years or more ❓ More Info

◯ Yes　　◯ No

⌄ Show Person Remarks (printed)

No remarks

⌄ Show File Documentation Notes

No notes

[Next]　[Previous]　[Save & Exit]

CCE Screens SSA-1 Reduced Retirement

As we collect information about pensions, we ask individuals if they are eligible to any pension from work not covered under SSA e.g., State, or local agencies.

*Currently entitled to a pension from work not covered under SSA

(●) Yes   ( ) No

If the individual indicates they are not currently receiving a pension but will be in the future, we only ask for a date for such pension.

*Currently entitled to a pension from work not covered under SSA
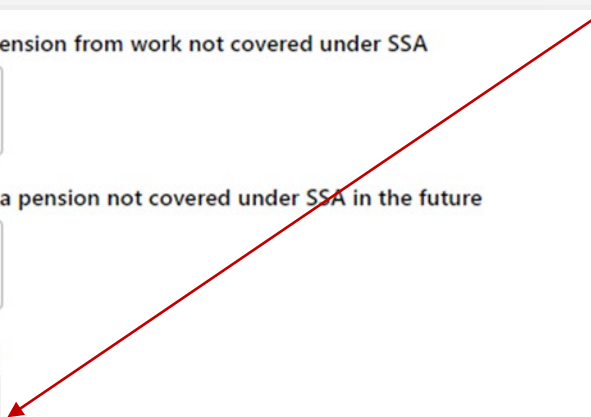
( ) Yes   (●) No

*Expect to be entitled to a pension not covered under SSA in the future

(●) Yes   ( ) No

*Future Entitlement Date

[   ]

mm/yyyy

CCE Screens SSA-1 Reduced Retirement

Another piece of information we ask the individual is when they would like to start receiving benefits. The year and months options provided the individual is based on different factors, i.e., their date of birth, a protective filing date, and the month they are filing the application.

In situations where individuals want benefits outside these factors, the technician will select "elect other date" and annotate the specific date requested. determination.

After the individual elects a month to start receiving benefits, we collect their bank account information for direct deposit as required by the treasury department.

Individuals indicating that they do not have a bank account, are provided with the option to enroll in the direct express program. If they answer "yes" to direct express, the treasury department will handle the enrollment. Similarly, if the individual refuses both options, the treasury department will contact then to discuss the need of a waiver.