

BSO Tutorial for Tax Year 2008

Submit a Wage File

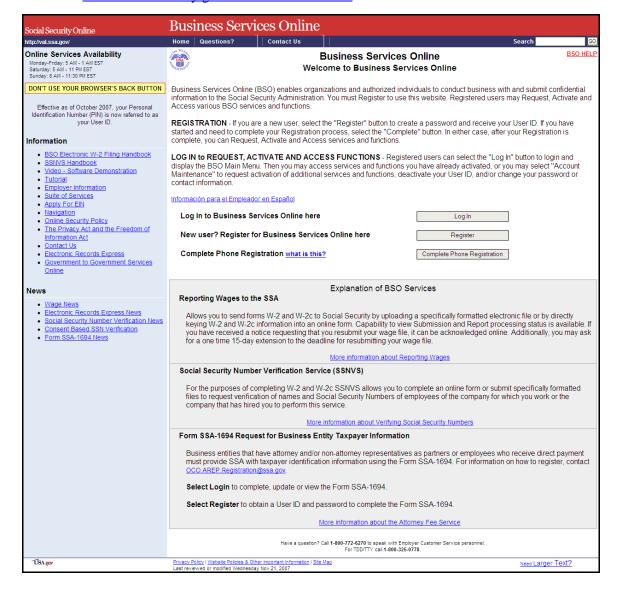
Contains the following lessons:

- Submit a W-2 Wage File
- Submit a W-2c Wage File
- Submit a Resubmission File
- Submit a Reconciliation File

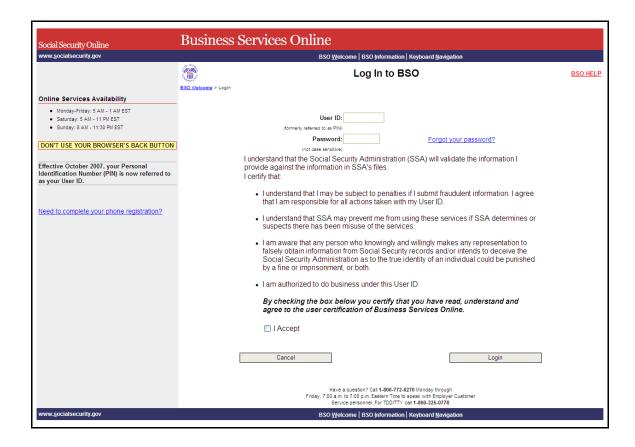
LESSON 1: SUBMIT A W-2 WAGE FILE

Follow the instructions below to submit a W-2 wage file to the Social Security Administration (SSA). For information on preparing formatted Electronically Filing Wage W-2 data files (EFW2, formerly MMREF-1), select the link for *Specifications for Filing Forms W-2 Electronically (EFW2)* at www.socialsecurity.gov/employer/pub.htm.

STEP 1: Point your browser to the Business Services Online (BSO) Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

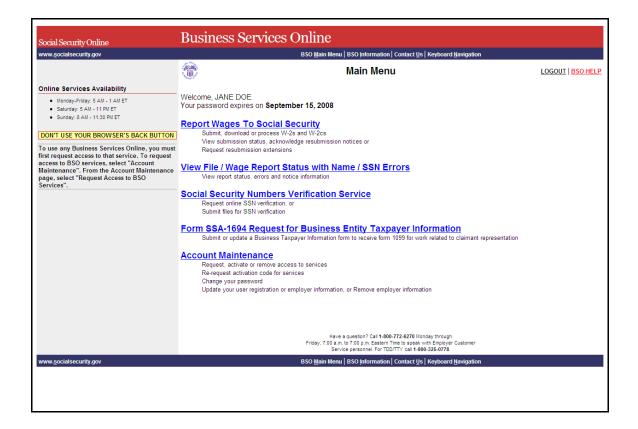


STEP 2: Select the **Log In** button on the BSO Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

STEP 4: Select the "I Accept" check box after reading the conditions defined on the Log In to BSO page. Select the **Login** button to display the BSO Main Menu page (To return to the BSO Welcome page, select the **Cancel** button.).

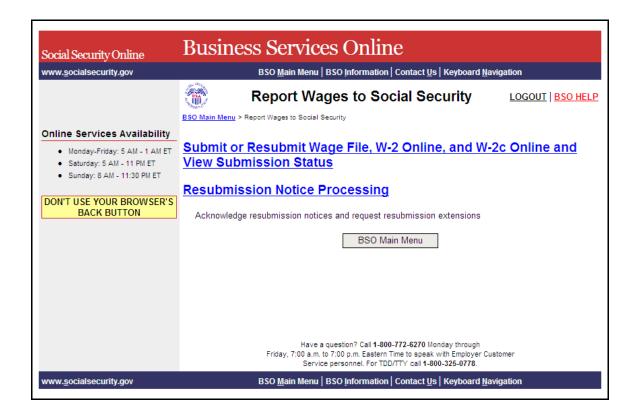


STEP 5: Select the Report Wages to Social Security link on the BSO Main Menu page.

Report Wages To Social Security

Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions

The system displays the Report Wages to Social Security page.

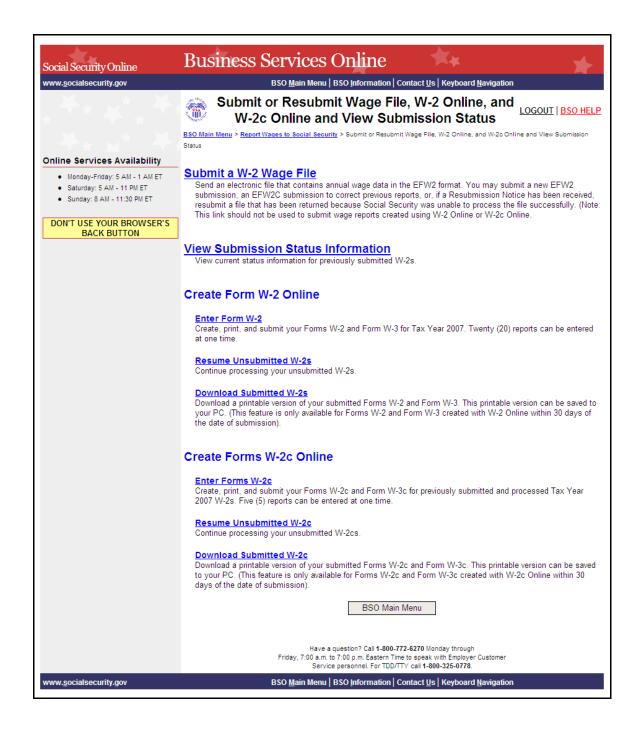


STEP 6: Select Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status link on the Report Wages to Social Security page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status

The system displays the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.



STEP 7: Select Submit a W-2 Wage File link on the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page. (To return to the BSO Main Menu page, select the BSO Main Menu button.)

Submit a W-2 Wage File

Send an electronic file that contains annual wage data in the EFW2 format. You may submit a new EFW2 submission, an EFW2C submission to correct previous reports, or, if a Resubmission Notice has been received, resubmit a file that has been returned because Social Security was unable to process the file successfully. (Note: This link should not be used to submit wage reports created using W-2 Online or W-2c Online.

The system displays the Wage Reporting Attestation page.



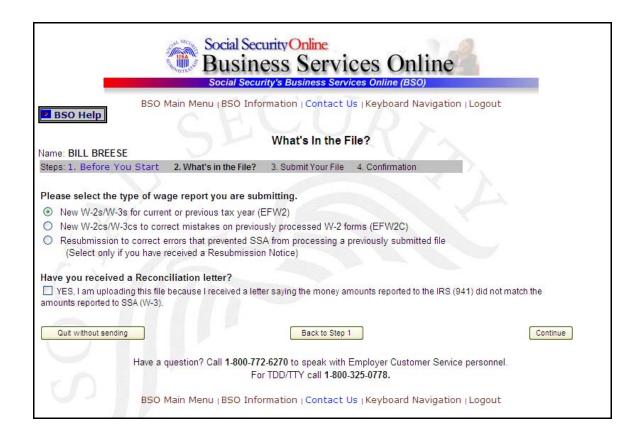
STEP 8: Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the Before You Start page.

(To return to the BSO Main Menu page, select the **I DO NOT Accept** button.)



STEP 9: Select the **Continue** button after verifying that you have ensured the quality of your submission and properly compressed your file(s). The system displays the What's in the File? page.

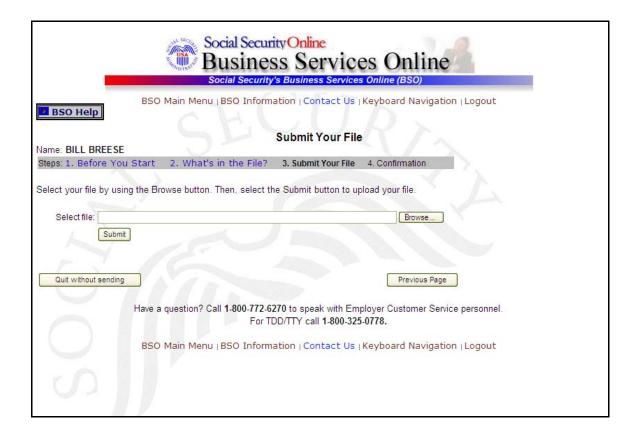
(To return to the BSO Main Menu page, select the **Quit without sending** button.)



STEP 10: If multiple Employee Identification Numbers (EIN) are associated with the submitter then a list box of EINs will appear. An EIN should be selected from the list box. Otherwise proceed to Step 12.



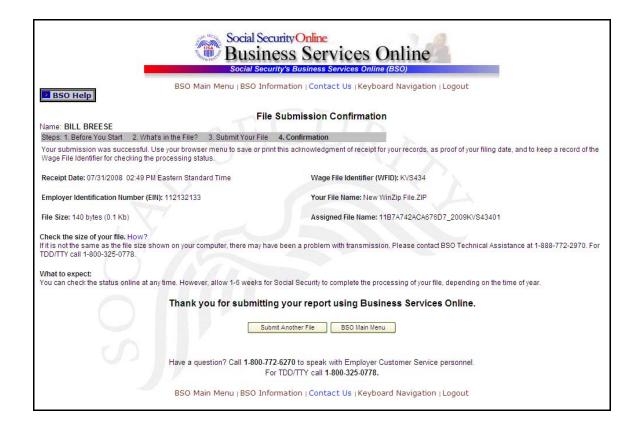
STEP 11: Select the New W-2s/W-3s for current or previous tax year (EFW2) radio button and select the Continue button to access the Submit Your File page (The Back to Step 1 button displays the Before You Start page and the Quit without sending button displays the BSO Main Menu page.).



- **STEP 12**: Type the name of the file in the Select file field or select the **Browse** button to the right of the field to select the file.
- **STEP 13**: Select the **Submit** button to submit the file to SSA (The **Previous Page** button displays the What's in the File? page and the **Quit without sending** button displays the BSO Main Menu page.). After displaying the Submission in Progress window (for large files), the system displays the Confirmation Your File Was Received page with a pop-up window for the option to request print of the confirmation.
- **STEP 14**: Select the **OK** button in the pop-up window to print the Confirmation Your File Was Received page. Otherwise, select the **Cancel** button to close the pop-up window.



At this time, print this page and check the size of your file.



STEP 15: To submit another file, select the Submit Another File button to return to the What's in the File? page. To return to the BSO Main Menu page, select the BSO Main Menu button.

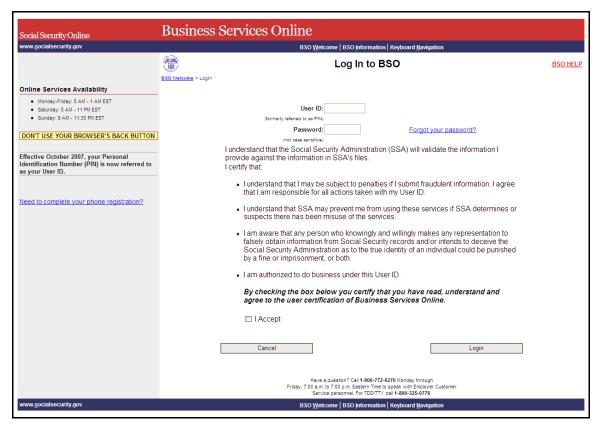


If a communications disruption occurs while you are submitting a wage file, log in again and select the **View File/Wage Report Status [with or without] Name/SSN Errors** link from the BSO Main Menu page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

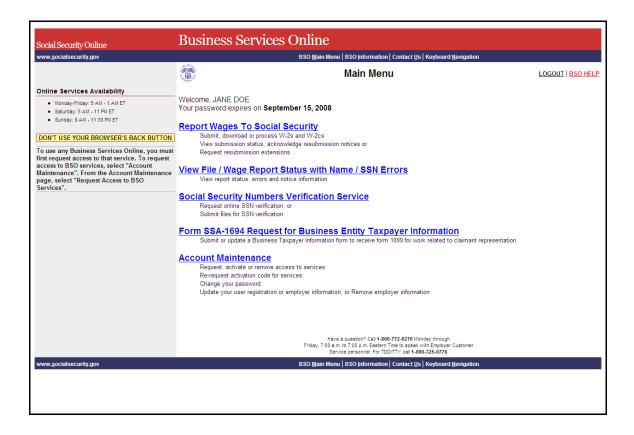
LESSON 2: SUBMIT A W-2C WAGE FILE

Follow the instructions below to submit a corrected W-2 wage file to the Social Security Administration. For information on preparing formatted Electronically Filing Wage W-2c data files (EFW2C, formerly MMREF-2), select the link for *Specifications for Filing Forms W-2c Electronically (EFW2C)* at www.socialsecurity.gov/employer/pub.htm.

- **STEP 1**: Point your browser to the BSO Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the BSO Welcome page. The system displays the Log In to BSO page.



- **STEP 3**: Enter your User ID and password.
- **STEP 4**: Select the "I Accept" check box after reading the conditions defined on the Log In to BSO page. Select the **Login** button to display the BSO Main Menu page (To return to the BSO Welcome page, select the **Cancel** button.).

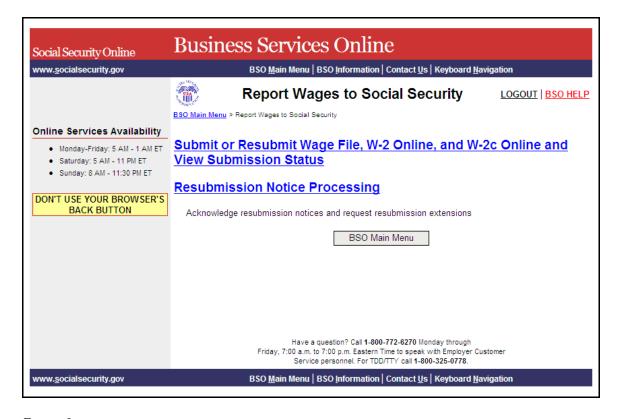


STEP 5: Select the Report Wages to Social Security link on the BSO Main Menu page.

Report Wages To Social Security

Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions

The system displays the Report Wages to Social Security page.

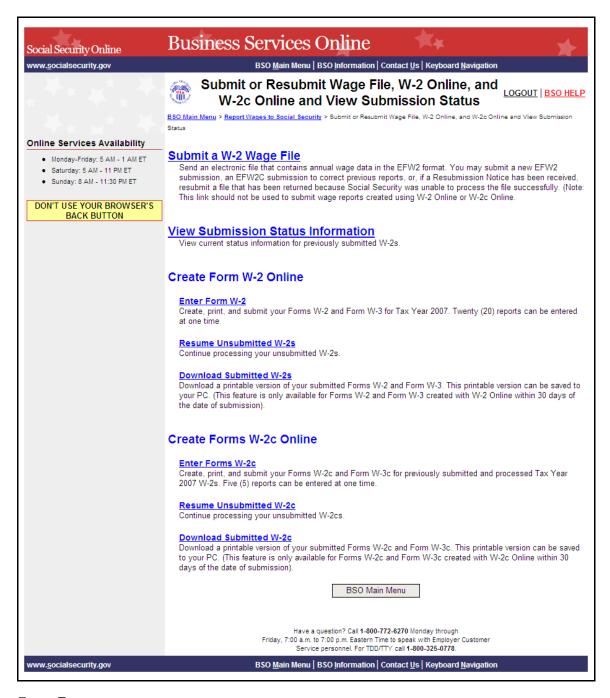


STEP 6: Select Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status link on the Report Wages to Social Security page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status

The system displays the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.



STEP 7: Select Submit a W-2 Wage File link on the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit a W-2 Wage File

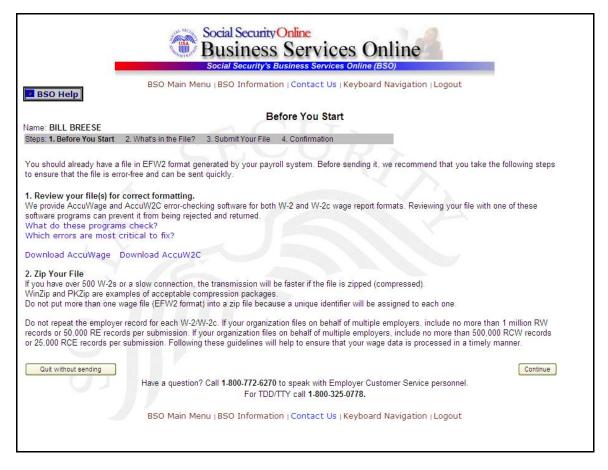
Send an electronic file that contains annual wage data in the EFW2 format. You may submit a new EFW2 submission, an EFW2C submission to correct previous reports, or, if a Resubmission Notice has been received, resubmit a file that has been returned because Social Security was unable to process the file successfully. (Note: This link should not be used to submit wage reports created using W-2 Online or W-2c Online.

The system displays the Wage Reporting Attestation page.



STEP 8: Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the Before You Start page.

(To return to the BSO Main Menu page, select the I DO NOT Accept button.)



STEP 9: Select the **Continue** button after verifying that you have ensured the quality of your submission and properly compressed your file(s). The system displays the What's in the File? page.

(To return to the BSO Main Menu page, select the **Quit without sending** button.)



STEP 10: If multiple Employee Identification Numbers (EIN) are associated with the submitter then a list box of EINs will appear. An EIN should be selected from the list box. Otherwise proceed to Step 12.



STEP 11: Select the New W-2cs/W-3cs to correct mistakes on previously processed W-2 forms (EFW2C) radio button and select the Continue button to access the Submit Your File page (The Back to Step 1 button displays the Before You Start page and the Quit without sending button displays the BSO Main Menu page.).

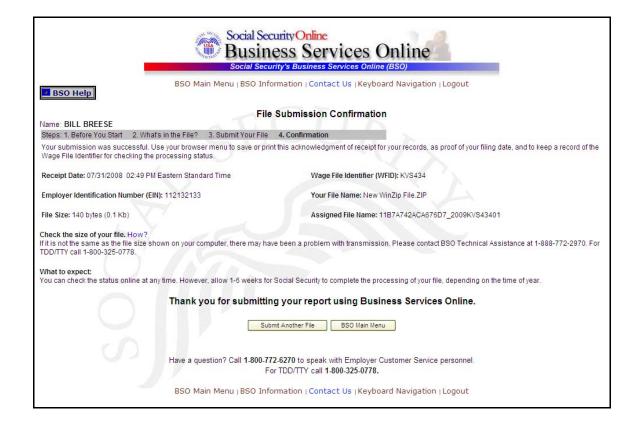
Please select the type of wage report you are submitting. ○ New W-2s/W-3s for current or previous tax year (EFW2) ● New W-2cs/W-3cs to correct mistakes on previously processed W-2 forms (EFW2C) ○ Resubmission to correct errors that prevented SSA from processing a previously submitted file (Select only if you have received a Resubmission Notice)



- **STEP 12**: Type the name of the file in the Select file field or select the **Browse** button to the right of the field to select the file.
- STEP 13: Select the Submit button to submit the file to SSA (The Previous Page button displays the What's in the File? page and the Quit without sending button displays the BSO Main Menu page.). After displaying the Submission in Progress window (for large files), the system displays the Confirmation Your File Was Received page with a pop-up window for the option to request print of the confirmation.
- **STEP 14**: Select the **OK** button in the pop-up window to print the Confirmation Your File Was Received page. Otherwise, select the **Cancel** button to close the pop-up window.



At this time, print this page and check the size of your file.



STEP 15: To submit another file, select the **Submit Another File** button to return to the What's in the File? page. To return to the BSO Main Menu page, select the **BSO Main Menu** button.

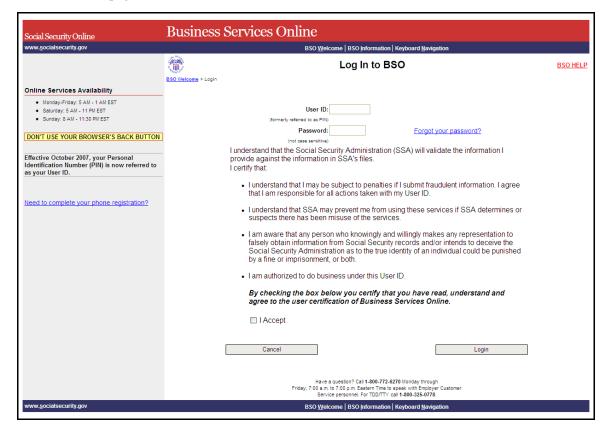


If a communications disruption occurs while you are submitting a wage file, log in again and select the **View File/Wage Report Status [with or without] Name/SSN Errors** link from the BSO Main Menu page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

LESSON 3: SUBMIT A RESUBMISSION FILE

Follow the instructions below to submit a resubmission file to the SSA. This option should be used only if you have received a notice from the SSA asking you to correct and resubmit your data. The EIN of the person resubmitting wage data to SSA must match the EIN of the person who originally submitted the file.

- **STEP 1**: Point your browser to the BSO Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the BSO Welcome page. The system displays the Log In to BSO page.

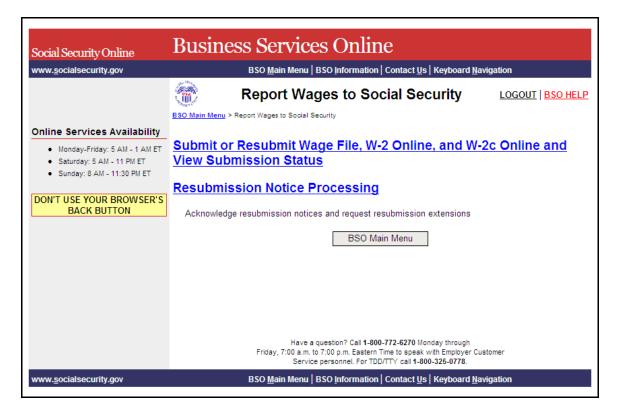


- **STEP 3**: Enter your User ID and password.
- **STEP 4**: Select the "I Accept" check box after reading the conditions defined on the Log In to BSO page. Select the **Login** button to display the BSO Main Menu page (To return to the BSO Welcome page, select the **Cancel** button.).
- **STEP 5:** Select the **Report Wages to Social Security** link on the BSO Main Menu page.

Report Wages To Social Security

Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions

The system displays the Report Wages to Social Security page.

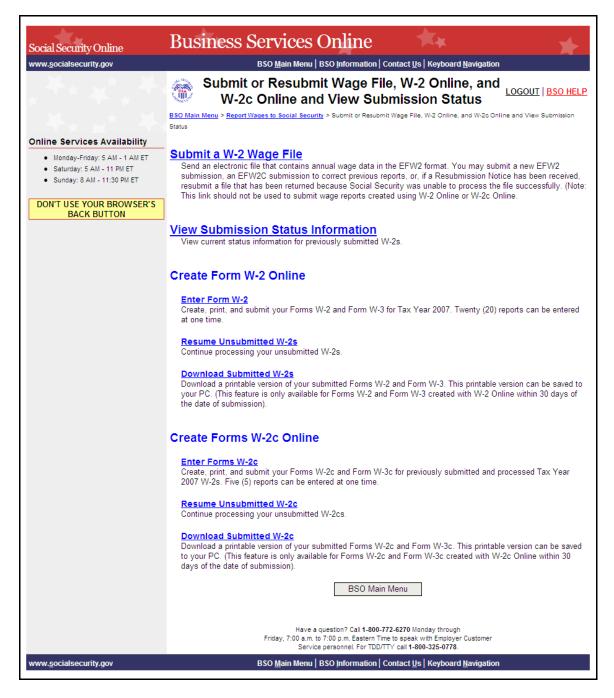


STEP 6: Select Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status link on the Report Wages to Social Security page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status

The system displays the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.



STEP 7: Select Submit a W-2 Wage File link on the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit a W-2 Wage File

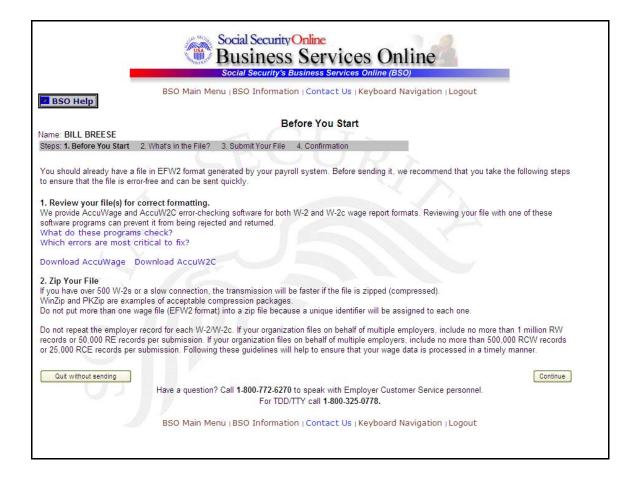
Send an electronic file that contains annual wage data in the EFW2 format. You may submit a new EFW2 submission, an EFW2C submission to correct previous reports, or, if a Resubmission Notice has been received, resubmit a file that has been returned because Social Security was unable to process the file successfully. (Note: This link should not be used to submit wage reports created using W-2 Online or W-2c Online.

The system displays the Wage Reporting Attestation page.



STEP 8: Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the Before You Start page.

(To return to the BSO Main Menu page, select the I DO NOT Accept button.)



STEP 9: Select the **Continue** button after verifying that you have ensured the quality of your submission and properly compressed your file(s). The system displays the What's in the File? page.

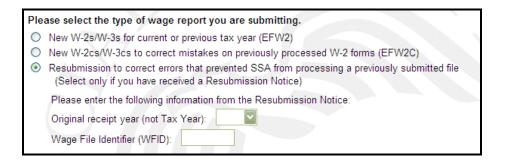
(To return to the BSO Main Menu page, select the **Quit without sending** button.)



STEP 10: If multiple EIN are associated with the submitter then a list box of EINs will appear. An EIN should be selected from the list box. Otherwise proceed to Step 12.



STEP 11: Select the Resubmission to correct errors that prevented SSA from processing a previously submitted file radio button (Select only if you received a Resubmission Notice). The system will activate the fields below the Resubmission radio button.



- **STEP 12**: Select the original receipt year in the **Original Receipt Year (not Tax Year)** from the drop-down menu. This should match the Receipt Year given on the Resubmission Notice.
- **STEP 13**: Enter the WFID in the WFID field.
- **STEP 14**: Select the **Continue** button to access the Submit Your File page (The **Back to Step 1** button displays the Before You Start page and the **Quit without sending** button displays the BSO Main Menu page.).



STEP 15: Type the name of the file in the Select file field or select the **Browse** button to the right of the field to select the file.

- STEP 16: Select the Submit button to submit the file to SSA (The Previous Page button displays the What's in the File? page and the Quit without sending button displays the BSO Main Menu page.). After displaying the Submission in Progress window (for large files), the system displays the Confirmation Your File Was Received page with a pop-up window for the option to request print of the confirmation.
- **STEP 17**: Select the **OK** button in the pop-up window to print the Confirmation Your File Was Received page. Otherwise, select the **Cancel** button to close the pop-up window.



At this time, print this page and check the size of your file.



STEP 18: To submit another file, select the **Submit Another File** button to return to the What's in the File? page (To return to the BSO Main Menu page, select the **BSO Main Menu** button.).



If a communications disruption occurs while you are submitting a wage file, log in again and select the **View File/Wage Report Status [with or without] Name/SSN Errors** link from the BSO Main Menu page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

LESSON 4: SUBMIT A RECONCILIATION FILE

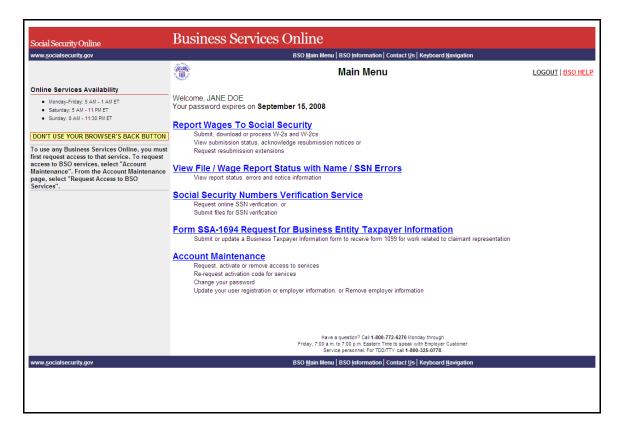
Follow the instructions below to submit a reconciliation file to the SSA. This option should only be used if you have received a letter from the SSA notifying you of a discrepancy between money amounts shown on a Form W-3 sent to the SSA and a Form 941 sent to the IRS.

- **STEP 1**: Point your browser to the BSO Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the BSO Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

STEP 4: Select the "I Accept" check box after reading the conditions defined on the Log In to BSO page. Select the **Login** button to display the BSO Main Menu page (To return to the BSO Welcome page, select the **Cancel** button.).



STEP 5: Select the Report Wages to Social Security link on the BSO Main Menu page.

Report Wages To Social Security

Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions

The system displays the Report Wages to Social Security page.

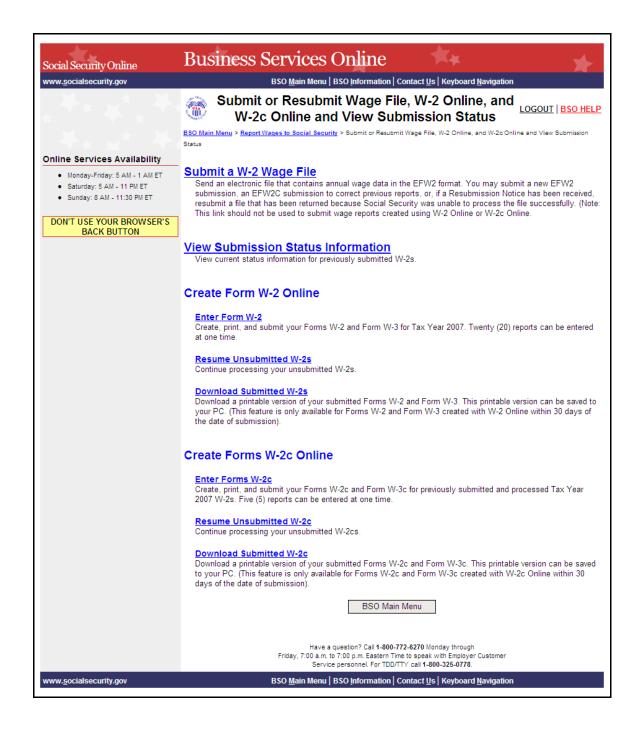


STEP 6: Select Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status link on the Report Wages to Social Security page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status

The system displays the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.



STEP 7: Select **Submit a W-2 Wage File** link on the Submit or Resubmit Wage File, W-2 Online, and W-2c Online and View Submission Status page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Submit a W-2 Wage File

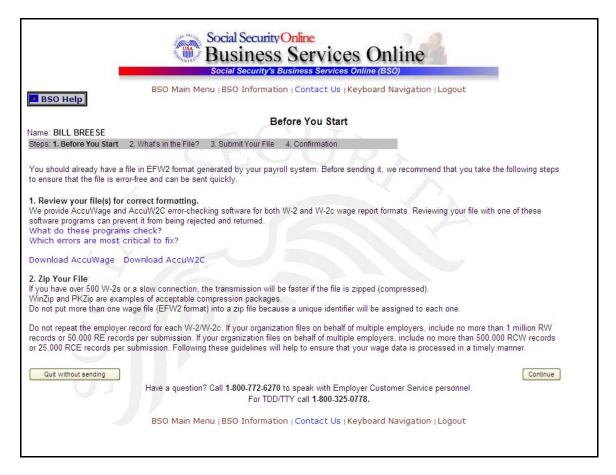
Send an electronic file that contains annual wage data in the EFW2 format. You may submit a new EFW2 submission, an EFW2C submission to correct previous reports, or, if a Resubmission Notice has been received, resubmit a file that has been returned because Social Security was unable to process the file successfully. (Note: This link should not be used to submit wage reports created using W-2 Online or W-2c Online.

The system displays the Wage Reporting Attestation page.



STEP 8: Select the **I Accept** button after reading the conditions defined on the Wage Reporting Attestation page. The system displays the Before You Start page.

(To return to the BSO Main Menu page, select the **I DO NOT Accept** button.)

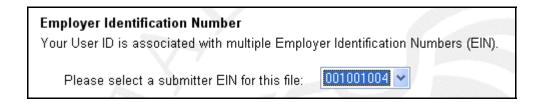


STEP 9: Select the **Continue** button after verifying that you have ensured the quality of your submission and properly compressed your file(s). The system displays the What's in the File? page.

(To return to the BSO Main Menu page, select the Quit without sending button.)



STEP 10: If multiple EIN are associated with the submitter then a list box of EINs will appear. An EIN should be selected from the list box. Otherwise proceed to Step 12.



- **Step 11**: Select the appropriate type of file (New W-2, New W-2c, or Resubmission).
- Step 12: Select the YES, I am uploading this file because SSA sent a letter saying the money amounts reported to IRS (941) did not match the amounts reported to SSA (W-3). checkbox.

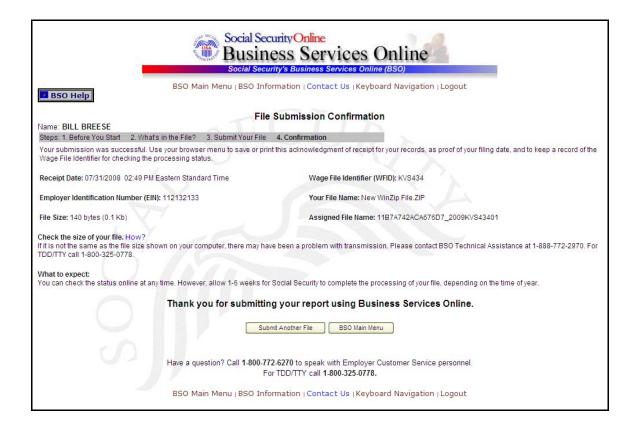
Step 13: Select the Continue button to access the Submit Your File page. (The Back to Step 1 button displays the Before You Start page and the Quit without sending button displays the BSO Main Menu page.)



- **Step 14**: Type the name of the file in the Select file field or select the **Browse** button to the right of the field to select the file.
- Step 15: Select the Submit button to submit the file to SSA. (The Previous Page button displays the What's in the File? page and the Quit without sending button displays the BSO Main Menu page.) After displaying the Submission in Progress window (for large files), the system displays the Confirmation Your File Was Received page with a pop-up window for the option to request print of the confirmation.
- **Step 16**: Select the **OK** button in the pop-up window to print the Confirmation Your File Was Received page. Otherwise, select the **Cancel** button to close the pop-up window.



At this time, print this page and check the size of your file.



Step 17: To submit another file, select the **Submit Another File** button to return to the What's in the File? page. To return to the BSO Main Menu page, select the **BSO Main Menu** button.



If a communications disruption occurs while you are submitting a wage file, log in again and select the **View File / Wage Report Status [with or without] Name / SSN Errors** link from the BSO Main Menu page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.