

## **Addendum to the Supporting Statement for Social Security Benefits Application**

**OMB No. 0960-0618**

### **Changes to Reporting Burden**

In previous Information Collection Requests (ICRs), we reported one aggregate figure for completion of form SSA-1 via MCS/Signature Proxy (in 2008 this was 1,549,800 respondents, corresponding to 258,300 burden hours). This figure represented all of the respondents who used this form, including Medicare-only respondents. Medicare-only SSA-1 applications were always an option that we offered through the MCS/Signature Proxy modalities. In the past, we never listed Medicare-only respondents as a separate SSA-1 option.

In the current ICR, we are clearing a new modality, Medicare-only applications via iClaim. Because we are reporting this new cohort of iClaim respondents as a separate line entry (see burden chart, question #12 of the supporting statement), we included corresponding separate line entries for Medicare-only SSA-1 MCS and SSA-1 Paper respondents in the burden chart (question #12, supporting statement). Accordingly, we reduced the total SSA-1 MCS/Signature Proxy entry in the question #12 burden chart. It now reflects 1,250,800 respondents and 208,467 burden hours. There was no actual burden reduction; we made this change to reflect that we are now reporting the Medicare-only MCS and Paper respondents in separate entries under the same form number.

### **Changes to iClaim**

This addendum summarizes the Medicare-only related changes to the iClaim process. These changes are reflected in the attached iClaim Medicare-Only Screen Shots file.

We based the Medicare-only iClaim application on the existing Abbreviated Application (ABAP) version of the full SSA-1 retirement application used by SSA technicians in the Modernized Claims System (MCS). The number of questions asked in the ABAP is significantly less than the number asked in the full Retirement application. The iClaim Medicare Only application follows the same interactive criteria as other iClaim applications (i.e., Retirement, Disability, and Aged Spouse).

While there are more screens in the actual iClaim application path, we ask the same questions as for the MCS version. We also made changes to related screens to accommodate the new functionality, and clarified some existing screens. Changes include the following:

- We modified language on the screens of the SSA Home Page and subsequent Welcome screens preceding entry into the actual iClaim application to reflect the inclusion of the new Medicare-only application. (Existing Screens, pg.1)
- We added new screens and interactive questions patterned after the existing iClaim application for the Medicare-only iClaim function. (New Screens, all)

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- We made minor changes to the Disability application screens to improve readability and understanding. (Existing Screens, pg.2)

Below is a summary of changes and additions for all the iClaim screens included in this Information Collection Request:

- *Social Security Online* (socialsecurity.gov home page) - Existing screen. The title of the entry button changes from, “Applying Online for Retirement Benefits” to “Applying Online for Retirement / Medicare Benefits.” This is the primary gateway to the Medicare-only and Retirement applications. (Existing Screens, pg.1)
- *Welcome Screen* - Existing Screen. The title header of the page changes from “Retirement Benefit Application” to “Benefit Application” to make it more generic. The screen title changes from, “Welcome to the Social Security Retirement Benefit Application” to “Welcome to the Social Security Benefit Application.” The introductory sentence changes from, “Thank you for using our online Retirement application” to “Thank you for using our online Retirement/ Medicare application.” (Existing Screens, pg.1)
- *Medicare Election Information Screen* - New screen. We included a corresponding third party screen. We added a conditional screen to the end of the “Initial Information” tab displayed to applicants age 64 and older who are not in current payment status or already receiving Medicare on their own SSN. Screen presents the new question “Do you wish to file for Medicare Only, excluding monthly retirement cash benefits at this time?” (New Screens, pg.1)

Applicant response to this question determines which application path will be presented (i.e., Retirement or Medicare Only). If the applicant answers “Yes,” but the claimant is not at least age 64 years and 8 months old, an onscreen message is generated providing the exact age criteria. If the answer to the Medicare Only question is “Yes,” another question appears, “Are you already enrolled in Medicare under a Social Security number other than your own?” Applicants who meet one of the following exceptions will receive a message advising them to call the 800 number explaining that he or she did not meet one or more qualifications to file for Medicare Only over the Internet:

- 1) users who are uninsured but electing Medicare Only;
- 2) underage claimants who insist on electing Medicare Only (under 64 years and 8 months old) after they received the age criteria message;
- 3) users who are already enrolled in Medicare on someone else’s record; and
- 4) users who elect Medicare only, and are already in active status for health insurance only.

- *Application Number Screen* - Existing screen. The corresponding third party screen is included. We changed the introductory sentence to reference the “Medicare” application when Medicare-only is selected instead of the “Retirement” application. Also, the

Supplemental Security Income (SSI) closeout language is suppressed since this is an abbreviated application path that does not include SSI. (New Screens, pg.2)

- *Application Signoff Page* - Existing screen. We removed 3 paragraphs starting under the “Unable to Come Back?” heading that contains SSI language (not applicable for Medicare), as the language is already displayed on the APN page (although it is slightly different). (New Screens, pg.3)
- *HIHI Screen* - New screen. This is a screen asking about Health Insurance information, and we added new questions “Do you want to enroll in Medicare Part B?” We also added the iClaim question “Are you receiving Medicaid?” We added the parenthetical “(state health insurance)” after the word “Medicaid” for further clarification since different states use different terminology for this program. (New Screens, pg. 4)
- *HI19 Screen* - New screen. The system generates a conditional screen if the answer to the Medicaid question is “Yes.” It asks four other questions related to Medicaid (i.e., Medicaid start and end dates, Medicaid number, and Medicaid state). (New Screens, pg. 5)
- *HIGP Screen* - New screen. The system presents questions regarding Group Health Plan coverage. If the response is “Yes” to being covered under a group health plan, the next question generated is, “Are you covered through your own employment?” If the answer to this question is “No”, then the question, “Are you covered through another person’s employment?” generates. If the question about being covered under a group health plan is answered “Yes,” then “start date” and “stop date” questions about Employment and Health Insurance Coverage appear. (New Screens, pg. 6)
- *Remarks* - Existing screen. We removed the information about marriage dates from the explanatory text because marriage information is not included in the abbreviated Medicare Only application. (New Screens, pg. 7)
- *Overall Summary Screen* - Existing screen. We amended this to reflect responses to the new Medicare-only questions. (Existing Screens, pg. 5)
- *Send this Application Screen* - Existing screen. We changed the congratulatory sentence to reflect “Medicare insurance” rather than “retirement benefits.” Added the sentence, “I apply for all insurance benefits for which I may be eligible under Part A (and part B) of Title XVIII (Health Insurance for the Aged and Disabled) of the Social Security Act as presently amended.” The (and Part B) phrase is a fill-in that only generates if the applicant response to the “file for Part B” question was “Yes”. Also, we added the following sentence, “I understand I must file a separate application when I wish to establish entitlement to monthly Social Security benefits.” We included a corresponding third party screen. (New Screens, pg. 8-9)
- *What’s Next Screen* - Existing screen. The SSI closeout language is suppressed from this screen. Also, we deleted the link to *Reporting Responsibilities* and added the three

reporting responsibilities directly related to Medicare Only. In addition, the system suppresses Voluntary Tax Withholding information, since there are no benefits payments to withhold from in Medicare-only claims. We included the corresponding third-party screens. (New Screens, pg.10)

- *Change Your Answer Screen* - New screen. There are two versions of this new screen. One is for when the applicant wishes to convert the application from a Medicare Only to Retirement Application (cash benefits), and the other is for when the applicant wishes to convert the application from cash benefits to Medicare Only. (New Screens, pg.12)

We made the following minor changes to the Disability Benefit screens. The iClaim Medicare-only application does not generate any disability screens; however, these changes to the Disability application screens are necessary to improve readability and understanding.

- *Disability Benefits Screen* - Existing Screen. Corresponding third party screen included. When entering iClaim through the Disability or Retirement/ Medicare portal, we changed the “More Info” link for the question, “Do you want to receive reduced Retirement benefits while waiting for the disability decision?” to read, “Things to Consider.” This link contains information about the impact of electing or not electing reduced retirement benefits. (Existing Screens, pg. 2)
- *What’s Next (Disability Version)* – We added Existing Screen. Helpful Health Care websites, general health information, and prescription drug assistance program information to the bottom of the screen. This information will generate on any iClaim application where disability is involved (e.g., DIB, RIB/DIB, DIB/RIB). (New Screens, pg.12)

### **Notice Changes**

*We are planning the following changes, to be implemented in early 2010, to the Notice sent to Beneficiaries whose applications are completed by a third party/representative:*

- We are adding a new conditional fill-in referring to the type of claim filed on the claimant’s behalf to the first line of the notice (i.e., Medicare insurance and Social Security benefits). Currently, “Social Security benefits” is the only option available.
- The third party’s name and address will appear in UPPER case font throughout both notices. Currently, this information is displayed in all lower case.
- Universal text indicators (UTI) containing language that explains Supplemental Security Income (SSI) and SSI closeout language will be generated conditionally in these notices (i.e., they will only appear when claimant is at least 64 years and 10 months old, or alleges blindness, or a disability). Currently, these UTIs are hard-coded, with slightly different language, and are not consistently generated together as we prefer to happen.

- We will add the SSI enclosure referred to in the above UTI (further explaining the SSI program) using the same generation criteria as those for the SSI UTIs. This enclosure is not currently included with the notice.
- We will list the above SSI publication under “Enclosure(s):” on these notices when the SSI UTIs are generated. Currently, we do not list the publication.
- We are adding language clarifications to the Confirmation Number section about checking the status of the iClaim application online to conform with changes to related language on the Social Security Online screen in our website. These clarifications include updates to the disability-related UTI, generated only when blindness or a disability is alleged.
- We added Reporting Responsibilities directly related to Medicare under the Confirmation Number language. This will only appear in Medicare-only claims notices.
- We will list the Medical Release Form (SSA-827, OMB No. 0960-0623) “Enclosure(s):” when blindness or disability is alleged. Currently, we included the SSA-827 enclosure in disability claims, but we did not list it under “Enclosure(s):”

#### **Changes to the Internet Application Summary**

- Most of the changes above are reflected in the application summary attached to the Comprehensive Notice.
- Additionally, we added the conditional fill-in referring to the type of claim filed on the claimant’s behalf to the first line of the Internet Application Summary so that it can be utilized for all Internet claim types (i.e., Medicare insurance and Social Security benefits). Currently, “Social Security benefits” is hard-coded.
- In addition, we added a new conditional fill-in to the declaration statement displayed just above the summary of information. This fill-in refers to Medicare Part B and, as shown in brackets below, will only generate when the applicant indicated the claimant wanted Part B coverage.

“I apply for all insurance benefits for which I am eligible under Title II (Federal Old-Age, Survivors, and Disability Insurance) and Part A [and Part B] of Title XVIII (Health Insurance for the Aged and Disabled) of the Social Security Act, as presently amended.”

- Finally, we added the following statement under the Remarks section specifically for Medicare-only claims:

“I understand I must file a separate application when I wish to establish entitlement to monthly Social Security benefits.”