

OMB No. 0960-0068
Forms SSA-623 and SSA-6230
Addendum to the Supporting Statement - Explanation of Changes

Background

Virtually every representative payee is required to submit a written report to SSA annually explaining how the funds they received have been used throughout the year. SSA mails out more than 5 million blank report forms to payees every year for their completion and return. In this way, SSA ensures that payees use benefits in the best interest of the beneficiary. The Wilkes-Barre Data Operations Center (WBDOC) receives, reviews and processes most of these completed report forms.

There is presently an initiative underway, headed by the NY Regional Office, which will improve the handling and review of completed representative payee report forms at the WBDOC. This project is called the eRPA.

The eRPA will:

- Increase the efficiency of the representative payee accounting process.
- Improve delivery of service to payees and beneficiaries.
- Enhance control over the payee accounting workload.
- Improve the effectiveness of SSA monitoring of representative payee activities.

In large part, these goals will be achieved via a more sophisticated decision and control logic through which all incoming report forms will be processed.

Reason for Report Revisions

To facilitate this process, the report form processing will be automated to a greater degree than presently exists.

The most common payee report forms, SSA-623, SSA-6230, and SSA-6234, will undergo minor revisions to make them more amenable to the improved scanning and automation processes in WBDOC; to improve clarity of instructions to payees; and to reduce the incidence of manual intervention at WBDOC caused by exceptions to the automated processing.

Report Revisions Explained

SSA-623

The statement just below the payee's address on the front of the SSA-623 alerting SSA to an address change will be modified to direct the respondent to the REMARKS section on the back of the report where a dedicated "NEW ADDRESS" section will be added. The new address will be shown here instead crossing out and changing the preprinted mailing address on the report.

Question 4.A., TYPE OF ACCOUNT – An additional box labeled "Treasury Bills" will be added to the payee choices. Presently, if a payee invested conserved funds in treasury bills, he/she would be required to check the "OTHER" box and provide additional clarifying information in the REMARKS Section of the report.

Question 5.A. and 5.B., - The wording of these questions is being revised to make it more clear to the payee that the questions should only be answered if the previous questions are answered "OTHER."

Question 7. – This question is being removed since it does not relate to payee performance or usage of benefits. (Questions 8 and 9 will be renumbered as a result).

FOR SSA USE ONLY boxes on reverse of report – Instead of the three boxes that now exist, there will be six boxes for SSA use. Payees will not respond to these boxes.

SSA-6230

The statement just below the payee's address on the front of the SSA-623 alerting SSA to an address change will be modified to direct the respondent to the REMARKS section on the back of the report where a dedicated "NEW ADDRESS" section will be added. The new address will be shown here instead crossing out and changing the preprinted mailing address on the report.

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Question 5., - The wording of this question is being revised to make it more clear to the payee that the question should only be answered if the previous questions are answered "OTHER."

Question 7. – This question is being removed since it does not relate to payee performance or usage of benefits. (Questions 8 and 9 will be renumbered as a result).

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