

**Justification for Non-Substantive Changes to Form SSA-8240  
Authorization for the Social Security Administration to Obtain Wage and Employment  
Information from Payroll Data Providers  
OMB No. 0960-0807**

**Background**

OMB approved the final rule for Use of Electronic Payroll Data to Improve Program Administration (RIN 0960-AH88) on January 13, 2025. This non-substantive change request is for the submission of the Revised Forms Upon Implementation of the Final Rules for Use of Electronic Payroll Data To Improve Program Administration (RIN 0960-AH88).

SSA uses Form SSA-8240 to collect wage and employment information authorization from any person filing for or receiving SSDI or SSI benefits and from any SSI deemor or SSI ineligible child pursuant to the Bipartisan Budget Act of 2015. In addition, SSA uses Form SSA-8240 to obtain such person's wage and employment information from payroll data providers (PDPs) via the payroll information exchange (PIE). SSA also uses the form to conduct manual requests for wage evidence from agency approved PDPs.

In support of the phased implementation of the Payroll Information Exchange (PIE) and enactment of the associated regulations, we are updating the disclosures we provide on the SSA-8240 and separating revocation of authorization into its own item on the form. Respondents previously used item 5 answered negatively to provide written revocation. By creating a dedicated question, we are able to ensure we provide appropriate disclosures prior to an individual revoking authorization.

**Minor Revision to Form SSA-840**

SSA is making the following revision:

- **Change 1:** We are adding several instructional sentences above item 5 and in 5.b to guide respondents to the appropriate fields depending on whether they are using the SSA-8240 to provide authorization or revoke authorization they previously provided.

**Justification 1:** Because we are adding a dedicated item for revocation, it is necessary to direct respondents to item 5 if they are providing authorization or item 6 if they are revoking authorization. The reenforcing instruction in 5.b aids in navigating to the appropriate fields.

- **Change 2:** We are revising the disclosures provided in item 5 on the first page of this collection to clarify a respondent's rights and responsibilities regarding the wage and employment information authorization.
  - We simplified language in the third bullet to clarify effects of revocation.
  - In the fourth bullet, we are revising the penalty relief statement to specifically provide that relief applies to the penalty of non-payment of Social Security Disability Insurance (SSDI) benefits and ineligibility for Supplemental Security Income (SSI)

payments. Previously, we cited the applicable provisions in the Social Security Act without descriptive language.

- o We are adding a new, ninth bullet that clearly explains the voluntary nature of the authorization, informs the respondent they may request revocation in writing at any time, and specifies that revocation or refusal of wage and employment authorization does not affect entitlement to SSDI or eligibility for SSI.
- o We are removing the additional disclosures from item 5.c and 5.d into the 5.a under a new bullet 10 and 11 and clarified revocation information.

**Justification 2:** Based on public comments on the final rule ([Use of Electronic Payroll Data To Improve Program Administration](#)), we found opportunities to clarify the disclosures we provide to respondents who are considering providing wage and employment authorization to SSA via the SSA-8240. The updated language more clearly conveys in one place the rights and responsibilities associated with the respondent's decision to provide authorization.

**Change 3:** We are adding a new item 6 to capture requests to revoke authorization and provide disclosures. This change moves the signature and witness signature fields to item 7 and 8, respectively.

**Justification 3:** We previously collected revocation of authorization on the SSA-8240 by allowing individuals to answer item 5 negatively and having the new negative response supplant the prior affirmative response in our systems. This process caused some confusion; so, we are revising our form and associated policy instructions to improve the process of collecting revocation in writing. To ensure the respondent provides appropriate disclosures before collecting a request for revocation, we are changing the form to now request revocation using a dedicated question. The change better informs respondents of changes to penalty relief and reporting responsibilities resulting from revocation.

- **Change #4:** We are revising the Privacy Act Statements for this collection.

**Justification #4:** SSA's Office of Law and Policy 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 this collection.

We will implement these revisions upon OMB approval. These revisions will not change the current burden for the information collection.

As mentioned in the PRA documentation for this Final Rule (approved under OMB No. 0960-0837, we are submitting this Change Request to include the revised form under its own OMB number. Once OMB approves this Change Request, and the subsequent Change Requests for the other forms associated with 0960-0837, we will discontinue the ICR for 0960-0837.