

Emergency Message

Effective Dates: 09/21/2021 - Present

Identification Number: EM-21062
Intended Audience: RCs/ARCs/ADs/FOs
Originating Office: DCO OPSOS
Title: WorkTrack Enhancements for SSI Waiver and SSI Non-Medical Reconsideration Requests
Type: EM - Emergency Messages
Program: Title XVI (SSI)
Link To Reference: See **References** at the end of this EM.

Retention Date: 09/21/2023

A. Purpose

This Emergency Message (EM) provides Field Offices (FOs) information and instructions regarding changes to WorkTrack profile and sort functions designed to better track and control SSI waiver and SSI non-medical reconsideration requests.

B. Background

When the agency issues a Notice of Overpayment or a Notice of Planned Action (NOPA), the recipient has the right to file a reconsideration request using an SSA-561-U2 form or other writing or, in response to an overpayment notice, to request a waiver using the SSA-632-BK form (see [SI 02260.001](#) and [SI 04020.020](#)). These documents are loaded into WorkTrack for review and processing.

The WorkTrack enhancements detailed in this EM allow for streamlined identification of these documents, which must be input timely to provide due process rights and continuation of payments or suspension of overpayment recovery until a decision is made on the reconsideration or waiver request.

C. New WorkTrack Functions

1. Mandatory Profiling Selections

a. Effective with the release of this EM, as part of the profiling process in WorkTrack, when management or designated staff identifies a document as a reconsideration request, they will specify if the reconsideration request is medical or non-medical by selecting:

- 561M – Request for Reconsideration (Medical)
- 561N – Request for Reconsideration (Non-Medical)

NOTE: SSA-561s in “pending status” at the time of this release will also require this new identification.

IMPORTANT: Per [SI 04020.020](#), individuals do not need to submit form SSA-561-U2 in order to file a reconsideration.

Consider any written disagreement with an initial determination as a request for reconsideration and identify it in WorkTrack as 561M or 561N.

b. If the Form Type is 561M, 561N or 632, the Title Field becomes mandatory and management or designated staff must choose one of the following:

- T2
- T16

- Concurrent
- T18

NOTE: The **main profiling elements** required for a “Process Ready” document, also known as, a “Fully Profiled” document are: **Page Selection, SSN, Last name, and Form Type.** If any of these main elements are missing, the document will not appear as “Process Ready” because some of the elements necessary to electronically identify the document are missing. With this change, when Form Type 561M, 561N or 632 is selected, the document will not be considered “Fully Profiled” until the Title Field is also selected.

The screenshot shows the 'Profile' form for ID: 5362. The form contains the following fields and controls:

- Clear All** button
- SSN** text input field (placeholder: No Hyphens...)
- BIC** dropdown menu (placeholder: -- Select A BIC --)
- Last Name** text input field
- First Name** text input field
- Form Type** dropdown menu (placeholder: -- Input Form Type --)
- Title** dropdown menu (placeholder: -- Select A Title --), highlighted with a red box
- Stamp Date** text input field (value: 12/10/2020)
- Due Date** text input field (value: 12/25/2020)
- Remarks** text area
- Action:** dropdown menu (value: Route to employee)
- Employee** dropdown menu (placeholder: -- Select An Employee --)
- Save & Process** button
- Save & Next** button with a right arrow

2. New Document Status Tab – “Spotlight”

Documents automatically stored under this tab include the following Form Types:

- T16 – 561N - Request for Reconsideration (Non-Medical)
- Concurrent – 561N - Request for Reconsideration (Non-Medical)
- T16 – 632 - Request for Waiver of Overpayment Recovery
- Concurrent – 632-Request for Waiver of Overpayment Recovery

These forms are time-sensitive and should be processed according to local FO instructions.

My Work

The 'My Work' dashboard displays the following status counts:

- Pending (50)
- Profile (27)
- Process (23)
- Hold (0)
- Spotlight (2)** (highlighted with a red box)
- Completed (0)
- Closed (0)

D. Summary

Technicians should follow current FO workflows for processing, including making necessary inputs and uploading the

scanned image into NDRED or eView as appropriate. Once uploaded or otherwise processed, the document will be marked as “complete” and will no longer be on the FO pending list in WorkTrack.

E. Closing

Direct all program-related and technical questions to your Regional Office (RO) support staff or Program Service Center (PSC) Operations Analysis (OA) staff. RO support staff or PSC OA staff may refer questions, concerns, or problems to their Central Office contacts.

References

[SI 04020.020](#) Requests for SSI Reconsideration

[SI 02260.001](#) Basic Requirements Concerning Supplemental Income (SSI) Overpayment Waiver

[SI 02301.300](#) Due Process Protections – General

[EM-21051](#) Mandating Use of the Dallas Appeals Application for Non-Medical Post Eligibility Supplemental Security Income Reconsideration Requests

[WorkTrack User Guide](#)