

Social Security Administration

Representative Payee Report

Why You Received This Form

We must regularly review how representative payees used the benefits they received on behalf of the Social Security and/or Supplemental Security Income (SSI) beneficiaries. We do this to ensure the benefits are used properly.

When you were appointed representative payee, you were informed of the duties and responsibilities of a representative payee, including keeping records and reporting on the use of benefits. You should use these records to answer the questions on the enclosed reporting form. You must complete this form if you received any Social Security and/or SSI payments during the 12-month report period shown on the form. You must also complete the form if you wish to continue to receive payments for another person. It is called Representative Payee Report, SSA-623-F6.

You should keep these records (e.g., bank statements, canceled checks, receipts for rent, etc.) for two years from the time you complete the form. Do not submit any records with the completed form. If we have any questions or require proof, we will contact you.

What You Need To Do

Please read the instructions below before completing the form. **Then, complete the form and send it to us in the enclosed envelope within 30 days.**

General Instructions

To help us process your report, please follow these instructions:

1. Use black ink or a #2 pencil.
2. Keep your numbers and "X's" inside the boxes.
3. Do not use dollar signs.
4. Show money amounts in dollars only. Do not show cents.

For example, show \$1,540.70 like this:

DOLLAR AMOUNT

		1	,	5	4	0
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5. Use the REMARKS section on the back of the form to provide additional information as requested.
6. Review the payee mailing address and correct if necessary.
7. **Be sure you, the representative payee, sign the form.**

Some Definitions To Help You

Benefits - The Social Security and/or SSI money that you receive.

Payee - You. The person who receives Social Security and/or SSI benefits for someone else.

Beneficiary - The person for whom you receive Social Security and/or SSI benefits.

Legal Guardian - The person or organization appointed by a court to handle a beneficiary's legal matters.

Report Period - The 12-month period shown on the report for which you must account for the benefits you received.

Total Accountable Amount - The amount of benefits paid to you during the report period **plus** any amount you reported as saved on last year's report.

HOW TO FILL OUT THE FORM

QUESTION 1 - Payee Felony Convictions

Place an "X" in the "YES" box if during the report period, you (the payee) were convicted of a crime considered to be a felony, and explain the type of crime under REMARKS. Otherwise, place an "X" in the "NO" box.

QUESTION 2 - Beneficiary Custody Changes

Place an "X" in the "YES" box if the beneficiary continued to live alone, or with the same person, or in the same institution during the entire report period. Place an "X" in the "NO" box if different people or different institutions took care of the beneficiary during any part of the report period. Explain the change and provide the beneficiary's current address under REMARKS.

QUESTION 3 - Accounting For Benefits

The total accountable amount includes the benefits you received during the report period **plus** any benefits you reported as saved on last year's report.

A. Who Decided How Benefits Were Used?

Place an "X" in the "YES" box if **you** (the payee) decided how the benefits were to be spent or saved. Place an "X" in the "NO" box if the beneficiary or someone else decided how to use the money, and explain under REMARKS.

B. Food And Housing

Show the total amount of benefits spent for food and housing for the beneficiary during the report period. If the beneficiary lives in an institution or nursing home and you pay monthly charges, multiply the monthly charge by 12 and show this total amount.

C. Personal Items

Show the total amount of benefits spent on clothing, medical/dental care, education, and recreational items like toys, movies, cameras, radios, candy, stationery, grooming aids, etc. during the report period. **Note:** If the beneficiary lives in an institution or other care facility, you should spend at least \$360 a year for the beneficiary's personal needs.

D. Unused Benefits

Show the total amount of benefits you have saved for the beneficiary at the end of the report period, including any interest earned. Show zeroes if you did not save any of the benefits.

**QUESTION 4 -
Savings Information**

Answer this question if you showed an amount in 3.D.

**A. Type Of
Account**

Place an "X" in the box which shows how you are saving the benefits. Place an "X" in the "Other" box if your method of saving the benefits is not listed.

**B. Account
Title**

Place an "X" in the box which most accurately describes the wording of the account title you have on the beneficiary's savings. Place an "X" in the "Other" box if the account title is different **or** if you have not placed the savings in any type of account. **Note:** A savings or checking account title should always show that the money belongs to the beneficiary, but the beneficiary should not have direct access to the funds. If you are not sure whether the account title is correct, check with your bank.

**QUESTION 5 -
Other Savings/
Account Titles**

Answer this question only if you checked "OTHER" in 4.A. or 4.B.

**A. Type Of
Account**

Indicate whether the saved benefits are in cash, Treasury Bills, or some other investment such as mutual funds, or property. For mutual funds, be sure to show the name of the fund in your response (e.g., "XYZ Growth" mutual fund).

**B. Title Of
Account**

Show the title of the account if the savings are in an account or other investment. Show "none" if the savings are not in an account or investment.

**6. Payee's
Signature**

Sign your name in this block. If you sign by mark ("X"), please have two witnesses sign their names and show the date. If the payee is an institution or agency, the form must be signed by an authorized person.

**7. Relationship
To The
Beneficiary**

Show your relationship to the beneficiary. Some examples include, "parent, brother, friend, legal guardian." If you represent a bank, institution or agency, show your job title (e.g., administrator, bookkeeper, caseworker, etc.).

Your Responsibilities As Representative Payee

We appreciate your services as representative payee. As payee, you must use the Social Security and/or SSI benefits you receive for the care and well-being of the beneficiary. You need to know the beneficiary's needs so that you can use the money properly.

In addition to reporting on the use of benefits, you must report any changes which may affect the beneficiary's eligibility for benefits, or the payment amount. You should report the changes as soon as possible by calling SSA at 1-800-772-1213, or by calling or writing your local SSA office. For example, you must tell us if the beneficiary:

- dies,
- moves (especially if he/she enters or leaves a hospital),
- marries,
- starts or stops working,
- is imprisoned,
- is adopted,
- no longer needs a payee, or
- you are no longer responsible for the beneficiary.

If you are payee for a child receiving SSI benefits, we may ask you for proof that the child is receiving medical treatment for his/her disabling condition. We may ask for this information at the time we review the child's case. If we do ask for this information, you must give it to us.

The Privacy Act And Paperwork Reduction Act Statements

We are required by sections 205(j) and 1631(a) of the Social Security Act to ask you to complete this report. The information provided by you on a voluntary basis enables SSA to account for the beneficiary's payments, and ensures that beneficiary needs are being met. If you do not complete and return this report, we may not be able to continue sending the beneficiary's payments to you.

The law sometimes requires us to give out the facts on this form without your consent. The information must be released to another person or government agency if Federal law requires the information for research and audits in order to administer or improve our representative payee program.

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.

This information collection meets the clearance requirements of 44 U.S.C. §3507, as amended by Section 2 of the Paperwork Reduction Act of 1995. You are not required to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take you about 15 minutes to read the instructions, gather the necessary facts, and answer the questions.

If You Have Any Questions

If you have any questions, please call us at 1-800-772-1213. We can answer most questions over the phone. If you prefer to visit one of our offices, please use the 800 number and we will give you the address and telephone number of the office nearest you. Please take this report with you if you visit an office.

Representative Payee Report

FORM APPROVED
OMB NO. 0960-0068

PAYEE'S NAME AND ADDRESS	REPORT PERIOD		SOCIAL SECURITY NUMBER		
	FROM:	TO:			
	BENEFICIARY				
	ID	BIC	FP	PC	DOC
	D	TP	CC	GS	
	CF	TAA			
PF	BSSN				

This report is about the benefits you received for the beneficiary during the report period shown above. Please read the enclosed instructions before completing this form to help you answer each question.

1.	Were you (the payee) convicted of a crime considered to be a felony during the report period shown above? If YES, please explain in REMARKS on the back of this form.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
2.	Did the beneficiary continue to live alone, or with the same person, or in the same institution during the report period shown above? If NO, please explain and provide the beneficiary's current address in REMARKS on the back of this form.	<input type="checkbox"/>	<input type="checkbox"/>
3.	Benefits paid to you during the report period = \$ _____ Benefits you reported as saved on last year's report = \$ _____ Total Accountable Amount = \$ _____		
A.	Did you (the payee) decide how the total accountable amount was spent or saved? _____ If NO, please explain in REMARKS on the back of this form.	YES <input type="checkbox"/>	NO <input type="checkbox"/>
B.	How much of the total accountable amount did you spend for the beneficiary's food and housing during the report period? _____	DOLLAR AMOUNT (NO CENTS) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
C.	How much of the total accountable amount did you spend on other things for the beneficiary such as clothing, education, medical and dental expenses, recreation, or personal items during the report period? _____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
D.	How much, if any, of the total accountable amount did you save for the beneficiary as of the last month in the report period? If none, show zeroes. _____	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

4. If you showed an amount in 3.D. above, place an "X" in the boxes below to show how you are saving the benefits. If you have more than one account, you may mark more than one box in each section.

A. TYPE OF ACCOUNT					B. TITLE OF ACCOUNT		
Savings/Checking Account	U.S. Savings Bonds	Certificates of Deposit	Collective Savings/Checking Account	Other	Beneficiary's Name by Your Name	Your Name for Beneficiary's Name	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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FO ASSISTANCE

5.A. If you answered "OTHER" in 4.A. on the front page, show the type of account or investment in which the benefits are saved. →

TYPE OF ACCOUNT

B. If you answered "OTHER" in 4.B. on the front page, show the title of the account in which the benefits are saved. →

TITLE OF ACCOUNT

REMARKS

I CERTIFY THAT THE INFORMATION I HAVE GIVEN ON THIS FORM IS TRUE. (A PERSON WHO CONCEALS OR FAILS TO TELL SSA ABOUT EVENTS ASKED ABOUT ON THIS FORM WITH THE INTENT TO FRAUDULENTLY RECEIVE BENEFITS MAY BE FINED, IMPRISONED, OR BOTH.)

PAYEE'S SIGNATURE
(If signed by mark (X), two witnesses must sign below)

DATE

6.

8.

RELATIONSHIP TO BENEFICIARY OR TITLE

DAYTIME TELEPHONE NUMBER(S)
(Include area code)

7.

9. _____
Area Code

WITNESS SIGNATURES ARE REQUIRED ONLY IF THE PAYEE'S SIGNATURE ABOVE HAS BEEN SIGNED BY MARK (X).

SIGNATURE OF WITNESS

DATE

SIGNATURE OF WITNESS

DATE

