



SCREEN PACKAGE DOCUMENT

**THE MANAGEMENT OF AUTHENTICATION AND AUTHORIZATION OF
GOVERNMENT USERS, INSTITUTIONS, AND CUSTOMERS (MAGIC)
APPLICATION:
REGISTRATION OF AN ORGANIZATION BY THEIR RESPONSIBLE
ENTITY OFFICER**

SEPTEMBER 21ST, 2023




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1. Responsible Entity Officer (REO)

An REO candidate, referred to in this document as the user, accesses their Business Services Online (BSO) account with an authenticated credential and proceeds to register their organization.

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Social Security

[Sign Out](#)

SSA is launching a new process that will require organizations to be registered by a Responsible Entity Officer (REO). Completing this step now will allow an REO to access Business Services Online (BSO) and authorize others to use BSO on behalf of their organizations (including Service Providers) when this functionality becomes available. Each organization can have only one REO. If you are an REO within your organization, please proceed with the registration.


NOTE: You can only register your organization at this time. To access and use services today, select the Back to Business Services Online button below.

[Register Your Organization with EIN](#)

[Back to Business Services Online](#)

2. Enter Organization Details

The footer shown on this page will persist on every page of the application. We will omit showing it from this point on.

 An official website of the United States government [Here's how you know](#) ▼



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Register Your Organization with EIN

* Indicates required information

* **Employer Identification Number (EIN) of Your Organization**

Please enter the EIN for your organization.

* **Name of Your Organization**

Please enter the name of your organization as referenced in IRS records.

Doing Business As (DBA) Name for Your Organization

Please enter a name your organization is operating under.

[Next](#)

[Cancel](#)

OMB # 0960-0789

[Privacy Act Statement](#)



SSA.gov

An official website of the Social Security Administration

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[FOIA requests](#)

[Office of the Inspector General](#) [Privacy Policy](#)

[Accessibility support](#)

[No FEAR Act Data](#)

[Performance Reports](#)

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3. Cancel Registration

The user can cancel registration at any time by selecting the Cancel button. An alert will be displayed to let them know all registration information will be lost if they confirm this option.

The screenshot shows the 'Register Your Organization' page on the Social Security website. A red dialog box is overlaid on the page, asking 'Are you sure you want to cancel?' and stating 'All registration information you have entered will be lost.' The dialog box has 'Close' and 'Yes' buttons. The background page shows a 'Sign Out' link in the top right corner and several form fields with asterisks indicating required information: 'Employer Identification Number (EIN) of Your Organization', 'Name of Your Organization', and 'Doing Business As (DBA) Name for Your Organization'.

4. REO Attestation

If they choose to proceed with the registration, the user must answer several dynamic questions and agree to the statement of perjury.

The screenshot shows the 'Attest as a Responsible Entity Officer for Your Organization' page on the Social Security website. It features a blue header with the Social Security logo and 'Sign Out' link. Below the header is a light blue information box with an 'i' icon and the title 'Responsible Entity Officer: A Definition'. The text in the box reads: 'The Responsible Entity Officer (REO) is an individual who is authorized by the entity to legally bind the entity, including the ability to execute agreements that are binding and enforceable against the entity. The REO should have the authority to access, authorize disclosure of, and delegate other individuals to have access to, the information available through this Social Security service.' Below this box, there is a question: '* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?' with radio button options for 'Yes' and 'No'. At the bottom, there are 'Next' and 'Cancel' buttons.

Below, we have included all possible variations of the questions asked.

4.1 Scenario 1

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 Social Security [Sign Out](#)

Attest as a Responsible Entity Officer for Your Organization

Responsible Entity Officer: A Definition

The Responsible Entity Officer (REO) is an individual who is authorized by the entity to legally bind the entity, including the ability to execute agreements that are binding and enforceable against the entity. The REO should have the authority to access, authorize disclosure of, and delegate other individuals to have access to, the information available through this Social Security service.

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No


* Is your organization a corporation or a partnership?

Corporation
 Partnership

* Are you a principal officer of the corporation?

Yes No

4.2 Scenario 2

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Social Security

[Sign Out](#)

Attest as a Responsible Entity Officer for Your Organization

Responsible Entity Officer: A Definition

The Responsible Entity Officer (REO) is an individual who is authorized by the entity to legally bind the entity, including the ability to execute agreements that are binding and enforceable against the entity. The REO should have the authority to access, authorize disclosure of, and delegate other individuals to have access to, the information available through this Social Security service.

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Is your organization a corporation or a partnership?


Corporation
 Partnership

* Are you a general partner?

Yes No

4.3 Scenario 3

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 Social Security Sign Out

Attest as a Responsible Entity Officer for Your Organization

i Responsible Entity Officer: A Definition

The Responsible Entity Officer (REO) is an individual who is authorized by the entity to legally bind the entity, including the ability to execute agreements that are binding and enforceable against the entity. The REO should have the authority to access, authorize disclosure of, and delegate other individuals to have access to, the information available through this Social Security service.

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Do you have the authority to control, manage, or direct your organization?

Yes No

* Do you have the authority to control the disposition of its funds and assets?

Yes No

If the user answers “No” to any of the subsequent questions (aside from the first question), they may not proceed with the registration.

4.4 Scenario 4

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Is your organization a corporation or a partnership?

Corporation

Partnership

* Are you a principal officer of the corporation?

Yes No

! You do not meet our criteria for serving as a Responsible Entity Officer for your organization.

4.5 Scenario 5

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Is your organization a corporation or a partnership?

Corporation

Partnership

* Are you a general partner?

Yes No

! You do not meet our criteria for serving as a Responsible Entity Officer for your organization.

Cancel

4.6 Scenario 6

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Do you have the authority to control, manage, or direct your organization?

Yes No

* Do you have the authority to control the disposition of its funds and assets?

Yes No

! You do not meet our criteria for serving as a Responsible Entity Officer for your organization.

Cancel

4.7 Scenario 7

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Do you have the authority to control, manage, or direct your organization?

Yes No

! You do not meet our criteria for serving as a Responsible Entity Officer for your organization.

Cancel

If the user does not meet REO criteria, they will have to cancel their registration.

Responsible Entity Officer: A Definition

The Responsible Entity Officer (REO) is an individual who is authorized by the entity to legally bind the entity, including the ability to execute agreements that are binding and enforceable against the entity. The REO should have the authority to access, authorize disclosure of, and delegate other individuals to have access to, the information available through this Social Security service.

* Indicates required information

* Does your organization have shares or interests traded on a public exchange, or is it registered with the U.S. Securities and Exchange Commission (SEC)?

Yes No

* Is your organization a corporation or a partnership?

Corporation Partnership

Are you sure you want to cancel?

All registration information you have entered will be lost.

Close Yes

Upon selecting the Next button, the user is provided with the Statement of Perjury statement they must accept.

Declaration

* **I declare under penalty of perjury that the information I provided herein is true and correct to the best of my knowledge.**


I certify that I have the authority on behalf of my organization to access, and authorize disclosure of, the confidential information available through this Social Security service. I understand that anyone who knowingly or willfully seeks or obtains access to personally identifiable information or tax return information, under false pretenses commits a crime and is subject to civil and criminal penalties.

Close Submit

5. Confirm Address of Your Organization

The user must confirm the address where SSA can send the registration code. The addresses presented are based on IRS data for the EIN entered.

An official website of the United States government [Here's how you know](#) ▾

 Social Security Sign Out

Confirm Address of Your Organization

* Indicates required information

* Addresses Registered for Your Organization
Please select your preferred address for receiving a registration code.

100 North Charles Street, Suite 501, Baltimore MD 21246-1188

3320 Baltimore Avenue, College Park MD 20740-1010

The current address is not listed.

Once the address is selected, the user can continue.

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 Social Security Sign Out

Confirm Address of Your Organization

* Indicates required information

* Addresses Registered for Your Organization
Please select your preferred address for receiving a registration code.

100 North Charles Street, Suite 501, Baltimore MD 21246-1188

3320 Baltimore Avenue, College Park MD 20740-1010

The current address is not listed.

If the address is not listed, the user can select “The current address is not listed.” and review an alert advising them to complete the Change of Address for Businesses [8822-B Form at IRS.gov](#). The user cannot continue with their registration.

An official website of the United States government [Here's how you know](#)

Social Security Sign Out

Confirm Address of Your Organization

* Indicates required information

* Addresses Registered for Your Organization
Please select your preferred address for receiving a registration code.

100 North Charles Street, Suite 501, Baltimore MD 21246-1188

3320 Baltimore Avenue, College Park MD 20740-1010

The current address is not listed.

If the current address is not listed, you will need to update the address information with the IRS.
At this time, you may not be able to proceed with this registration. Once we have received an updated address from the IRS, you will need to sign back in to complete this step. Please refer to the [Form 8822-B at IRS.gov](#).

6. Provide and Verify Work Email Address

The user must provide an email address.

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Social Security Sign Out


Provide Your Work Email Address

* Indicates required information

* Your Work Email Address
Please enter the email address to receive communications for your organization.

The system will verify the email address by sending a one-time verification code to the user.

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 Social Security Sign Out

i We sent an email to na*****@gmail.com.
Please allow up to 2 minutes for the verification code to arrive. The code will **expire** after 15 minutes from the time of your request.

* Indicates required information


* Enter Your Verification Code

Example: V-12345678

[Need another code?](#)

[Incorrect email address?](#)

Should the verification code expire, the user has an option to request a new code.

 Social Security Sign Out

i We sent a new code to na*****@gmail.com.
Please allow up to 2 minutes for the verification code to arrive. The code will **expire** after 15 minutes from the time of your request.

* Indicates required information

* Enter Your Verification Code


Example: V-12345678


[Need another code?](#)

[Incorrect email address?](#)

7. Provide Work Phone Number

The user must provide their primary phone number.

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 Social Security Sign Out

Provide Your Work Phone Number

*** Indicates required information**


Your Primary Phone Number
Please enter the primary phone number to receive communications for your organization.

*** 10-digit Number** **Ext.**

() -

[+ Add Alternate Phone Number](#)

The user can provide an alternate phone number.

 Social Security Sign Out

Provide Your Work Phone Number

*** Indicates required information**

Your Primary Phone Number
Please enter the primary phone number to receive communications for your organization.

*** Country Code + Number** **Ext.**

Your Alternate Phone Number
Please enter the alternate phone number to receive communications for your organization.


10-digit Number **Ext.**


() -

8. Confirmation: Registration Code to be Mailed

A confirmation page is displayed with details explaining that the registration code will be mailed to the address previously selected. NOTE future release: only the REO will have to go through this authorization process (i.e., mailing of registration code). In a future release, other users will be added and assigned roles by the REO and/or other administrators. Electronic confirmations will be sent.

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 **Social Security** Sign Out

 **We will be sending you a letter with a registration code.**

The code helps us verify your identity and improves security of your account. You will need to provide this code only once.

A letter addressed to you will be mailed to:

3320 Baltimore Avenue
College Park MD 20740-1010

Once you receive the letter, please use the code to complete this registration. The letter may take up to 15-20 days to arrive.

[Back to Dashboard](#)

9. Complete Registration of Organization

Once the user receives a letter with the registration code, they will need to complete the registration process for their organization.

An official website of the United States government [Here's how you know](#) ▾

Social Security Sign Out

Complete Registration of Your Organization

[Complete Registration of EIN 54-1234567](#)

[Have not received a letter with the registration code? Request a new code](#)

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)

[Back to Business Services Online](#)

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Social Security Sign Out

Enter Registration Code

i **For registration code, please refer to the letter we mailed to you.**
Note that the letter was sent to your organization's address. The letter may take up to 15-20 days to arrive.

* Indicates required information


* Registration Code

Example: R-12345678

[Have not received the letter with a registration code?](#)

[Next](#) [Cancel](#)

In the event, the user did not receive the registration code they can request a new code after 20 days since the original code was issued. The user will have to confirm the address to ensure there are no changes.

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Enter Registration Code

i For registration code, please r
Note that the letter was sent to your org

! Please note that once you request a new code, the code previously mailed to you will become invalid.

Close **Request a New Code by Mail**

* Indicates required information


* Registration Code
R-
Example: R-12345678

[Have not received the letter with a registration code?](#)

Next Cancel

10. Registration Confirmation

Once the registration code is entered correctly, the system will confirm a successful registration. The user can return to the dashboard.

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✓ You successfully registered your organization.
You can now use Business Services Online.

[Back to Dashboard](#)

11. Registered Organizations

The user can view details of the organization they just registered. At this time, they can register another organization if needed.



Social Security

Your Registered Organizations

You have successfully registered the following organizations:
EIN 54-1234567


NOTE: You can only register your organization at this time. To access and use services today, select Back to the Business Services Online button below.

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)

[Back to Business Services Online](#)

The REO can return to Business Services Online to [Business Services Online \(ssa.gov\)](https://ssa.gov).

 An official website of the United States government [Here's how you know](#) ▾



Social Security

Benefits ▾

Medicare ▾


Card & record ▾

Search SSA.gov



Español

Account

 Beginning March 25, 2023, employers will use the log in link below to report wages and other related actions.
[Learn more about the updated registration process.](#)

Business Services Online (BSO)

The [Suite of Services](#) allows organizations, businesses, people, employers, attorneys, non-attorneys representing Social Security claimants, and third-parties to exchange information with Social Security securely via the Internet. You must register and create your own password to access BSO.

[Información para el Empleador en Español](#)

BSO hours

Monday-Friday: 5 a.m. - 1 a.m. ET

Saturday: 5 a.m. - 11 p.m. ET

Sunday: 8 a.m. - 11:30 p.m. ET

Questions or comments?

Phone: [1-800-772-6270](tel:1-800-772-6270) (TTY [1-800-325-0778](tel:1-800-325-0778))

Monday-Friday: 7 a.m. - 7 p.m. ET

Employers

For employers to:

- Report wages
- View submission and report status
- Act on resubmission notices
- Verify Social Security numbers

[Log in](#)

[Create account](#)

[Employer information](#)

[Customer support for wage reporting](#)

For questions: employerinfo@ssa.gov

Representative Payees

For people and organization representatives to file their Representative Payee Report electronically.

[Log in](#)

[Register](#)

[Complete phone registration](#)

[Information about being a payee](#)

Appointed Representatives


Consent Based Verification (CBSV)

12. Dashboard Versions

Depending on where the user is in their process or how many organizations they may have to register, there are several versions of the Dashboard.

1. New Registration

An official website of the United States government [Here's how you know](#) ▾

 **Social Security** Sign Out

SSA is launching a new process that will require organizations to be registered by a Responsible Entity Officer (REO). Completing this step now will allow an REO to access Business Services Online (BSO) and authorize others to use BSO on behalf of their organizations (including Service Providers) when this functionality becomes available. Each organization can have only one REO. If you are an REO within your organization, please proceed with the registration.


NOTE: You can only register your organization at this time. To access and use services today, select the Back to Business Services Online button below.

[Register Your Organization with EIN](#)

[Back to Business Services Online](#)

2. Pending Registration – Single EIN

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 **Social Security** Sign Out

Complete Registration of Your Organization

[Complete Registration of EIN 54-1234567](#)

[Have not received a letter with the registration code? Request a new code](#)


If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)

[Back to Business Services Online](#)

3. Pending Registration – Multiple EINs

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 **Social Security** Sign Out

Complete Registration of Your Organization

Select Organization

--▾

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)

[Back to Business Services Online](#)

A user can select an EIN and continue to complete their registration.

Complete Registration of Your Organization


Select Organization


EIN 54-1234567▾

[Complete Registration](#)

[Have not received a letter with the registration code? Request a new code](#)

4. Completed Registrations – Multiple EINs

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 **Social Security** Sign Out

Your Registered Organizations

You have successfully registered the following organizations:
EIN 54-1234567
EIN 42-0011229


NOTE: You can only register your organization at this time. To access and use services today, select Back to the Business Services Online button below.


If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)

[Back to Business Services Online](#)

5. Single Pending and Single Completed Registrations

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 **Social Security** Sign Out

Complete Registration of Your Organization

[Complete Registration of EIN 54-1234567](#)

[Have not received a letter with the registration code? Request a new code](#)

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)


[Back to Business Services Online](#)


Your Registered Organizations

You have successfully registered the following organizations:
EIN 54-1234567

NOTE: You can only register your organization at this time. To access and use services today, select Back to the Business Services Online button below.

6. Single Pending and Multiple Completed Registrations

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 **Social Security** Sign Out

Complete Registration of Your Organization

[Complete Registration of EIN 54-1234567](#)

[Have not received a letter with the registration code? Request a new code](#)

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)


[Back to Business Services Online](#)


Your Registered Organizations

You have successfully registered the following organizations:
EIN 54-1234567
EIN 42-0011229

NOTE: You can only register your organization at this time. To access and use services today, select Back to the Business Services Online button below.

7. Single Pending and Single completed Registration.

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 **Social Security** Sign Out

Complete Registration of Your Organization

[Complete Registration of EIN 54-1234567](#)

[Have not received a letter with the registration code? Request a new code](#)

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)



[Back to Business Services Online](#)

Your Registered Organizations

You have successfully registered the following organizations:
EIN 54-1234567

NOTE: You can only register your organization at this time. To access and use services today, select Back to the Business Services Online button below.

8. Multiple pending and Multiple completed Registration

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Social Security

[Sign Out](#)

Complete Registration of Your Organization

Select Organization

If you will serve as the REO for another organization, please proceed with the registration process.

[Register Another Organization with EIN](#)

[Back to Business Services Online](#)

Your Registered Organizations

You have successfully registered the following organizations:

EIN 54-1234567

EIN 42-0011229

NOTE: You can only register your organization at this time. To access and use services today, select [Back to the Business Services Online](#) button below.