

**From:** Davidson, Liz [mailto:Liz.Davidson@ssa.gov]  
**Sent:** Thursday, November 01, 2007 4:04 PM  
**To:** Matsuoka, Karen Y.  
**Cc:** Drew, Kathy R.; Lebowitz, Naomi  
**Subject:** FW: 0960-0606 Schedule SSA

Karen, please see our answers in blue.

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**From:** Matsuoka, Karen Y.  
**Sent:** Tuesday, October 30, 2007 11:13 AM  
**To:** Davidson, Liz; Lipsky, Faye  
**Subject:** 0960-0606 Schedule SSA

Liz, I just wanted to clarify a couple things about this ICR. Can you let me know by the end of the week? Thanks. – Karen

- Is there an actual form? (The supporting statement says 50% are filed electronically, which would lead me to believe there is a paper form as well) If so, it does not appear to have been submitted in ROCIS.

The form is called Schedule SSA and is part of the 5500 series of forms owned by DOL. Please open ROCIS and we will upload the form.

- The supporting statement also makes reference to “instructions” but these do not seem to be in ROCIS either.

Please open ROCIS and we will upload the instructions.

- Is the document called “Information Exchange Agreement between SSA and IRS” the “MOU” that is referenced in the previous terms of clearance (from 2006)? Has IRS signed off on this document?

The document called Information Exchange Agreement between SSA and IRS is not what is referenced in the terms of clearance. We have been told by IRS that they will sign off on the Information Exchange Agreement in the near future. SSA has already signed off and is waiting for IRS to sign. The agreement that is currently in effect was signed by IRS and SSA and implemented in January 1996.

- The addendum says a couple times under “current status” that issue X will be addressed “when SSA discusses the issue with IRS when we revise the MOU.” Can SSA clarify whether SSA has already discussed these with IRS and whether they are reflected in the MOU?

These items have been discussed with the IRS but they do not appear on the soon to be signed "MOU". IRS is now working on instituting IERS (IRS ERISA Residual Solution) for Fiscal Year 2009. IERS will change how Schedule SSA is processed including what information is requested on the Schedule SSA. SSA will be working with IRS on the changes to the Schedule SSA and will resolve the issues with the changed form and process.