

Request for Non-substantive or Nonmaterial Changes

Form SSA-7050-F4 Requests for Social Security Earnings Information 20 CFR 404.810, 20 CFR 401.100

OMB No. 0960-0525

Background

The Social Security Administration (SSA) uses the Request for Social Security Earnings Information (Form SSA-7050-F4) for Social Security number (SSN) holders or their legal representative to request an Itemized Statement of Earnings (Form SSA-1826) for various non-program related reasons. SSA uses the information on Form SSA-7050 to produce the earnings statement requested, to verify the requester's authorization to receive the earnings information, and to collect payment when the requester pays by credit card. In addition, SSA requires proof of death or relationship if the request is for earnings information from a deceased person's record. Such proof must support that a legal relationship exists between the requester and the Social Security number holder (i.e., surviving spouse, legal representative) so that SSA can access and subsequently disclose the requested information. This is a voluntary information collection.

Justification

SSA is making the revisions to improve the clarity and readability of the form; to clarify instructions, improve the flow of the form's information, and to update the fee schedule.

We will announce to the public fee schedule changes via a Federal Register Notice once OMB approves the change request.

This change does not affect the public reporting burden.

REVISIONS TO THE COLLECTION INSTRUMENT

Change 1: Beginning on page one, number one removed the word "period" from the form and replaced it with "years".

Justification 1: We are making this language change throughout the entire form for clarification purposes.

Change 2: Revised the language on the top of page one in the flower box on the right from "DO NOT USE THIS FORM FOR: Non-certified yearly totals of earnings This service is free to the public. These totals can obtained by calling 1-800-772-1213 to receive Form SSA-7004, Request for Social Security Statement" to "DO NOT USE THIS FORM TO REQUEST YEARLY EARNINGS TOTALS. Yearly earnings totals are FREE to the public if you do not require certification. To obtain FREE yearly totals of earnings, visit our website at www.ssa.gov/myaccount."

Justification 2: We revised the instructions for using Form SSA-7004 (Request for Social Security Statement) therefore, we must remove that language from the SSA-7050 and advise the public of the alternative method of obtain yearly earnings totals.

Change 3: The “INFORMATION ABOUT YOUR REQUEST” section on page two was moved to page three.

Change 4: The information previously displayed on page three stood alone and moved to page two.

Justification 3 and 4: This change provides clarity, places all instructions on one page (page three) and reduces the number form pages from five to four. In addition, when the public opens the SSA-7050 form booklet, the instructions will appear next to the information collection portion of the form (page two).

Change 5: Language in section one changed from “From whose record do you need the earnings information?” to “Provide your name as it appears on your most recent Social Security card or the name of the individual whose earnings you are requesting.”

Justification 5: We are making this language change for clarification purposes.

Change 6: The name field in section one changed from a line to fillable boxes.

Change 7: The social security number field in section one changed from a line to fillable boxes.

Change 8: The date of birth field in section one changed from a line to fillable boxes.

Justification 6, 7, 8: We are making these changes to change the form to fillable boxes. This will provide the public with clarity when completing the form and aid in completing the form properly and allow scanning and data extraction.

Change 9: Added the language “One SSN per request.” next to the SSN field.

Justification 9: We are making this change to for clarification purposes.

Change 10: Added a barcode to the form that includes the Social Security number.

Justification 10: We added the barcode to the form to prepare the form for scanning and image retrieval.

Change 11: Added fillable field for the date of death (if applicable).

Justification 11: We are making this change at the recommendation of SSA’s Office of General Counsel (OGC) and to comply with Internal Revenue Service regulations regarding the release of earnings information for deceased individuals.

Change 12: Language in section two changed from “What kind of information do you need?” to “What kind of earnings information do you need?”

Change 13: Added language to read “(Choose ONE of the following types of earnings or SSA must return this request.)”

Justification 12, 13: We are making these language changes for clarification purposes.

Change 12: Language in section two changed from “Detailed Earnings Information” to “Itemized Statement of Earnings”

Change 13: Added language “(Includes the names and addresses of employers.)” after “Itemized Statement of Earnings” in section two.

Change 14: Language in section two changed from “For the periods(s)/years:” to “Years Requested”.

Change 15: Both period(s)/years field in section two changed from a line to fillable boxes.

Change 16: Language in section two changed from “Do you want us to certify this information?” to “Check this box if you want the earnings information CERTIFIED for an additional \$32.00 fee”

Justification 12, 13, 14, 15, 16: We are making these language changes for clarification purposes.

Change 17: Language in section two under Certified Yearly Totals of Earnings changed from “Check this box if you want the earnings information certified. Otherwise, call 1-800-772-1213 to request Form SSA-7004, Request for Social Security Statement?” to “Yearly earnings totals are FREE to the public if you do not require certification. To obtain FREE yearly totals of earnings, visit our website at www.ssa.gov/myaccount.”

Justification 17: We changed the instructions for Form SSA-7004. We are removing that language from the SSA-7050 and advising the public of the alternative method of obtaining yearly earnings totals. (Same as justification 2 above.)

Change 18: Sections 2 and 3 combined to form the new section two. The cost for each type of request appears next to the type. Itemized statement of earnings cost \$102 plus an additional \$32 for certification and certified yearly totals of earnings cost \$32.

Justification 18: We are making these form changes for clarification purposes. In addition, the form will no longer require a section three to calculate the cost of each request with the implementation of the standard fee.

Change 19: Sections 4 and 6 combined to form the new section four. The lines converted to boxes.

Change 20: The signature date changed from a line to fillable boxes.

Change 21: Section 5 became the new section four. The lines converted to boxes.

Justification 19, 20, 21: We are making these form changes for clarification purposes.

Change 22: Section 5 became the new section four.

Justification 22: We are making this form change for clarification purposes and per OGC directive to include these sections for individuals that sign the form with an “X” in lieu of a signature to obtain witness signatures.

Change 23: Sections 2 and 3 combined to form the new section two. The cost for each type of request appears next to the type. Itemized statement of earnings cost \$102 and certified yearly totals of earnings cost \$32.

Change 24: The information regarding payment on page three moved to new form’s instruction page three.

Justification 23, 24: We are making these form changes for clarification purposes. Also, the form will no longer require a section three to calculate the cost of each request with the implementation of the standard fee.

Change 25: The mailing addresses from page four on the old form moved to page four of the new form.

Justification 25: We are making this form change for clarification purposes.

Change 26: Removed the fee schedule.

Change 27: Added language on page four of the new form to read, “How much do I have to pay for an Itemized Statements of Earnings?”

Change 28: Added a chart to page four of the new form to display the new standard fee for Non-Certified Itemized Statements of Earnings and Certified Itemized Statements of Earnings.

Justification 26, 27, 28: The form will no longer require a fee schedule to calculate the cost of each request with the implementation of the standard fee and increased certification fee. Changes made to issue the standard fee amount.

Change 29: The section “Whose Earnings Can Be Requested” from page five of the old form moved to the instructions page three on the new form.

Justification 29: This change provides clarity, places all instructions on one page (page three) and reduces the number of pages from five to four. In addition, when the public opens the SSA-7050 form booklet, the instructions will appear next to the information collection portion of the form (page two). (Same as justification 3 and 4.)

Change 30: Added language on page four of the new form to read, “How much do I have to pay for certified yearly totals of earnings? Certified yearly totals of earnings cost \$32.00. You may obtain non-certified yearly totals FREE of charge at www.ssa.gov/myaccount. Certification is usually not necessary unless you are specifically asked to obtain a certified earnings record.”

Justification 30: We are making this change to show the increased fee from \$15 to \$32 for certified yearly totals. In addition, we must advise the public that non-certified yearly totals are available free of charge via the SSA website.

Change 31: Removed the Diners Card credit card from the credit card form on page four of the form.

Justification 31: We are making this change so that the SSA-7050 credit card form matches SSA’s Office of Finance approved credit card form. In addition, SSA no longer accepts Diners Card credit cards. We are making this language change for clarification purposes.

Change 32: Added language in the amount charged field of the credit card form to read, “See above to select the correct fee for your request. Applicable fees are \$32, \$102 or \$134. SSA will return forms without the appropriate fee.”

Justification 32: We are making this change to ensure clarity for the public on the acceptable amounts to send based on the new standard and certification fees.