STATEMENT OF CARE AND RESPONSIBILITY FOR BENEFICIARY

NAME AND ADDRESS OF CUSTODIAN

See Revised PA Statement

In replying, use this address:
SOCIAL SECURITY ADMINISTRATION

TELEPHONE NUMBER

DATE

SSA CONTACT

Sections 205(a) and 205(j) of the Social Security Act allow us to ask for the information on this form. Although responses to these questions are voluntary, the information you provide is needed to establish an applicant's suitability to serve as representative payee.

We may also use the information you give us when we match records by computer. Matching programs compare our records with those of other Federal, State, or local government agencies. Many agencies may use matching programs to find or prove that a person qualifies for benefits paid by the Federal government. The law allows us to do this even if you do not agree to it.

Explanations about these and other reasons why information you provide us may be used or given out are available in Social Security offices. If you want to learn more about this, contact any Social Security office.

IDENTIFYING INFORMATION
(if different from patient)

NAME OF WAGE EARNER OR SELF-EMPLOYED PERSON

SOCIAL SECURITY NUMBER

APPLICANT'S NAME AND ADDRESS

BENEFICIARY NAME

BENEFICIARY SOCIAL SECURITY NUMBER

APPLICANT'S RELATIONSHIP TO BENEFICIARY

YOUR HELP IS NEEDED

The applicant shown above has applied to be appointed representative payee for the above beneficiary. We need you to complete this form and return it to us in the enclosed envelope. The information you provide will help us decide if we should pay this person directly or if he or she needs a representative payee to handle funds. If a representative payee is needed, you will help us to determine the responsibility assumed by the applicant for the beneficiary's well-being. Thank you for your help.

1. DATE BENEFICIARY BEGAN LIVING WITH YOU (month/day/year)	HOW LONG WILL BENEFICIARY LIVE WITH YOU?	REASON BENEFICIARY DOES NOT LIVE WITH THE APPLICANT

2. If the beneficiary is not living with you, where and with whom is the beneficiary living and when did he or she leave your care?

3. Do you believe the beneficiary is capable of managing or directing the management of benefits in his or her own best interest?

By capable we mean the beneficiary:
- Is able to understand and act on the ordinary affairs of life, such as providing for own food, housing, clothing, etc., and
- Is able, in spite of physical impairments, to manage funds or direct others how to manage them.

☐ YES ☐ NO ☐ UNSURE

If "NO" or "Unsure," please provide a brief explanation.

4. Please show the approximate amount you charge each month for the beneficiary's room, board, and care — PER MONTH $

5. Does (or did) any agency, including the applicant, pay toward the cost of the beneficiary's care and maintenance? ☐ YES ☐ NO

If "Yes," please supply the information requested below.

NAME AND ADDRESS	AMOUNT CONTRIBUTED	HOW OFTEN CONTRIBUTIONS ARE MADE

6. How often and when was the last time the applicant did any of the things shown below for the beneficiary?

	VISIT	SENDS CLOTHING	SENDS OTHER GIFTS	WRITES LETTERS
How often?				
Last Time?				

7. List the names and relationship of any other relatives or close friends who have provided support and/or show interest in the claimant. Describe the type and amount of support and/or how interest is displayed.

NAME	ADDRESS/PHONE NO.	RELATIONSHIP	SUPPORT/INTEREST

8. Does the beneficiary have any unmet personal needs at this time? ☐ YES ☐ NO

If "Yes," please list the needs.

9. In emergency situations, where the beneficiary needs surgery, becomes seriously ill, etc., who would you notify?

NAME	ADDRESS

1 0. Does the applicant give you any instructions for the care of the beneficiary? ☐ YES ☐ NO

If "Yes," explain what those instructions are, how often they are given, and what the applicant does to see that they are carried out.

REMARKS: (This space may be used for explaining any answers to the questions. If you need more space, attach a separate sheet.)

I declare under penalty of perjury that I have examined all the information on this form, and on any accompanying statements or forms, and it is true and correct to the best of my knowledge. I understand that anyone who knowingly gives a false or misleading statement about a material fact in this information, or causes someone else to do so, commits a crime and may be sent to prison, or may face other penalties, or both.

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by Section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 10 minutes to read the instructions, gather the facts, and answer the questions. SEND THE COMPLETED FORM TO YOUR LOCAL SOCIAL SECURITY OFFICE. The office is listed under U. S. Government agencies in your telephone directory or you may call Social Security at 1-800-772-1213. *You may send comments on our time estimate above to: SSA, 1338 Annex Building, Baltimore, MD 21235-0001.* **Send only comments relating to our time estimate to** *this* **address, not** *the* **completed form.** See Revised Paperwork Reduction Act Statement

SIGNATURE OF PERSON

SIGNATURE **(First name, middle initial, last name) (Write in ink)**	DATE **(Month, day, year)**
SIGN HERE ▶	TELEPHONE NUMBER **(include area code)**

MAILING ADDRESS **(Number and street, Apt. No., P.O. Box, or Rural Route)**

CITY AND STATE	ZIP CODE	NAME OF COUNTY (IF ANY)

Witnesses are required ONLY if this statement has been signed by mark (X) above. If signed by mark (X), two witnesses to the signing who know the individual must sign below, giving their full address.

1. SIGNATURE OF WITNESS	2. SIGNATURE OF WITNESS
ADDRESS (No. & Street, City, State & ZIP Code)	ADDRESS (No. & Street, City, State & ZIP Code)

REMARKS: (Continued--If you need more space, please attach a separate sheet)

The following revised Privacy Act Statement will be inserted into the form at its next scheduled reprinting:

Privacy Act Statement

Collection and Use of Personal Information

Sections 205(a) and 205(j) of the Social Security Act, as amended, authorize us to collect the information on this form. The information you provide will help us establish your suitability to serve as representative payee. Your response is voluntary. However, failure to provide the requested information may prevent our decision to select you as representative payee.

We rarely use the information provided on this form for any purpose other than for establishing payee suitability. However, in accordance with 5 U.S.C. § 552a(b) of the Privacy Act, we may disclose the information provided on this form (1) to enable a third party or an agency to assist Social Security in evaluating payee applicants' suitability to be named representative payees; (2) to claimants or other individuals when needed to pursue a claim for recovery of misapplied or misused benefits; (3) to comply with Federal laws requiring the disclosure of the information from our records; and (4) to facilitate statistical research, audit or investigative activities necessary to assure the integrity of SSA programs.

We may also use the information you provide when we match records by computer. Computer matching programs compare our records with those of other Federal, state or local government agencies. Information from these matching programs can be used to establish or verify a person's eligibility for federally funded or administered benefit programs and for repayment of payments or delinquent debts under these programs. The law allows us to do this even if you do not agree to it.

A complete list of routine uses for this information is contained in our System of Records Notice 60-0222 (Master Representative Payee File). Additional information regarding this form and our other systems of records notices and Social Security programs are available from our Internet website at www.socialsecurity.gov or at your local Social Security office.

The following revised PRA Statement will be inserted into the form at its next scheduled reprinting:

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 10 minutes to read the instructions, gather the facts, and answer the questions. **SEND OR BRING THE COMPLETED FORM TO YOUR LOCAL SOCIAL SECURITY OFFICE. The office is listed under U. S. Government agencies in your telephone directory or you may call Social Security at 1-800-772-1213 (TTY 1-800-325-0778).** *You may send comments on our time estimate above to*: *SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.* ***Send only comments relating to our time estimate to this address, not the completed form.***