

BSO Tutorial for Tax Year 2009

Submit a Wage File

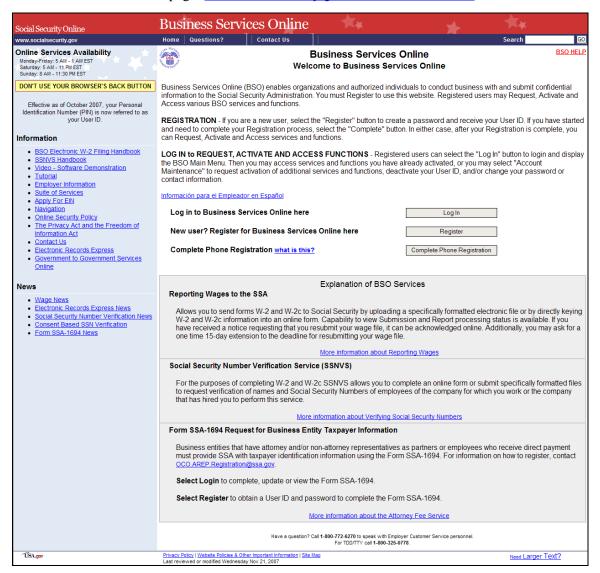
Contains the following lessons:

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

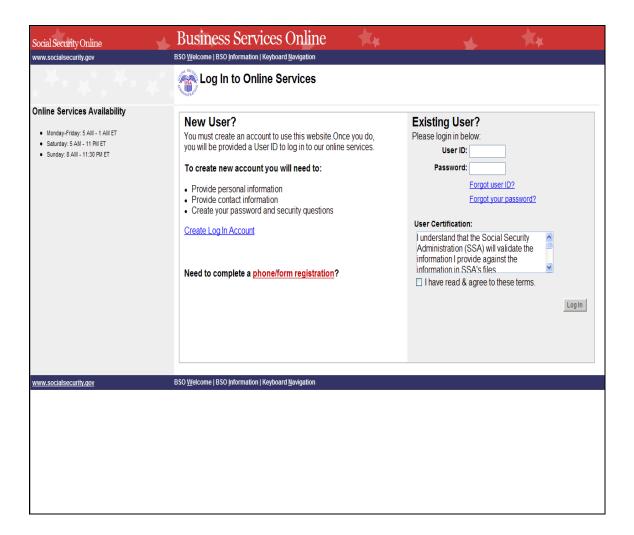
LESSON 1: SUBMIT A W-2 WAGE FILE

Follow the instructions below to submit a W-2 wage file to the Social Security Administration (SSA). For information on preparing formatted Wage W-2 data files for electronic filing (EFW2, formerly Magnetic Media and Electronic Filing-1 [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 to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



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



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



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 Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

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

The system displays the Electronic Wage Reporting (EWR) home page (see screen example below.)



STEP 7: Select the **Upload Formatted Wage File** tab. The system displays the tasks associated with Upload Formatted Wage File.

Select the **Submit/Resubmit a Formatted Wage File** link. The system displays the Before You Start page.



STEP 8: 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 EWR Home page, select the **Quit without sending** button.



STEP 9: If multiple Employer 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 10.



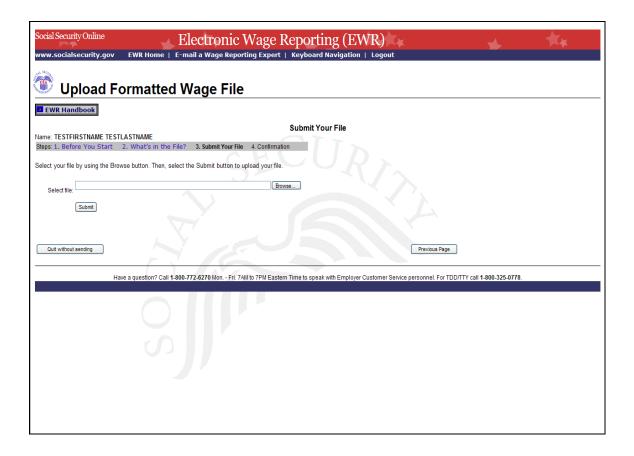
STEP 10: Select the New W-2s/W-3s for Tax Year 2009 or previous tax year (EFW2) radio button and select the Continue button to access the Submit Your File page.

To return to the Before You Start page, select the **Back to Step 1** button.

To return to the EWR Home page, select the **Quit without sending** button.

Which of the following is the best description of the wage report(s) in your file? ○ New W-2s/W-3s for Tax Year 2009 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)

Enlargement, above, of the radio buttons from the What's In The File page



- **STEP 11**: 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 12**: Select the **Submit** button to submit the file to SSA. After displaying the Please wait. Your file upload is in progress... page, the system displays the Confirmation Your File Was Received page with a pop-up window for the option of requesting a printed copy of the confirmation. To print the Confirmation Your File Was Received page, please go to Step 13.

Before submitting any file, there are two other options you may exercise:

- 1. To return to the EWR Home page, select the **Quit without sending** button.
- 2. To return to the What's in the File? page, select the **Previous Page** button.

STEP 13: Select the **OK** button in the pop-up window (see screen example below) to print the Confirmation – Your File Was Received page.

Otherwise, select the **Cancel** button to close the pop-up window.





At this time, print the Confirmation – Your File Was Received page and check the size of your file.



STEP 14: To submit another file, select the **Submit Another File** button to return to the What's in the File? page.

To return to the EWR Home page, select the **EWR Home** link at the top of the page or the **EWR Home** button at the bottom of the page.

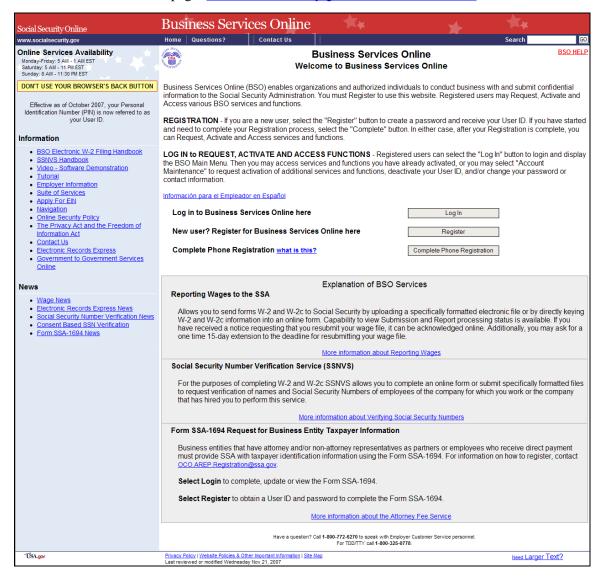


If a communications disruption occurs while you are submitting a wage file, log in again and select the **View Submission Status** link from the EWR Home page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

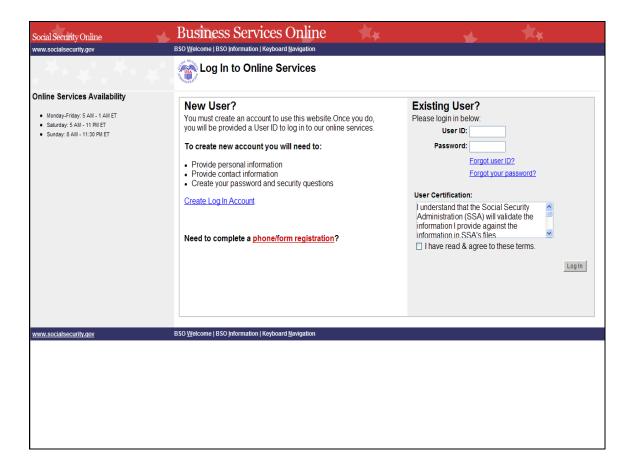
LESSON 2: SUBMIT A W-2C WAGE FILE

Follow the instructions below to submit a corrected W-2 wage file to SSA. For information on preparing formatted X Wage W-2c data files for electronic filing (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 Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



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



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



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 Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

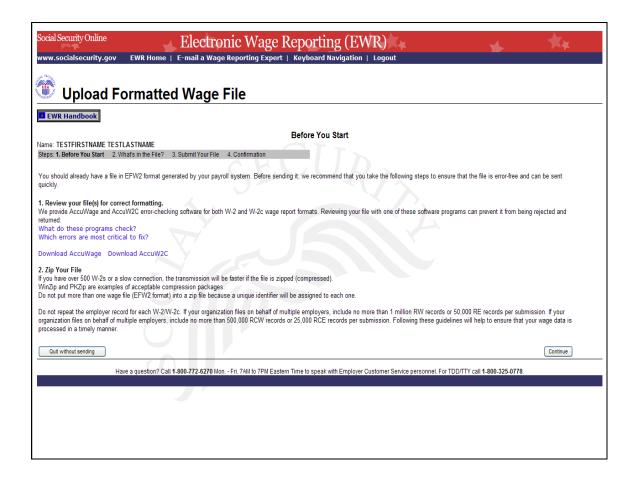
To return to the BSO Main Menu page, select the I DO NOT Accept button.

The system displays the EWR Home page (see screen example below.)



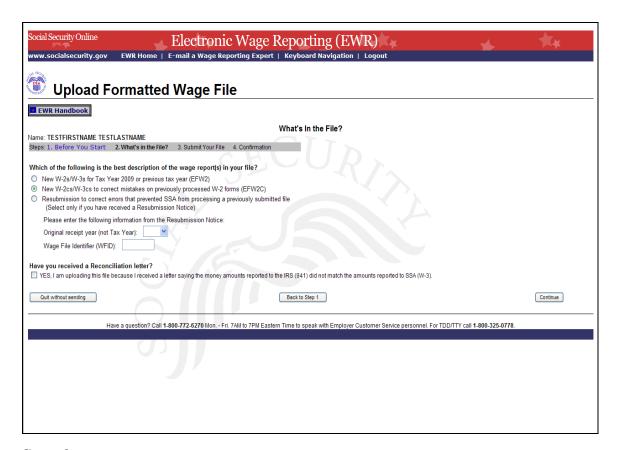
STEP 7: Select the **Upload Formatted Wage File** tab. The system displays the tasks associated with Upload Formatted Wage File.

Select the **Submit/Resubmit a Formatted Wage File** link. The system displays the Before You Start page.



STEP 8: 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 EWR Home page, select the **Quit without sending** button.



STEP 9: If multiple Employer 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 10.



STEP 10: 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.

To return to the Before You Start Page, select the **Back to Step 1** button.

To return to the EWR Home page, select the **Quit without sending** button.

Which of the following is the best description of the wage report(s) in your file?

- New W-2s/W-3s for Tax Year 2009 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)

Enlargement, above, of the radio buttons from the What's In The File page



- **STEP 11**: 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 12**: Select the **Submit** button to submit the file to SSA. After displaying the Please wait. Your file upload is in progress... page, the system displays the Confirmation Your File Was Received page with a pop-up window for the option of requesting a printed copy of the confirmation. To print the Confirmation Your File Was Received page, please go to Step 13.

Before submitting any file, there are two other options you may exercise:

1. To return to the EWR Home page, select the **Quit without sending** button.

2. To return to the What's in the File? page, select the **Previous Page** button.

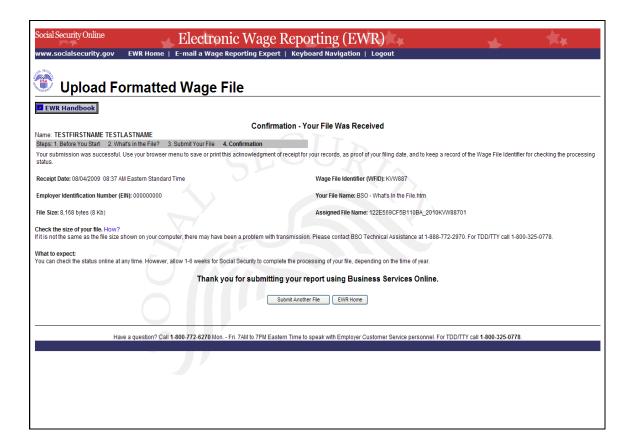
STEP 13: Select the **OK** button in the pop-up window to print the Confirmation – Your File Was Received page (see screen example below).

Otherwise, select the Cancel button to close the pop-up window.





At this time, print the Confirmation – Your File Was Received page and check the size of your file.



STEP 14: To submit another file, select the **Submit Another File** button to return to the What's in the File? page.

To return to the EWR Home page, select the EWR Home link at the top of the page or the EWR Home button at the bottom of the page.

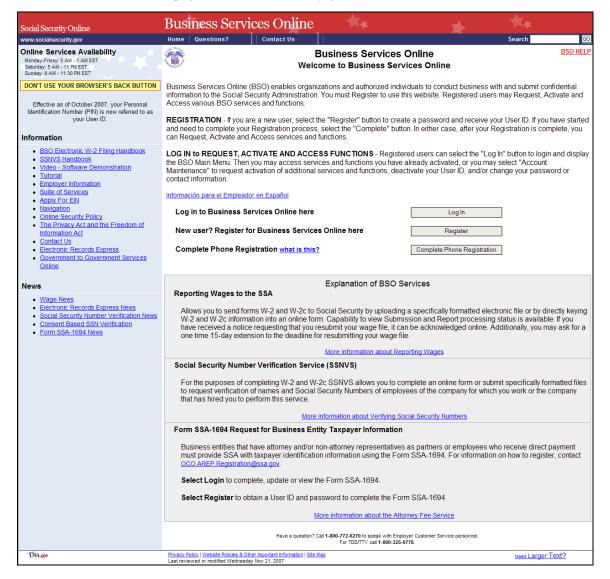


If a communications disruption occurs while you are submitting a wage file, log in again and select the **View Submission Status** link from the EWR Home page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

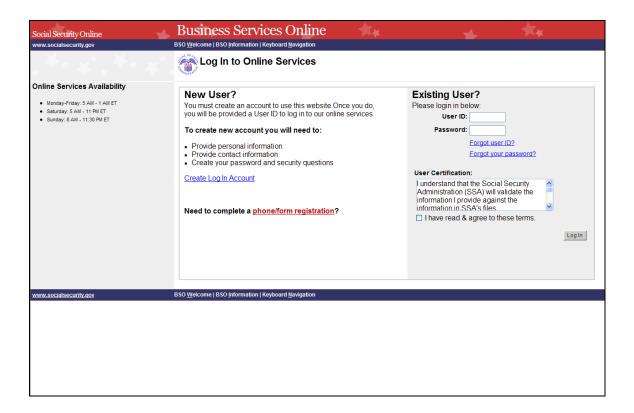
LESSON 3: SUBMIT A RESUBMISSION FILE

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 Employer Identification Number (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 Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



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



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



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

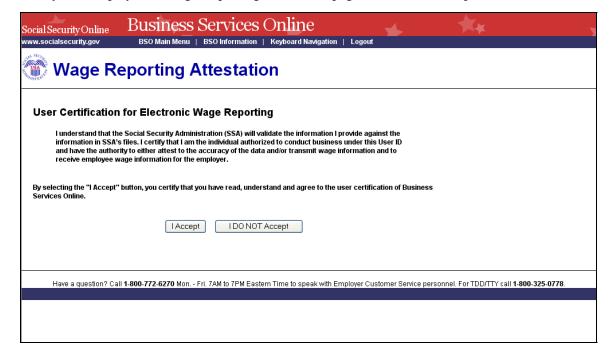
Report Wages To Social Security

Submit, download or process W-2s and W-2cs

View submission status, acknowledge resubmission notices or

Request resubmission extensions

The system displays the Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

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

The system displays the EWR Home page (see screen example below.)



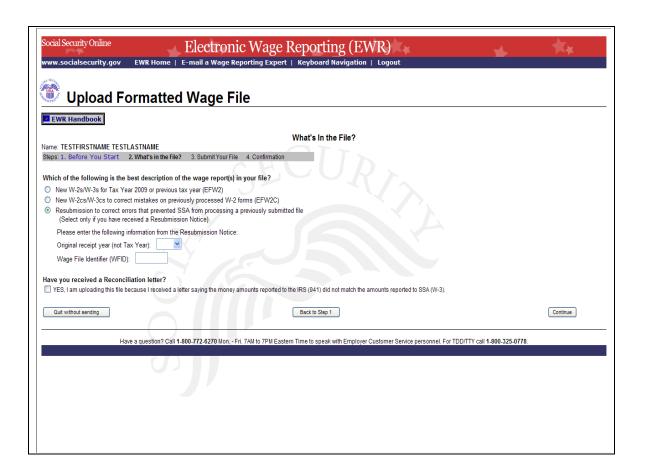
STEP 7: Select the **Upload Formatted Wage File** tab. The system displays the tasks associated with Upload Formatted Wage File.

Select the **Submit/Resubmit a Formatted Wage File** link. The system displays the Before You Start page.



STEP 8: 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 EWR Home page, select the **Quit without sending** button.



STEP 9: If multiple Employer 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 10.



STEP 10: Select the Resubmission to correct errors that prevented SSA from processing a previously submitted file (Select only if you received a Resubmission Notice) radio button. The system will activate the fields below the Resubmission radio button.

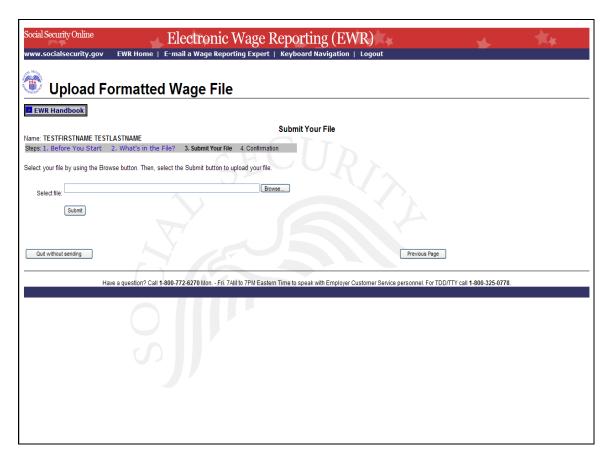
Which of the following is the best description of the wage report(s) in your file?
New W-2s/W-3s for Tax Year 2009 or previous tax year (EFW2)
 New W-2cs/W-3cs to correct mistakes on previously processed W-2 forms (EFW2C)
 Resubmission to correct errors that prevented SSA from processing a previously submitted file (Select only if you have received a Resubmission Notice)
Please enter the following information from the Resubmission Notice:
Original receipt year (not Tax Year):
Wage File Identifier (WFID):

Enlargement, above, of the radio buttons from the What's In The File page

- **STEP 11**: 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 12**: Enter the Wage File Identifier (WFID) in the WFID field.
- **STEP 13**: Select the **Continue** button to access the Submit Your File page.

To return to the Before You Start page, select the **Back to Step 1** button.

To return to the EWR Home page, select the **Quit without sending** button.



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. After displaying the Please wait. Your file upload is in progress... page, the system displays the Confirmation – Your File Was Received page with a pop-up window for the option of requesting a printed copy of the confirmation. To print the Confirmation – Your File Was Received page, please go to Step 16.

Before submitting any file, there are two other options you may exercise:

- 1. To return to the EWR Home page, select the **Quit without sending** button.
- 2. To return to the What's in the File? page, select the **Previous Page** button.

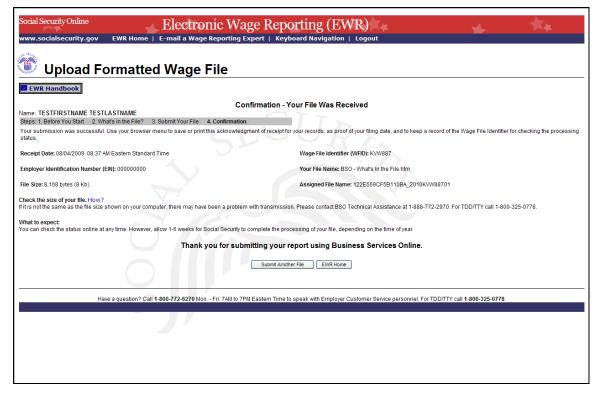
STEP 16: Select the **OK** button in the pop-up window to print the Confirmation – Your File Was Received page (see screen example below).

Otherwise, select the **Cancel** button to close the pop-up window.





At this time, print the Confirmation – Your File Was Received 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 EWR Home page, select **EWR Home** link at the top of the page or the **EWR Home** button at the bottom of the page.

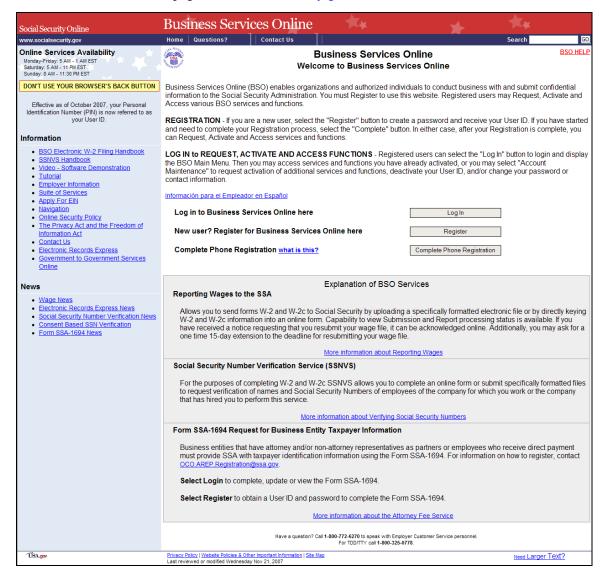


If a communications disruption occurs while you are submitting a wage file, log in again and select the **View Submission Status** link from the EWR Home page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

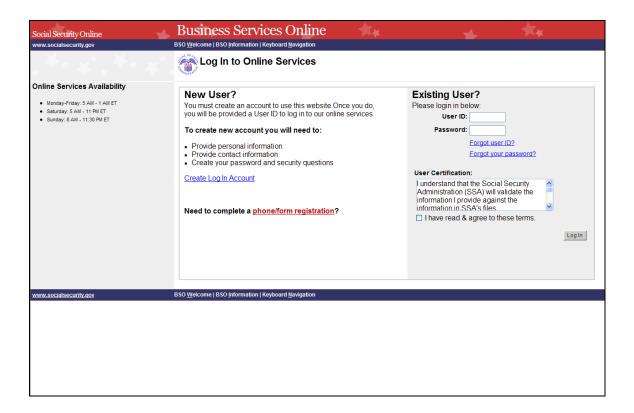
LESSON 4: SUBMIT A RECONCILIATION FILE

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 Business Services Online (BSO) Welcome to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



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



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



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 Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

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

The system displays the EWR Home page (see screen example below.)



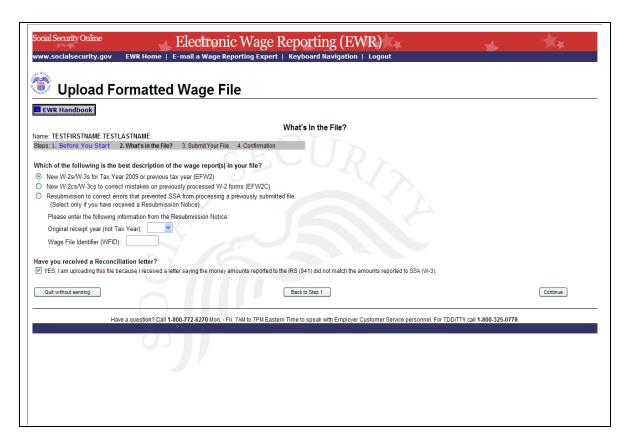
STEP 7: Select the **Upload Formatted Wage File** tab. The system displays the tasks associated with Upload Formatted Wage File.

Select the **Submit/Resubmit a Formatted Wage File** link. The system displays the Before You Start page.

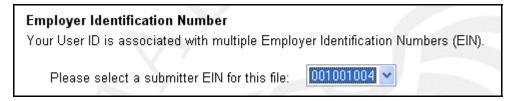


STEP 8: Select the **Continue** button after verifying that you have ensured the quality of your submission and properly compressed your file(s). The system displays the What's in the File? page.

To return to the EWR Home page, select the **Quit without sending** button.



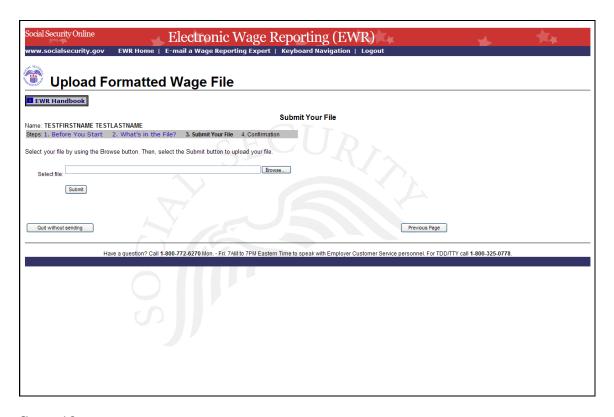
STEP 9: If multiple Employer Identification Numbers (EIN) are associated with the submitter then a list box of EINs will appear. An EIN should be selected from the list box. Otherwise proceed to Step 10.



- **STEP 10:** Select the appropriate type of file (New W-2s/W-3s for Tax Year 2009 or previous tax year (EFW2)).
- STEP 11: Select the "YES, I am uploading this file because I received a letter saying the money amounts reported to IRS (941) did not match the amounts reported to SSA (W-3)" checkbox.
- **STEP 12:** Select the **Continue** button to access the Submit Your File page.

To return to the Before You Start page, select the **Back to Step 1** button.

To return to the EWR Home page, select the **Quit without sending** button.



STEP 13: 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 14: Select the **Submit** button to submit the file to SSA. After displaying the Please wait. Your file upload is in progress... page, the system displays the Confirmation – Your File Was Received page with a pop-up window for the option of requesting a printed copy of the confirmation. To print the Confirmation – Your File Was Received page, please go to Step 15.

Before submitting any file, there are two other options you may exercise:

- 1. To return to the EWR Home page, select the **Quit without sending** button.
- 2. To return to the What's in the File? page, select the **Previous Page** button.

STEP 15: Select the **OK** button in the pop-up window to print the Confirmation – Your File Was Received page (see screen example, below).

Otherwise, select the **Cancel** button to close the pop-up window.





At this time, print the Confirmation – Your File Was Received page and check the size of your file.



STEP 16: To submit another file, select the **Submit Another File** button to return to the What's in the File? page.

To return to the EWR Home page, select the **EWR Home** link at the top of the page or the **EWR Home** button at the bottom of the page.

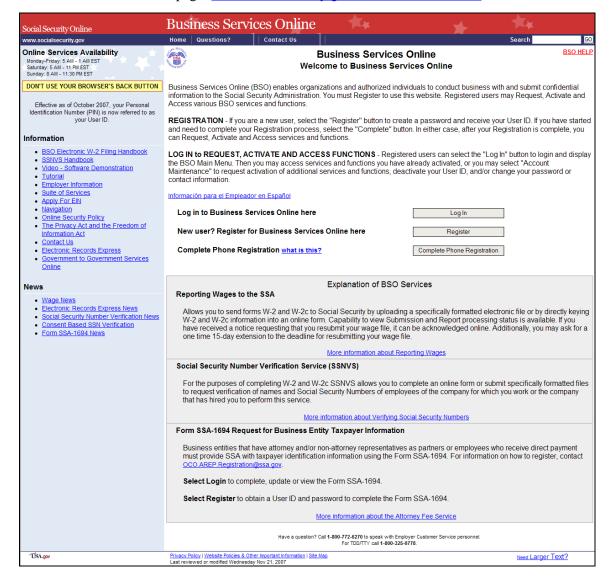


If a communications disruption occurs while you are submitting a wage file, log in again and select the **View Submission Status** link from the EWR Home page to determine whether the file transfer was successful. If the submission is not displayed, you will have to submit it again. Select the same submission type that you initially selected.

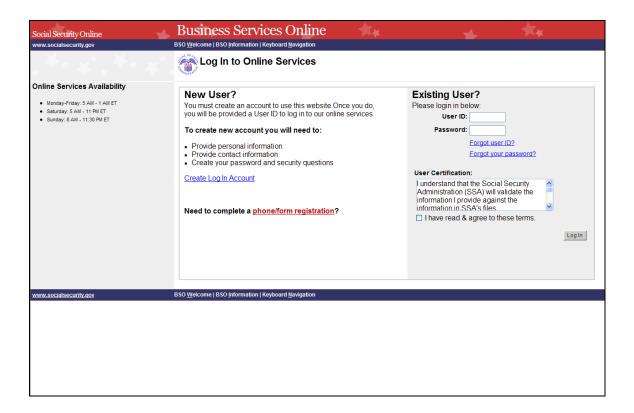
LESSON 5: SUBMIT A SPECIAL WAGE PAYMENTS FILE

Follow the instructions below to submit a special wage payments file to the Social Security Administration (SSA). For information on preparing Special Wage Payment data files for electronic filing (EFW2, formerly Magnetic Media and Electronic Filing-1 [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 to Business Services Online page: www.socialsecurity.gov/bso/bsowelcome.htm.



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



STEP 3: Enter your User ID and Password.

STEP 4: Select the **I have read & agree to these terms** check box after reading the conditions defined in the **User Certification** text box on the Log In to Online Services page.

Select the **Log In** button to display the BSO Main Menu page.

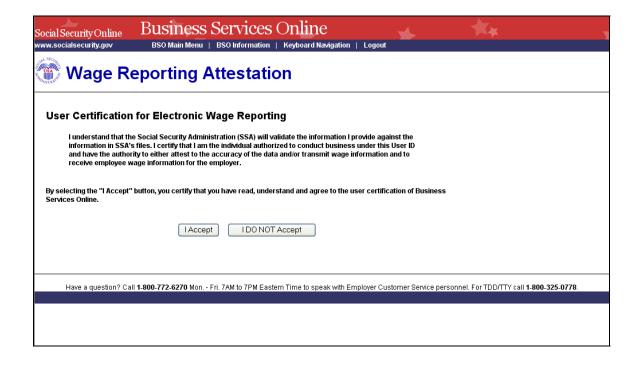
To return to the BSO Welcome to Business Services Online page, select the **BSO Welcome** link at the top or bottom of the page.



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

Report Wages To Social Security

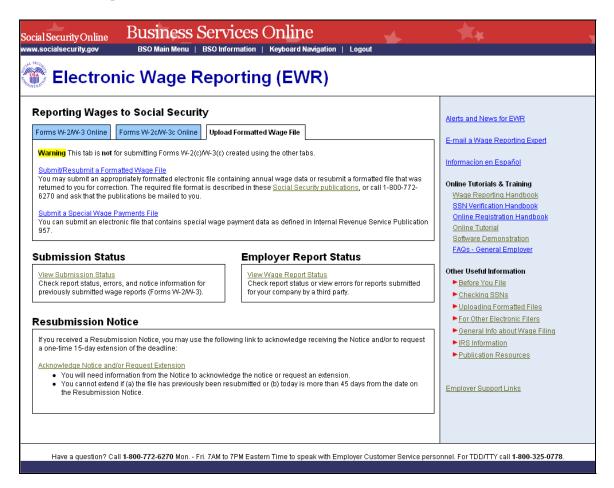
Submit, download or process W-2s and W-2cs View submission status, acknowledge resubmission notices or Request resubmission extensions The system displays the Wage Reporting Attestation page (see screen example below.)



STEP 6: Select the **I Accept** button after reading the conditions defined in the User Certification for Electronic Wage Reporting on the Wage Reporting Attestation page.

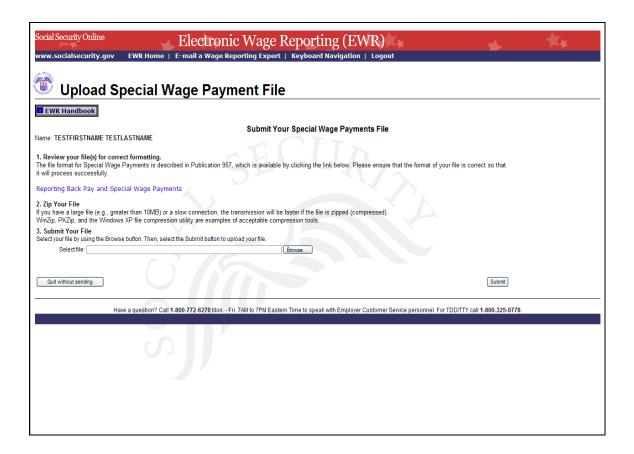
To return to the BSO Main Menu page, select the I DO NOT Accept button.

The system displays the Electronic Wage Reporting (EWR) home page (see screen example below.)



STEP 7: Select the **Upload Formatted Wage File** tab. The system displays the tasks associated with Upload Formatted Wage File.

Select the **Submit a Special Wage Payments File** link. The system displays the Submit Your Special Wage Payments File page.



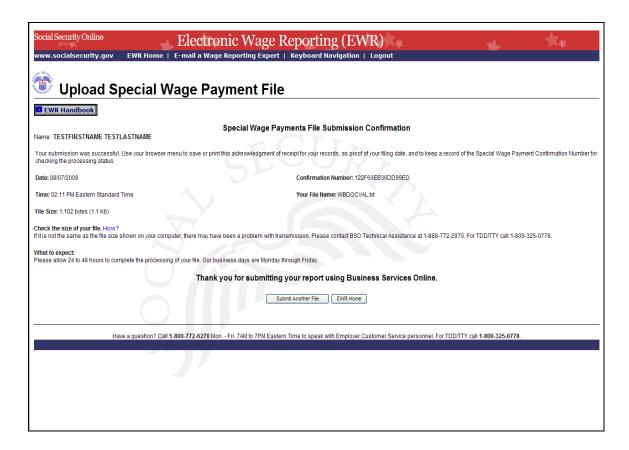
- **STEP 8**: Type the name of the file in the Select file field or select the **Browse** button to the right of the field to select the file.
- **STEP 9**: Select the **Submit** button to submit the file to SSA. After displaying the Please wait. Your file upload is in progress... page, the system displays the Confirmation Your File Was Received page with a pop-up window for the option of requesting a printed copy of the confirmation. To print the Confirmation Your File Was Received page, please go to Step 10.

To return to the EWR Home page, select the **Quit without sending** button.

Select the **Reporting Back Pay and Special Wage Payments** link to view the Internal Revenue Service (IRS) Publication 957, "Reporting Back Pay and Special Wage Payments to the Social Security Administration".



If you submit a Special Wage Payment file that is not formatted correctly, you will receive an error message stating, "The file you submitted is not in the appropriate file format for Special Wage Payments." If this occurs, please go to information on preparing Special Wage Payment data files for electronic filing (EFW2, formerly Magnetic Media and Electronic Filing-1 [MMREF-1]) by selecting the link for Specifications for Filing Forms W-2 Electronically (EFW2) at www.socialsecurity.gov/employer/pub.htm.



STEP 10: Select the **OK** button in the pop-up window (see screen example below) to print the Confirmation – Your File Was Received page.

Otherwise, select the **Cancel** button to close the pop-up window.



STEP 11: To submit another file, select the **Submit Another File** button to return to the Submit Your Special Wage Payments File page.

To return to the EWR Home page, select the **EWR Home** link at the top of the page or the **EWR Home** button at the bottom of the page.



If a communications disruption occurs while you are submitting a wage file, log in again and select the **View Submission Status** link from the EWR Home 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.