

**Addendum to Supporting Statement for  
RSI/DI Quality Review Case Analysis - Auxiliaries/Survivors,  
SSA-8553 (Beneficiary Telephone Contact),  
SSA-8554 (Representative Payee Telephone Contact), SSA-4659 Stewardship AET  
Workbook, Form SSA-2930, Form SSA-2931, Form SSA-85, and Form SSA-2935  
OMB: 0960-0189**

**Background**

The Social Security Administration (SSA) uses Forms SSA-2930 and SSA-2931 to establish a national payment accuracy rate for all cases in payment status, and to serve as a source of information regarding problem areas in the Retirement and Survivors Insurance (RSI) and Disability Insurance (DI) programs. We also use the information to measure the accuracy rate for newly adjudicated RSI/DI cases.

The Social Security Administration (SSA) uses Form SSA-4659 when the Stewardship review samples a beneficiary receiving RSI benefits and their posted earnings subject them to an Annual Earnings Test (AET) action. We use the SSA-4659 to review the accuracy of the existing AET action on the record, and to obtain additional information about the earnings related to that action, such as any non-work months and special wage payments that apply that could affect or change the original AET decision.

We collect all of the information on these forms through personal telephone interviews with the beneficiaries. An SSA employee conducts the interviews, and documents the respondents' answers to the questions directly on the appropriate forms. We send respondents a notice for a telephone contact review using either the SSA-8553 (Beneficiary Telephone Contact) or the SSA-8554 (Representative Payee Telephone Contact).

To help the beneficiary prepare for the interview, we include three forms with each aforementioned notice. (1) We include the SSA-85 (Information Needed to Review Your Social Security Claim), which lists the information the beneficiary will need to gather for the interview. (2) We include the SSA-2935 (Authorization to the Social Security Administration to Obtain Personal Information), which verifies the beneficiary's correct payment amount, if necessary. (3) Lastly, we include the SSA-8552 (Interview Confirmation), which confirms or reschedules the interview if necessary.

**Revisions to the Collection Instruments**

SSA is making the following revisions to the SSA-2930:

- **Change #1:** Page 1:1.A. We added "Study ID Code" and placed "SIC" in parenthesis.

**Justification #1:** We want to make the form more concise.

- **Change #2:** Page 1:1.C. We revised "(As Shown on SCL)" to "(as shown in Sample

Cycle field)”.

**Justification #2:** We want to make the form more concise.

- **Change #3:** Page 1:1.D. We revised “Review Amount on SCL” to “Review Amount (as shown in Dollar tab)”.

**Justification #4:** We revised to make the form more concise.

- **Change #5:** Page 1:1.E. Revised “Review Amount Determined by QR” to “Review Amount Determined by OQR (as shown in PHUS)”.

**Justification #5:** We revised to make the form more concise and for clarity.

- **Change #6:** Revised “Explanation of SCL Changes, if Any” to “Explanation of review amount change (if OQR determination is different)”.

**Justification #6:** We revised to make the form more concise and for clarity.

- **Change #7:** Page 2:2.A. Deleted the line “type of interview telephone” and added check box option “Other” with fill in text box.

**Justification #7:** We revised to make the form more concise and for clarity.

- **Change #8:** Page 2:2.B. Added “N/A” check box option.

**Justification #8:** We revised to make the form more concise and for clarity.

- **Change #9:** Page 2:2.C. Revised line from “Date of Birth/Citizenship to “Date of Birth/U.S. Citizenship/Alien Status”.

**Justification #9:** We revised to make the form more concise and for clarity.

- **Change #10:** Page 2:2.C.8. Added “US” before Citizenship.

**Justification #10:** We updated for clarity.

- **Change #11:** Page 3:2.A.1. Deleted “Observation” check box, “Photo ID” check box, and “Other”. Replaced with “Telephone” and added fillable text box.

**Justification #11:** We revised to make the form more concise and for clarity.

- **Change #12:** Page 3:2.A.2. Deleted “SSN Card” and “Medicare Card” check boxes. Replaced with “Other”.

**Justification #12:** We revised to make the form more concise and for clarity.

- **Change #13:** Page 3:2.B. Replaced “Number Holder” with “NH”. Added “N/A” check box option.

**Justification #13:** We revised to make the form more concise and for clarity.

- **Change #14:** Page 3:2.C. Added. “US” before Citizenship. Replaced “Number Holder” with “NH”.

**Justification #14:** We revised to make the form more concise and for clarity.

- **Change #15:** Page 3:2.C. Right Side. Replaced “DOB and Citizenship/Alien” with “DOB and U.S. Citizenship/Alien Status”.

**Justification #15:** We wanted to make the form more concise.

- **Change #16:** Page 4:2.D.3. Changed “DOE” to “MOE”.

**Justification #16:** We wanted to make the form more concise.

- **Change #17:** Page 4:2.D.4. Changed “DOE” to “MOE”.

**Justification #17:** We wanted to make the form more clear and concise.

- **Change #18:** Page 5:2.D. Replaced “Number Holder” with “NH”.

**Justification #18:** We wanted to make the form more concise.

- **Change #19:** Page 5:2.E. Replaced “Number Holder” with “NH”.

**Justification #19:** We wanted to make the form more concise.

- **Change #20:** Page 5:2.F. Replaced “Number Holder” with “NH”.

**Justification #20:** We wanted to make the form more concise.

- **Change #21:** Page 6:2.G. Added “N/A” check box option.

**Justification #21:** We wanted to make the form easier to complete.

- **Change #22:** Page 6:2.H. Added “N/A” check box option.

**Justification #22:** We wanted to make the form easier to complete.

- **Change #23:** Page 6:2.I. Added “N/A” check box option.

**Justification #23:** We wanted to make the form easier to complete.

- **Change #24:** Page 6:2.J.4. Added “/Deductions” after “Withholding”. Added “,Alien Tax” after “Voluntary Tax Withholding”.

**Justification #24:** We made this change for clarity.

- **Change #25:** Page 7:2.G. Added “N/A” check box option and Replaced “Number Holder” with “NH”.

**Justification #25:** We made this change to make the form more concise and for clarity.

- **Change #26:** Page 7:2.H. Added “N/A” check box option and Replaced “Number Holder” with “NH”.

**Justification #26:** We made this change to make the form more concise and for clarity.

- **Change #27:** Page 7:2.I. Added “N/A” check box option and Replaced “Number Holder” with “NH”.

**Justification #27:** We made this change to make the form more concise and for clarity.

- **Change #28:** Page 7:2.J. Replaced “Number Holder” with “NH”.

**Justification #28:** We made this change to make the form more concise.

- **Change #29:** Page 8:2. Replaced “NUMBER HOLDER NEVER MARRIED” with “NH NEVER MARRIED”.

**Justification #29:** We made this change to make the form more concise.

- **Change #30:** Page 8:2.K. Replaced “Number Holder” with “NH”.

**Justification #30:** We made this change to make the form more concise.

- **Change #31:** Page 9:2.K. Replaced “Number Holder” with “NH”. Corrected spelling of Marital by replacing “Martial” with “Marital”.

**Justification #31:** We made this change to make the form more concise and to correct a spelling error.

- **Change #32:** Page 10:2.L.1. Added data line, check box and text box for “Duplicates/Incompletes” after Annual Reports.

**Justification #32:** We made this change to include additional data for the field.

- **Change #33:** Page 10:2.L.4. Added “(PPD):”.

**Justification #33:** We made this change to provide clarity.

- **Change #34:** Page 11:2.L.1. Replaced “Number Holder” with “NH”. Added “Explain” and fillable text box. Deleted “Year”, “Amount On ER”, and “Amount Alleged”.

**Justification #34:** We made this change to provide clarity and to make the form more concise.

- **Change #35:** Page 11:2.L.2. Replaced “Number Holder” with “NH”.

**Justification #35:** We made this change to make the form more concise.

- **Change #36:** Page 11:2.L.3. Replaced “Number Holder” with “NH”.

**Justification #36:** We made this change to make the form more concise.

- **Change #37:** Page 11:2.L.4. Replaced “Number Holder” with “NH”.

**Justification #37:** We made this change to make the form more concise.

- **Change #38:** Page 11:2.L.5. Replaced “Number Holder” with “NH”.

**Justification #38:** We made this change to make the form more concise.

- **Change #39:** Page 12:L.5.a. Revised “NH has 30 or More Special Minimum Coverage Years” to “NH has 30 or More Years of Coverage (YOCs)” Deleted directive “Go skip to 2.M” after “yes” text boxes.

**Justification #39:** We made this change to make the form more concise and to provide clarity.

- **Change #40:** Page 12:L.5.b. deleted “skip to 2.M” after No.

**Justification #40:** We made this change to make the form more concise and to provide clarity.

- **Change #41:** Page 12:L.5.b.(3). Revised “Other Exception to WEP Applies” to “If NH does not have 30 YOCs, does other WEP Exception Apply”.

**Justification #41:** We made this change to make the form more concise and to

provide clarity.

- **Change #42:** Page 12:L.5.c.(2). Revised “Period(s) of Employment Upon Which the Pension Is Based (Include Both Employment Covered and Not Covered by Social Security)” to “Total Period(s) of Employment Used to Determine Pension (Both Covered and non-Covered Employment)”.

**Justification #42:** We made this change to make the form more concise and to provide clarity.

- **Change #43:** Page 12:L.5.c.(4). Deleted “for the” before “first month” and replaced with “in”.

**Justification #43:** We made this change to make the form more concise and to provide clarity.

- **Change #44:** Page 13:2. L.5. Replaced “Number Holder” with “NH”.

**Justification #44:** We made this change to make the form more concise.

- **Change #45:** Page 14: 2.M. Deleted directive Go to 2.N” after Not Applicable and abbreviated to “NH”.

**Justification #45:** We made this change to make the form more concise and to provide clarity.

- **Change #46:** Page 14: 2.M.1.b. Replaced “Date of Entitlement” with “MOE”.

**Justification #46:** We made this change to make the form more concise and to provide clarity.

- **Change #47:** Page 15:2.M.1. Added “N/A” check box option. Replaced “Number Holder” with “NH”.

**Justification #47:** We made this change to make the form more concise and to provide clarity.

- **Change #48:** Page 15:2.M.2. Replaced “Number Holder” with “NH”.

**Justification #48:** We made this change to make the form more concise and to provide clarity.

- **Change #49:** Page 16:2.M. Added letter “M” before “Worker’s Compensation”.

**Justification #49:** We made this change because the M was previously not present and should have been on the form.

- **Change #50:** Page 16: 2.M.3.a. Deleted directive “go to 2.N’ after “No” text box.

**Justification #50:** We made this change to make the form more concise and to provide clarity.

- **Change #51:** Page 17:2.M.3. Replaced “Number Holder” with “NH”.

**Justification #51:** We made this change to make the form more concise and to provide clarity.

- **Change #52:** Page 17:2.M.4. Replaced “Number Holder” with “NH”.

**Justification #52:** We made this change to make the form more concise and to provide clarity.

- **Change #53:** Page 18:2.P. Revised question from “Does the claims folder indicate an unresolved representative payee issue (need for payee change, etc.) for the sampled number holder” to “Does the desk review indicate that an unresolved representative payee issue exists (need for payee change, etc.) for the sampled NH”.

**Justification #53:** We made this change to make the form more concise and to provide clarity.

- **Change #54:** Page 19:2.P. Replaced “Number Holder” with “NH”.

**Justification #54:** We made this change to make the form more concise and to provide clarity.

We are making the following revisions to the SSA-2931:

- **Change #1:** We are making changes to the SSA-2931-BK – RSI/DI Quality Review Case Analysis – Sampled Number Holder (interview workbook) to revise language. This includes abbreviating “number holder” to “NH” and “Not Applicable” to “N/A.” Additionally, we added a dash between the words non-sampled.

**Justification #1:** We made the updates for clarity, consistency, and to make the form more concise.

- **Change #2:** On page 1: 1.A of the 2931, we changed “SIC” to “Study ID Code.”

**Justification #2:** We replaced the abbreviation with detailed wording to provide clarity.

- **Change #3:** On page 1: 1.E of the 2931, we revised “QR” to “OQR.”

**Justification #3:** We changed the abbreviation to provide clarity.

- **Change #4:** On page 1: 1.F of the 2931, we added “Review Amount” and replaced “any” with “OQR Determination is different.”

**Justification #4:** We revised the language to provide clarity.

- **Change #5:** On page 1: 1.G of the 2931, we added an “Other” option to Type of Interview.

**Justification #5:** We added the option and check box to provide clarity when a telephone interview does not occur.

- **Change #6:** On page 2: 2.A. of the 2931, we changed “Number Holder” to “NH.”

**Justification #6:** We wanted to make the form more concise.

- **Change #7:** On page 2: 2.B. of the 2931, we added the “N/A” checkbox next to “Other Names and SSNs Shown in File/Numident.”

**Justification #7:** We added the check box to provide clarity and prevent confusion if the situation does not apply.

- **Change #8:** On page 2: 2.C., we deleted the “Not applicable” box next “Date of Birth” on the SSA 2931.

**Justification #8:** We wanted to make the form more concise.

- **Change #9:** On page 2: 2.D. of the 2931, we changed “Not Applicable” to “N/A.”

**Justification #9:** We wanted to make the form more concise.

- **Change #10:** On page 3: 2.B. of the 2931, we added the “N/A” checkbox next to “Other Names and SSNs Used.”

**Justification #10:** We added the check box to provide clarity and prevent confusion if the situation does not apply.

- **Change #12:** On page 3: 2.D. of the 2931, we changed “Not Applicable” to “N/A.”

**Justification #12:** We wanted to make the form more concise.

- **Change #12:** On page 3: 2.E. of the 2931, we changed “Not Applicable” to “N/A.”

**Justification #12:** We wanted to make the form more concise.

- **Change #13:** On page 4: 2.F. of the 2931, we changed “Number Holder” to “NH.”

**Justification #13:** We wanted to make the form more concise.
- **Change #14:** On page 5: 2.F. of the 2931, we changed “Number Holder” to “NH.”

**Justification #14:** We wanted to make the form more concise.
- **Change #15:** On page 6: 2.G.1. of the 2931, we added an “Duplicates/Incompletes” option.

**Justification #15:** We added the option and check box to provide clarity when duplicates or incompletes are present.
- **Change #16:** On page 6: 2.G.4. of the 2931, we added “PPD.”

**Justification #16:** We added the abbreviation to provide clarity.
- **Change #17:** On page 7: 2.G.1. of the SSA 2931, we replaced the chart underneath “Beneficiary Disagrees with DR summary” with “Explain” and a fill-in box.

**Justification #17:** The chart is no longer necessary. The data was removed to make the form easier to complete and more concise.
- **Change #18:** On page 8: 3.B. of the 2931, we added the “N/A” checkbox next to “Other Names and SSNs Shown in Claims Folder/Numident.”

**Justification #18:** We added the check box to provide clarity and prevent confusion if the situation does not apply.
- **Change #19:** On page 8: 3.C. of the 2931, we added “U.S.” next to Citizenship and added “Alien Status.”

• **Justification #19:** We added the abbreviation and additional option to provide clarity when completing the form.
- **Change #20:** On page 8: 3.C.8. of the 2931, added “U.S.” next to Citizenship.”

**Justification #20:** We added the abbreviation to provide clarity.
- **Change #21:** On page 09: 3.A.1. of the SSA 2931, we deleted the boxes “Observation and Photo ID”. We also changed “Other” to “Telephone”.

**Justification #21:** The Telephone interview is the only applicable option.
- **Change #22:** On page 09: 3.B. of the 2931, we added the “N/A” checkbox next to

“Other Names and SSNs Used.”

**Justification #22:** We added the check box to provide clarity and prevent confusion if the situation does not apply.

- **Change #23:** On page 09: 3.C. of the 2931, added “U.S.” next to Citizenship.”

**Justification #23:** We added the abbreviation to provide clarity.

- **Change #24:** On page 10: 3.D.2 of the 2931, we changed “DOE” to “MOE.”

**Justification #24:** We corrected the abbreviation to provide clarity.

- **Change #25:** On page 10: 3.D.3 of the 2931, we changed “DOE” to “MOE.”

**Justification #25:** We corrected the abbreviation to provide clarity.

- **Change #26:** On page 10:3.F. of the SSA 2931, we changed “Not Applicable” to “N/A” and deleted the directive “go to 3.G”.

**Justification #26:** We wanted to make the form more concise and the directive is no longer necessary.

- **Change #27:** On page 10: 3.F. of the 2931, we added an “Duplicates/Incompletes” option.

**Justification #27:** We added the option and check box to provide clarity when duplicates or incompletes are present.

- **Change #28:** On page 11: 3.F. of the 2931, we added the “N/A” checkbox next to “Potential Entitlement on Own SSN.”

**Justification #28:** We added the check box to provide clarity and prevent confusion if the situation does not apply.

- **Change #29:** On page 11:3.F. of the SSA 2931, we replaced the chart underneath “Beneficiary Disagrees with DR summary” with “Explain” and a fill-in box.

**Justification #29:** The chart is no longer necessary. The data was removed to make the form easier to complete and more concise.

- **Change #30:** On page 14:3.I.1. of the SSA 2931, we deleted “go to 3.J.” after “No”.

**Justification #30:** This directive is no longer necessary.

- **Change #31:** On page 14:3.I.5. of the SSA 2931, we deleted “and go to I.7” after

“GPO Exception Met”.

**Justification #31:** This directive is no longer necessary.

- **Change #32:** On page 14:6 of the 2931, we changed “None of the Exceptions in I.5 are met” to “No Exemptions for GPO Apply, Enter Pension Information.”

**Justification #32:** We revised the language to provide clarity.

- **Change #33:** On page 16:3.J. of the SSA 2931, we changed “Not Applicable” to “N/A” and deleted the directive “go to 3.K”.

**Justification #33:** We wanted to make the form more concise and the directive is no longer necessary.

- **Change #34:** On page 17:3.J. of the SSA 2931, we added the “N/A” checkbox after “child in care”.

**Justification #34:** We wanted to make the form more concise and deleted the directive, as it was no longer necessary.

- **Change #35:** On page 17:3.J.1.b of the SSA 2931, we changed “Child Observed in Home (in person or by phone)” to “Phone Verification. We also changed “Child Not Observed in Home” to “Other”.

**Justification #35:** To make the form clearer and for ease of completion.

- **Change #36:** On page 17:3.J.2.b of the SSA 2931, we changed “Child Observed in Home (in person or by phone)” to “Phone Verification. We also changed “Child Not Observed in Home” to “Other”.

**Justification #36:** To make the form clearer and for ease of completion.

- **Change #37:** On page 19:3.K. of the SSA 2931, we deleted “Go to 4” after “Not Applicable”. We also changed “Not Applicable” to “N/A”

**Justification #37:** The directive is no longer necessary and we abbreviated “not applicable” to make the form more concise.

- **Change #38:** On page 20:4.B.4. of the SSA 2931, we deleted “Date” and replaced with “Month”.

**Justification #38:** To make the form more concise.

- **Change #39:** On page 20:4.B.5 of the SSA 2931, we deleted “Date” and replaced with “Month”. We also changed “DOE” to “MOE” on four occurrences in the chart.

**Justification #39:** To make the form more concise and clear.

- **Change #40:** On page 22:E.1.g. of the SSA 2931, we added “US” before “Citizenship”.

**Justification #40:** To make the form more concise and clear.

- **Change #41:** On page 22:E.2.g. of the SSA 2931, we added “US” before “Citizenship”.

**Justification #41:** To make the form more concise and clear.

- **Change #42:** On page 22:E.3.g. of the SSA 2931, we added “US” before “Citizenship”.

**Justification #42:** To make the form more concise and clear.

- **Change #43:** On page 22:E.4.g. of the SSA 2931, we added “US” before “Citizenship”.

**Justification #43:** To make the form more concise and clear.

- **Change #44:** On page 23: 4.E. of the SSA 2931, we added “US” before “Citizenship”.

**Justification #44:** To make the form more concise and clear.

- **Change #45:** On page 23:4.E. Consolidated Review. of the SSA 2931, we added “US” before “Citizenship” and added “Status” after “Alien.”

**Justification #45:** To make the form more concise and clear.

- **Change #46:** On page 24: F.1.b. of the SSA 2931, we changed “Number Holder” to “NH”.

**Justification #46:** To make the form more concise and clear.

- **Change #47:** On page 24: F.2.b. of the SSA 2931, we changed “Number Holder” to “NH”.

**Justification #47:** To make the form more concise and clear.

- **Change #48:** On page 24: F.3.b. of the SSA 2931, we changed “Number Holder” to “NH”.

**Justification #48:** To make the form more concise and clear.

- **Change #49:** On page 24: F.4.b. of the SSA 2931, we changed “Number Holder” to “NH”.

**Justification #49:** To make the form more concise and clear.

- **Change #50:** On page 24: F.4.c. of the SSA 2931, we changed “go to” to “Complete” before d.

**Justification #50:** To revise the language of the directive and make it more specific.

- **Change #51:** On page 26:4.H. of the SSA 2931, we changed “Not Applicable.” to “NH”.

**Justification #51:** To make the form more concise and clear.

- **Change #52:** On page 28:4.I. of the SSA 2931, we deleted “Go to 6.” and changed “Not Applicable.” to “NH”.

**Justification #52:** To make the form more concise and clear. To remove an unnecessary directive.

- **Change #53:** On page 28:4.I.3. of the SSA 2931, we added “Duplicates/Incompletes” before “Other”.

**Justification #53:** To add an additional option and include choices that are more specific.

- **Change #54:** On page 29:4.I.3. of the SSA 2931, we added “Explain” before the fillable text box.

**Justification #54:** To describe the use of the fillable text box.

- **Change #55:** On page 30:5.A.1. of the SSA 2931, we revised “Stepparent” to “Step-Parent”.

**Justification #55:** To revise the language.

- **Change #56:** On page 30:5.C.1. of the SSA 2931, we changed “Not Applicable.” to “NH”.

**Justification #56:** To make the form more concise.

- **Change #57:** On page 30:5.A.1. of the SSA 2931, we revised “Stepparent” to “Step-Parent”.

**Justification #57:** To revise the language.

- **Change #58:** On page 32:6.A. of the SSA 2931, we added an “N/A” check box.

**Justification #58:** To add an additional and potentially applicable option.

- **Change #59:** On page 32:6.B. of the SSA 2931, we added an “N/A” check box.

**Justification #59:** To add an additional and potentially applicable option.

- **Change #60:** On page 32:6.C. of the SSA 2931, we added an “N/A” check box.

**Justification #60:** To add an additional and potentially applicable option.

- **Change #61:** On page 32:6.D.6. of the SSA 2931, we added “Deductions” after “Withholding” and “Alien Tax” before “Garnishment”.

**Justification #61:** To revise the language.

- **Change #62:** On page 33:6.A. of the SSA 2931, we added an “N/A” check box.

**Justification #62:** To add an additional and potentially applicable option.

- **Change #63:** On page 33:6.B. of the SSA 2931, we added an “N/A” check box.

**Justification #63:** To add an additional and potentially applicable option.

- **Change #64:** On page 33:6.C. of the SSA 2931, we added an “N/A” check box.

**Justification #64:** To add an additional and potentially applicable option.

- **Change #65:** On page 34:7.C. of the SSA 2931, revised the question “Does the claims folder indicate an unresolved representative payee issue (need for payee change, etc.) for a sampled beneficiary?” to “Does the desk review indicate that an unresolved representative payee issue exists (need for payee change, etc.) for a sampled beneficiary(ies)?”.

**Justification #65:** To provide clarity.

- **Change #66:** On page 35:7.B. of the SSA 2931, we corrected “6.B” to “7.B.”

**Justification #66:** To correct the directive after formatting changes.

- **Change #67:** On page 35:7.C. of the SSA 2931, revised “beneficiary” to “beneficiary(ies)”.

**Justification #67:** To correct language for singular and plural situations.

We are making the following revisions to the SSA-8552:

- **Change #1:** Page 1: 1. Revised statement. Deleted “set” and “better”. Added “schedule” and “convenient”.

**Justification #1:** We made this change to make the form more concise and to provide clarity.

We are making the following revisions to the SSA-8553:

- **Change #1:** Page 1: Header. Fax line added.

**Justification #1:** To provide a fax option as an alternative means of contact.

- **Change #2:** Page 1: Paragraph 1. Deleted “get” and replaced with “receive”.

**Justification #2:** We wanted to revise the language on the form.

- **Change #3:** Page 1: Paragraph 2. Revised to include “receive”.

**Justification #3:** We wanted to make the form more concise.

- **Change #4:** Page 1: Paragraph 3. Deleted “am with” and added “work in.”

**Justification #4:** We wanted to make the form more concise.

- **Change #5:** Page 1: Revised statement to “How you can you prepare for my call”. Deleted “get ready”.

**Justification #5:** We wanted to revise the language on the form.

- **Change #6:** Page 1: Second bullet under how you can you prepare for my call. Deleted “my” and changed to “the”.

**Justification #6:** We wanted to revise the language on the form.

- **Change #7:** Page 1: Added third bullet under *how you can you prepare for my call* to “Review the enclosed copy of your Earnings Record”.

**Justification #7:** We wanted to provide more information about the nature of the call and other ways to prepare.

- **Change #8:** Page 1: Statement under *please return the enclosed forms to me*. Added

hyphen before 8550 and 2935 and bolded the form numbers.

**Justification #8:** We wanted to make this form more consistent with our other forms.

- **Change #9:** Page 2: Signature Line. Revised statement to “Quality Review Analyst”.

**Justification #9:** The agency updated the position title. \_

- **Change #10:** Pages 1,2, and 3: Updated the footers.

**Justification #10:** The justification for the change is to make the format consistent between our notice forms.

We are making the following revisions to the SSA-8554:

- **Change #1:** Page 1: Header. Fax line added.

**Justification #1:** To provide a fax option as an alternative means of contact.

- **Change #2:** Page 1: Paragraph 1. Deleted “get” and replaced with “receive”.

**Justification #2:** We wanted to revise the language on the form.

- **Change #3:** Page 1: Revised statement and text box order. Revised statement to “I would like to telephone you and (Text Box BENE\_FIRST\_NAME\_1) at your home (Text Box common\_text) (Text Box APPT\_DTTM).”

**Justification #3:** We revised this statement to make it clearer and easier to read.

- **Change #4:** Page 1: Paragraph 3. Deleted “am with” and added “work in.”

**Justification #4:** We wanted to make the form more concise.

- **Change #5:** Page 1: Revised statement to “How you can you prepare for my call”. Deleted “get ready”.

**Justification #5:** We wanted to revise the language on the form.

- **Change #6:** Page 1: First bullet under how you can you prepare for my call. Added “when I call”.

**Justification #6:** We wanted to revise the language on the form.

- **Change #7:** Page 1: Third bullet under how you can you prepare for my call. Deleted “my” and changed to “the”.

**Justification #7:** We wanted to prewise the language to this statement.

- **Change #8:** Page 1: Statement under *please return the enclosed forms to me*. Added hyphen before 8550 and 2935 and bolded the form numbers.

**Justification #8:** We wanted t make this form more consistent with our other forms.

- **Change #9:** Page 2: Signature Line. Revised statement to “Quality Review Analyst”.

**Justification #9:** The agency updated the position title. \_

- **Change #10:** Pages 1, 2, and 3: Updated the footers.

**Justification #10:** The justification for the change is to make the format consistent between our notice forms.

We are making the following revisions to the SSA-4659:

- **Change #1:** Page 1: We revised language in the Note to QR Analyst section. In the first sentence, we changed “this case” to “their case” and changed “this review” to “doing this review.”

**Justification #1:** We made the update to provide clearer language.

- **Change #2:** Page 1: We revised language in the Note to QR Analyst section. In the second sentence, we changed “Tell them” to “Advise.”

**Justification #2:** We made the update to simplify the language.

- **Change #3:** Page 1: We revised language in the Note to QR Analyst section. In the third sentence, we changed “point out” to “explain” and “to review from time to time the entitlement of beneficiaries” to “to review the entitlement of beneficiaries from time to time.”

**Justification #3:** We made the update to provide clearer language.

- **Change #4:** Page 1: In the title, we removed the double dashes between “Part I” and “Closed Year” and added a hyphen between the words “Non Service.”

**Justification #4:** We made the update to add proper format.

- **Change #5:** Page 1: In Part I, 2. In the heading, we changed “--As shown” to “Posted to.”

**Justification #5:** We made the update to add proper format and add clarity to the language.

- **Change #6:** Page 1: In Part I, 2. In column 2, changed “noncovered earnings” to “Non-covered earnings.”

**Justification #6:** We made the update to add proper format.

- **Change #7:** Page 1: Part I, 2. We deleted the word “from” from the question “Annual Report information **from** the MBR/Claims file” and replaced it with the word “on.”

**Justification #7:** We made the update to simplify the language.

- **Change #8:** Page 1: Part II, question 3. We changed the sentence, “If Yes, was AET information given or were the earnings on SSA records by the later of April 30 of the sample year or the last day of the sample month” to “If Yes, did the NH provide AET information or were earnings posted by the later of either April 30 of the sampled year or the last day of the sample month?”

**Justification #8:** We made the update to simplify the language.

- **Change #9:** Page 1: Part II, question 4. Changed sentence from “by the later of April 30 of the sample year or the last day of the sample month?” to “by the later of either April 30 of the sampled year or the last day of the sample month?”

**Justification #9:** We made the update to simplify the language.

- **Change #10:** Page 2: We changed Page Heading from “Field Review to “Phone Review.”

**Justification #10:** We made this change because Stewardship only conducts phone interviews.

- **Change #11:** Page 2: Part I. In the title, we removed the double dashes between “Part I” and “Closed Year” and changed “NSM” to “Non-Service Months.”

**Justification #11:** We made the update to add proper format and to add clarifying language.

- **Change #12:** Page 2: Part I.1. We changed the first word in parenthesis from “Get” to “Obtain.”

**Justification #12:** We made the update to simplify language.

- **Change #13:** Page 2: Part I. Removed the question “Was the beneficiary a corporate officer/related to a corporate officer of a close or family corporation listed above?” and the answers associated with the question.

**Justification #13:** We reviewed current Policy related to corporate officers and found that this issue no longer is relevant to an AET action after 2011. We required this change since this is no longer a question that we would ask on a Stewardship sample.

- **Change #14:** Page 2, Part I, 2: we changed sentence “If business sold or transferred, give the name, address, and phone number of the present operator and relationship to the beneficiary” to “If business was sold or transferred, give the name, address, and phone number of the present operator and their relationship to the beneficiary.”

**Justification #14:** We made the update to simplify language.

- **Change #15:** Page 3: We changed Page Heading from “Field Review to “Phone Review.”

**Justification #15:** We made this change because Stewardship only conducts phone interviews.

- **Change #16:** Page 3, Part I, 3. We removed the double dashes after “Special Wage/SEI Payments” and changed the section in parenthesis from “If material to payment for the closed year, get evidence” to “If material to payment for the closed year, obtain evidence.”

**Justification #16:** We made the update to simplify language.

- **Change #17:** Page 3, Part I, 4. Removed the double dashes after “Non-Service months” and changed second sentence from “Check the Wages block if beneficiary” to “Check the Wages block if the beneficiary.”

**Justification #17:** We wanted to update the format and clarify language.

- **Change #18:** Page 3, Part I, 4. Changed sentence in parenthesis from “If alleged NSMs are material to payment for the closed year, get evidence of wage NSMs from the beneficiary or the employer. If SE, get the name/phone/address of people with knowledge & contact them for verification” to “If alleged NSMs are material to payment for the closed year, obtain evidence of wage NSMs from the beneficiary or the employer. If SE, obtain the contact information (including the name, phone number, and address) of any individuals with information in reference to the SE and contact them for verification.”

**Justification #18:** We made the update to clarify language.

- **Change #19:** Page 3, Part II. We removed double dashes before ANNUAL REPORT INFORMATION.

**Justification #19:** We made the update to correct the format.

- **Change #20:** Page 4, Case Summary. First question changed from “Do the payment adjustments, if any, made by SSA through the later of April 30 of the sample year or the last day of the sample month accurately reflect information for the closed year?” to “Do the payment adjustments (if any) made by SSA through the later of either April 30 of the sampled year or the last day of the sample month accurately reflect information for the closed year?”

**Justification #20:** We made the update to clarify language.

- **Change #21:** Page 4, Case Summary. Changed second question from “If there are any AET deficiencies which affect payment for the closed year, summarize here, code the error, and prepare the SSA-93 for corrective action” to “If there are any AET deficiencies that affect payment for the closed year, summarize below, code the error, and prepare the SSA-93 for corrective action.”

**Justification #21:** We made the update to clarify language.

We are making the following revisions to the SSA-2935:

- **Change #1:** Page 1: Paragraph 1. Revised opening statement to delete “I authorize the Individual, Organization, or Agency listed below to disclose to the Social Security Administration information about me relating to a claim for Social Security benefits”. Replaced with “I authorize the Individual, Organization, or Agency listed below to disclose to the Social Security Administration information about me relating to my Social Security benefits.”

**Justification #1:** We made the update to clarify language.

We are making the following revisions to the SSA-85:

- **Change #1:** Deleted the statement “Any information that is not checked below but may relate to you should also be mentioned during the interview” and replaced with “Please mention in your interview any information that relates to you, even if not checked below”.

**Justification #1:** We revised to make the form more concise and for clarity.

- **Change #2:** (The Earnings Record) Revised Earnings statement from:

“Benefits are computed by giving credit for any earnings, since 1937, that were covered under the Social Security Act. As part of our review, we check the record for accuracy.

The earnings record shows yearly amounts for 1951 through recent years. In the years not shown, no earnings were reported to Social Security. Earnings during

1937 -- 1950 are shown as a separate total.

Please compare the earnings amounts to any records you have. Pay particular attention to:

- Years with no earnings
- Years with earnings much higher than the ones before and after them
- Years with earnings much lower than the ones before and after them

If you disagree with any of these earnings, please have your records available at the time of the interview. W2 forms are the best evidence of wages. Tax returns and proof of filing are the best evidence of self-employment earnings.”

to:

“Your benefits are based on giving credit for any earnings that were covered under the Social Security Act since 1937. As part of our review, we check your earnings record for accuracy.

The earnings record shows yearly amounts for 1951 to recent years. For years not shown, there were no earnings reported to Social Security. There is a separate total for earnings during 1937 through 1950.

Please compare the earnings amounts to any records you have. Please pay particular attention to:

- Years with no earnings
- Years with earnings much higher than the ones before and after them
- Years with earnings much lower than the ones before and after them

If you disagree with any of these earnings, please have your records available at the time of the interview. W2 forms are the best evidence of wages. Tax returns and proof of filing are the best evidence of self-employment earnings.”

**Justification #2:** We revised to make the form more concise and for clarity.