EM - Emergency Message

Identification Number: EM-20029 SEN
Intended Audience: All RCs, ARCs/ADs/FOs/TSCs/WSUs/PSCs/OCO/OCO-CSTs
Originating Office: DCO OPSOS
Title: Disaster Procedures -- CDR Mailer Phone Process due to COVID-19 pandemic – One-Time Instructions
Type: EM - Emergency Messages
Program: Title II (RSI); Title XVI (SSI)
Link To Reference: See References at the end of this EM

Effective Date: July 21, 2020
Retention Date: 07/21/2021

A. Purpose

This emergency message (EM) provides the steps to take if the public contacts you regarding the need for assistance with completing the SSA-455 CDR Mailer using the telephonic process.

B. Background

Effective March 17, 2020, SSA began taking steps to protect the public and our employees from the COVID-19 Coronavirus. This includes ensuring the public understands SSA is open for business online, by telephone, and by mail with limited in-person services. To accommodate claimants requiring assistance completing the CDR maller, Field Office (FO) and Payment Center (PC) technicians will be
able to complete the CDR mailer over the phone using alternative signature methods.

C. Field Office Procedure

When a beneficiary or representative payee contacts the FO for help with filling out the SSA-455, the technician should:

1. Access form SSA-455 using the electronic fillable version in inForm
2. Read the start of the interview attestation script for telephone interviews at the beginning of the interview GN 00201.015 F.3
3. Complete the interview over the phone with the beneficiary to complete the form
4. Read the end of the interview attestation script for telephone interviews at the conclusion of the interview GN 00201.015 F.3
5. Save the form as a PDF on the desktop or P drive
6. Open the PDF in Adobe and select “Fill and Sign” on the right-hand side of the form. This opens a new menu bar at the top of the form.

7. Select “Sign” Add Signature
8. In the window that opens, type “Your Name, Title, ALTSIG”. The ALTSIG will indicate that alternative signature methods are being used per EM-20010 SEN REV 4.
9. Select Apply, which will move the signature into the PDF like a picture.
10. Click in the signature box to paste the signature in the appropriate place.
11. Fill out the date and telephone number.
12. The electronic form should be saved as a PDF on either the desktop or P drive.
13. Lastly, the technician uploads the completed and attested PDF form to PC Paperless using the barcode “CDR Mailing T2 or CDR Mailing T16 Doc/Type”. For guidance on uploading the form electronically to PC Paperless see Guide - Working in a Paperless Environment.

D. WBDOC and Payment Center Procedure

Once the SSA-455 is received into PC Paperless, distribution and processing of the SSA-455 will follow normal business process in DI 13004.005 and DI 40502.001.

NOTE: The beneficiary is not required to utilize this telephonic process and may still complete the SSA-455-OCR-SM and return to WBDOC via mail, follow normal procedure.
E. TeleService Center Procedure
If the beneficiary calls the National 800# asking for assistance on completing the SSA-455, refer them to their servicing FO by providing the General Inquiry (GI) line phone number available in DOORS.

References:

[GN 00201.015] Alternative Signature Methods  

[DI 40502.001] Processing Center Instructions for the Continuing Disability Review Mailer Forms SSA-455 and SSA-455-OCR-SM


[Guide - Working in a Paperless Environment]


Link to this document:

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