STEPS FOR OBTAINING A BENEFITS PLANNING QUERY (BPQY)

2 signed releases are needed to get a BPQY. One release authorizes SSA to provide 75% of the information on the BPQY (the info from their computer system). The second release authorizes SSA to provide annual earnings information they get from the IRS (25% of info on BPQY).

1. Fill in the individual's name, date of birth, and social security number on the top row of the release.

2. Fill in agency name and the specific name of person SSA should send the BPQY to. Then fill in agency address, fax number and phone number.

3. Have the individual sign and date the release. If person has a guardian, guardian must sign also.

4. Repeat steps 1-3 for the second release.

5. If your agency has a contact at the local office, give your request to that person. Contact your local CWIC to clarify the process they go through to request BPQYs. They will have identified the best approach for requesting them for each office.

6. Fax both releases to the contact person at the local SSA, with example BPQY. Note on fax cover sheet you are requesting a Benefits Planning Query (BPQY) and that you are including an example BPQY (print pages 12-13 from BPQY Handbook) to clarify the specific report you are requesting. Some SSA Claims Representatives aren't familiar with what a BPQY is, so they can inadvertently give you a TPQY, which doesn't provide the information we need. Once you have determined the Claims Representative is familiar with the BPQY, you don't need to send the example BPQY with the releases.

7. The BPQY will be mailed or faxed to you. Any questions about the BPQY should be directed to the person who generated it at SSA (unless directed otherwise) and they will only be able to speak to the person on the release. If you are working with a CWIC, SSA will need a signed release for the CWIC to speak with them. Establish plan with CWIC for who will get the release signed for them.