Valley Residential Service (VRS)

Tenant Income Questionnaire Certification Instructions

Valley Residential Services (VRS) * 1075 Check Street, Suite 102 * Wasilla, AK 99654 * Phone: (907) 357-0256 * Fax:(907) 357-0368 www.valleyres.org or email vrs@valleyres.org

When submitting your Certification Packet, please ensure that a separate Certification Packet is completed for EACH applicant 18 and over who will reside in the unit and that the following information is completed, including all requested documentation. If placed on a waitlist or you haven't from VRS then you must call within 90 days and check status if you do not your application will be closed.

Please fill in every blank line on the forms. If not applicable, please leave blank and ask VRS if applicable. Do not use white-out on any forms in this packet. Any correction must be made by drawing a line through and initialing the error. Each form must be filled out completely even if you have provided the same information on a previous form. Please provide the following, where required:

	Your full name, social security number, and date of birth, and copy of State ID
	Your daytime and evening telephone numbers where you can be reached, or a good message #.
	List all household members who will be living in the unit,
	If you anticipate any additions to your household in the next twelve (12) months, please explain.
	Current employment history of all employed household members to include past 6 weeks pay stubs,
	Employment verification must be provided by your employer via fax or mail,
	Non-Employment form if applicable
	Additional income specifying where the money comes from and how much you receive monthly,
	Provide current documentation from agencies such as: Current year's Social Security Benefit letter (dated no more than 90 days prior to certification), Public Assistance, Unemployment, Child Support, etc.
	Provide name of banking institution and checking/savings/CD's/Bonds/Stocks/other assets with account numbers,
—— or deni	If you check "no" on the Permanent Fund Dividend Form then you must provide verification of ineligibility al. Garnishment of PFD will still count toward household income,
	Other general information requested.
	forms are incomplete or incorrect when they are submitted, it will slow down the annual certification process all result in your household being out of compliance with your housing program. This is a violation of your

Failure to provide requested certification information will cause a delay in processing and could negatively affect your application or certification for housing.

For new applicants, failure to provide requested documentation could result in denial of application.

lease and may cause termination of your program and lease.



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Name:	Check One TELEPHONE # OR MESSAGE #:
□ Re-certification	Development Name
□ Other	Unit #

EACH ADULT HOUSEHOLD MEMBER MUST COMPLETE THIS FORM INCOME INFORMATION

YES	No		MONTHLY GROSS INCOME
		I am self employed. (List nature of self employment)	(use <u>net</u> income from self employment) \$
		I have a job and receive wages, salary, overtime pay, commissions, fees, tips, bonuses, and/or other compensation: List the businesses and/or companies that pay you: Name of Employer	
		2)	\$ \$
		I have seasonal employment (fishing, agriculture, tourist industry, etc.): Identify type of seasonal employment (identify employer if applicable)	
		1)	\$(per season) \$(per season)
		I receive cash contributions of gifts, including rent or utility payments, on an ongoing basis from persons not living with me.	\$
		I receive unemployment benefits.	\$
		I receive Veteran's Administration, GI Bill, or National Guard/Military benefits/income.	\$
		I receive periodic Social Security payments.	\$
		The household receives <u>unearned</u> income from family members age 17 or under (example: Social Security, SSI, Trust Fund disbursements, etc.).	\$
		I receive Supplemental Security Income (SSI).	\$
		I receive disability or death benefits other than Social Security.	\$
		I receive Public Assistance Income (examples: TANF, APA, ATAP, AFDC, General Assistance).	\$



			1 a g c 2
Name	:	Unit #	
		INCOME INFORMATION CONTINUED	
YES	No		MONTHLY GROSS INCOME
		I am entitled to receive child support payments.	\$
		I am currently receiving child support payments.	\$
		If yes, from how many persons do you receive support?	
		I am currently making efforts to collect child support owed to me. List efforts being made to collect child support:	
		I receive alimony/spousal maintenance payments.	\$
		I receive periodic payments from trusts, annuities, inheritance, retirement	
		funds or pensions, insurance policies, or lottery winnings.	
		If yes, list sources:	
		1)	\$
		2)	\$
		I receive income from real estate or personal property.	(use <u>net</u> earned income)
		I receive income from Alaska Senior Care program.	Ψ
		Treceive income nom Alaska Semor Sare program.	\$
		I receive income from Native Dividends.	
		List sources:	\$

ASSET INFORMATION

The household will receive the Alaska Permanent Fund Dividend.

If yes, how many people will receive the dividend? _____

YES	NO		INTEREST KATE	CASH VALUE
		I have a checking account(s).		
		If yes, list all bank(s).		
		1)	%	\$
		2)	%	\$
		I have a savings account(s).		
		If yes, list all bank(s).		
		1)	%	\$
		2)	%	\$



NAME:	Unit #
I MAIVIE.	ONII #

ASSET INFORMATION CONTINUED

YES	NO		INTEREST RATE	CASH VALUE
		I have an online bank account(s).		
		If yes, list all institution(s).		
		1)	%	\$
		2)	%	\$
		I have a debit card(s).		
		If yes, list type of card(s).		
		1)	%	\$
		2)	%	\$
		I have a revocable trust(s).		
	_	If yes, list bank(s).		
		1)	%	\$
		I own real estate.		
	_	If yes, provide description and location:		
				\$
		I own stocks, bonds, or Treasury Bills.		
		If yes, list sources/bank names.		
		1)	%	\$
		2)	%	\$
		3)	%	\$
		I have Certificates of Deposit (CD) or Money Market		
	_	Account(s).		
		If yes, list sources/bank names.		
		1)	%	\$
		2)	%	\$
		3)	%	\$
		I have an IRA / Lump Sum Pension / Keogh Account /		
	_	401K.		
		If yes, list bank(s).		
		1)	%	\$
		2)	%	\$
		I have a whole life insurance policy.		
]	-	If yes, how many policies		\$
		I have cash on hand.		\$
	_	Thave cash on hand.		

<u>s no</u>	I have disposed of assets (i.e. gave away money/assets) for less than the fair market value in the past 2 years.	INTEREST RATE	CASH VALUE
	money/assets) for less than the fair market value in the past 2 years.		
	the past 2 years.		
	If yes, list items and date disposed:		
	1)		\$
	2)		\$
	I have income from assets or sources other than		
	those listed above.		
	If yes, list type below:		
	1)	%	\$
		<u> </u>	¢
	2)	70	Φ



		ANNUAL STUDENT CERTIFICATION (This form must be completed by each adult household member)	
NAME:	:	Unit #	
<u>Unit d</u>	ESIGNATION	LIHTC - HOME - LIHTC & HOME	
		Complete the following if occupying a LIHTC unit	
YES	NO		
		Will ALL of the persons in your household be or have they been full-time students (Kindergarten and high Examples: Elementary, High School, College/University, trade school, etc.) during five (5) calendar months current and/or upcoming calendar year? (<i>Please note that the five calendar months do not have to be consecutive</i>)	
If you	answered	NO to this question please proceed to the bottom of the questionnaire and sign and date.	
If you	answered	YES to this question please specify which of the following exceptions your household meets.	
		Are you receiving assistance under Title IV of the Social Security Act (AFDC/TANF)?	
		Are you enrolled in a job training program receiving assistance through the Job Training Participation Act or other similar program?	(JTPA)
		Are you married and filing a joint tax return	
		Are you a single parent with a dependent child or children and neither you nor your child(ren) are depend of another individual other than a parent of such children	lent(s)
		Are you a student who was previously under the care and placement responsibility of the state agency responsible for administering a plan under part B or part E of title IV of the Social Security Act	
**If r	one of th	e above five (5) exceptions have been identified, the household does not qualify to reside in a LIHTC unit.	**
		Complete the following if occupying a HOME unit	
YES	NO		
		Are you a student at an institution of higher education (including but not limited to post-secondary college universities and vocational institutes)?	es /
If you	answered	NO to this question please proceed to the bottom of the questionnaire and sign and date.	
If you	answered	YES to this question please specify which of the following exceptions your household meets.	
		Are you over the age of 24?	
		Are you a veteran of the United States military?	
		Are you married?	
		Do you have a dependent child?	
		Have you been independent of your parents for at least one year? (emancipated minor or youth aging out of foster care)	
		e above five (5) exceptions has been identified, the household must income qualify including the income a parents.**	and
FURTHE	R UNDERSTAN	PERJURY, I CERTIFY THAT THE INFORMATION PRESENTED ON THIS FORM IS TRUE AND ACCURATE TO THE BEST OF MY/OUR KNOWLEDGE. THE UNDERSIGNED SO THAT PROVIDING FALSE REPRESENTATIONS HEREIN CONSTITUES AN ACT OF FRAUD. FALSE, MISLEADING OR INCOMPLETE INFORMATION WILL RESULT IN THIS OF TERMINATION OF THE LEASE AGREEMENT.	IE
PRINTE	D NAME OF A	PLICANT/TENANT SIGNATURE OF APPLICANT/TENANT DATE	



UNDER \$5,000 ASSET CERTIFICATION

For households whose <u>combined</u> net assets do not exceed \$5,000. Complete only <u>one</u> form per household; include assets of children.

Household Nam	ıe:				Un	it No	
Development Na	ame:					City:	
1. Choose one:			Complete the states time. (if this box is checked, we over	G	through the		below, place a zero in #3,
☐ My/our as (A) Cash Value*	(B) Int. Rate	ude: (Please comp (A*B) Annual Income	Source Savings Account	line that does not ap (A) Cash Value*	(B) Int. Rate	(A*B) Annual Income \$	Source Checking Account
\$		\$	Cash on Hand	\$		\$	Safe Deposit Box
\$		\$	Certificates of Deposit	\$		\$	Money market funds
\$		\$	_ Stocks	\$		\$	_ Bonds
\$		\$	_ IRA Accounts	\$		\$	401K Accounts
\$		\$	_ Keogh Accounts	\$		\$	_ Trust Funds
\$		\$	_ Equity in real estate	\$		\$	_ Land Contracts
\$		\$	_ Lump Sum Receipts	\$		\$	_ Capital investments
\$		\$	Online Bank Account	\$		\$	_ Debit/gift card
\$		\$	_ Life Insurance Policies (e	xcluding Term)			
\$		\$	_ Other Retirement/Pension	Funds not name	ed above:		
\$ PLEASE NOT	E: Certain	\$ \$ funds (e.g., Retir	Personal property held as Other (list): ement, Pension, Trust) may or m			ou. Include only t	those amounts which are.
*Cash value is withdrawal pena	defined as alties, etc.	market value mir	nus the cost of converting the asse	et to cash, such as	broker's fees	, settlement costs,	outstanding loans, early
			include, but is not limited to, gem o, household furniture, daily-use at				
market value	ast two (2 (FMV). T	Those amounts*	ve sold or given away assets (i are included above and are equa amount received, for each asse	al to a total of: \$		c.) for more than	\$1,000 below their fair
☐ I/we have <u>no</u>	<u>t</u> sold or g	given away assets	(including cash, real estate, etc	e.) for less than fa	ir market va	alue during the pa	ast two (2) years.
	assets (a		CFR 813.102) above do no				
The undersigned	further un	derstand(s) that	he information presented in th providing false representations a lease agreement.				
Applicant/Tenar	nt Signati	ure	Date	Applicant/	Tenant Sig	gnature	Date

VERIFICATION OF ASSETS

	THIS SEC	TION TO BE COMPLE	TED BY MANAGE	MENT A	ND EXECUTED	BY TENANT		
TO:	(Name & address of financial	institution)		Date	:			
RE:	Applicant/Tenan	t Name		cial Securi	ty Number	Unit # (if assigned)		
l hereb	y authorize release of my informa	ation.						
	Signature of Appli	cant/Tenant				Date		
The inc	dividual named directly above is ad will remain confidential to sati	an applicant/tenant of sfaction of that stated	of a housing program purpose only. Your p	n that re prompt re	quires verifications esponse is crucia	on of income. The information all and greatly appreciated.		
	Project Owner/ Ma	nagement Agent			1075 S C	idential Services heck St Ste 102 la AK 99654		
	N	IAIL OR FAX THIS FO	RM TO:	(907)357-0256 Phone (907)357-0368 Fax				
		IS SECTION TO BE C	OMPLETED BY FIN	ANCIAL	INSTITUTION			
	ing Accounts:							
Accou	unt #	Six (6) Month	Average Balance		Interest Rat	e		
Couina	to Accounts / Monoy Morket /							
Accou	<u>s Accounts / Money Market A</u>	Current Balar	200		Interest Rat	0		
ACCO	unt #	Current Balar	ice		interest Nat	.e		
Cortific	cates of Deposit:							
Accou	-	Cash Value	Interest Rate	Date	e of Maturity	Cost to Withdrawal Early		
Safety	Deposit Box? □ Yes □	ı No	1	l				
	Signature		Printed Name			Date		
	Phone #		Fax #			E-mail		

NOTE: Section 1001 of Title 18 of the U.S. Code makes it a criminal offense to make willful false statements or misrepresentations to any Department or Agency of the United States as to any matter within its jurisdiction.





Verification of Deposit Housing Assistance Agencies



For faster processing, please complete the form on your computer before printing.

This form is for housing assistance agencies requesting consumer deposit information. Please complete the form including the customer authorization signature and fax to the number noted below. Your completed request will be faxed to the return fax number provided on this form

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ALASKA PERMANENT FUND DIVIDEND CERTIFICATION

The Alaska Permanent Fund Dividend is available to Alaska Residents who have been a resident of the State for at least 1 calendar year (January 1st - December 31st). An Alaska Resident is defined as an individual who is physically present in the State with the intent to remain in the State indefinitely and to make a home in the State.

SECTION: I

Please complete the following information: List all members that will be living in this household & provide date of birth, eligible or not eligible to receive PFD and date of AK. Residency for each household member.

	Print Name of Household Member	Date of Birth	Eligible and / or received PFD Yes or No	Date of Alaska Residency
1				
2				
3				
4				
5				
6				
7				
8				

If all household members listed above were Eligible, & you answered "YES", received the PFD then you have completed this statement. Please sign & date in section III below.

If any household members listed above were Ineligible & you answered "NO", did not receive the PFD, please write the household member line number listed above, under appropriate reason in Section II below.

Section: II

Did not meet Alaska residency requirement of 1-year and will not meet the requirement before they are issued again.
Did not meet Alaska residency requirement of 1-year but will meet the requirement before they are issued again.
Alaska State Eligible Resident & applied but, my/our application was received by PFD office after deadline date.
Garnishment by IRS, State, Civil lawsuit, lien, child support or other.
Other, Explain:

All Household members that answered "NO", to receiving the PFD may be required to provide additional documentation as proof of non-receipt.

Section: III

I/We certify that the above information is true and correct. Under penalty of perjury, I certify the above representations to be true and accurate to the best of my knowledge.

Applicant/Tenant Signature:	Date:
Co-Applicant/Tenant	Date:
Signature:	Date:



NON-EMPLOYED STATUS CERTIFICATION

Apartment Number:
Applicant / Resident Name:
I confirm that:
 I am not currently employed in any capacity. I have no intention of becoming employed in the next 12 months. I do not receive unemployment compensation or other benefits as a result of my non-employment status. I am not under any other obligation to obtain employment. The reason I am not seeking employment is:
(Skip to question B below)
 I am not presently employed but I anticipate becoming employed in the next 12 months. Based on my educational background, prior experience, and career training, I anticipate starting employment as a
Previous year's tax returns Previous job and salary history Written confirmation from a new employer Three current employment advertisements showing average compensation Other
B: I will be using the following sources of funds to pay for rent and other necessities:
I understand that this certification and supporting documentation is made as part of the qualification procedure to determine eligibility for residency and that any misrepresentation herein will be considered a material breach of the lease and subjects me to immediate eviction.
Under penalty of perjury, I certify the above representations to be true and accurate to the best of my knowledge.
Applicant / Resident Signature Date



EMPLOYMENT VERIFICATION

THIS SECTION TO BE COMPLETED BY MA	ANAGEMENT AND EXECUTED BY TENANT
TO: (Name & address of employer)	Date:
<u> </u>	_
RE:Applicant/Tenant Name	Social Security Number Unit # (if assigned)
hereby authorize release of my employment information.	, , , , , , , , , , , , , , , , , , ,
Signature of Applicant/Tenant	Date
The individual named directly above is an applicant/tenant of a housing provided will remain confidential to satisfaction of that stated purpose only	program that requires verification of income. The information y. Your prompt response is crucial and greatly appreciated.
Project Owner/ Management Agent MAIL OR FAX THIS FORM TO:	Valley Residential Services 1075 S Check St Ste 102 Wasilla AK 99654 (907)357-0256 Phone (907)357-0368 Fax
THIS SECTION TO BE COM	 MPLETED BY EMPLOYER
Employee Name: Jo	ob Title:
Presently Employed: Yes Date First Employed	No Last Day of Employment
Current Wages/Salary: \$ (circle one) hourly weekly bi-v	weekly semi-monthly monthly yearly other
Average # of regular hours per week: Year-to-date earnings: \$	from/ through/
Overtime Rate: \$ per hour Average # of o	vertime hours per week:
Shift Differential Rate: \$ per hour Average # of sl	hift differential hours per week:
Commissions, bonuses, tips, other: \$ (circle one) hourly weekly	bi-weekly semi-monthly monthly yearly other
Included in the year-to-date figure above? $\ \square$ Yes $\ \square$ No	
List any anticipated change in the employee's rate of pay within the next 12 mo	onths:; Effective date:
Does the employee participate in a 401 (k) retirement account? \Box Yes \Box No	Can the employee access the funds? ☐ Yes ☐ No
If the employee's work is seasonal or sporadic, please indicate the layoff period	d(s):
Additional remarks:	
Employer's Signature Employer's Pr	rinted Name Date
Employer [Company]	Name and Address
Phone # Fax	# E-mail

NOTE: Section 1001 of Title 18 of the U.S. Code makes it a criminal offense to make willful false statements or misrepresentations to any Department or Agency of the United States as to any matter within its jurisdiction.



Child Support Certification

Unit Number:		
Applicant / Resident Name:		
Child(ren) name(s):		
PLEASE CHECK ALL THAT APPLY:		
☐ I AM legally entitled to receive child supp	port and I am currently receiving support.	. (Attach verification of collection)
☐ I <u>AM</u> legally entitled to receive child supp following)	oort; however, I am not currently receiving	g support AND: (check one of the
agency or other legal channels. I an	seeking monies for child support through m pursuing support for the following child (At	
	es of seeking any monies for child suppor	
I certify that I am NOT legally entitled to refollowing child/children:		
Aithough Fuo hot receive child so	Average value per	
Food	\$	
Diapers, clothing and other househo		
Payment of utility, car insurance, or o		
Health insurance and child care	\$ \$	
Other items not listed above	(Attach verification of recurring gift)	
☐ I do not receive support from the		
Although child support has not been order months in the amount of	ered at this time I <u>anticipate receiving</u> su per month starting	
Child support is not an issue for this hou	sehold as both parents reside in the hon	ne.
☐ I do not have children at this time.		
I understand it is my responsibility to notify the lathat the information presented in this certifical understand(s) that providing false representation result in the termination of a lease agreement.	tion is true and accurate to the best of	my knowledge. The undersigned further
Signature of Applicant/Tenant	Printed Name of Applicant/Tenant	 Date



AUTHORIZATION FOR RELEASE OF INFORMATION

Your signature on this form authorizes Valley Residential Services (VRS) to obtain information on your income, financial position and personal history to determine your eligibility for rental housing. This authorization and the information obtained may be given to any Federal, State, or local program that is enforcing applicable housing rules and regulations.

Persons and/or organizations that may be contacted include, but are not limited to: employers, financial institutions, landlords, local governments, Native corporations, the State of Alaska's Permanent Fund Dividend (PFD) Division, child support enforcement agencies, private individuals, public assistance agencies, law enforcement agencies, school authorities, the Social Security Administration, and unearned income sources. Therefore, this consent form authorizes the release of income, financial, and personal information from all of the persons and organizations described above, including directly from financial institutions, regarding any period(s) within the last 5 years.

I understand that this authorization cannot be used to obtain any information about me that is not pertinent to my eligibility for rental housing with Valley Residential Services (VRS).

COMPUTER MATCHING NOTICE AND CONSENT

I understand and agree that Valley Residential Services (VRS) may conduct computer matching programs to verify the information supplied for my application. If a computer match is done, I understand that I have a right to disprove any information that may be incorrect.

CONDITIONS

I agree that a photocopy of this authorization may be used for the purposes stated above. The original of this authorization is on file with Valley Residential Services (VRS) and will stay in effect fifteen (15) months from the date signed. I understand that I have a right to review my file and correct any information that may be incorrect.

Applicant/Resident Name (Please print)	Date
Applicant/Resident Signature	Date

PENALTIES FOR MISUSING THIS CONSENT

Title 18, Section 1001 of the U.S. Code states that a person is guilty of a felon for knowingly and willingly making false or fraudulent statements to any department of the United States Government. HUD and any owner (or any employee of HUD or the owner) may be subject to penalties for unauthorized disclosures or improper uses of information collected based on the consent form. Use of the information collected based on the verification form is restricted to the purposes cited above. Any person who knowingly or willingly requests, obtains, or discloses any information under false pretenses concerning an applicant or participant may be subject to a misdemeanor and fined not more than \$5,000. Any applicant or participant affected by negligent disclosure of information may bring civil action for damages and seek other relief, as may be appropriate, against the officer or employee of HUD or the owner responsible for the unauthorized disclosure or improper use. Penalty provisions for misusing the social security number are contained in the Social Security Act at 42 U.S.C. 208a (6), (7), and (8). Violation of these provisions are cited as violations of 42 U.S.C. 408a (6), (7), and (8).

