

**Addendum to the Supporting Statement
For the Social Security Benefits Application:**

Internet Social Security Benefits Application (ISBA)

OMB No. 0960-0618

Background:

SSA is making multiple changes to ISBA. These changes are designed to make ISBA easier and faster to read, understand, and complete. Where appropriate, we will make parallel changes to the MCS parts of this ICR.

Because ISBA is such an important online platform with widespread effects, we will begin using the revised version in only a few states before implementing the new ISBA nationwide. This pilot use of ISBA will begin in late September 2008 and will last for a few weeks. During those weeks, SSA will randomly pre-select specific cases in the pilot states for use with the new ISBA. We will closely follow the progress of these cases in the new system. Once we determine the new ISBA platform is working well, we will migrate all states into the updated system.

General Description of ISBA Changes:

As we stated above, our planned ISBA changes are designed to make the ISBA application easier and faster. To accomplish those goals, we made the following types of changes:

- We removed what proved to be unnecessary questions;
- We shortened many questions;
- We reduced the number of words per screen page;
- We inserted links to various parts of the SSA website that might be helpful to people completing the application;
- We used plain language to explain complex programmatic terms, and provided easy access to SSA online publications which explain programs in greater detail;
- We will implement operational changes that will allow us to determine where claims should be processed to ensure the fastest processing time.

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Specific Changes:

We removed the following questions, because we determined they were not essential to the application process:

Removal: *Would you like to register a password so that you can continue doing business with us securely on the Internet?*

Rationale: Our management information data indicates the question is unnecessary.

Removal: *Have you taken a vow of poverty as a member of a religious order?*

Rationale: Previously, we asked this question because the earnings of a person who has taken a vow of poverty may or may not be covered by Social Security. We are removing the question because we can obtain the same information through a normal review of the earnings record.

Removal: *Do you have any open felony warrants for your arrest?*

Rationale: We will review the issue before making a determination on applicant eligibility, so the question is now unnecessary.

Removal: *Do you have any open Federal or State warrants for your arrest for any violations of the conditions of probation or parole?*

Rationale: We will also review this issue before making a determination on applicant eligibility.

Removal: *Was a public record of your birth made before age 5? Was a religious record of your birth made before age 5?*

Rationale: These questions are no longer necessary, as we can obtain the same information using computer matching with SSA records and/or the Proof of Age (POA) Tolerance policy. If these methods do not work, we can re-visit the issue later when we develop the claim file.

Removal: *Do you want to check the status of your application?*

Rationale: There is no status to check while the applicant is completing an initial application; there is a different way to check the claims status after the applicant files with SSA.

We designated several questions as “conditional” – i.e., the system will only ask them if it has checked its records and determined they are necessary:

Change: *Do you have military service prior to 1968? (And the follow-up questions: Type of Duty, Branch of Service, Start Date, End Date)*

Rationale: This question determines if “deemed military wage credits” apply. If the existence of such military service will not increase the applicant’s benefits, we will not ask the question.

Change: *Receives or is eligible to receive Military or Civilian Federal Agency benefit?*

Rationale: This question is related to the one above; we will only ask if it applicable.

Change: *Worked for employer in 2007? (And the follow-up questions: Employer Name, Employer Address, Date Employment Began, Date Employment Ended)*

Rationale: This question is intended to identify employers who can provide evidence of recent earnings (called “lag wages”). A recent policy change eliminates this question unless the lag wages are needed to establish insured status – i.e., to make the person eligible. If SSA discovers that the person is already eligible without the lag wages, we will not ask the question.

Change: *Were you self-employed in 2007 (And the follow-up questions: Type of Business, Net Income Greater than \$400, Total Earnings for 2007.)*

Rationale: As with the above question, a recent policy change eliminates this question unless the lag earnings are needed to make the person eligible. If SSA discovers the person is already eligible without the lag earnings, we will not ask the question.

Change: *Have you ever had work not covered by Social Security?*

Rationale: This question determines whether the Windfall Elimination Provision (WEP) applies. WEP, which can reduce retirement benefits, becomes an issue if the person had substantial earnings for which they did not pay Social Security taxes – usually government employment. If a person has 30 “years of coverage” (YOCS) under Social Security, WEP does not apply. By checking our records, we can determine if the person has 30 YOCS and the question will be unnecessary.

Change: *The following questions are related to the preceding one: Are you receiving a pension or annuity? Is the pension or annuity based on Government Employment? Do you expect to receive a pension or annuity in the future? Date future pension or annuity to begin?*

Rationale: As with the question above, we can eliminate these questions if our records show the WEP does not apply.

Change: *Have you worked in the Railroad 5 years or more?*

Rationale: This question determines whether SSA benefits must be coordinated with the Railroad Retirement Board (if the person has five or more years of railroad employment). SSA has records of railroad earnings, so we will ask this question only if there are five or more years of railroad earnings.

Change: *Are you receiving or eligible to receive railroad pension or annuity?*

Rationale: This question is similar to the one above. If SSA can determine from its records that railroad retirement is not an issue, we will not ask the question.

Change: *Did you work for the Federal Government in January 1983?*

Rationale: We use this question to ascertain if a person who is ineligible for retirement benefits might still qualify for Medicare (under a special provision for people who were Federal employees when Federal workers first started paying Medicare tax). If the person is eligible to receive retirement benefits, the question does not apply.

We streamlined the following questions to make it easier for applicants to provide information:

- We condensed the request for telephone contact information, focusing on the best daytime number to reach the applicant.
- We simplified the “Other Names and Other SSNs” fields – these additional fields only appear if user responses indicate they are necessary.
- We simplified “marriage” information; additional “marriage” questions only appear if user responses indicate they are necessary.
- We simplified “children” information; additional “children” questions only appear if user responses indicate they are necessary.
- We improved the Request for Direct Deposit by providing users with a visual of the check that highlights the routing and account numbers.
- We used a two-level tab structure (section/page level) to re-group questions so they are organized and easily identifiable.
- Subject matter experts (SMEs) reviewed all the questions and reworded them in plain language so they are easier to understand.

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