

**Addendum to the Supporting Statement for Form SSA-8508 BK
Supplemental Security Income (SSI)-
Quality Review Case Analysis
OMB No. 0960-0133**

Minor Revisions to the Collection Instrument

e8508 Start-Up Form screen [see e8508.pdf, page 1]

- **Change 1:** We added “Reviewer Name” field.

Justification 1: We added this field to identify the individual making review determinations.

- **Change 2:** We removed the “Retro payment Involved” checkbox

Justification 2: We replaced with field that will display retroactive amount if there is a retroactive payment involved.

- **Change 3:** We added field “Retroactive Payment Amount”, it displays only when an amount is propagated from the SSR.

Justification 3: The field provides user with a case identified to have a retroactive payment.

- **Change 4:** We added “Retroactive Review Period:” from and to fields

Justification 4: The system does not propagate, user needs to specify the retroactive period after reviewing the record.

Element 5, Marriage [see e8508.pdf, page 20]

- **Change 5:** We reworded the question “Since mm/dd/yyyy was the SI married or living with an unrelated adult of the opposite sex?” to “Since mm/dd/yyyy was the SI married or living with an unrelated adult?”

Justification 5: Question reflects change in POMS policy.

Element 6, Living Arrangement (LA) - (Other Household LA Situations screen) [see e8508.pdf, pages 63-74]

- **Change 6:** We added the following fields to capture potential rental subsidy development.
 - Does any other household member have rental liability?
 - Is anyone in the household related to the landlord or the landlord's spouse as parent or child?
 - Landlord's Contact Information
 - Who is Related to Landlord?
 - CMRV
 - Evidence of CMRV
 - Monthly Required Rent
 - Does the Household Receive a Rental Subsidy?
 - Amount of Rental Subsidy
 - Number of HH members
 - Amount of SI Rental Subsidy

- **Justification 6:** To assist reviewers in developing potential rental subsidy on the screen.

Element 9, Unearned Income (Sampled Individual Unstated Income Development Screen) [see e8508.pdf, page 186]

- **Change 7:** We reworded the statement “Consider all household income, savings, debts incurred, outstanding bills, etc. when determining the actual unstated income amount.” to “Consider all household income, savings, debts incurred, outstanding bills, etc. to determine the Actual Unstated Income amount.”

Justification 7: We reworded to provide clarity to the statement.

- **Change 8:** We removed the word “Link” from the “Unstated Income Link” button.

Justification 8: The word was not necessary.

- **Change 9:** We added text field “Explain why the "Actual Unstated Income" amount is different from the "Possible Unstated Income" amount.”

Justification 9: The change allows users to explain the information on the form.

Element 10, Financial Institution Accounts (detail screen) [see e8508.pdf, pages 210-224]

- **Change 10:** We added question “Does the SI have bank records available?”

Justification 10: To address POMS development procedures.

Element 13, Negative Property Search screen [see e8508.pdf, pages 284-288]

- **Change 11:** We added checkboxes to the right of the determination field.

Justification 11: To identify the individual/s with found property/ies.

Element 22, Potential Entitlement (main screen) [see e8508.pdf, page 342]

- **Change 12:** We added labels that will display the age of the SI and ES

Justification 12: Allows for quick reference as to the age of the individual

- **Change 13:** We added checkboxes titled “Override” next to each Yes/No dropdown fields.

Justification 13: Allows the user to indicate if they are overriding the allegation based on verified findings.

- **Change 14:** We added checkbox titled “No to ALL”

Justification 14: Facilitates the user to answer “No” in all dropdown fields with one click instead of manually selecting no for each.

Element 22, Potential Entitlement (Title II screen) [see e8508.pdf, pages 357-371]

- **Change 15:** We added labels that will display the SI and ES age next to the date of birth

Justification 15: Allows for quick reference as to the age of the individual

- **Change 16:** We renamed the label “Disabled Adult Child (DAC) Benefits” to now say “Childhood Disability Benefits (CDB)” on the Auxiliary and Survivor pages for both the SI and ES.

Justification 16: Reflects change in POMS policy.

We will implement these changes upon OMB’s approval.