

INFORMATION NEEDED TO REVIEW YOUR SOCIAL SECURITY CLAIM

Claim Number: XXX-XX-_____

Please have documents or proof of the **ITEMS CHECKED** below available for your interview if you have them in your possession. This will help us complete the review of your claim more quickly. Information regarding any items that are not checked but may pertain to you should also be mentioned during the interview. **With the exception of W-2 forms and tax returns, we must see the original document or a copy certified by the custodian of the record or by a representative in your local Social Security office.**

Social Security or Medicare card for _____

Birth or baptismal certificate recorded before you were age 5 - otherwise, at least two of the following documents are needed: school records, census records, delayed birth certificate, children's birth certificates, family bible, naturalization certificate, etc.

Records of age will also be needed for _____

Marriage certificates for you and _____

Divorce or annulment decrees for all prior marriages

Death certificates for _____

Social Security numbers for all former spouses

Proof of military service

Pay slips or W-2 forms for _____

Self-employment tax returns for _____

A copy of the earnings record for the account on which you are receiving benefits is enclosed. Please review the earnings and compare them with your records. I have highlighted some specific years that I would like to discuss with you.

If you disagree with any of these earnings, please have your records available at the time of the interview. W2 forms are the best evidence of wages. Tax returns and proof of filing are the best evidence of self-employment income.

Other

Privacy Act Statement Collection and Use of Personal Information

Sections 205(a), 228(a), 1614(a) and 1836 of the Social Security Act, as amended, allow us to collect this information. Furnishing us this information is voluntary. However, failing to provide all or part of the information may prevent us from making an accurate and timely decision on your claim.

We will use the information to review your claim. We may also share your information for the following purposes, called routine uses:

1. To third party contacts in situations where the party to be contacted has, or is expected to have, information relating to the individual's capability to manager their affairs or eligibility for or entitlement to benefits under the Social Security program when the data are needed to establish the validity of evidence or to verify the accuracy of information presented by the individual; and
2. To applicants, claimants, prospective applicants or claimants, other than the data subject, their authorized representatives or representative payees to the extent necessary to pursue Social Security claims and to representative payees when the information pertains to individuals for whom they serve as representative payees, for the purpose of assisting SSA in administering its representative payment responsibilities under the Act and assisting the representative payees in performing their duties as payees, including receiving and accounting for benefits for individuals for whom they serve as payees.

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) 60-0089, entitled Claims Folders Systems. Additional information and a full listing of all our SORNs are available on our website at www.socialsecurity.gov/foia/bluebook.