

Screen Shots for SSI claim system Household Expenses and Contributions Page

The attached SSI claim system “Household Expenses and Contributions” page establishes whether a bona fide loan of ISM (food or shelter) exists. The information is collected during the interviewing process. Form SSA-5062 (“Claimant’s Statement About Loan of Food or Shelter”) collects additional information necessary to support the claimant’s statement that he or she has a bona fide loan of ISM. The SSA-L5063-F3 (“Statement About Food or Shelter Provided to Another”) collects information from the lender to verify that the claimant has a bona fide loan of ISM.

FACSIMILE 1: HOUSEHOLD EXPENSES AND CONTRIBUTIONS

[1-D]

PERIOD EFFECTIVE DATES SS/SS/SSSS – SS/SS/SSSS

HOUSEHOLD EXPENSES AND CONTRIBUTIONS

*INDICATES REQUIRED INFORMATION

[2-M]

*ALL PUBLIC ASSISTANCE HOUSEHOLD

YES NO UNKNOWN

[3-C]

*PUBLIC ASSISTANCE WITH TEMPORARY ASSISTANCE FOR NEEDY FAMILIES PAYMENT CAP HOUSEHOLD

YES NO UNKNOWN

[12-C]

*LOAN AGREEMENT REGARDING HOUSEHOLD EXPENSES [\[13-O\] MORE INFO](#)

YES NO UNKNOWN

[14-C]

*BONA FIDE LOAN EXISTS

YES NO UNKNOWN

[\[15-C\]](#)

*ASSUMED TO COVER PRO RATA SHARE

YES NO DECIDE LATER

[\[16-O\]](#)

DEVELOP INSIDE IN-KIND SUPPORT AND MAINTENANCE OR UNSTATED INCOME

[\[13-O\]](#)

[MORE INFO](#)

[\[17-C\]](#)

*DO OTHERS CONTRIBUTE TO HOUSEHOLD EXPENSES

YES NO UNKNOWN

[\[18-C\]](#)

*EATS ALL MEALS OUT

YES NO UNKNOWN

[\[19-C\]](#)

*BUYS FOOD SEPARATE FROM HOUSEHOLD

YES NO UNKNOWN

CONTRIBUTION AVERAGE PERIOD

[\[20-C\]](#)

*DATE FROM UNKNOWN

PP/PPPP

(MM/YYYY)

[\[21-C\]](#)

*DATE TO UNKNOWN

PP/PPPP

(MM/YYYY)

[\[22-C\]](#)

*AMOUNT OTHERS CONTRIBUTE \$9999.99 UNKNOWN

[\[23-C\]](#)

*MONTHLY LOAN AMOUNT \$9999.99 UNKNOWN

[\[24-C\]](#)

*CLAIMANT'S CONTRIBUTION \$9999.99 [] UNKNOWN
EXPENSE AVERAGE PERIOD

[\[25-C\]](#)

*DATE FROM
PP/PPPP
(MM/YYYY)

[\[26-C\]](#)

*DATE TO [] UNKNOWN
PP/PPPP
(MM/YYYY)

*MONTHLY EXPENSES

FOR THE PERIOD ABOVE, COLLECT THE FOLLOWING EXPENSES

[\[27-C\]](#)

*FOOD(\$)
9999.99

[\[28-P\]](#)

*MORTGAGE
OR RENT(\$)
PPPP.PP

[\[29-C\]](#)

*PROPERTY
INSURANCE(\$)
9999.99

[\[30-C\]](#)

*PROPERTY
TAXES(\$)
9999.99

[\[31-C\]](#)

*HEATING
FUEL(\$)
9999.99

[\[32-C\]](#)

*ELECTRICITY(\$)
9999.99

[\[33-C\]](#)

*GAS(\$)
REMOVAL(\$)
9999.99

[\[34-C\]](#)

*GARBAGE
9999.99

[\[35-C\]](#)

*WATER(\$)
9999.99

[\[36-C\]](#)

*SEWER(\$)
9999.99

[\[37-O\]](#)

UNKNOWN
[]

[\[38-D\]](#)

TOTAL MONTHLY EXPENSES \$SSSSS.SS

[\[39-D\]](#)

PRO RATA SHARE FOR (CLAIMANT FIRST NAME + LAST NAME) – (SSN) – (RELATIONSHIP) \$SSSS.SS

DEEMOR CONTRIBUTION

[\[40-D\]](#)

DEEMOR

[\[41-C\]](#)

*DEEMOR
CONTRIBUTION
EXCESS
AMOUNT(\$)
9999.99

[\[42-D\]](#)

DEEMOR
EXCESS
CONTRIBUTION(\$)
SSSS.SS

[\[43-D\]](#)

CLAIMANT'S
SHARE OF
EXCESS(\$)
SSSS.SS

[\[37-O\]](#)

UNKNOWN
[]

[\[44-D\]](#)

TOTAL CONTRIBUTION FOR CLAIMANT \$SSSS.SS

[\[45-D\]](#)

CLAIMANT'S EXCESS CONTRIBUTION \$SSSS.SS

[\[46-D\]](#)

INSIDE ISM TO (CLAIMANT FIRST NAME + LAST NAME) – (SSN) – (RELATIONSHIP) \$SSSS.SS

[\[47-D\]](#)

CASH FROM WITHIN HOUSEHOLD TO (CLAIMANT FIRST NAME + LAST NAME) – (SSN) – (RELATIONSHIP) \$SSSS.SS

[\[48-C\]](#)

*CONTRIBUTION VERIFICATION RECEIVED

() YES () NO

[\[7-O\]](#)

[V/^] SHOW/HIDE PERSON REMARKS

[\[8-O\]](#)

PERSON REMARKS (PRINTED)

XX[MAXIMUM OF 1000 CHARACTERS]XX

[\[9-O\]](#)

[V/^] SHOW/HIDE FILE DOCUMENTATION NOTES

[\[10-O\]](#)

FILE DOCUMENTATION NOTES

XX[MAXIMUM OF 1000 CHARACTERS]XX

[\[11-O\]](#)

[CLEAR PAGE/UNDO CHANGES]

SCREEN SHOT 1: HOUSEHOLD EXPENSES AND CONTRIBUTIONS

Household Expenses and Contributions

* Indicates required information

All public assistance household

Yes No Unknown

Public assistance with Temporary Assistance for Needy Families payment cap household

Yes No Unknown

Loan agreement regarding household expenses [More Info](#)

Yes No Unknown

Bona fide loan exists

Yes No Unknown

Assumed to cover pro rata share

Yes No Decide later

Develop inside in-kind support and maintenance or unstated income [More Info](#)

*** Do others contribute to household expenses**

Yes No Unknown

*** Eats all meals out**

Yes No Unknown

Contribution average period

*** Date from**

11/2012
mm/yyyy

Unknown

*** Date to**

11/2012
mm/yyyy

Unknown

*** Amount others contribute**

\$

Unknown

*** Claimant's contribution**

\$

Unknown

Expense average period

*** Date from**

11/2012
mm/yyyy

Unknown

*** Date to**

11/2012
mm/yyyy

Unknown

Monthly Expenses

For the period above, collect the following expenses

* Food (\$)	* Mortgage or Rent (\$)	* Heating Fuel (\$)	* Electricity (\$)	* Gas (\$)	* Garbage Removal (\$)	* Water (\$)	* Sewer (\$)	Unknown
	2,000.00							<input type="checkbox"/>

Total monthly expenses \$ (incomplete)

Pro rata share for [REDACTED] Claimant \$0.00 (incomplete)

Deemor Contribution

Deemor	* Deemor Contribution Amount (\$)	Deemor Excess Contribution (\$)	Claimant's Share of Excess (\$)	Unknown
[REDACTED] Parent	<input type="text"/> <small>Unknown</small>			<input checked="" type="checkbox"/>
[REDACTED] Parent	<input type="text"/> <small>Unknown</small>			<input checked="" type="checkbox"/>

Total contribution for claimant \$ 0.00 (incomplete)

Claimant's excess contribution \$ 0.00 (incomplete)

Inside ISM to [REDACTED] Claimant \$ 0.00 (incomplete)

Cash from within the household to [REDACTED] Claimant \$ 0.00 (incomplete)

*** Contribution verification received**

Yes No

▼ Show person remarks

No remarks

▼ Show file documentation notes