Addendum to the Supporting Statement for
Work Incentives Planning and Assistance (WIPA) Projects
OMB No. 0960-0629

<u>Revisions to the Collection Instrument</u>

SSA is making the following revisions:

- **Change #1:** We are revising the Privacy Act Statement on this form.

  Justification #1: SSA's Office of the General Counsel is conducting a systematic review of SSA's Privacy Act Statements on agency forms. As a result, SSA is updating the Privacy Act Statement on the form.

- **Change #2:** We changed the fields to include white backgrounds with green headings.

  Justification #2: We did this to maintain uniformity throughout the screens.

- **Change #3:** We removed the I&R Assessment Form from the clearance package.

  Justification #3: We ask the questions on the I&R Form on others. We removed it to reduce burden time, as well as remove repetitive questions.

- **Change #4:** We will move the Time Spent (minutes) field to the Efforts Form from the I&R Form.

  Justification #4: We are removing the I&R Form, and needed to still acquire the Time Spent information.

- **Change #5:** We are deleting the Race field on the Demographics page.

  Justification #5: We are not asking for race information anymore.

- **Change #6:** We are moving down the TTY/ Videophone number/ IP address field on the Demographics page.

  Justification #6: We are moving the field down to ask questions in order.

- **Change #7:** On the Demographics page, we changed the "Is the beneficiary his or her own payee?" field answers to Yes/True and No/False

  Justification #7: We want to update the answer options to include True and False.

- **Change #8:** We swapped the order of Level of Education at Intake and Health Status at Intake fields.

Justification #8: We did this to have the questions in correct order.

- **Change #9:** We deleted the Participant, Point of Service/Activity, Contact Location/Method, Date of Last Contact, Date of Next Contact, Time Spent, Value, and Notes fields from the Beneficiary Effort Form.

  Justification #9: We removed duplicate fields.

- **Change #10:** We will break up the Work Incentives Discussed field on the Beneficiary Effort form, and rename it as Title II Work Incentives / Provisions Discussed and SSI Work Incentives / Provisions Discussed.

  Justification #10: We are changing this to provide Title II and Title 16 questions separately.

- **Change #11:** We changed the field name for Benefit Suggestions to Health Coverage Options Discussed, and added a new field named Other Benefits Discussed on the Beneficiary Effort Form.

  Justification #11: We made the changes to be more precise.

- **Change #12:** We changed the options in the Service Referrals, BS&A Status, and WIP Status fields on the Beneficiary Effort Form.

  Justification #12: We made the changes to be more precise.

- **Change #13:** We deleted the Name of Service Referral Organization field on the Beneficiary Effort Form.

  Justification #13: We removed the unnecessary field.

- **Change #14:** We changed the field name for, "Did the beneficiary identify employment goals?" to, "Does the beneficiary currently have an employment goal."

  Justification #14: We made the change to be more general.

- **Change #15:** We changed the field name for, "If beneficiary identified work goals, did they identify strategies to meet these goals?" to, "Has the beneficiary identified strategies for pursuing the employment goal?"

  Justification #15: We made the change to be more general.

- **Change #16:** We deleted the, "In what type of work is beneficiary interested? What suggestions did WIPA staff make regarding type of work? (Text Box)" field.

- **Justification #16:** We removed the unnecessary field.

- **Change #17:** We changed the field name for, "Did the beneficiary use employment services in the past year for purpose of getting a job or increasing earnings?" to, "Has the beneficiary used employment services in the past year?"

  Justification #17: We made the change to be consistent.

- **Change #18:** We changed the field name for, "Did the beneficiary look for work in the past four weeks?" to, "Has the beneficiary looked for work in the past four weeks?"

  Justification #18: We made the change to be consistent.

- **Change #19:** We changed the field name for, "Did the beneficiary identify education goals?" to, "Does the individual currently have an educational goal?"

  Justification #19: We made the change to be consistent.

- **Change #20:** We changed the field name for, "Is the beneficiary pursuing education?" to, "Is the beneficiary currently pursuing secondary or postsecondary education?"

  Justification #20: We made the change to be more precise.

- **Change #21:** We changed the field name for, "If beneficiary is pursuing education, are they taking classes or have they applied for classes?" to, "Does the beneficiary plan to pursue education in the next 12 months?"

  Justification #21: We made the change to be consistent.

- **Change #22:** On the Baseline Form, we made the following field options "yes" or "no":
  - Does the beneficiary want to earn enough to reduce benefits?
  - Does the beneficiary want to earn enough to stop benefits?
  - Benefits- Subsidized housing or other rental
  - Benefits- Food Stamps
  - Benefits- Workers Compensation
  - Benefits- TANF
  - Benefits- Veterans Benefits
  - Benefits- Unemployment Insurance Benefits
  - Benefits- Other Benefit(s)

  Justification #22: We made these changes to shorten the questions.

- **Change #23:** On the Baseline Form, we changed the options for the, "Benefits- Private Health Insurance?" field to Employer, Parent/Spouse/Child Employer, Private, Workers Compensation, and Other (Specify)

  Justification #23: We made these changes to be more precise.

- **Change #24:** On the Baseline Form, we merged fields, "Benefits- Public Health Insurance?" and "If yes to Public Health Insurance, what type?"

  Justification #24: We merged these two fields because they directly relate to each other.

- **Change #25:** On the Baseline Form, we deleted the fields, "If receiving Medicaid, has the beneficiary participated in Medicaid Buy-In?"; "Benefits- Enrolled in State Vocational Rehabilitation Agency (SVRA)"; and "If the beneficiary assigned his/her ticket to an EN, what is the name of the EN?"

  Justification #25: We deleted unnecessary fields.

- **Change #26:** On the Baseline Form, the following fields were merged into one option field named SSDI Work Incentive Recommended:
    o Work Incentives- TWP
    o Work Incentives- EPE
    o Work Incentives- IRWE
    o Work Incentives- PASS
    o Work Incentives- Subsidy Development
    o Work Incentives- Section 301
    o Work Incentives- Expedited Reinstatement

  Justification #26: We made the change to include all options under one common field.

- **Change #27:** On the Baseline Form, we deleted the following fields:
    o Work Incentives- 1619(a)
    o Work Incentives- SGA
    o Work Incentives- EITC
    o Services- Para Transit
    o Services- Work Related Training/Counseling
    o Services- EARN

  Justification #27: We deleted unnecessary fields.

- **Change #28:** On the Baseline Form, the following fields were merged into one option field named Health Insurance Work Incentives recommendations:
    o Work Incentives- 1619(b)
    o Work Incentives- Medicaid Buy In
    o Work Incentives- Extended Medicare

  Justification #28: We made the change to include all options under one common field.

- **Change #29:** On the Baseline Form, the following fields were merged into one option field named SSI Work Incentive Recommended:
    o Work Incentives- Blind Work Expense

- o Work Incentives- Student Earned Income Exclusion
- o Work Incentives- Property Essential to Self Support

Justification #29: We made the change to include all options under one common field.

- **Change #30:** On the Baseline Form, the following fields were merged into one option field named Employment Service Referral:
  - o Services- Vocational Rehabilitation Services
  - o Services- Protection and Advocacy
  - o Services- DOL One Stop Career Center
  - o Services- Employment Network (EN)
  - o Services- Youth Transition Program

  Justification #30: We made the change to include all options under one common field.

- **Change #31:** On the Baseline Form, we renamed the field, "Number of hours per week" to "Hours Worked Per Week."

  Justification #31: We made the change to be more precise.

- **Change #32:** On the Baseline Form, we renamed the field, "Hourly Wage ($)" to "If wage, hourly wage."

  Justification #32: We made the change to be more precise.

- **Change #33:** On the Baseline Form, we renamed the field, "Does beneficiary own beneficiary's own home?" to "Does the beneficiary have a current financial goal?"

  Justification#33: We made the change to be a little more general.

- **Change #34:** On the Baseline Form, we renamed the field, "How much money does beneficiary have in a savings account?" to "Stable Financial Situation?"

  Justification #34: We made the change to be a little more general.

- **Change #35:** We will delete all other fields on the Baseline Form, which we are not updating.

  Justification #35: We are removing unnecessary fields. This change will streamline the form processing, and greatly reduce burden hours.

We will make these revisions upon OMB's approval.