

Example Screens

SSA Request: The screens an SSA employee sees when creating a new AFI request using the e4641 system.

1.1

The screenshot shows the login interface for the SSA 4641 system. At the top, the text "SSA 4641" is displayed in a large, blue, serif font. Below this, a blue horizontal bar contains the text "Social Security Administration E4641". The main heading is "Social Security Administration - Form 4641". A paragraph of text explains that this is a U.S. Government computer system subject to Federal law, with no expectation of user privacy. A second paragraph states that unauthorized access is strictly prohibited and subject to disciplinary or criminal action. Below the text is a "Log In Information" section with two input fields: "User ID:" and "Password:". A "Forgot Password?" link is positioned to the right of the password field. Below the input fields is a "Submit Log In Information" section containing two buttons: "Login" and "Reset". At the bottom right of the page, a copyright notice reads "©2018 Accuity Asset Verification Services Inc. All rights reserved."

1.2

The screenshot displays the dashboard for the SSA 4641 system. The top left features the "SSA 4641" logo. To the right of the logo is a search bar with the text "Requests/DOI ID" and "HON/NR SSN" and a "Quick Search" button. Below the logo is a blue bar with the text "Social Security Administration E4641". The dashboard is divided into several sections. On the left is a "Welcome" section with a user profile picture and the text "OQP (N04) OQP OQR T16 BALTIMORE, MD 21235 [switch account]". Below this is a vertical navigation menu with items: "Home", "Response Inbox", "New Request", "My Requests", "Unsent Requests", "Reports", "Participation Report", "F.I. Favorites", "Contact Support", and "Log Out". The main content area starts with a warning: "This application times out after 30 minutes of inactivity. Welcome, [redacted]". Below this are several informational boxes: "Response Inbox" (0 new responses, 6 total), "New Request" (Create a New Request), "My Requests" (Check status on all of your Requests), "Unsent Requests" (32 Unsent Request(s)), and "Excess Resource Alerts". On the right side, there are four more boxes: "User Support Information" (no new tips or updates, 1 total new system message), "Edit Your Email Notifications", "Change Your Password / Security Questions", and "SSA User Guide" (links to Administrator Guide, User Guide, and Password Reset Guidelines PDFs). At the bottom right, a copyright notice reads "© 2018 Accuity Asset Verification Services Inc. All rights reserved."

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Request WebForm - Customer Information

Steps: [Customer Information] [Account Information] [Review Data]

* = Required Information

Request ID Information

*Request ID:

Financial Institution Information

*FI Name: Embarcadero FCU

*Street Address: 555 Battery St

*City: San Francisco

*State: CA

*ZIP: 94126

Select Adjudicator

Adjudicator: [Select Adjudicator]

Internal SSA Information

*HUN/NH SSN: []

*Request Type:

SSI Eligibility

SSI Initial Claim

SSI RZ/LI

Waivers

SSI Waiver

RSI Waiver

DIB Waiver

SSI/RSI/DIB Concurrent Waiver

Customer Information

*First Name: []

Middle: []

*Last Name: []

Suffix: []

*SSN: [][][]-[][][]-[][][]

*Street Address: []

Use as Address Reference Point

*City: []

*State: [Select State]

*ZIP: []

Customer Other Names

First Name	Middle Name	Last Name	Suffix

Applicant/Recipient Information (If not Customer)

First Name: []

Middle: []

Last Name: []

Legal Representative or Representative Payee's Information (If Applicable)

First Name: []

Middle: []

Last Name: []

Street Address: []

Use as Address Reference Point

City: []

State: [Select State]

ZIP: []

Witness Information

Your authorization does not ordinarily have to be witnessed. However, if you have signed by mark (X), two witnesses to the signing who know you must sign below giving their full addresses.

Witness 1

Street Address: []

City: []

State: [Select State]

ZIP: []

Witness 2

Street Address: []

City: []

State: [Select State]

ZIP: []

Continue

Continue [Save to Unsent Requests] [Delete Request]

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
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- Unsent Requests
- Reports
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- Contact Support
- Log Out

Request WebForm - Customer Information

Steps: [Customer Information] [Account Information] [Review Data]

* = Required Information

Request ID Information

*Request ID:

Financial Institution Information

*FI Name: Embarcadero FCU
 *Street Address: 555 Battery St
 *City: San Francisco *State: CA *ZIP: 94126

Select Adjudicator

Adjudicator:

Internal SSA Information

*HUN/NH SSN:
 *Request Type: SSI Eligibility Waivers
 SSI Initial Claim SSI Waiver DIB Waiver
 SSI RZ/LI RSI Waiver SSI/RSI/DIB Concurrent Waiver

Customer Information

*First Name: Middle: *Last Name: Suffix:
 *SSN:
 *Street Address: Use as Address Reference Point
 *City: San Francisco *State: CA *ZIP: 94126

Customer Other Names

First Name	Middle Name	Last Name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Applicant/Recipient Information (If not Customer)

First Name: Middle: Last Name:

Legal Representative or Representative Payee's Information (If Applicable)

First Name: Middle: Last Name:
 Street Address: Use as Address Reference Point
 City: State: ZIP:

Witness Information

Your authorization does not ordinarily have to be witnessed. However, if you have signed by mark (X), two witnesses to the signing who know you must sign below giving their full addresses.

Witness 1

Street Address: State: ZIP:
City:

Witness 2

Street Address: State: ZIP:
City:

Continue

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Request WebForm - Account Information

Steps: [Customer Information] [Account Information] [Review Data]

*** = Required Information**

Request ID Information

*Request ID: 362501

Account Information : Date Range

*From Month: August *From Year: 2016 *To Month: September *To Year: 2018

Add Additional Date Ranges

Account Numbers

Account 1:

Account 2:

Account 3:

Account 4:

Joint Account

Joint Account

Joint Account

Joint Account

SSI Direct Deposit

SSI Direct Deposit

SSI Direct Deposit

SSI Direct Deposit

Add Additional Accounts

Additional Information or Remarks

Request Interest Information

Remarks:

(Maximum 1000 Characters)

Continue

Create Geo SubRequests Continue Save to Unsent Requests Delete Request

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Request WebForm - Review Data

Steps: [Customer Information] [Account Information] [Review Data]

Review data.

* = Required Information

Request ID Information

*Request ID: 362501G

SSA Request ID:

Financial Institution Information

*FI Name: Embarcadero FCU
*Street Address: 555 Battery St
*City: San Francisco

*State: CA

*ZIP: 94126

Adjudicator

Adjudicator:

Internal SSA Information

*HUN/NH/SSN: [REDACTED]
*Request Type: SSI Initial Claim

Revise

Customer Information

*First Name: [REDACTED] Middle: [REDACTED] *Last Name: [REDACTED] Suffix: Jr
Other Names: [REDACTED]
*SSN: [REDACTED]
*Street Address: [REDACTED]
*City: San Francisco *State: CA *ZIP: 94126

Revise

Applicant/Recipient Information

Not Applicable

Revise

Legal Representative or Representative Payee's Information (If Applicable)

Not Applicable

Revise

Witness Information

Not Applicable

Revise

Account Information

*From Month: Aug *From Year: 2016 *To Month: Sep *To Year: 2018

Interest Requested: NO
Remarks:

Revise

Sub Requests

FI Name and Address	Institution Type	Locations in Area	Central Process	Distance to Closest	Delete?
Bank of America, National Association 100 N Tryon St Charlotte, NC 28255	Bank	194	Yes	12.46	<input type="checkbox"/>
Citibank, N.A. 3900 Paradise Rd, Ste 127 Las Vegas, NV 89109	Bank	76	Yes	12.85	<input type="checkbox"/>
HSBC Bank USA, National Association One HSBC Ctr Buffalo, NY 14203	Bank	1	Yes	13.54	<input type="checkbox"/>
Provident CU 303 Twin Dolphin Dr Redwood City, CA 94065-1419	Credit Union	3	Yes	15.27	<input type="checkbox"/>
Wells Fargo Bank, National Association 101 N Phillips Ave Sioux Falls, SD 57104	Bank	2	Yes	16.33	<input type="checkbox"/>

Delete All SubRequests

Delete Selected SubRequests

Print Form 4641

Select View and Print Form 4641. The PDF file of the populated Form 4641 may open in a new window or it might be loaded into the current window depending on your web browser settings. If the form is loaded into your current web browser window, you will have to re-enter the system to return to this page. Select Print from the Toolbar to print the document once it has opened. Adobe Reader is required to view the PDF file below.

View and Print Form 4641

Continue

All required fields must be completed before continuing to authorization.

Save to Unsent Requests Delete Request Copy to Request

Welcome



[switch account]

- Home
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- E.I. Favorites
- Contact Support
- Log Out

Request WebForm - Authorization

* Required Information

Request ID Information

*Request ID: [REDACTED]

Authorization

I understand:

- I have the right to revoke this authorization at any time before any records are disclosed;
- The Social Security Administration may request all records about me from any financial institution;
- Any information obtained will be kept confidential;
- I have the right to obtain a copy of the record which the financial institution keeps concerning the instances when it has disclosed records to a government authority unless the records were disclosed because of a court order; and
- This authorization is not required as a condition of doing business with any financial institution.

Supplemental Security Income Eligibility

- The Social Security Administration will request records to determine initial or continuing eligibility and the accuracy of the payment for Supplemental Security Income (SSI) benefits.
- If I am an applicant or recipient, failing to provide or revoking my authorization will result in a denial or suspension of SSI benefits.
- If I am a person whose income and resources the Social Security Administration considers as being available to an applicant or recipient, failing to provide or revoking my authorization may result in a denial of benefits for the applicant or a suspension of benefits for the recipient.
- This authorization is in effect until the earliest of: 1) a final adverse decision on my application for benefits, 2) the cessation of my eligibility for benefits, or 3) my revocation of this authorization in a written notification to the Social Security Administration.

I authorize any custodian of records at this financial institution to disclose to the Social Security Administration any records about my financial business or that of the person named above whom I legally represent or whose benefits I manage.

*Authorizing signature is on file. Customer Signed Permanent Authorization.

*Date Signed: [REDACTED]

Geo SubRequest Information

In addition to the institution identified on pg. 1 of Form 4641, SSA is authorized to submit Requests to the following institutions:

- CAPITAL ONE, NATIONAL ASSOCIATION**
45 S MAIN ST
BRAINFORD, CT 06405-3891
- FIRST NATIONAL BANK OF PENNSYLVANIA**
166 MAIN ST
GREENVILLE, PA 16125-2146
- HOWARD BANK**
3301 BOSTON ST
BALTIMORE, MD 21224-4976
- Manufacturers and Traders Trust Company**
One M B T Plaza, 15th Fl
Buffalo, NY 14203
- NAVY FCU**
820 FOLLIN LN
VIENNA, VA 22180-4907
- PNC BANK, NATIONAL ASSOCIATION**
222 DELAWARE AVE
WILMINGTON, DE 19801-1621
- STATE EMPL CU OF MARYLAND INC**
971 CORPORATE BLVD
LINTHICUM, MD 21090-2342
- TD BANK, NATIONAL ASSOCIATION**
2035 LIMESTONE RD
WILMINGTON, DE 19808-5529
- WELLS FARGO BANK, NATIONAL ASSOCIATION**
301 S TRYON ST
CHARLOTTE, NC 28282-1915
- WESBANCO BANK, INC.**
1 BANK PLZ
WHEELING, WV 26003-3543

Social Security Administration Representative

I certify that the applicable provisions of the Right to Financial Privacy Act of 1978 (12 U.S.C. 3401-3422) have been complied with in this request. Pursuant to the Right to Financial Privacy Act of 1978, good faith reliance upon this certification relieves your institution and its employees and agents of any possible liability to the customer in connection with the disclosure of these financial records.

SSA Representative's Information

*SSA Representative's authorizing signature is on file.

First Name: [REDACTED] Middle: [REDACTED]
 Address 1: [REDACTED] State: [REDACTED]
 City: [REDACTED] ZIP: [REDACTED]
 Phone: [REDACTED]

*Date Signed: [REDACTED]
Last Name: [REDACTED]

Continue

[Send to FI](#) [Delete Request](#)

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Request WebForm - Review Data

Steps: [Customer Information] [Account Information] [Review Data]

Review data.

* = Required Information

Request ID Information

*Request ID: 362501

SSA Request ID:

Financial Institution Information

*FI Name: Embarcadero FCU
*Street Address: 555 Battery St
*City: San Francisco

*State: CA

*ZIP: 94126

Adjudicator

Adjudicator:

Internal SSA Information

*HUN/NH SSN: [REDACTED]
*Request Type: SSI Initial Claim

Revise

Customer Information

*First Name: [REDACTED]
Other Names:
*SSN: [REDACTED]
*Street Address: [REDACTED]
*City: San Francisco

Middle: [REDACTED]

*Last Name: [REDACTED]

Suffix: Jr

*State: CA

*ZIP: 94126

Revise

Applicant/Recipient Information

Not Applicable

Revise

Legal Representative or Representative Payee's Information (if Applicable)

Not Applicable

Revise

Witness Information

Not Applicable

Revise

Account Information

*From Month: Aug

*From Year: 2016

*To Month: Sep

*To Year: 2018

Interest Requested: NO
Remarks:

Revise

Print Form 4641

Select View and Print Form 4641. The PDF file of the populated Form 4641 may open in a new window or it might be loaded into the current window depending on your web browser settings. If the form is loaded into your current web browser window, you will have to re-enter the system to return to this page. Select Print from the Toolbar to print the document once it has opened. [Adobe Reader](#) is required to view the PDF file below.

[View and Print Form 4641](#)

Continue

All required fields must be completed before continuing to authorization.

[Save to Unsent Requests](#) [Delete Request](#) [Copy to Request](#)

SSA 4641

Request/SSN ID: HUN/NH SSN Quick Search

Social Security Administration E4641

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
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- Participation Report
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- Contact Support
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Request WebForm - Review Data

Steps: [Customer Information] [Account Information] [Review Data] [Authorization]

Review data.

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*ZIP: 94126

Adjudicator

Adjudicator:

Internal SSA Information

*HUN/NH SSN: [REDACTED]

*Request Type: SSI Initial Claim

Revise

Customer Information

*First Name: [REDACTED]

Middle: [REDACTED]

*Last Name: [REDACTED]

Suffix: Jr

Other Names:

*SSN: [REDACTED]

*Street Address: [REDACTED]

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*State: CA

*ZIP: 94126

Revise

Applicant/Recipient Information

Not Applicable

Revise

Legal Representative or Representative Payee's Information (If Applicable)

Not Applicable

Revise

Witness Information

Not Applicable

Revise

Account Information

*From Month: Aug

*From Year: 2016

*To Month: Sep

*To Year: 2018

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Remarks:

Revise

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View and Print Form 4641

Continue

All required fields must be completed before continuing to authorization.

Continue to Authorization Save to Unsent Requests Delete Request Copy to Request

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

Home Page

Response Inbox

New Request

My Requests

Unsent Requests

Reports

Participation Report

F.I. Favorites

Contact Support

Log Out

Request WebForm - Authorization

* - Required Information

Request ID Information

*Request ID: 362501

Authorization

I understand:

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- Any information obtained will be kept confidential;
- I have the right to obtain a copy of the record which the financial institution keeps concerning the instances when it has disclosed records to a government authority unless the records were disclosed because of a court order; and
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*Date Signed: 21 September 2018

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SSA Representative's Information

*SSA Representative's authorizing signature is on file.

First Name: ██████████
Address 1: 2620 Yorktowne Boulevard
City: Brick
Phone: ██████████

Middle:
State: NJ

*Date Signed: 21 September 2018

Last Name: ██████████
ZIP: 08723

Continue

Send to FI Delete Request

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
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- My Requests
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Request WebForm - Authorization

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Request ID Information

*Request ID: 362501

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City: Brick
Phone: ██████████

Middle:
State: NJ

Last Name: ██████████
ZIP: 08723

Continue

Send to FI Delete Request

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Request WebForm

Request has been sent.

* = Required Information

[View Case Management Page](#)

Request ID Information

*Request ID: 362501 SSA Request ID: *Date Submitted:

Financial Institution Information

*FI Name: Embarcadero FCU
*Street Address: 555 Battery St *State: CA *ZIP: 94126
*City: San Francisco

Adjudicator

Adjudicator:

Internal SSA Information

*HUN/NH SSN: ██████████
*Request Type: SSI Initial Claim

Customer Information

*First Name: ██████████ Middle: ██████████ *Last Name: ██████████ Suffix: Jr
Other Names:
*SSN: ██████████
*Street Address: ██████████ *State: CA *ZIP: 94126
*City: San Francisco

Account Information

*From Month: Aug *From Year: 2016 *To Month: Sep *To Year: 2018

Interest Requested: NO
SSA Remarks:

Authorization

I understand:

- I have the right to revoke this authorization at any time before any records are disclosed;
- The Social Security Administration may request all records about me from any financial institution;
- Any information obtained will be kept confidential;
- I have the right to obtain a copy of the record which the financial institution keeps concerning the instances when it has disclosed records to a government authority unless the records were disclosed because of a court order; and
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*Date Signed: 21 Sep 2018

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SSA Representative's Information

*SSA Representative's authorizing signature is on file. *Date Signed: 21 Sep 2018
First Name: ██████████ Middle: Last Name: ██████████
Street Address: 2620 Yorktowne Boulevard
City: Brick State: NJ ZIP: 08723
Phone: ██████████

Print Form 4641

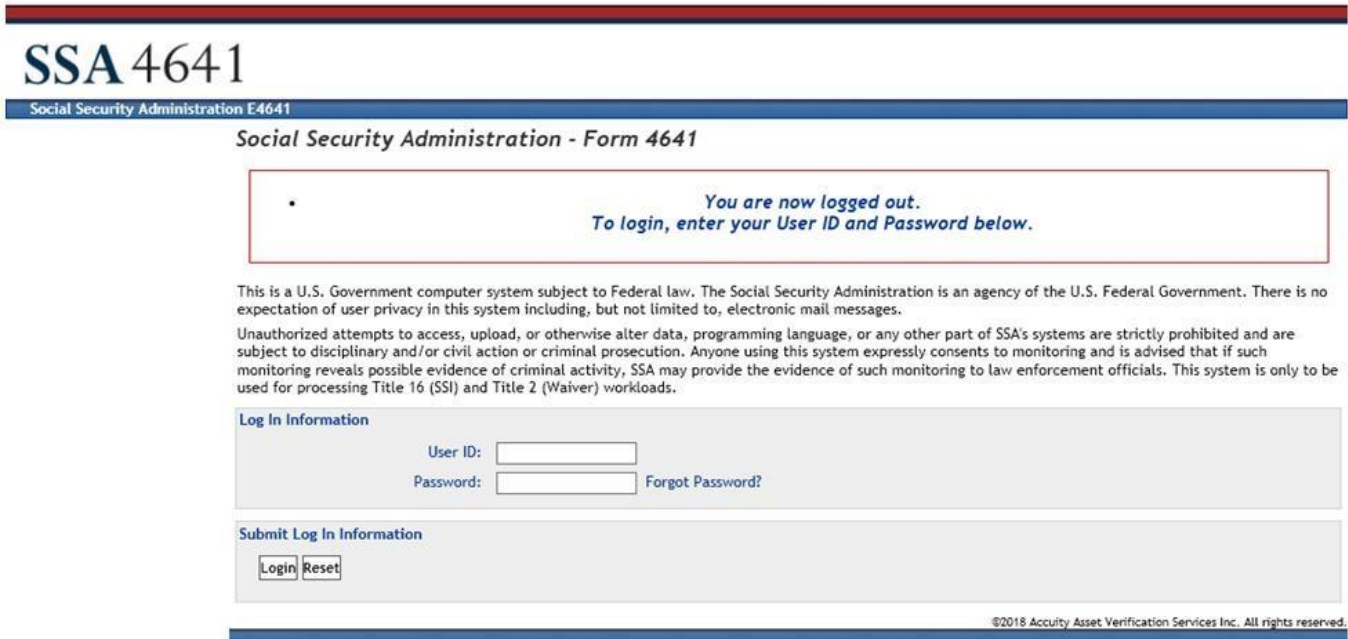
Select [View and Print Form 4641](#). The PDF file of the populated Form 4641 may open in a new window or it might be loaded into the current window depending on your web browser settings. If the form is loaded into your current web browser window, you will have to re-enter the system to return to this page. Select Print from the Toolbar to print the document once it has opened. *Adobe Reader* is required to view the PDF file below.

[View and Print Form 4641](#)

[Copy to Request](#)

FI View: The screens a financial institution (FI) employee sees when using the FI version of the e4641 system to respond to SSA's AFI request.

2.1



SSA 4641
Social Security Administration E4641

Social Security Administration - Form 4641

*You are now logged out.
To login, enter your User ID and Password below.*

This is a U.S. Government computer system subject to Federal law. The Social Security Administration is an agency of the U.S. Federal Government. There is no expectation of user privacy in this system including, but not limited to, electronic mail messages.

Unauthorized attempts to access, upload, or otherwise alter data, programming language, or any other part of SSA's systems are strictly prohibited and are subject to disciplinary and/or civil action or criminal prosecution. Anyone using this system expressly consents to monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, SSA may provide the evidence of such monitoring to law enforcement officials. This system is only to be used for processing Title 16 (SSI) and Title 2 (Waiver) workloads.

Log In Information

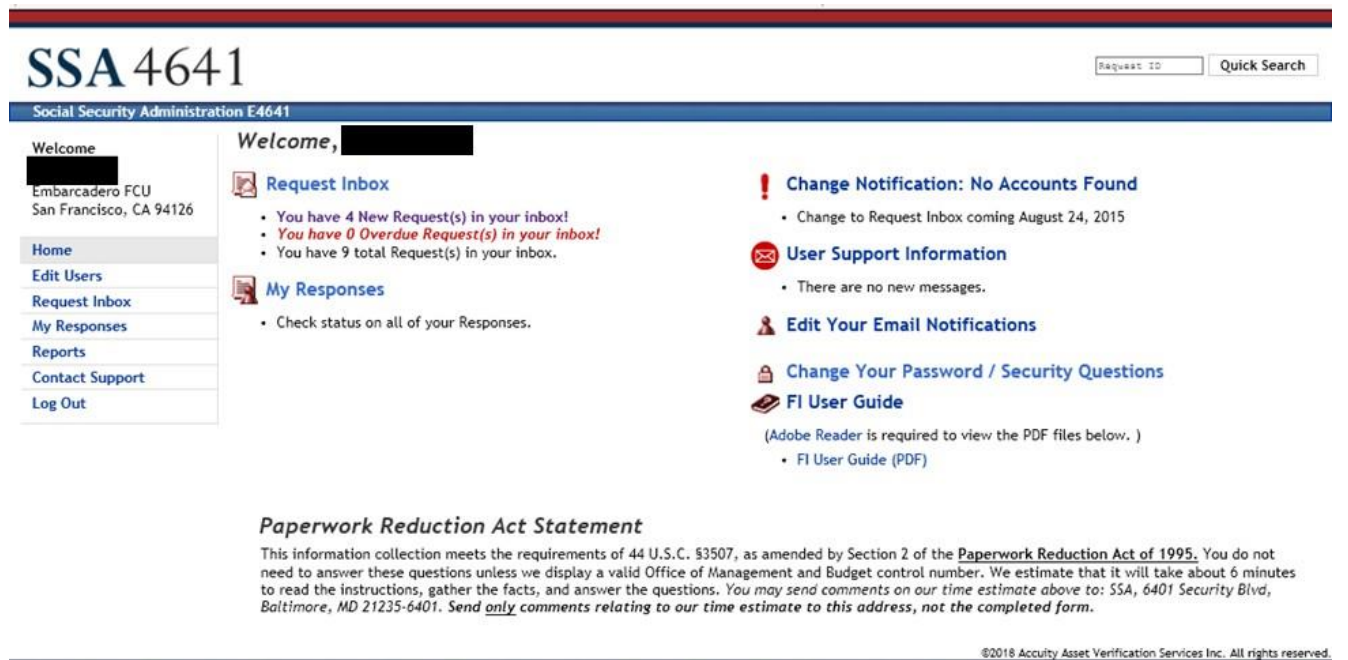
User ID:

Password: [Forgot Password?](#)

Submit Log In Information

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2.2



SSA 4641

Social Security Administration E4641

Welcome
[redacted]
Embarcadero FCU
San Francisco, CA 94126

Home

- Edit Users
- Request Inbox
- My Responses
- Reports
- Contact Support
- Log Out

Welcome, [redacted]

Request Inbox

- You have 4 New Request(s) in your inbox!
- You have 0 Overdue Request(s) in your inbox!**
- You have 9 total Request(s) in your inbox.

My Responses

- Check status on all of your Responses.

Change Notification: No Accounts Found

- Change to Request Inbox coming August 24, 2015

User Support Information

- There are no new messages.

Edit Your Email Notifications

Change Your Password / Security Questions

FI User Guide

(Adobe Reader is required to view the PDF files below.)

- FI User Guide (PDF)

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 6 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.

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Welcome
 [REDACTED]
 AUBURNBANK
 AUBURN, AL 36830-4814

- Home
- Edit Users
- Request Inbox
- My Responses
- Reports
- Contact Support
- Log Out

Request Inbox

- You have 3 New Request(s)
- You have 15 Overdue Request(s)
- You have 18 total Request(s).

Show 10 entries

Request ID	Request Date	SSA Office	Customer Name	Date Range	Response Due	Status	Assigned To	Update Assignee	No Accounts Found
Request 894090G	12/17/2021	R02 (106) BORO HALL NY	[REDACTED]	11/2019-12/2021	01/01/2022	New		<input type="checkbox"/>	<input type="checkbox"/>
Request 894079G	12/17/2021	R02 (106) BORO HALL NY	[REDACTED]	11/2019-12/2021	01/01/2022	New		<input type="checkbox"/>	<input type="checkbox"/>
Request 893770	12/03/2021	R02 (102) ALBANY NY	[REDACTED]	11/2019-12/2021	12/18/2021	New		<input type="checkbox"/>	<input type="checkbox"/>
Request 893736	12/01/2021	R02 (101) SYRACUSE NY Changed	[REDACTED]	11/2019-12/2021	12/16/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>
Request 893627	10/27/2021	OQP (H04) OQP OQR T16	[REDACTED]	09/2019-10/2021	11/11/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>
Request 893589	10/27/2021	OQP (H04) OQP OQR T16	[REDACTED]	09/2019-10/2021	11/11/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>
Request 893588	10/27/2021	OQP (H04) OQP OQR T16	[REDACTED]	09/2019-10/2021	11/11/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>
Request 893550	10/26/2021	OQP (H04) OQP OQR T16	[REDACTED]	09/2019-10/2021	11/10/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>
Request 893548	10/26/2021	OQP (H04) OQP OQR T16	[REDACTED]	09/2019-10/2021	11/10/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>
Request 893547	10/26/2021	OQP (H04) OQP OQR T16	[REDACTED]	09/2019-10/2021	11/10/2021	Overdue		<input type="checkbox"/>	<input type="checkbox"/>

Showing 1 to 10 of 18 entries

Previous 1 2 Next

Actions Section

Choose Assignee Assign Respond No Accounts

Welcome

Embarcadero FCU
San Francisco, CA 94126

Home

Edit Users

Request Inbox

My Responses

Reports

Contact Support

Log Out

Response WebForm - Part I - Customer Detail

Status

Status: New on 09/21/2018

Request Assigned To

Assign Request

Request ID Information

Request ID: 362501

Date Submitted: 09/21/2018

SSA Representative

I certify that the applicable provisions of the Right to Financial Privacy Act of 1978 (12 U.S.C. 3401-3422) have been complied with in this request. Pursuant to the Right to Financial Privacy Act of 1978, good faith reliance upon this certification relieves your institution and its employees and agents of any possible liability to the customer in connection with the disclosure of these financial records.

First Name: ██████████ Middle: ██████████ Last Name: ██████████
 Address: 2620 Yorktowne Boulevard City: Brick State: NJ ZIP: 08723
 Phone: ██████████ SSA Representative's Signature: Signature is on file.

Request Data from Social Security Administration

Customer's Social Security Number

██████████
 Customer's Address
 San Francisco, CA 94126

Customer's Name

██████████
 Applicant/Recipient if Other Than Customer

Account Number(s) (Individual or Joint)

Please Provide Balances from:
 8/2016 through 9/2018

Authorizing Signature:
 Signature is on file.

Customer Other Names:
 SSA Remarks:

Name and Address of Financial Institution

Embarcadero FCU
 555 Battery St
 San Francisco, CA 94126
 Interest Requested:
 NO

Unable to Supply Requested Information

No Accounts Found: Only select this option if you have no record of the Customer Name or Customer SSN at your institution.
 Will Not Respond: Select this option if you were able to locate some record of the Customer Name or Customer SSN, but cannot respond for one of the reasons provided.

- No accounts found.
 Will not respond. If select the "Other explanation", please enter reason in text box.

(Maximum 1000 Characters)

Send to SSA

Request for Records

This request is authorized by sections 204(b), 1631(b)(1)(B) and 1631(e)(1)(B) of the Social Security Act, as amended. While you are not required to respond, your cooperation will help us either to: (1) determine the eligibility of the applicant or recipient named above for Supplemental Security Income benefits; or (2) determine if a request to waive a Social Security overpayment should be granted. The customer's authorization for release of the information contained in your records appears on page one of this form.

Instructions for Completion

- Please provide information for the period 8/2016 through 9/2018 for the account number(s) listed and any others held (either individually or jointly) by the customer named.
- Please provide information on ALL accounts associated with the customer named, regardless if the account number is listed on this request
- Copies of account records may be submitted in lieu of entering data below.
- For all accounts, provide opening balances as of the first day of the month for each account, for each month listed in the period.
- We need account information even if the account has been closed or the account number has changed.
- If you need to add forms for additional accounts, select the "Add Additional Accounts" option and a new blank form will be provided
- If no accounts are located, please return to the Customer Detail page and select the "No Accounts Found" option and then "Send to SSA".
- For step-by-step instructions for completing this Request using the e4641 System, please refer to your SSA SSI Asset Verification System User Guide.

Welcome
[Redacted]
Embarcadero FCU
San Francisco, CA 94126

- Home
- Edit Users
- Request Inbox
- My Responses
- Reports
- Contact Support
- Log Out

Response WebForm - Part I - Customer Detail

Status
Status: New on 09/21/2018

Request Assigned To

First Name: [Redacted] Middle: Last Name: [Redacted]
Phone: 000/000-0000

[Redacted]

Request ID Information

Request ID: 362501 Date Submitted: 09/21/2018

SSA Representative

I certify that the applicable provisions of the Right to Financial Privacy Act of 1978 (12 U.S.C. 3401-3422) have been complied with in this request. Pursuant to the Right to Financial Privacy Act of 1978, good faith reliance upon this certification relieves your institution and its employees and agents of any possible liability to the customer in connection with the disclosure of these financial records.

First Name: [Redacted] Middle: Last Name: [Redacted]
Address: 2620 Yorktowne Boulevard City: Brick State: NJ ZIP: 08723
Phone: [Redacted] SSA Representative's Signature: Signature is on file.

Request Data from Social Security Administration

Customer's Social Security Number [Redacted]	Customer's Name [Redacted]
Customer's Address [Redacted] San Francisco, CA 94126	Applicant/Recipient if Other Than Customer
Account Number(s) (Individual or Joint)	Name and Address of Financial Institution Embarcadero FCU 555 Battery St San Francisco, CA 94126
Please Provide Balances from: 8/2016 through 9/2018	Interest Requested: NO
Authorizing Signature: Signature is on file.	Customer Other Names:
SSA Remarks:	

Unable to Supply Requested Information

No Accounts Found: Only select this option if you have no record of the Customer Name or Customer SSN at your institution. Will Not Respond: Select this option if you were able to locate some record of the Customer Name or Customer SSN, but cannot respond for one of the reasons provided.

- No accounts found.
- Will not respond. If select the "Other explanation", please enter reason in text box.

(Maximum 1000 Characters)

Request for Records

This request is authorized by sections 204(b), 1631(b)(1)(B) and 1631(e)(1)(B) of the Social Security Act, as amended. While you are not required to respond, your cooperation will help us either to: (1) determine the eligibility of the applicant or recipient named above for Supplemental Security Income benefits; or (2) determine if a request to waive a Social Security overpayment should be granted. The customer's authorization for release of the information contained in your records appears on page one of this form.

Instructions for Completion

- Please provide information for the period 4/2013 through 4/2013 for the account number(s) listed and any others held (either individually or jointly) by the customer named.
- Please provide information on **ALL accounts associated** with the customer named, regardless if the account number is listed on this request
- Copies of account records may be submitted in lieu of entering data below.
- For all accounts, provide opening balances as of the **first day of the month** for each account, for each month listed in the period.
- We need account information even if the account has been closed or the account number has changed.
- If you need to add forms for additional accounts, select the "Add Additional Accounts" option and a new blank form will be provided
- If no accounts are located, please return to the *Customer Detail* page and select the "No Accounts Found" option and then "Send to SSA".
- For step-by-step instructions for completing this Request using the e4641 System, please refer to your SSA SSI Asset Verification System User Guide.

SSA 4641

Request ID Quick Search

Social Security Administration E4641

- Welcome [Redacted]
- Embarcadero FCU
- San Francisco, CA 94126
- Home
- Edit Users
- Request Inbox
- My Responses
- Reports
- Contact Support
- Log Out

Response WebForm - Part II, Part A - Account Information

Steps: [Customer Detail] [Account Information] [Account Balances] [Review Data]

Customer Summary

Customer's Name

Customer's Social Security Number

SSA Remarks

Account Types

Account 1

Account Number: Joint Account: SSI Direct Deposit:

Type of Account: Select Account Type If "Other", Describe:

Account Title:

Add Additional Accounts

Continue to Part B, Account Balances

Save to My Responses Enter Account Balances

SSA 4641

Request ID Quick Search

Social Security Administration E4641

- Welcome [Redacted]
- Embarcadero FCU
- San Francisco, CA 94126
- Home
- Edit Users
- Request Inbox
- My Responses
- Reports
- Contact Support
- Log Out

Response WebForm - Part II, Part A - Account Information

Steps: [Customer Detail] [Account Information] [Account Balances] [Review Data]

Customer Summary

Customer's Name

Customer's Social Security Number

SSA Remarks

Account Types

Account 1

Account Number: 111 Joint Account: SSI Direct Deposit:

Type of Account: Savings Account If "Other", Describe:

Account Title: Savings Account Title

Add Additional Accounts

Continue to Part B, Account Balances

Save to My Responses Enter Account Balances

Welcome

Embarcadero FCU
San Francisco, CA 94126

Home

Edit Users

Request Inbox

My Responses

Reports

Contact Support

Log Out

Response WebForm - Part II, Part B - Account Balances

Steps: [Customer Detail] [Account Information] [Account Balances] [Review Data]

Copies of account records may be submitted in lieu of entering data below.
For all accounts, provide opening balances as of the first day of the month for each account, for each month listed in the period.

Account Balances

Month/Year	Account # 111 Savings Account Savings Account Title Balance (00.00)	Interest Paid (00.00)
9/2018	\$ <input type="text"/>	Not Required
8/2018	\$ <input type="text"/>	Not Required
7/2018	\$ <input type="text"/>	Not Required
6/2018	\$ <input type="text"/>	Not Required
5/2018	\$ <input type="text"/>	Not Required
4/2018	\$ <input type="text"/>	Not Required
3/2018	\$ <input type="text"/>	Not Required
2/2018	\$ <input type="text"/>	Not Required
1/2018	\$ <input type="text"/>	Not Required
12/2017	\$ <input type="text"/>	Not Required
11/2017	\$ <input type="text"/>	Not Required
10/2017	\$ <input type="text"/>	Not Required
9/2017	\$ <input type="text"/>	Not Required
8/2017	\$ <input type="text"/>	Not Required
7/2017	\$ <input type="text"/>	Not Required
6/2017	\$ <input type="text"/>	Not Required
5/2017	\$ <input type="text"/>	Not Required
4/2017	\$ <input type="text"/>	Not Required
3/2017	\$ <input type="text"/>	Not Required
2/2017	\$ <input type="text"/>	Not Required
1/2017	\$ <input type="text"/>	Not Required
12/2016	\$ <input type="text"/>	Not Required
11/2016	\$ <input type="text"/>	Not Required
10/2016	\$ <input type="text"/>	Not Required
9/2016	\$ <input type="text"/>	Not Required
8/2016	\$ <input type="text"/>	Not Required

[Edit Only this Account](#)

Attachments

[Attach Account Records](#)

Additional Information or Remarks

Remarks:

(Maximum 1000 Characters)

Continue

[Save to My Responses](#) [Continue to Review Data](#)

Welcome
Embarcadero FCU
San Francisco, CA 94126

- [Home](#)
- [Edit Users](#)
- [Request Inbox](#)
- [My Responses](#)
- [Reports](#)
- [Contact Support](#)
- [Log Out](#)

Response WebForm - Part II, Part B - Account Balances

Steps: [\[Customer Detail\]](#) [\[Account Information\]](#) [\[Account Balances\]](#) [\[Review Data\]](#)

Copies of account records may be submitted in lieu of entering data below.
For all accounts, provide opening balances as of the first day of the month for each account, for each month listed in the period.

Account Balances

Month/Year	Account # 111 Balance (00.00)	Interest Paid (00.00)
9/2018	\$ 123.45	Not Required
8/2018	\$ 678.90	Not Required
7/2018	\$ 12.34	Not Required
6/2018	\$ 56.78	Not Required
5/2018	\$ 90.12	Not Required
4/2018	\$ 345.67	Not Required
3/2018	\$ 890.12	Not Required
2/2018	\$ 34.56	Not Required
1/2018	\$ 78.90	Not Required
12/2017	\$ 987.65	Not Required
11/2017	\$ 432.10	Not Required
10/2017	\$ 98.76	Not Required
9/2017	\$ 54.32	Not Required
8/2017	\$ 10.98	Not Required
7/2017	\$ 1234.56	Not Required
6/2017	\$ 7890.12	Not Required
5/2017	\$ 3456.78	Not Required
4/2017	\$ 9012.34	Not Required
3/2017	\$ 56.78	Not Required
2/2017	\$ 90.12	Not Required
1/2017	\$ 34.56	Not Required
12/2016	\$ 78.90	Not Required
11/2016	\$ 123.45	Not Required
10/2016	\$ 678.90	Not Required
9/2016	\$ 111.11	Not Required
8/2016	\$ 222.22 <input type="text"/>	Not Required

[Edit Only this Account](#)

Attachments

[Attach Account Records](#)

Additional Information or Remarks

Remarks:

(Maximum 1000 Characters)

Continue

[Save to My Responses](#) [Continue to Review Data](#)

- Welcome
- Embarcadero FCU
San Francisco, CA 94126
- Home
- Edit Users
- Request Inbox
- My Responses
- Reports
- Contact Support
- Log Out

Response WebForm - Review Data

Steps: [Customer Detail] [Account Information] [Account Balances] [Review Data]

Status
Status: Assigned on 09/21/2018

Request Assigned To
First Name: [REDACTED] Middle: [REDACTED] Last Name: [REDACTED]
Phone: 000/000-0000

Request ID Information from Social Security Administration
Request ID: 362501 Date Submitted: 09/21/2018

SSA Representative
I certify that the applicable provisions of the Right to Financial Privacy Act of 1978 (12 U.S.C. 3401-3422) have been complied with in this request. Pursuant to the Right to Financial Privacy Act of 1978, good faith reliance upon this certification relieves your institution and its employees and agents of any possible liability to the customer in connection with the disclosure of these financial records.
First Name: [REDACTED] Middle: [REDACTED] Last Name: [REDACTED]
Address: 2620 Yorktowne Boulevard City: Brick State: NJ ZIP: 08723
Phone: [REDACTED]
SSA Representative's Signature: Signature is on file.

Request Data from Social Security Administration
Customer's Social Security Number [REDACTED] Customer's Name [REDACTED]
Customer's Address: [REDACTED] Applicant/Recipient if Other Than Customer
San Francisco, CA 94126
Account Number(s) (Individual or Joint) Name and Address of Financial Institution
Embarcadero FCU
555 Battery St
San Francisco, CA 94126
Please Provide Balances from: 8/2016 through 9/2018 Interest Requested: NO
Authorizing Signature: Signature is on file.
Customer Other Names:
SSA Remarks:

Request for Records
This request is authorized by sections 204(b), 1631(b)(1)(B) and 1631(e)(1)(B) of the Social Security Act, as amended. While you are not required to respond, your cooperation will help us either to: (1) determine the eligibility of the applicant or recipient named above for Supplemental Security Income benefits; or (2) determine if a request to waive a Social Security overpayment should be granted. The customer's authorization for release of the information contained in your records appears on page one of this form.

- Instructions for Completion
- Please provide information for the period 8/2016 through 9/2018 for the account number(s) listed and any others held (either individually or jointly) by the customer named.
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 - Copies of account records may be submitted in lieu of entering data below.
 - For all accounts, provide opening balances as of the first day of the month for each account, for each month listed in the period.
 - We need account information even if the account has been closed or the account number has changed.
 - If you need to add forms for additional accounts, select the "Add Additional Accounts" option and a new blank form will be provided
 - If no accounts are located, please return to the Customer Detail page and select the "No Accounts Found" option and then "Send to SSA".
 - For step-by-step instructions for completing this Request using the e4641 System, please refer to your SSA SSI Asset Verification System User Guide.

Account Balances

Account # 111 - Savings Account			
Month/Year	Balance	Savings Account Title	
9/2018	\$123.45	Interest Paid	
8/2018	\$678.90	Not Required	
7/2018	\$12.34	Not Required	
6/2018	\$56.78	Not Required	
5/2018	\$90.12	Not Required	
4/2018	\$345.67	Not Required	
3/2018	\$890.12	Not Required	
2/2018	\$34.56	Not Required	
1/2018	\$78.90	Not Required	
12/2017	\$987.65	Not Required	
11/2017	\$432.10	Not Required	
10/2017	\$98.76	Not Required	
9/2017	\$54.32	Not Required	
8/2017	\$10.98	Not Required	
7/2017	\$1234.56	Not Required	
6/2017	\$7890.12	Not Required	
5/2017	\$3456.78	Not Required	
4/2017	\$9012.34	Not Required	
3/2017	\$56.78	Not Required	
2/2017	\$90.12	Not Required	
1/2017	\$34.56	Not Required	
12/2016	\$78.90	Not Required	
11/2016	\$123.45	Not Required	
10/2016	\$678.90	Not Required	
9/2016	\$111.11	Not Required	
8/2016	\$222.22	Not Required	

[Edit Account Information](#)

Attachments
None
[Edit Attachments](#)

Additional Information or Remarks
Remarks:

Continue
[Save to My Responses](#) [Send to Social Security Administration](#)

SSA 4641

Social Security Administration E4641

Welcome

██████████
Embarcadero FCU
San Francisco, CA 94126

Home

Edit Users

Request Inbox

My Responses

Reports

Contact Support

Log Out

Response WebForm - Responded 09/21/2018

Status

Status: Responded on 09/21/2018

Print Form 4641

Select View and Print Form 4641. The PDF file of the populated Form 4641 may open in a new window or it might be loaded into the current window depending on your web browser settings. If the form is loaded into your current web browser window, you will have to re-enter the system to return to this page. Select Print from the Toolbar to print the document once it has opened. Adobe Reader is required to view the PDF file below.

Response Completed By

Name: ██████████
Phone: 000/000-0000

Request ID Information from Social Security Administration

Request ID: 362501 Date Submitted: 09/21/2018

SSA Representative

I certify that the applicable provisions of the Right to Financial Privacy Act of 1978 (12 U.S.C. 3401-3422) have been complied with in this request. Pursuant to the Right to Financial Privacy Act of 1978, good faith reliance upon this certification relieves your institution and its employees and agents of any possible liability to the customer in connection with the disclosure of these financial records.

First Name: ██████████ Middle: ██████████ Last Name: ██████████
 Address: 2620 Yorktowne Boulevard City: Brick State: NJ ZIP: 08723
 Phone: ██████████

SSA Representative's Signature: Signature is on file.

Request Data from Social Security Administration

Customer's Social Security Number	Customer's Name
Customer's Address	Applicant/Recipient If Other Than Customer
San Francisco, CA 94126	
Account Number(s) (Individual or Joint)	Name and Address of Financial Institution
Please Provide Balances from: 8/2016 through 9/2018	Embarcadero FCU 555 Battery St San Francisco, CA 94126
Authorizing Signature: Signature is on file.	Interest Requested: NO
Customer Other Names: SSA Remarks:	

Request for Records

This request is authorized by sections 204(b), 1631(b)(1)(B) and 1631(e)(1)(B) of the Social Security Act, as amended. While you are not required to respond, your cooperation will help us either to: (1) determine the eligibility of the applicant or recipient named above for Supplemental Security Income benefits; or (2) determine if a request to waive a Social Security overpayment should be granted. The customer's authorization for release of the information contained in your records appears on page one of this form.

Instructions for Completion

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- For all accounts, provide opening balances as of the first day of the month for each account, for each month listed in the period.
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- If no accounts are located, please return to the Customer Detail page and select the "No Accounts Found" option and then "Send to SSA".
- For step-by-step instructions for completing this Request using the e4641 System, please refer to your SSA SSI Asset Verification System User Guide.

Account Balances

Month/Year	Account # 111 - Savings Account	Balance	Interest Paid
9/2018	Savings Account Title	\$123.45	Not Required
8/2018		\$678.90	Not Required
7/2018		\$12.34	Not Required
6/2018		\$56.78	Not Required
5/2018		\$90.12	Not Required
4/2018		\$345.67	Not Required
3/2018		\$890.12	Not Required
2/2018		\$34.56	Not Required
1/2018		\$78.90	Not Required
12/2017		\$987.65	Not Required
11/2017		\$432.10	Not Required
10/2017		\$98.76	Not Required
9/2017		\$54.32	Not Required
8/2017		\$10.98	Not Required
7/2017		\$1234.56	Not Required
6/2017		\$7890.12	Not Required
5/2017		\$3456.78	Not Required
4/2017		\$9012.34	Not Required
3/2017		\$56.78	Not Required
2/2017		\$90.12	Not Required
1/2017		\$34.56	Not Required
12/2016		\$78.90	Not Required
11/2016		\$123.45	Not Required
10/2016		\$678.90	Not Required
9/2016		\$111.11	Not Required
8/2016		\$222.22	Not Required

Attachments

None

Additional Information or Remarks from the Financial Institution

Remarks:

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SSA Response: The screens the SSA employee sees when viewing the FI's response in the e4641 system.

3.1

SSA 4641

Social Security Administration E4641

Social Security Administration - Form 4641

This is a U.S. Government computer system subject to Federal law. The Social Security Administration is an agency of the U.S. Federal Government. There is no expectation of user privacy in this system including, but not limited to, electronic mail messages.

Unauthorized attempts to access, upload, or otherwise alter data, programming language, or any other part of SSA's systems are strictly prohibited and are subject to disciplinary and/or civil action or criminal prosecution. Anyone using this system expressly consents to monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, SSA may provide the evidence of such monitoring to law enforcement officials. This system is only to be used for processing Title 16 (SSI) and Title 2 (Waiver) workloads.

Log In Information

User ID:
Password: [Forgot Password?](#)

Submit Log In Information

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3.2

SSA 4641

Request/IDP ID HUN/NH SSN Quick Search

Social Security Administration E4641

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

[Home Page](#)
[Response Inbox](#)
[New Request](#)
[My Requests](#)
[Unsent Requests](#)
[Reports](#)
[Participation Report](#)
[F.I. Favorites](#)
[Contact Support](#)
[Log Out](#)

This application times out after 30 minutes of inactivity.

Welcome, ██████████



Response Inbox

- **You have 6 new Response(s) in your inbox!**
- You have 6 total Response(s) in your inbox.



New Request

- Create a New Request.



My Requests

- Check status on all of your Requests.



Unsent Requests

- Your location has 390 Unsent Request(s).



Excess Resource Alerts

- **You have 2 new alert(s).**



User Support Information

- There are no new tip(s).
- There are no new FI Community update(s).
- There are no new system message(s).



Edit Your Email Notifications



Change Your Password / Security Questions



SSA User Guide

(Adobe Reader is required to view the PDF files below.)

- SSA Administrator Guide (PDF)
- SSA User Guide (PDF)
- e4641 User Password Reset Guidelines - SSA Users National AFI Program (PDF)

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SSA 4641

Request/ROW ID HUN/NR SSN Quick Search

Social Security Administration E4641

Welcome

SSA
BRICK (E21)
Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Response Inbox

- You have 6 new response(s)!
- You have 6 total response(s).

< Previous 50 1 through 6 of 6 Next 50 >

Request ID	Request Date	Customer Name	Customer SSN	Request Type	FI Name	Response Date	View Response	Status	Adjudicator	A2+
Request 3 62501	09/21/2018	[REDACTED]	[REDACTED]	SSI Initial Claim	Embarcadero F CU San Francisco, CA	09/21/2018	Response 362 501	New		A2+
Request 3 62340G	09/25/2017	[REDACTED]	[REDACTED]	SSI Waiver	Embarcadero F CU San Francisco, CA	09/25/2017	Response 362 340G	No Accounts	[REDACTED]	
Request 3 62352G	09/25/2017	[REDACTED]	[REDACTED]	SSI Waiver	Embarcadero F CU San Francisco, CA	09/25/2017	Response 362 352G	No Accounts	[REDACTED]	
Request 3 62364G	09/25/2017	[REDACTED]	[REDACTED]	SSI Waiver	Embarcadero F CU San Francisco, CA	09/25/2017	Response 362 364G	No Accounts	[REDACTED]	
Request 3 62320G	09/22/2017	[REDACTED]	[REDACTED]	SSI/RSI/DIB Concurrent Waiver	Embarcadero F CU San Francisco, CA	09/22/2017	Response 362 320G	New	[REDACTED]	A
Request 3 61822G	11/18/2016	[REDACTED]	[REDACTED]	SSI Initial Claim	Embarcadero F CU San Francisco, CA	11/18/2016	Response 361 822G	New	[REDACTED]	A2+

< Previous 50 1 through 6 of 6 Next 50 >

SSA 4641

Social Security Administration E4641

Request/ROW ID: [REDACTED] NUM/ATR: [REDACTED] Quick Search

Welcome
 [REDACTED]
 SSA
 BRICK (E21)
 Brick, NJ 08723

- Home Page
- Response Inbox
- New Request
- My Requests
- Unsent Requests
- Reports
- Participation Report
- F.I. Favorites
- Contact Support
- Log Out

Response WebForm - Opened 09/21/2018

[View Case Management Page](#)

Status
 Status: Viewed on 09/21/2018 [Set Status to Closed](#)

Print Form 4641
 Select View and Print Form 4641. The PDF file of the populated Form 4641 may open in a new window or it might be loaded into the current window depending on your web browser settings. If the form is loaded into your current web browser window, you will have to re-enter the system to return to this page. Select Print from the Toolbar to print the document once it has opened. Adobe Reader is required to view the PDF file below.
[View and Print Form 4641](#)

Response Completed By
 Name: [REDACTED]
 Phone: 000/000-0000

Internal SSA Information
 HLN /NH SSN: [REDACTED] Request Type: SSI Initial Claim

Request ID Information from Social Security Administration
 Request ID: 362501 SSA Request ID: [REDACTED] Date Submitted: 09/21/2018

SSA Representative
 I certify that the applicable provisions of the Right to Financial Privacy Act of 1978 (12 U.S.C. 3401-3422) have been complied with in this request. Pursuant to the Right to Financial Privacy Act of 1978, good faith reliance upon this certification relieves your institution and its employees and agents of any possible liability to the customer in connection with the disclosure of these financial records.
 First Name: [REDACTED] Middle: [REDACTED] Last Name: [REDACTED]
 Address: 2620 Yorktowne Boulevard City: Brick State: NJ ZIP: 08723
 Phone: [REDACTED] SSA Representative's Signature: Signature is on file.

Request Data from Social Security Administration
 Customer's Social Security Number: [REDACTED] Customer's Name: [REDACTED]
 Customer's Address: [REDACTED] Applicant/Recipient if Other Than Customer: [REDACTED]
 San Francisco, CA 94126
 Account Number(s) (Individual or Joint): [REDACTED] Name and Address of Financial Institution: Embarcadero FCU, 555 Battery St, San Francisco, CA 94126
 Please Provide Balances from: 8/2016 through 9/2018 Interest Requested: NO
 Authorizing Signature: Signature is on file.
 Customer Other Names: [REDACTED]
 SSA Remarks: [REDACTED]

Request for Records
 This request is authorized by sections 204(b), 1631(b)(1)(B) and 1631(e)(1)(B) of the Social Security Act, as amended. While you are not required to respond, your cooperation will help us either to: (1) determine the eligibility of the applicant or recipient named above for Supplemental Security Income benefits; or (2) determine if a request to waive a Social Security overpayment should be granted. The customer's authorization for release of the information contained in your records appears on page one of this form.

- Instructions for Completion**
- Please provide information for the period 8/2016 through 9/2018 for the account number(s) listed and any others held (either individually or jointly) by the customer named.
 - Please provide information on ALL accounts associated with the customer named, regardless if the account number is listed on this request.
 - Copies of account records may be submitted in lieu of entering data below.
 - For all accounts, provide opening balances as of the first day of the month for each account, for each month listed in the period.
 - We need account information even if the account has been closed or the account number has changed.
 - If you need to add forms for additional accounts, select the "Add Additional Accounts" option and a new blank form will be provided
 - If no accounts are located, please return to the Customer Detail page and select the "No Accounts Found" option and then "Send to SSA".
 - For step-by-step instructions for completing this Request using the e4641 System, please refer to your SSA SSI Asset Verification System User Guide.

Account Balances

Account # 111 - Savings Account			
Month/Year	Balance	Savings Account Title	Interest Paid
9/2018	\$123.45		Not Required
8/2018	\$678.90		Not Required
7/2018	\$12.34		Not Required
6/2018	\$56.78		Not Required
5/2018	\$90.12		Not Required
4/2018	\$345.67		Not Required
3/2018	\$890.12		Not Required
2/2018	\$34.56		Not Required
1/2018	\$78.90		Not Required
12/2017	\$987.65		Not Required
11/2017	\$432.10		Not Required
10/2017	\$98.76		Not Required
9/2017	\$54.32		Not Required
8/2017	\$10.98		Not Required
7/2017	\$1234.56		Not Required
6/2017	\$7890.12		Not Required
5/2017	\$3456.78		Not Required
4/2017	\$9012.34		Not Required
3/2017	\$56.78		Not Required
2/2017	\$90.12		Not Required
1/2017	\$34.56		Not Required
12/2016	\$78.90		Not Required
11/2016	\$123.45		Not Required
10/2016	\$678.90		Not Required
9/2016	\$111.11		Not Required
8/2016	\$222.22		Not Required

Attachments
 None

Additional Information or Remarks from the Financial Institution
 Remarks: FI has changed account numbers.