

Form SSA-6234
OMB No. 0960-0691
Addendum to the Supporting Statement

Revisions to the Form

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.

Form 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:

Changes to the Instructions:

Page 1, General Instructions - a clarifying statement has been added to ensure the payee keeps SSA apprised of his/her physical address.

Page 3, 6. Relationship to the Beneficiary - this instruction has been retitled and modified to match the change on the report form.

Page 4, Your Responsibilities As Representative Payee - a reminder has been added regarding the need to return conserved funds to SSA when the payee changes.

Page 4, If You Have Any Questions - a reference to SSA's website has been added.

Changes to the Form:

The statement just below the payee's address on the front of the SSA-6234 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 3.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 4. - 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 rewritten to state "PRINT JOB TITLE."_

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.