



Information for Tax Preparers

Your clients can get replacement Social Security tax forms online with ease

If your clients need a replacement form SSA-1099 or SSA-1042S, we have an easy way for them to get an instant replacement. Encourage your clients to go online and get theirs using a personal *my* Social Security account at www.ssa.gov/myaccount.

We send a SSA-1099 to your clients who are U.S. citizens, nationals, or U.S. residents as defined in U.S. income tax laws. We send a SSA-1042S to your clients who are **not** U.S. citizens or nationals, or U.S. residents as defined in the U.S. income tax laws. These clients received or repaid Social Security benefits last year or had income tax withheld or refunded from their Social Security benefits last year. The forms SSA-1099 and SSA-1042S are not issued for people who receive Supplemental Security Income (SSI) because these payments are not considered taxable income.

A replacement SSA-1099 or SSA-1042S is generally available for the previous tax year after February 1.

Your clients can now download a replacement SSA-1042 or SSA-1042S for any of the past 6 years for which benefits were paid. If your client lives outside the U.S., go to www.ssa.gov/foreign and learn how they can access our online services.

For more information on when people may have to pay federal income taxes on their Social Security Benefits, visit www.ssa.gov/planners/taxes.

Your clients can get their *Social Security Statement* anytime, online

Your clients can get their *Social Security Statement* online by using their personal *my* Social Security account. Their online *Statement* gives them secure and convenient access to their earnings records. It also shows estimates for retirement, disability, and survivors benefits.

Save time — business owners can report wages online

Do you manage payroll responsibilities for some of your clients? Use our Business Services Online (BSO) to report employee wages and verify names and Social Security numbers for W-2s.

BSO is a suite of services that allows organizations, businesses, employers, and third parties to exchange information with Social Security securely over the internet.

BSO allows you to send W-2s and W-2Cs to Social Security by uploading a specifically formatted electronic file or by directly keying W-2s and W-2Cs into an online form. This allows you to view the processing status, errors, and error notices for wage files and/or wage reports submitted by or for your company. In addition, a one-time 15-day extension of the deadline for resubmitting wage data can be requested.

To access BSO employer services, your clients will need to have a personal *my* Social Security account or a Login.gov or ID.me credential. If they do not have an account or a Login.gov or ID.me credential, they will need to create one. For more information, visit www.ssa.gov/bsa.

Contacting Us

There are several ways to do business with us including online, by mail, by phone, and in person. If you cannot use our online services, we can help you by phone when you call our national toll-free 800 number.

If you don't have access to the internet, we offer many automated services by telephone, 24 hours a day, 7 days a week, so you may not need to speak with a representative. Call us toll-free at **1-800-772-1213** or at our TTY number, **1-800-325-0778**, if you're deaf or hard of hearing. We provide free interpreter services upon request. For quicker access to a representative, try calling early in the day (between 8 a.m. and 10 a.m. local time) or later in the day. **We are less busy later in the week (Wednesday to Friday) and later in the month.**



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