§ 422.505 What types of applications and related forms are used to apply for retirement, survivors, and disability insurance benefits?

(a) Applications. Prescribed applications include our traditional pre-printed forms, and applications our employees complete on computer screens based on information you give us. We then print a copy on paper, have you sign it and process the signed application electronically. You may also use SSA’s Internet website to submit an SSA-approved application to us. You can complete an Internet application on a computer (or other suitable device, such as an electronic kiosk) and electronically transmit the form to us using an SSA-approved electronic signature. If, however, we do not have an approved electronic signature established when you file your Internet application, you must print and sign the completed application and deliver the form to us.

(b) Related forms. The following are some related forms:

SSA-3—Marriage Certification. (For use in connection with Application for Wife’s or Husband’s Insurance Benefits, (Form SSA-2))

SSA-11—Request to be Selected as Payee.

SSA-21—Supplement to Claim of Person Outside the United States. (To be completed by or on behalf of a person who is, was, or will be outside the United States.)

SSA-25—Certificate of Election for Reduced Spouse’s Benefits. (For use by a wife or husband age 62 to full retirement age who has an entitled child in his or her care and elects to receive reduced benefits for months during which he or she will not have a child in his or her care.)

SSA-721—Statement of Death by Funeral Director. (This form may be used as evidence of death (see § 404.704 of this chapter).)

SSA-760—Certificate of Support (Parent’s, Husband’s or Widower’s). (For use in collecting evidence of support.)

SSA-766—Statement of Self-Employment Income. (For use by a claimant to establish insured status based on self-employment income in the current year.)

SSA-783—Statement Regarding Contributions. (This form may be used as evidence of total contributions for a child.)

SSA-787—Physician’s/Medical Officer’s Statement of Patient’s Capability to Manage Benefits. (This form may be used to request evidence of capability from various medical sources.)

SSA-624—Report on Individual with Mental Impairment. (For use in obtaining medical evidence from medical sources when the claimant has been treated for a mental impairment.)

SSA-827—Authorization for Source to Release Information to the Social Security Administration. (To be completed by a disability claimant to authorize release of medical or other information.)

SSA-1002—Statement of Agricultural Employer (Years Prior to 1988). (For use by employer to provide evidence of annual wage payments for agricultural work.)

SSA-1372—Student’s Statement Regarding School Attendance. (For use in connection with request for payment of child’s insurance benefits for a child who is age 18 through 19 and a full-time student.)

SSA-1724—Claim for Amount Due in the Case of a Deceased Beneficiary. (For use in requesting amounts payable under title II to a deceased beneficiary.)

SSA-3368—Disability Report—Adult. (For use in recording information about the claimant’s condition, source of medical evidence and other information needed to process the claim to a determination or decision.)

SSA-3369—Disability Report—Work History. (For use in recording work history information.)

SSA-3826-F4—Medical Report—General. (For use in helping disability claimants in obtaining medical records from their doctors or other medical sources.)

SSA-3827—Medical Report—(Individual with Childhood Impairment). (For use in requesting information to determine if an individual’s impairment meets the requirements for payment of childhood disability benefits.)

SSA-4111—Certificate of Election for Reduced Widower’s Benefits. (For use by applicants for certain reduced widow’s or widower’s benefits.)

SSA-7156—Furm Self-Employment Questionnaire. (For use in connection with claims for benefits based on farm income to determine whether the income is covered under the Social Security Act.)

SSA-7169—Employment Relationship Questionnaire. (For use by an individual and the alleged employer to determine the individual’s employment status.)

SSA-7183—Questionnaire about Employment or Self-Employment Outside the United States. (To be completed by or on behalf of
§ 422.510 Applications and related forms used in the health insurance for the aged program.

(a) Application forms. The following forms are prescribed for use in applying for entitlement to benefits under the health insurance for the aged program:

SSA–38—Application for Hospital Insurance Entitlement. (For use by individuals who are not entitled to retirement benefits under title II of the Social Security Act or under the Railroad Retirement Act. This form may also be used for enrollment in the supplementary medical insurance benefits plan.)

SSA–40—Application for Enrollment in the Supplementary Medical Insurance Program. (This form is mailed directly to beneficiaries at the beginning of their initial enrollment period.)

SSA–40A—Application for Enrollment in Supplementary Medical Insurance. (For use by civil service employees who are not eligible for enrollment in the hospital insurance plan.)

SSA–40B—Application for Medical Insurance. (For general use in requesting medical insurance protection.)

SSA–40C—Application for Enrollment. (This form is mailed to beneficiaries as a followup on Form SSA–40. (Application for Enrollment in the Supplementary Medical Insurance Program.).)

SSA–40F—Application for Medical Insurance. (For use by beneficiaries residing outside the United States.)

An individual who upon attainment of age 65 is entitled to a monthly benefit based on application OA–C1, SSA–2, OA–C7, OA–C10, SSA–10A, OA–C13, or SSA–14 is automatically entitled to hospital insurance protection. (For conditions of entitlement to hospital insurance benefits, see 42 CFR part 405, subpart A. For medical insurance protection, an applicant must request supplementary medical insurance coverage (see Forms SSA–40, SSA–40A, SSA–40B, SSA–40C, and SSA–40F under § 422.510(a)). (For conditions of entitlement to supplementary medical insurance benefits, see 42 CFR part 405, subpart B.)

(b) Related forms. The following are the prescribed forms for use in requesting payment for services under the hospital insurance benefits program and the supplementary medical insurance benefits program and other related forms:

SSA–1453—Inpatient Hospital and Extended Care Admission and Billing. (To be completed by hospital for payment of hospital expenses for treatment of patient confined in hospital.)

SSA–1453—Inpatient Hospital and Other Health Services. (To be completed by hospital for payment of hospital expenses for treatment of patient who is not confined in the hospital.)

SSA–1484—Explanation of Accommodation Furnished. (To be completed by the hospital to explain accommodation of a patient in other than a semiprivate (two- to four-bed) room.)

SSA–1486—Inpatient Admission and Billing—Christian Science Sanatorium. (To be completed by a Christian Science sanatorium for payment for treatment of patients confined in the sanatorium.)

SSA–1487—Home Health Agency Report and Billing. (For use by an organization providing home health services.)

SSA–1490—Request for Medicare Payment. (For use by patient or physician to request payment for medical expenses.)

SSA–1554—Provider Billing for Patient Services by Physicians. (For use by organizations which have been determined to be group practice prepayment plans for medicare purposes) for reimbursement for medical services provided to beneficiaries.

SSA–1555—Prepayment Plan for Group Medical Practices Dealing Through a Carrier. (For use by organizations (which have been determined to be group practice prepayment plans for medicare purposes) for reimbursement of medical services provided to beneficiaries.

SSA–1669—Request for Information—Medicare Payment For Services to a Patient Now Deceased. (For use in requesting amounts payable under title XVIII to a deceased beneficiary.)

SSA–1729—Request for Enrollment Card Information by Foreign Beneficiary. (Used to notify beneficiaries approaching age 65 who reside in foreign countries that they are eligible to enroll for SMI. They return this form if they wish additional information and an application, SSA–49F.)

SSA–1966—Health Insurance Card. (This card is issued to a person entitled to benefits under the health insurance for the aged program and designates whether he is entitled to hospital insurance benefits or supplementary medical insurance benefits or both.)

SSA–1980—Carrier or Intermediary Request for SSA Assistance.

SSA–2384—Third Party Premium Billing Request. (For use by a nonbeneficiary enrollee who must pay premiums by direct