



OVERVIEW: FILING FOR SOCIAL SECURITY BENEFITS

This document will provide you with an overview of the process for filing for Social Security benefits. It is recommended that you apply four months prior to the date you wish to start collecting benefits.

Methods for Filing

There are three options to file for benefits: (1) Online, (2) over the phone, or (3) in person.

Online

Follow this link to learn more about applying online. <https://www.ssa.gov/benefits/retirement/>.

When you're ready, apply for benefits here: <https://secure.ssa.gov/iClaim/rib>

By Phone

Call to speak with a Social Security representative to apply for your benefits. The number is (800) 772-1213, and representatives are available between 8 a.m. and 7:00 p.m. Monday through Friday.

In Person

Locate your Social Security Office here <https://secure.ssa.gov/ICON/main.jsp>.

Note: Due to restrictions related to COVID-19, the offices will be closed to the public for in-person service until further notice.

Before You File...

Prior to filing for benefits, you'll need to be prepared with the following documents and information. Even if you don't have all the required information gathered, go ahead start the filing with the information you do have. The Social Security Administration may have access to some of the missing information.

Documents

- Proof of Birth: original birth certificate, certified copy of birth certificate or your status as a legal alien
- Proof of US Citizenship or your status as a legal alien
- A copy of your US military service papers if you served in the military before 1968 (i.e., DD-214-Certificate of Release or Discharge from Active Duty document)
- A copy of your W-2 form(s) and/or your tax return for last year if you were self-employed

Information

- Your birth date, place of birth, and Social Security number. (If you've ever used another Social Security number, be sure to inform the SSA, too.)
- The name, birth date, and Social Security number of your spouse, if you have one, as well as any former spouses. For each of your marriages, you should be able to provide the wedding date and location, and dates of divorce or death, if either happened.
- The names of any unmarried children you have who are younger than 18; 18 or 19 and in secondary school; or who are disabled since before they turned 22.
- Whether you have ever applied for Social Security benefits, Medicare, or Supplemental Security Income (SSI) before -- or whether anyone has done so on your behalf. If any of these were done based on someone else's Social Security record, the SSA will need details on that.

Important: You'll need to specify when you want your Social Security benefits to start being paid to you, and also provide the account number and routing number of your bank or financial institution to set up the direct deposit.



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After You File...

After you file for your Social Security benefits, the SSA will review the application and contact you if additional information is needed. You'll receive a letter in the mail with SSA's decision. If you included information about other family members when you applied, you will be notified if they may be able to receive benefits from your application.

You can check the status of your application online using your personal **my Social Security** account. If you are unable to check your status online, you may call SSA (800) 772-1213 (TTY 1-800-325-0778) from 8:00 a.m. to 7:00 p.m., Monday through Friday.

Source: <https://www.ssa.gov/benefits/retirement/apply.html>

