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

Table of Contents

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.

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. 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 ˅

Social Security   *Sign Out*

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

About SSA   FOIA requests   Office of the Inspector General   Privacy Policy
Accessibility support   No FEAR Act Data   Performance Reports

Looking for U.S. government information and services? Visit USA.gov

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.

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.

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

4.1 Scenario 1

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

Next   **Cancel**

4.2 Scenario 2

Social Security

Sign Out

Attest as a Responsible Entity Officer for Your Organization

ℹ️ **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

[Next]   [Cancel]

4.3 Scenario 3

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

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

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

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

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.

Once the address is selected, the user can continue.

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.

6. Provide and Verify Work Email Address

The user must provide an email address.

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

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

7. Provide Work Phone Number

The user must provide their primary phone number.

The user can provide an alternate phone number.

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.

An official website of the United States government   Here's how you know ∨

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 adressed 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.

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.

10.   Registration Confirmation

Once the registration code is entered correctly, the system will confirm a successful registration. The user can return to the 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).](#)

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 (TTY 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

2. Pending Registration – Single EIN

3. Pending Registration – Multiple EINs

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

4. Completed Registrations – Multiple EINs

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

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

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.

Back to Business Services Online

6. Single Pending and Multiple Completed Registrations

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

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.

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

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

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.