

Justification for Non-Substantive Changes for eSignature/Upload Documents
20 CFR 404.704; 404.1512, 416.912, and 422.505
OMB No. 0960-0830

Summary of Change

We are revising the eSignature/Upload Documents portal to allow for a customer-initiated option for Individual Representative Payees (IRP) to access the eSignature/Upload Documents portal via the Representative Payee Services section of their *my Social Security* account and electronically submit certain agency forms and evidence to SSA. At this time, the IRPs can only access these forms through the Electronic Records Express (ERE) portal (OMB No. 0960-0767), which requires them to log into the ERE website alongside their *my Social Security* account. This change will allow IRPs to submit the same forms directly through eSignature/Upload Documents from their *my Social Security* account, as an additional modality.

Background

As per the requirements of *EO 14058*, respondents may use the secure upload portal, eSignature/Upload Documents, to submit forms and evidence to SSA. The current process is limited to submissions from first party customers. To further expand access and flexibility to our customers, we are expanding eSignature/Upload documents in December 2025 to allow Individual Representative Payee (IRP) customer-initiated submissions which will not require IRPs to interact with SSA to make an online form or evidence submission on behalf of the beneficiaries they represent. This self-service approach empowers customers to initiate document uploads as soon as they recognize a need, eliminating delays caused by waiting for technician outreach.

SSA will release the new IRP customer-initiated option on **December 11, 2025**.

Revisions to the Information Collection

- **Change #1:** SSA is introducing a customer-initiated option for eSignature/Upload Documents, which will allow IRPs to access the eSignature/Upload Documents portal via the Representative Payee Services section of their *my Social Security* account and electronically submit certain agency forms and evidence to SSA. Subsequently, in FY2026 we will continue to add additional agency forms for submission through the Representative Payee Services section.

Justification #1: The current Upload Documents process is limited to first party customers, even though some of the forms are accessible for IRPs to submit through ERE (OMB No. 0960-0767). By implementing a self-service approach for IRPs, we expect it will empower these additional customers to initiate document uploads for the beneficiaries they represent as soon as they recognize a need, eliminating delays caused by mail time. Initially we will only include forms which the IRPs can already submit via fax or through Electronic Records Express (OMB No. 0960-0767). However, we hope to expand to further forms later in FY2026.

Once implemented, SSA anticipates this new process will increase agency efficiency by: (1) allowing technicians to receive documents faster and earlier in the claims and post-entitlement process, and (2) alleviating some of the burden on field offices by reducing both a large amount of paper mail and the volume of phone calls and in-person visits to a field office. The IRP customer-initiated process will allow technicians to access submitted documents directly from WorkTrack, which will remove the extra step of technician-customer coordination and eliminate the need for technicians to open, sort, scan, and profile paper submissions. Technicians will more quickly process documents allowing more time to focus on more complex tasks and workloads, ultimately enhancing overall productivity, while also improving customer satisfaction.

Finally, the IRP customer-initiated effort expands digital services for SSA customers by:

- o Increasing the number of successfully completed online transactions
- o Better understanding our customers' service preferences
- o Addressing our customers' service needs

Overall, the IRP customer-initiated option provides a valuable service as it gives IRPs the ability to submit documents to us without needing to speak with a technician, even though it does not change the overall burden for submitting these forms.

Future Plans: We expect to implement more forms through the Representative Payee Services section of the [my Social Security](#) portal as the fiscal year progresses. As we add more forms, we will submit a subsequent Change Request to update the burden for this ICR as needed, and to also inform OMB as to when we will add forms which the representative payees cannot currently submit electronically through other means (such as ERE).

Justification for Resubmission of the Information Collection Within a Year of Approval

We will implement these revisions on **December 11, 2025**, to keep in line with the approved Technology Modernization Fund (TMF) for this application. As the December 11, 2025 date is a required milestone per the TMF agreement, we are requesting OMB approval for these non-substantive changes prior to that date.

We do not anticipate any burden changes for these revisions to the information collection, as our prior revision to the burden already accounts for the IRP submissions.