

Interview Questions for Paper Filers

IRS Forum – July 2018

Facilitator: _____ Date: _____

Participant Name: _____

Telephone Number: _____

Email Address: _____

Name and address of business or organization you represent: _____

1. What is your role in submitting W-2s for your business/organization?
2. How many W-2s did you submit on behalf of your company or the companies you represent?
3. Tell me about your process for submitting your W-2s. (E.g. QuickBooks, paper...)

Please ask the following prompt questions if not answered in #3:

- a. If they don't mention software, ask what they use.
- b. How are your wage reports prepared?
- c. Do you use a third party?
- d. Do you keep paper records in some other way?
- e. Do you use purchased software?
- f. *If they use a Third-Party or Purchased Software:*
 - i. Do they offer the option to file electronically? Yes ___ No ___
 1. If yes: Would they be filing it *for you* electronically or giving you pre-formatted file that you would need to upload to SSA?

Do they charge for that option?
 2. If no, proceed to question 4.

4. Are you aware of SSA's Business Services Online (BSO)? Yes ___ No ___

If yes: What do you think you can do there?

- o For UXG reference, some of the services BSO offers are:
 - W-2 Online application: Create, save, print, and submit Forms W-2 online
 - W-2c Online application: Create, save, print, and submit corrections to Forms W-2 online
 - Wage File Upload application: Upload and submit wage files to SSA
 - Submission Status application: View status, error, and notice information for previously submitted wage reports

a. Do you have a BSO account?

b. Are you aware of the different options to submit your W-2s electronically:

___ Web service

___ Individual W-2s (up to 50)

___ Upload a wage report file (e.g. EFW2 /data file)

5. If you don't currently use BSO, can you share why?

6. Have you ever tried to file electronically?

a. Why or why not?

b. Have you ever considered filing electronically?

c. What's preventing you from filing electronically?

7. Are you registered with BSO?

a. If yes, what do you think of the current registration process?

b. Do you have suggestions for improving the process?

c. How many people in your organization have a BSO account?

8. How are your wage reports prepared?

a. If not answered, ask: Do you use a third party?

b. Purchase software?

c. Keep paper records in some other way?

9. If you use a Third-Party or Purchased Software do they offer the option to file electronically? Yes ___ No ___

a. If yes: Would they be filing it for you electronically or giving you pre-formatted file that you would need to upload to SSA?

b. Do they charge for that option?

10. What could SSA provide to make filing electronically more feasible?

11. What features/services could SSA offer you that would entice you to file electronically?

12. Can you think of a time when you had a problem submitting earnings information to SSA?

13. Have you ever needed assistance when submitting earnings information to SSA? Yes ___ No ___

a. If yes, how did you find assistance?

b. Have you ever contacted the employer 800# for assistance? If yes, tell me about your experience.

c. Have you ever contacted an Employer support liaison officer (ESLO)? If yes, tell me about your experience.

14. If you could improve the process of submitting your W-2s, what would it look like?

15. What would you like the service to do that it does not currently do?

16. In instances where you have to interact with other government agencies, what do you like most?

17. Have you ever received a letter from SSA stating that corrections need to be made to a submitted wage report? What was that experience like? How often has this occurred? What steps did you take to resolve it? How would you like to do corrections (W2C and other) in the future?

18. There are two types of wage report differences-missing and discrepant reports. When this occurs, SSA mails a Reconciliation notice to the employer. If you received one of these notices, how did you respond to this notice? Tell me about your experience to resolve the issue. What was that experience like? How would you like to process Reconciliations in the future?

19. Imagine you're filing your W-2s five years in the future, what is your vision for submitting W-2s/wage reports?

20. What are the biggest and most critical challenges that you think that SSA must address to improve the wage reporting experience?