Addendum to the Supporting Statement for
Redetermination of Eligibility for Extra Help
With Medicare Prescription Drug Plan Costs
Forms SSA-1026-REDE
(Social Security Administration Review of Your Eligibility for Extra Help)
And
SSA-1026-SCE
(Social Security Administration Reporting a Change That May Affect Your Extra Help)
20 CFR 418.3125
OMB No. 0960-0723

<u>**Revisions to the Collection Instruments**</u>

SSA is making the following revisions:

- **Change #1:** SSA updated the year shown on the bottom of each page.

  Justification #1: We updated the edition date to reflect OMB approval of the revised forms.

- **Change #2:** On page 1, paragraph 1, inserted the words "Medicare number."

  Justification #2: We added language to ensure third party individuals who assist applicants understand the information needed to complete the form.

- **Change #3:** On page 2, question 2, SSA updated the instructions:

  From: "(if you are married and living together)"

  To: "(If you are married **AND** living together, print your spouse's name **as it appears on your spouse's Social Security card**. If you are **NOT** currently married, do **NOT** live with your spouse or if you **ARE** widowed, **skip to Question 3**)."

  Justification #3: We updated existing language to reduce the number of erroneous spouse-related processing exceptions generated when applicants leave the spouse information blank in this question but indicate a spouse elsewhere on the form.

- **Change #4:** On page 2, question 3, SSA placed the following phrase in bold "**go to question 4**."

  Justification #4: We emphasized existing language to help reduce the number of spouse-related processing exceptions generated when applicants erroneously report a change in marital status.

- **Change #5**: On page 3, question 4, we placed the following existing language in bold "**place an X in the box and go to question 11 on page 5, sign and return this form**."

  Justifiction #4: We emphasized existing language to help reduce the number of erroneous processing exceptions.

- **Change #5:** On page 3, question 5, SSA un-italicized and bolded the word "**Instruction**."

  Justification #5: We emphasized existing language to help reduce the number of erroneous processing exceptions.

- **Change #6:** On page 3, question 6, SSA added and bolded the word "**Instructions**" and inserted the following clarifying language "*Do **NOT** place an X in the spouse **NO** box if you did not provide spouse information in Question 2.*"

  Justification #6: We made this change to clarify instructions. This will reduce the number of spouse-related exceptions generated when the spouse box is checked here but the applicant fails to indicate a spouse in Question 2.

- **Change #7:** On page 4, question 7, SSA unitialized and bolded the word "**Instruction**."

  Justification #7: We emphasized existing language to help reduce the number of erroneous processing exceptions.

- **Change #8:** On page 4, question 8, above the chart, SSA un-italicized and bolded the word "**Instruction**." SSA also added the following clarifying language "*If you or your spouse receive zero income from a source listed below, place an X in the NONE box for that source.*" Within the chart, SSA inserted boxes that provide applicants with an option to indicate zero income for income sources listed within the chart.

  Justification #8: We emphasized the word *instruction* and inserted clarifying language to help reduce the number of erroneous processing exceptions generated when applicants skip parts of the chart that pertain to them. This update will also help reduce the volume of follow- up calls and notices mailed to applicants.

- **Change #9:** On page 5, question 9, SSA un-italicized and bolded the word "**Instruction**."

  Justification #9: We emphasized existing language to help reduce the number of erroneous processing exceptions.

- **Change #10:** On page 5, question 10, SSA eliminated the "**NO**" box and inserted the words "***Instructions**: if **NO**, skip to question 11. If YES, place an X in the **YES** box then go to question 11. Do **NOT** fill in the boxes next to SPOUSE if you did not put spouse information in Question 2*".

Justification #10: We updated this language to help reduce the number of erroneous processing exceptions generated when applicants check both the "YES" and "NO" box for either the applicant or the applicant's spouse.

- **Change #11:** On page 5, question 11, in the example box, SSA updated the year. Above the example box, SSA inserted the following language "*Do **NOT** fill in the boxes next to **SPOUSE** if you did not put spouse information in Question 2.*"

    Justification #11: We made this change to clarify instructions. This will help reduce the number of spouse-related processing exceptions generated when applicants fill in dates for a spouse in this question but fail to indicate a spouse in Question 2.

- **Change #12:** We are revising the PRA statements on these forms.

    Justification #12: We are revising the PRA statements to reflect our current boilerplate language. The current language, which dates back to the last reprint of the forms, is now outdated.

- **Change #13:** We are revising the Privacy Act Statements on these forms.

    Justification #13: 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 Statements on these forms.

SSA will implement the changes above upon OMB approval.

These actions do not affect the public reporting burden.