MySSAgent in Claude: a guide for your compliance team

What your compliance officer needs to know about how MySSAgent works inside Claude: where the numbers come from, what your firm's records can capture, and what we keep.

What MySSAgent does in Claude

MySSAgent is a Social Security claiming engine. In Claude, an advisor can list their own clients, open a client's claiming analysis and re-run it on the records already on file. Anyone can use the free estimator without an account.

Where the numbers come from

MySSAgent's rules-based engine computes every benefit figure by applying SSA's published rules. Our tools hand Claude finished figures, including the monthly benefit at each claiming age, breakeven ages and the dollars given up while waiting, so Claude has no math to do.

If a figure in Claude's answer does not appear in the tool's output, Claude produced it. A reviewer can tell the two apart.

What your firm's Claude records can capture

If your firm is on Claude Enterprise and uses Anthropic's Compliance API, Anthropic says the records it returns include prompts, Claude's responses and MCP tool calls, for Claude chats and Cowork sessions. Calls to MySSAgent are MCP tool calls. A reviewer can see the question asked, the MySSAgent tool Claude called and the answer the advisor received.

Your Claude administrator turns this on, and MySSAgent has no access to it. Anthropic publishes what it covers and what it leaves out.

What MySSAgent keeps

We receive only what Claude sends to our tools, never the conversation itself. For each call our connector logs the tool name, whether it returned an error and which kind of app made the call. For an advisor, it also logs the advisor account. It does not log what was sent.

Re-running a client's analysis saves the new result to the advisor's account, as it does in the MySSAgent dashboard. Analysis inputs are kept for seven years after the relationship ends.

Social Security numbers

MySSAgent never collects a Social Security number. Our server refuses any tool call that contains something shaped like one, so it never reaches our database or our logs.

What stays with Anthropic

The conversation, including anything an advisor types, is held by Anthropic under your firm's agreement with Anthropic.

A checklist for advisors

- Never type a client's Social Security number, full date of birth or account number into Claude.
- Review anything Claude drafts before it goes to a client.
- When a figure matters, ask Claude to show the MySSAgent tool output it came from.
- Add clients in your MySSAgent dashboard. In Claude, the advisor tools return only your own clients.

Security

MySSAgent's SOC 2 Type I report was issued on September 14, 2026, and a Type II examination is under way. Encryption, hosting, backups and testing are covered on our Trust Center at myssagent.com/security.

Questions. Email support@myssagent.com. We are glad to walk your compliance team through any of this.