

Justification  
**Statement Regarding Contributions and Support**  
 RRB Form G-134

1. Circumstances of information collection – This information collection gathers pertinent data when dependency is claimed from spouses and survivors of railroad employees entitled to an annuity or to determine whether the annuity amount received by the respondent should be changed. The annuity amount for a survivor or spouse can be affected if the survivor or spouse was dependent on the employee for at least one-half of the survivor or spouse's support.

Entitlement to a survivor annuity – Annuity eligibility can be affected if the survivor was dependent on the employee for at least one-half of his or her support at the time of the employee's death as provided under Section 2 of the Railroad Retirement Act (RRA) (45 U.S.C. 231a). This occurs when the survivor is a parent of the deceased employee. The requirement is prescribed in 20 CFR 216.81(a)(3) and 222.41(a)(4).

Amount of spouse or survivor annuity - Under certain circumstances, a portion of an annuity payable to a spouse or widow(er) is subject to an offset for a public service pension received by the spouse or widow(er). A public service pension is any benefit payable to an individual because of their employment with a Federal, State, or local unit of government. The spouse or widow(er)'s dependency on the employee may negate the annuity offset. Sections 4(a)(1) and 4(f)(1) of the RRA provide that the annuity amount of a spouse, divorced spouse, and survivor shall be an amount equal to the amount a beneficiary would receive if entitled under the Social Security Act. Section 7(a)(1) of PL 97-455 amends Sections 202(b), (c), (e), (f), and (g) of the Social Security Act, to specify when half support will negate the public service pension offset for a wife, husband, widow, widower, and mother or father. In addition, the requirement is prescribed in 20 CFR 404.408(a).

Restored Amount - A Tier II restored amount is payable to a widow(er) whose annuity is reduced for receipt of an employee annuity under the RRA provided either the employee or the widow(er) had 10 years of creditable railroad service prior to January 1, 1975. In addition, a widow(er) must have been dependent on the railroad employee for at least half of his/her support in the year prior to the employee's death or, if earlier, at the time the spouse's annuity began. This requirement is prescribed in 20 CFR 228.52(c).

2. Purposes of collecting/consequences of not collecting the information - **Form G-134, Statement Regarding Contributions and Support**, obtains evidence of the claimed support from an applicant during a specific 12-month period. Without the information obtained by the G-134, the Railroad Retirement Board (RRB) cannot determine if an applicant meets the one-half support eligibility requirement.

Form G-134 is designed for self-administration. Other options are in-person field office, itinerant point assistance, or telephone interview. The RRB prefills the beginning and ending dates of the period in question, as well as the identifying information in Items 1-6. When a G-134 is completed outside the benefit application process, Form G-242, Notice of Information Needed in Claim Under the Railroad Retirement Act, and its cover letter, Form RL-57A-F, Letter Requesting Applicant to Furnish Evidence, are transmitted with the G-134 to request any proofs needed to complete the claim.

**The RRB proposes a minor editorial change to Form G-134 to change the date under Section 1 “General Instructions”.**

3. Planned use of improved information technology or technical/legal impediments to further burden reduction - None planned due to low volume (less than 15 responses annually).
4. Efforts to identify duplication - Form G-134 is similar to Form SSA-760-F4, OMB No. 0960-0001. While some of the RRB's beneficiaries may complete a SSA Form SSA-760-F4 because of other private pension benefits, new information needs to be obtained relevant to the Railroad Retirement Act. This information collection does not duplicate any other RRB information collection.
5. Small business respondents - N.A.
6. Consequences of less frequent collection - Not applicable since the information is solicited only once.
7. Special Circumstances - N.A.
8. Public Comments/Consultations outside the agency - In accordance with 5 CFR 1320.8 (d), comments were invited from the public regarding the information collection. The notice to the public was published on page 16039 of the March 6, 2024, Federal Register. No requests for further information or comments were received.
9. Payment or Gifts to Respondents - N.A.
10. Confidentiality - Privacy Act System of Records, RRB-22, Railroad Retirement, Survivor, and Pensioner Benefit System - RRB. In accordance with OMB Circular M-03-22, a Privacy Impact Assessment for this information collection was completed and can be found at <https://www.rrb.gov/sites/default/files/2017-06/PIA-BPO.pdf>.
11. Sensitive questions - There are no questions of a sensitive nature.
12. Estimate of respondent burden - The current and proposed burdens for the collection are shown below.

**Current Burden**

Form Number	Annual Responses	Time (Minutes)	Burden (Hours)
Form G-134			
With assistance	75	147	184
Without assistance	25	180	75
Total	100		259

**Proposed Burden**

Form Number	Annual Responses	Time (Minutes)/1	Burden (Hours)
Form G-134			
With assistance	11	147	27
Without assistance	4	180	12
Total	15		39

**1/**The RRB has been collecting the information on these forms since OMB approved the information collection. Based on a sampling done when the form was originally created, the office calculated the estimated time, which includes time for getting the needed data and reviewing the completed form.

	<b>Responses</b>	<b>Hours</b>
Total Burden Change	-85	-214
Adjustment	-85	-214

13. Estimate of annual cost burden to respondents or record keepers - N.A.
14. Estimated cost to Federal Government - N.A.
15. Explanation for changes in burden - Due to improved record-keeping, which allows for more accurate counts, and a decrease in the number of applications filed annually, we have seen a decrease in the total annual responses.
16. Time schedule for data collection and publication -The results of this collection will not be published.
17. Request to not display OMB expiration date – The RRB started an extensive multi-year IT Modernization Initiative at the beginning of Fiscal Year 2019 to transform our operations into the 21<sup>st</sup> Century using multiple contractor services to improve mission performance, expand service capabilities, and strengthen cybersecurity. We provided OMB with a consolidated project timeline.  
  
Given that the forms in this collection are seldom revised; the costs associated with redrafting, reprinting, and distributing forms to keep the appropriate OMB expiration date in place; and our desire to reevaluate after the completion of the modernization project, **the RRB requests the authority to not display the expiration date on the forms.**
18. Exceptions to Certification Statement - None