

# Social Security Administration Reporting A Change That May Affect Your Extra Help



Because of the report you made to us, we must review your eligibility for Extra Help with Medicare prescription drug plan costs. We will check that you are still eligible and that your Extra Help, also known as the subsidy, is correct. We want to make this review as simple as possible for you, so you will not need to visit the office.

## What We Will Do To Review Your Case

As part of the review, we will look at current information in our records. Your continued eligibility is determined by the amount of your resources, income and household size. If you have a spouse and you are living together, your total resources and income count.

## What You Need To Do For This Review

- Please complete the enclosed form; do not use the form on the Internet website.
- Refer to the *Resources and Income Summary* on the back of this letter when completing the form.
- Sign and return the form in the enclosed envelope within 90 days.

## If You Do Not Return This Form

If you do not return this form within 90 days, your Extra Help with Medicare prescription drug plan costs will be terminated. If you are waiting for information from another agency or need assistance, you can call Social Security toll-free at **1-800-772-1213** (TTY **1-800-325-0778**). If you need assistance, we can give you an additional 30 days to return the form to us.

*Social Security Administration*

Enclosures

# Social Security Administration Resources and Income Summary



Name \_\_\_\_\_  
Spouse Name \_\_\_\_\_

**This page shows information we have about your resources and income. Please review the information below and refer back to this page when completing the enclosed form (SSA-1026):**

<b>Resources (see question 5)</b>	<b>Value</b>
Bank accounts .....	\$ _____
Stocks, bonds or other investments .....	\$ _____
Cash .....	\$ _____
Value of real estate other than your home .....	\$ _____

**Household Size (see question 7)** .....

<b>Income Not From Work (see question 8)</b>	<b>Monthly Amount</b>
Social Security benefits before deductions .....	\$ _____
Railroad Retirement benefits before deductions .....	\$ _____
Veteran's benefits before deductions .....	\$ _____
Other pensions or annuities before deductions .....	\$ _____
Other income .....	\$ _____

<b>Earned Income (see question 9)</b>	<b>Annual Amount</b>
Wages before taxes and deductions	
Yours .....	\$ _____
Your spouse's .....	\$ _____
Net earnings from self-employment	
Yours .....	\$ _____
Your spouse's .....	\$ _____
Net loss from self-employment	
Yours .....	\$ _____
Your spouse's .....	\$ _____

<b>Disability Or Blind Work Expenses (see question 10)</b>	<b>Monthly Amount</b>
Disability work expenses .....	\$ _____
Blind work expenses .....	\$ _____

**KEEP THIS PAGE FOR YOUR RECORDS**



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# **Statement for Continuing Eligibility for Extra Help with Medicare Prescription Drug Plan Costs**

*Please go to the next page*

# Instructions for Completing the Statement for Continuing Eligibility for Extra Help with Medicare Prescription Drug Plan Costs



## If You Are Assisting Someone Else With This Form

Answer the questions as if that person were completing the form. You must know that person's Social Security number and financial information. Also, complete Section B on page 6.

## How To Complete This Form

- Refer to the *Resources and Income Summary* on the back of the enclosed letter when completing this form;
- Use **BLACK INK** only;
- **Keep your numbers, Xs and letters inside the boxes; use only CAPITAL letters;**
- Do not add any handwritten comments on the form;
- Do not use dollar signs when entering money amounts. The dollar sign is preprinted; and
- Cents can be rounded to the nearest whole dollar.

**EXAMPLE**

Place an X in the box. **DO NOT** fill in or use check marks in boxes.

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**EXAMPLE**

Use capital letters when entering answers

A	B	C	D
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## Completing Your Form

Please use the enclosed pre-addressed stamped envelope to return your completed and signed form to:

**Social Security Administration  
Wilkes-Barre Direct Operations Center  
P.O. Box 1080  
Wilkes-Barre, PA 18767**

The *Resources and Income Summary* sheet on the back of the enclosed letter will assist you in completing this form. **Do not include** the *Resources and Income Summary* sheet or any attachments when you return the form in the enclosed postage-paid envelope. If we need more information, such as statements from financial institutions, we will contact you.

## If You Have Questions Or Need Help Completing This Form

You can call us toll-free at **1-800-772-1213**, or if you are deaf or hard of hearing, you may call our TTY number, **1-800-325-0778**.





4. If **all** of the information on the *Resources and Income Summary* is correct, place an  in the box and go to question 11 on page 5, sign and return this form.

If **any** of the information on the *Resources and Income Summary* is **incorrect**, continue to question 5.

5. We need to know about **resources** that you, your spouse (if married and living together) or both of you have.

*Instructions:* Please look at the information we have about your resources on the *Resources and Income Summary* on the back of the enclosed letter.

If the information has **not** changed, place an  in the box and go to question 6.

If the information **has** changed, fill in the new amount in the boxes below.

Type of Resource	The Correct Amount Is
Bank accounts (checking, savings and certificates of deposit)	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Stocks, bonds, savings bonds, mutual funds, Individual Retirement Accounts or other similar investments	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Cash	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Value of real estate other than your home	\$ <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>

6. Will some money from the sources listed in **question 5** be used to pay for funeral or burial expenses?  
If **YES**, skip to question 7.

If **NO**, place an  in the **NO** box, then go to question 7.

YOU:  **NO**

SPOUSE:  **NO**



7. For this question, a relative is someone related to you by blood, adoption, or marriage (but not including your spouse). How many relatives live with you and depend on you or your spouse for **at least one-half** of their financial support?

*Instructions:* Please look at the information we have about your household size on the *Resources and Income Summary* on the back of the enclosed letter. If the information has **not** changed, place an  in the box and go to question 8.

**Please do not include yourself or your spouse in the number you enter.** If your household consists only of you or you and your spouse, place an  in the ZERO box. Place an  in only one box.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>ZERO</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9 or more</b>

8. We need to know about **income not from work** that you, your spouse (if married and living together) or both of you have from any of the sources listed below.

*Instructions:* Please look at the information we have about your income not from work on the *Resources and Income Summary* on the back of the enclosed letter.

If the information has **not** changed, place an  in the box and go to question 9.

If the information **has** changed, fill in the new amount in the boxes below.

	<b>The Correct Monthly Amount Is</b>
Social Security benefits <b>before deductions</b>	\$ <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> , <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> . <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/>
Railroad Retirement benefits <b>before deductions</b>	\$ <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> , <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> . <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/>
Veteran's benefits <b>before deductions</b>	\$ <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> , <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> . <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/>
Other pensions or annuities <b>before deductions.</b> Do not include money you receive from any item you included in question 5.	\$ <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> , <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> . <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/>
Other income not listed above, including alimony, net rental income, workers compensation, unemployment, private or State disability payments, etc. (Specify): _____	\$ <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> , <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid red;" type="text"/> . <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid blue;" type="text"/>



9. We need to know about **annual earned income** from work that you, your spouse (if married and living together) or both of you have.

*Instructions:* Please look at the information we have about your earned income on the *Resources and Income Summary* on the back of the enclosed letter.

If the information has **not** changed, place an  in the box and go to question 10.

If the information **has** changed, fill in the new amount in the boxes below.

Type of Earned Income	The Correct Annual Amount Is		
Wages <b>before taxes and deductions</b>	<b>YOU</b>	\$	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
	<b>SPOUSE</b>	\$	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Net earnings from self-employment	<b>YOU</b>	\$	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
	<b>SPOUSE</b>	\$	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
Net loss from self-employment	<b>YOU</b>	\$	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>
	<b>SPOUSE</b>	\$	<input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> . <input type="text"/> <input type="text"/>

10. Do you, your spouse (if married and living together), or both have to pay for things that enable you to work (also known as **disability or blind work expenses**)? We will count only a part of your earnings toward the income limit if you work and receive Social Security benefits based on a disability or blindness and you have work-related expenses for which you are not reimbursed. Examples of such expenses are: the costs of medical treatment and drugs for AIDS, cancer, depression or epilepsy; a wheelchair; personal attendant services; vehicle modifications, driver assistance or other special work-related transportation needs; work-related assistive technology; guide dog expenses; sensory and visual aids; and Braille translations.

**YOU:**  YES  NO

**SPOUSE:**  YES  NO

11. If you or your spouse (if married and living together) work and plan to stop working, enter month and year. Otherwise sign the form on page 6 and return it to us.

**EXAMPLE**

For January – September, place a zero (0) in the first box. May 2019 should read:

<input type="text"/> 0	<input type="text"/> 5	<input type="text"/> 2	<input type="text"/> 0	<input type="text"/> 1	<input type="text"/> 9
M	M	Y	Y	Y	Y

**YOU:**  – 20  
**MM** **Y Y Y Y**

**SPOUSE:**  – 20  
**MM** **Y Y Y Y**





## Signatures

### IMPORTANT INFORMATION - PLEASE READ CAREFULLY

I/We understand that the Social Security Administration (SSA) will check my/our statements and compare its records with records from Federal, State, and local government agencies, including the Internal Revenue Service (IRS) to make sure the determination is correct.

By submitting this form, I am/we are authorizing SSA to obtain and disclose information related to my/our income, resources, and assets, foreign and domestic, consistent with applicable privacy laws. This information may include, but is not limited to, information about my/our wages, account balances, investments, benefits, and pensions.

I/We declare under penalty of perjury that I/we have examined all the information on this form and it is true and correct to the best of my/our knowledge.

**Please complete Section A. If you cannot sign, a representative may sign for you. If someone assisted you, complete Section B as well.**

#### Section A

<b>Your Signature:</b>	Date:	Phone Number: (    )    -
Spouse's Signature:	Date:	
Your Mailing Address:		Apt. #:
City:	State:	Zip Code:

If you changed your mailing address within the last three months, place an  in the box:

If you would prefer that we contact someone else if we have additional questions, please provide the person's name and a daytime phone number.

Print First Name:	Print Last Name:	Phone Number: (    )    -
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#### Section B

If you are assisting someone else, place an  in the box that describes who you are and provide your daytime phone number and address.

- Family Member   
 Attorney   
 Other Advocate   
 Other Specify: \_\_\_\_\_
- Friend   
 Agency   
 Social Worker   
\_\_\_\_\_

Print First Name:	Print Last Name:	Phone Number: (    )    -
Address:		Apt. #:
City:	State:	Zip Code:



## Privacy Act / Paperwork Reduction Notice

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Section 1860D-14 of the Social Security Act, as amended, allows us to collect this information. Furnishing us this information is voluntary. However, failing to provide all or part of the information may affect your eligibility for the Medicare Prescription Drug Plan (Part D) subsidy.

We will use the information to review and re-determine your eligibility for the Medicare Part D subsidy. We may also share your information for the following purposes, called routine uses:

1. To applicants, claimants, prospective applicants or claimants (other than the data subjects and their authorized representatives) to the extent necessary for the purpose of pursuing Medicare Part D and Part D subsidy entitlement or appeal rights; and
2. To the Centers for Medicare and Medicaid Services, for the purpose of administering Medicare Part D enrollment and premium collection and Medicare Advantage Part C premium collections, as well as Medicare Part B income-related monthly adjustment amounts.

In addition, we may share this information in accordance with the Privacy Act and other Federal laws. For example, where authorized, we may use and disclose this information in computer matching programs, in which our records are compared with other records to establish or verify a person's eligibility for Federal benefit programs and for repayment of incorrect or delinquent debts under these programs.

A list of additional routine uses is available in our Privacy Act System of Records Notice (SORN) 60-0321, entitled Medicare Database File. Additional information and a full listing of all our SORNs are available on our website at [www.ssa.gov/privacy/sorn.html](http://www.ssa.gov/privacy/sorn.html).

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 18 minutes to read the instructions, gather the facts, and answer the questions. 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.**

**SEND THE COMPLETED FORM TO US AT THE ADDRESS SHOWN ON THE ENCLOSED PRE-ADDRESSED, POSTAGE-PAID ENVELOPE:**

**Social Security Administration  
Wilkes-Barre Direct Operations Center  
P.O. Box 1080  
Wilkes-Barre, PA 18767**