

**Addendum to Supporting Statement for SSA-632-BK & SSA-634
Request for Waiver of Overpayment Recovery
And
Request for Change in Overpayment Recovery Rate
20 CFR 404.502, 20 CFR 404.506-404.512
20 CFR 416.550-416.558, and 416.570-416.571
OMB No. 0960-0037**

Creating a Different Modality of Your IC

We are requesting clearance of a new form, Form SSA-634, Request for Change in Overpayment Recovery Rate. Individuals previously completed the SSA-632-BK to request a waiver of overpayment recovery and a change in their overpayment recovery rate. Respondents were unsure which questions they needed to complete on the SSA-632 if they wanted only to request a change in their overpayment repayment rate, which caused them to complete the entire form. We created the new SSA-634 form to make it easier for an individual to request this change, and to help avoid confusion. The new form eliminates unnecessary time and paperwork for respondents and SSA staff. After OMB approval, Form SSA-634 will also be made available as a fillable PDF on SSA's website.

Revisions to the Collection Instruments

SSA is making the following revisions to Form SSA-632-BK:

- **Change #1:** We changed the title of the form from “Request for Waiver of Overpayment Recovery or Change in Repayment Rate” to “Request for Waiver of Overpayment Recovery.”

Justification #1: This change will eliminate confusion and make it easier for an individual to request a waiver. We created the new SSA-634, for individuals to request a change in their overpayment repayment rate.

- **Change #2:** At the top of the form, we included information so that respondents will understand the purpose of the form; when they should complete it; or if they need to complete a different form.

Justification #2: This change provides guidance to respondents so that they will know whether the form is the correct one to submit. It will also save respondents from completing unnecessary paperwork by making sure they only complete the forms for their intended purpose.

- **Change #3:** We made question 1 its own section, “Section 1 – Identifying Questions”, and added additional questions.

Justification #3: We simplified the questions, and made it clear exactly which

questions respondents need to answer.

- **Change #4:** We added Sections 2 & 3 to request information from Representative Payees, if applicable.

Justification #4: We added these sections for clarity when a Representative Payee is filling out the SSA-632 for the overpaid individual.

- **Change #5:** We moved the original Section I to Section 4, “Information about Receiving the Overpayment.”

Justification #5: Due to adding the Representative Payee Sections (2 & 3), we needed to renumber accordingly.

- **Change #6:** We changed the, “Your Financial Statement” section from Section II to Section 5.

Justification #6: Due to adding the Representative Payee Sections (2 & 3), we needed to renumber accordingly.

- **Change #7:** We made Members of Household its own section (Section 6).

Justification #7: We wanted to highlight each section separately, so we gave each topic its own section number.

- **Change #8:** We made Assets – Things You Have and Own its own section (Section 7).

Justification #8: We wanted to highlight each section separately, so we gave each topic its own section number.

- **Change #9:** We made Monthly Household Income its own section (Section 8).

Justification #9: We wanted to highlight each section separately, so we gave each topic its own section number.

- **Change #10:** We made Monthly Household Expenses its own section (Section 9).

Justification #10: We wanted to highlight each section separately, so we gave each topic its own section number.

- **Change #11:** We made Income and Expenses Comparison its own section (Section 10).

Justification #11: We wanted to highlight each section separately, so we gave each topic its own section number.

- **Change #12:** We made Financial Expectation and Funds Availability its own section (Section 11).

Justification #12: We wanted to highlight each section separately, so we gave each topic its own section number.

- **Change #13:** We added the Authorization to access individuals financial account information for certain waiver determinations on page 12.

Justification #13: Section 834 of the *Bipartisan Budget Act of 2015 (BBA)*, Access to Financial Information (AFI) for Waivers and Adjustment Recovery,” requires SSA to obtain authorization from individuals to access their financial account information for certain waiver determinations.

- **Change #14:** We are revising the Privacy Act Statement on this form.

Justification #14: 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 #15:** We are revising the PRA statement on this form.

Justification #15: We are revising the PRA statement to reflect our current boilerplate language. The current language, which dates back to the last reprint of the form, is now outdated.