

## **Step-By-Step**

### **Instructions for Requesting Benefit Amounts and 1099SSA Forms Over the Telephone with the Social Security Administration**

1. Dial Social Security at **1-800-772-1213** between the hours of 8am and 7pm
- \*2. When it gets to the main menu asking “how can I help you,”  
– Say loudly and clearly: **“REPLACEMENT TEN NINETY NINE”**
3. When the automated voice asks if it is for the current year say **“NO, PRIOR YEAR”**
4. Say **“CONTINUE”** when asking if you need more information on the Paperwork Reduction Act, unless you want that.
5. **Say your Social Security number** slowly and loudly when prompted
6. Wait for approximately 5 minutes and when prompted for a call back, say Yes or dial the number prompted for this option. Enter your phone number and wait by your phone for a call-back. (Note: If they do not offer the call back option, that means you should have an agent on the phone within 10-15 minutes)
7. When on the phone with Social Security Agent, answer any verification questions that they have to the best of your knowledge. These will be verification questions like “what is your mother’s maiden name.”
- 8.a. If you are comfortable with it, have a pen and the attached fillable sheet available in this packet, and: **ask for your prior 5 years’ amounts in Box 3, Box 4, and Box 5, and “Description of amount in Box 3”**. **Use the following sheet to write these amounts down.**  
**Note:** For some, the “Description of amount in Box 3” will simply be an amount withheld for Medicare.
- 8.b. If you do not want to write these amounts down over the phone, you can simply request the 1099-SSA documents for the current and previous 5 years to be sent to you via the U.S.P.S. and it will arrive typically within 2 weeks. In some cases, The Social Security representative may need to help you to make an appointment at the local office to get prior years 1099-SSA.
9. Be sure when you have collected this information, to keep this information in a safe and secure place, and when finished with it, to destroy it completely.

\*For Spanish Speakers Press 2 immediately at the prompt after Step 1.

**2017:**

Box 3 \_\_\_\_\_

Box 4 \_\_\_\_\_

Box 5 \_\_\_\_\_

Description of Amount in Box 3 \_\_\_\_\_

**2018:**

Box 3 \_\_\_\_\_

Box 4 \_\_\_\_\_

Box 5 \_\_\_\_\_

Description of Amount in Box 3 \_\_\_\_\_

**2019:**

Box 3 \_\_\_\_\_

Box 4 \_\_\_\_\_

Box 5 \_\_\_\_\_

Description of Amount in Box 3 \_\_\_\_\_

**2020:**

Box 3 \_\_\_\_\_

Box 4 \_\_\_\_\_

Box 5 \_\_\_\_\_

Description of Amount in Box 3 \_\_\_\_\_