Addendum to the Supporting Statement for Form SSA-10
Application for Widow's or Widower's Insurance Benefits
20 CFR 404.335-404.338, and 404.603
OMB No. 0960-0004

Revisions to the Collection Instruments

Paper SSA-10 :
We are making the following revisions to the paper SSA-10.

- **Change #1:** We are adding "Widow's or Widower's Insurance Benefits." on page 1, under "Application for Social Security Benefits,"

  Justification #1: We are adding this language for clarity.

- **Change #2:** We are revising the language on page under the Application For Social Security Benefits heading **FOR SOCIAL SECURITY BENEFITS**

  Old Language: With this application, you are applying for all insurance benefits for which you are eligible under Title II (Federal Old-Age, Survivors, and Disability Insurance) and Part A of Title XVIII (Health Insurance for the Aged and Disabled) of the Social Security Act as presently amended.

  New Language: With this application, you are applying for all insurance benefits for which you are eligible under Title II (Federal Old-Age, Survivors, and Disability Insurance) of the Social Security Act as presently amended, and for which you may be eligible under Part A of Title XVIII (Health Insurance for the Aged and Disabled) of the Social Security Act as presently amended and Section 71201 of the One, Big, Beautiful Bill Act (OBBBA).

  Justification #2: We are revising the language to address Section 71201 of the One, Big, Beautiful Bill Act (OBBBA).

- **Change #3:** We are revising the language on page 1, questions 6(a) and 6(b) as follows:

  Old Language: 6(a): Was the deceased unable to work because of illnesses, injuries or conditions at the time of death?

  New Language: Did the deceased have any illnesses, injuries, or conditions that significantly limited their ability to work and lasted at least 12 months or resulted in death?

  Old Language 6(b): Enter the date the deceased became unable to work.

New Language: Approximately when do you believe the deceased's illnesses, injuries, or conditions became severe enough to significantly limit their ability to work or keep them from working?

Justification #3: We are revising these questions to better reflect SSA's definition of disability.

- **Change #4:** We are removing the "(a)" and adding a field for the response on page 2, Question 12,

  Justification #4: We are removing the "(a)", because it is not a multiple part question.

- **Change #5:** **We are revising the language on** page 4, questions 16(a) and 16(b)

  Old Language 16(a): Are you, or during the past 14 months have you been unable to work because of illness, injuries or conditions?

  New Language: Do you have any illnesses, injuries, or conditions that significantly limit your ability to work and has lasted or is expected to last at least 12 months or result in death?

  Old Language 16(b): Enter the date you became unable to work.

  New Language: Approximately when do you believe your illness, injuries, or conditions became severe enough to significantly limit your ability to work or keep or keep you from working?

  Justification #5: We are revising these questions to better reflect SSA's definition of disability.

- **Change #6:** We are removing the word "automatically" from the first sentence on page 4, under "Medicare Information,

  Justification #6: We are removing "automatically" because some individuals will not be eligible to receive Medicare based on Section 71201 of the One Big Beautiful Bill Act.

- **Change #7:** We are removing the Receipt page on page 7,

  Justification #7: We are removing the receipt section, because the form has been digitized where the technicians enter the information into the claims system and the system generates the claimant's receipt.

- **Change #8:** We are revising the Privacy Act Statements on this collection.

<u>Justification #8</u>: 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 this collection.

SSA will make these revisions upon OMB approval. These revisions do not affect the current burden for this information collection.

<u>Terms of Clearance</u>

OMB placed the following Terms of Clearance on this Information Collection when they last approved it on 6/23/23:

Prior to tri-annual renewal of this information collection request, the agency will substantially expand the description and justification for this information collection in the Supporting Statement A.

Consistent with M-22-10, this expanded discussion (in Question Prompt #2) should address the following aspects of the collection:

(1) Provide a discussion about the common pathways a widow or widower would learn about how to apply for benefits (e.g. being informed by the funeral home, being informed through direct outreach from SSA, such as a notice, or independently researching the matter);

(2) Explain the common circumstances in which the agency requires documentation from the respondent (or whether it is source from other entities) regarding proof of death, proof of marriage, proof of income of the deceased or respondent, and any other common documentation requirements;

(3) Explain if there are any circumstances in which the agency proactively contacts a known spouse or survivor after receiving indication from the funeral home or state vital services that the number holder had deceased;

(4) Explain in additional detail whether or not, during an interview application, the agency is able to use information already on file about the deceased to support or facilitate the respondent's answers to questions 7 and 8 (regarding the deceased's income); question 10 (regarding the deceased's former marriages); and questions 21 and 22 (regarding the surviving spouse's recent income);

(5) Provide any relevant management information that can demonstrate the amount of SSA-10s that are successfully filed and adjudicated in a single touchpoint (i.e. the phone call in which the application interview is conducted) vs. SSA-10s that require multiple touchpoints, such as through the need to provision additional evidence or because the respondent lacks sufficient information during the initial interview with SSA;

(6) Provide management information on the number of SSA-10s that are denied each year.

No later than 18 months after approval of this information collection, the agency will update the "Surviving Spouse" page of SSA's website to:

(1) For each "subsection," make more prominent the specific methods for "taking action" (e.g. filing a claim) through ensuring better placement at the top of the section and improved visual presentation of phone numbers or the use of buttons to link prospective respondents to the necessary modality for completing the information collection.

(2) To update the language of "For example, if the person died in July, you must return the benefits paid in August" to more clearly explain that benefits paid in August would be from the payment owed the number holder for July (e.g. by adding a parenthetical to the end of the sentence with verbiage like "(because the benefit they receive in August is for the month of July)".

(3) Make any necessary changes to improve greater consistency between the use of "Surviving spouse" vs. "Widow/Widower" among the form and any information materials, if appropriate.

SSA responded to each of the Terms below:

- **Term #1:** In #2 of the Supporting Statement, provide a discussion about the common pathways a widow or widower would learn about how to apply for benefits (e.g. being informed by the funeral home, being informed through direct outreach from SSA, such as a notice, or independently researching the matter);

  SSA Response #1: We expanded the discussion in Question Prompt #2 to address common pathways a widow or widower learns about how to apply for benefits.

- **Term #2:** Explain the common circumstances in which the agency requires documentation from the respondent (or whether it is source from other entities) regarding proof of death, proof of marriage, proof of income of the deceased or respondent, and any other common documentation requirements;

  SSA Response #2: We expanded the discussion in Question Prompt #2 to address common circumstances in which SSA requires documentation from the respondent.

- **Term #3:** Explain if there are any circumstances in which the agency proactively contacts a known spouse or survivor after receiving indication from the funeral home or state vital services that the number holder had deceased;

  SSA Response #3: We explained circumstances in which SSA proactively contacts a known spouse or survivor after receiving indication from the funeral home or state vital services.

- **Term #4:** Explain in additional detail whether or not, during an interview application, the agency is able to use information already on file about the deceased to support or facilitate the respondent's answers to:
  - questions 7 and 8 (regarding the deceased's income);
  - question 10 (regarding the deceased's former marriages); and
  - questions 21 and 22 (regarding the surviving spouse's recent income);

  SSA Response#4: We explained in #2 of the Supporting Statement whether SSA is able to use information already on file to facilitate the respondents' answers to the following questions:

  - questions 7 and 8 (regarding the deceased's income);
  - question 10 (regarding the deceased's former marriages); and
  - questions 21 and 22 (regarding the surviving spouse's recent income);

- **Term #5:** Provide any relevant management information that can demonstrate the amount of SSA-10s that are successfully filed and adjudicated in a single touchpoint (i.e. the phone call in which the application interview is conducted) vs. SSA-10s that require multiple touchpoints, such as through the need to provision additional evidence or because the respondent lacks sufficient information during the initial interview with SSA;

  SSA Response #5: We updated #2 of the Supporting Statement to provide the relevant management information which demonstrates the number of SSA-10's that SSA successfully files and adjudicates in a single touchpoint vs the SSA-10's that require multiple touch points.

- **Term #6:** Provide management information on the number of SSA-10s that are denied each year.

  SSA Response #6: We updated #2 of the Supporting Statement to provide management information on the number of SSA-10s SSA denies.

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No later than 18 months after approval of this information collection, the agency will update the "Surviving Spouse" page of SSA's website to:

SSA Response: We updated SSA's website to include "Survivor Benefits" page, and the we removed the "Surviving Spouse" page.

- **Term #7:** For each "subsection," make more prominent the specific methods for "taking action" (e.g. filing a claim) through ensuring better placement at the top of the section and improved visual presentation of phone numbers or the use of buttons to link prospective respondents to the necessary modality for completing the information collection.

SSA Response #7: The "Survivor Benefits" page has a very prominent "Learn how to apply" button right at the top, which takes the reader to a page with a very prominent phone number to set up an appointment (if an application is needed).

- **Term #8:** To update the language of "For example, if the person died in July, you must return the benefits paid in August" to more clearly explain that benefits paid in August would be from the payment owed the number holder for July (e.g. by adding a parenthetical to the end of the sentence with verbiage like "(because the benefit they receive in August is for the month of July)."

  SSA Response #8: This is no longer applicable because that sentence is no longer present on the "Survivor Benefits" pages.

- **Term #9:** Make any necessary changes to improve greater consistency between the use of "Surviving spouse" vs. "Widow/Widower" among the form and any information materials, if appropriate.

  SSA Response #9: SSA made changes and we are now more consistent with the terminology.