BSO Tutorial for Tax Year 2018

W-2 Online

Contains the following lessons:

- Lesson 1: Create/Resume Forms W-2 Online
- Lesson 2: Download Submitted Reports
- Appendix: Other Pages
LESSON 1: CREATE/RESUME FORMS W-2 ONLINE

Follow the instructions below to create up to fifty reports with fifty Forms W-2 in each report.

**STEP 1:** Select **Business & Government** tab on the “Social Security” home page, then select **Business Services** menu to go to the “Business Services” page. On the “Business Services” page, select **Log in or Use Business Services Online** button to go to the “Business Services Online” page at: https://www.ssa.gov/bsowelcome.htm

**STEP 2:** Select the **Log In** button on the “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 on the “Log In to Online Services” page.

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

To return to the “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. The system displays the “Wage Reporting Attestation” page.

STEP 6: Select the **I Accept** button on the “Wage Reporting Attestation” page to go to the EWR home page.
To return to the BSO “Main Menu” page, select the **I DO NOT Accept** button.

**STEP 7:** On the EWR home page:

- Forms W-2/W-3 Online tab is default.
- Select the **Create/Resume Forms W-2/W-3 Online** link. If there are no unsubmitted reports, the system displays the “Before You Create Your Form(s) W-2/W-3” page. If there are unsubmitted Forms W-2/W-3, the system displays the Forms W-2/W-3 Online “Unsubmitted Reports” page.

  You may have a maximum of fifty unsubmitted reports at one time. When you have reached the fifty “saved” report limit, you must first submit at least one of the unsubmitted reports in order to be able to start a new report. If there are forty-nine or fewer reports, you may continue without submitting the existing reports.
STEP 8: On the Unsubmitted Reports page:

- Select the Start a New Report button. The system displays the “Before You Create Your Form(s) W-2/W-3” page.
- Select Edit link or the Employer Name link to go to the “W-2 List for this Submission” page.
- Select the Delete link to delete an unsubmitted report. The “Are you sure you want to delete the unsubmitted report?” page will be displayed.
- Select the Cancel button to return to the EWR home page.
STEP 9: On the Before You Create Your Form(s) W-2/W-3 page:

- Provide correct information related to Tax Year, company name, EIN and the type of W-2 Form you are creating. If you received a Reconciliation Letter, select the check box.
- If none of the situations listed in the Check for Exceptions section apply, select the Continue button to go to the “Employer Information for this Wage Report” page.
- If any of the situations listed in the Check for Exception section apply, select the check box and the Continue button to go to the “W-2 Online Restrictions” page.
- Select the Cancel button to return to the EWR home page.
### Forms W-2/W-3 Online

#### Employer Information for this Wage Report

Enter/Review Employer Information for this Wage Report

- **Employer Name:**
  - *(Required)*
  - *(Enter)*

- **City:**
  - *(Enter)*

- **State Abbreviation (for U.S.):**
  - *(Enter)*

- **ZIP Postal Code:**
  - *(Enter)*

#### Contact Person for this Submission

- **Name:**
  - *(Enter)*

- **Email:**
  - *(Enter)*

- **Phone:**
  - *(Enter)*

#### Other Information

Other Information for this Employer

- **Establishment Number:**
  - *(Enter)*

### Kind of Payer

Select the Kind of Payer that best describes your situation, review the contact information on file and make any necessary changes.

- **Kind of Payer:**
  - *(Required)*
  - *(Select from list)*

### Kind of Employer

Select the Kind of Employer that best describes your situation.

- **Kind of Employer:**
  - *(Select from list)*

### Have a question?

Call 1-800-722-6270 Mon. - Fri. 7AM to 7PM Eastern Time to speak with Employer Customer Service personnel. For TTY call 1-800-325-0778.
STEP 10: On the Employer Information for this Wage Report page:

- Enter or review Employer Information, Contact Person information, Other Information and select the Kind of Payer and the Kind of Employer, then select the Continue button to go to the “Enter W-2 Information” page.
- If W-2 reports from last year exist, the system will display these reports.

- The user can choose to use these reports for Data Assist purpose by selecting one of the WFIDs to go to the “W-2(s) Available for WFID XXXXXX” page or choose to create a new W-2 by selecting Continue button to go to the “Enter W-2 Information” page.
- Select the Cancel button to return to the EWR home page.

STEP 11: On the W-2(s) Available for WFID XXXXXX page:
- Select W-2(s) for prefill this year’s W-2(s), and then select the **Continue** button to go to the “W-2 List for this Submission” page.
- Select the **Previous** button to return to the “Employer Information for this Wage Report” (with W-2 reports) page.
- Select the **Cancel** button to return to the EWR home page.

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**STEP 12:** On the W-2 List for this Submission page:

- The Status column displaying a symbol indicates that the form has been prefilled and not completed. To complete a form, please select a name to go to the “Enter W-2 Information” page.
- When all prefilled forms are completed, symbol will be replaced by ![checked](https://example.com/checkmark.png)

- Select a name to view and edit the W-2 data.
- Select the **Delete** link to delete the W-2. When you select the delete link, “Are you sure you want to delete this W-2” page will be displayed for your assistance.
- Select the **Save and Quit** button to exit W-2 Online without submitting your wage report to the Social Security Administration (SSA). When you select this button, “Are you sure you want to save and exit W-2 Online without submitting your annual wage report to SSA” page will be displayed for your assistance.

- Select the **Edit Employer Information** button to go to the “Employer Information for this Wage Report” page.

- Select the **Start a New W-2** button to go to the “Enter W-2 Information” page.

- Select the **Continue to W-3 Preview** button to go to the “W-3 Preview for this Submission” page. If one of the prefilled forms has not been completed, the **Continue to W-3 Preview** button will not be active.
### Forms W-2/W-3 Online

**Enter W-2 Information**

You are currently working on W-2 number 1 of 50.

Fields marked with an asterisk (*) MUST be completed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Employee’s social security number</td>
<td>123-22-3458</td>
<td></td>
</tr>
<tr>
<td>b) Employer identification number</td>
<td>50-0099864</td>
<td></td>
</tr>
<tr>
<td>c) Employer’s name, address, and ZIP code</td>
<td>MAY BALTIMORE, MD 21211</td>
<td></td>
</tr>
<tr>
<td>d) Control number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) Employee’s first name, middle initial, last name and suffix</td>
<td>First: John, Middle: Doe, Last: Smith</td>
<td></td>
</tr>
<tr>
<td>f) Employee’s address</td>
<td>Address: 123 Main St, Apt. A, Baltimore, MD 21212</td>
<td></td>
</tr>
</tbody>
</table>

**Enter W-2 Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Wages, tips, other compensation</td>
<td>15.00</td>
<td></td>
</tr>
<tr>
<td>2) Federal income tax withheld</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>3) Social security wages</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>4) Social security tax withheld</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>5) Medicare wages and tips</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>6) Medicare tax withheld</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>7) Social security tips</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>8) Allocated tips</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>9) None applicable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10) Dependent care benefits</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

**Enter W-2 Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 Nonqualified plans</td>
<td>Section 457 distributions or contributions</td>
<td>0.00</td>
</tr>
<tr>
<td>12a) Code</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>12b) Code</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>12c) Code</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>12d) Code</td>
<td>$0.00</td>
<td></td>
</tr>
<tr>
<td>13) Statutory employee retirement plan</td>
<td>Third-party sick pay</td>
<td></td>
</tr>
<tr>
<td>14) Other</td>
<td>Description (1):</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Amount (1):</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Description (2):</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Amount (2):</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Description (3):</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Amount (3):</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Enter W-2 Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>15) Employee’s State ID number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16) State wages, tips, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17) State income tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18) Local wages, tips, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19) Local income tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20) Location name</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Have a question? Call 1-800-772-2820 Mon. - Fri. 7AM to 7PM Eastern Time to speak with Employer Customer Service personnel. For TDD/TTY call 1-800-325-6078.**

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**STEP 13:** On the Enter W-2 Information page:

- Select the **Save and Create a New W-2** button to save this W-2 information and create a new W-2. The system may display some alerts. If an alert is displayed, you may proceed by making corrections to the W-2 or by selecting the override checkbox.

- Select the **Save and Go to Next W-2** button to save this W-2 information and edit next W-2 on the W-2 List for this Submission page. The system may display some alerts. If an alert is displayed, you may proceed by making corrections to the W-2 or by selecting the override checkbox.

- Select the **Save and Go to W-2 List** button when you finish creating or editing W-2s to go to the “W-2 List for this Submission” page.
You can enter a maximum of fifty W-2s. The number of the current W-2 is displayed at the top of the “Enter W-2 Information” page. When entering your fiftieth W-2, the system will no longer display the Save and Create a New W-2 button.

- Select the Cancel Changes button to discard changes made to this W-2 and go to the “W-2 List for this Submission” page.

- Select the Delete this W-2 button: If the form has been saved previously, the system will display the “Are you sure you want to delete this W-2” page; If the form has not been saved previously, the system will display the “W-2 List for this Submission” page.
**STEP 14:** On the W-3 Preview for this Submission page:

- The totals displayed in Boxes 16, 17, 18, and 19 are straight summations of state tax information entered on the Forms W-2. If you intend to use this form for reporting to your state and your state has different rules for reporting those totals, you may enter your own totals and select the I...
Agree check box to continue. This information will not be used by Social Security, nor will it be forwarded to any state or local entity.

- Select the Continue button to go to the “Print Unsubmitted Form(s) W-2/W-3 for Review” page.
- Select the Return to W-2 List button to return to the “W-2 List for this Submission” page.
- Select the Save and Quit button to exit W-2 Online without submitting your wage report to SSA. When you select this button, “Are you sure you want to save and exit W-2 Online without submitting your annual wage report to SSA” page will be displayed for your assistance.

**STEP 15:** On the Print Unsubmitted Form(s) W-2/W-3 for Review page:

- Select the Continue button to go to the “Sign and Submit” page.
- Select the Return to W-2 List button to return to the “W-2 List for this Submission” page.
- Select the Save and Quit button to exit W-2 Online without submitting your wage report to SSA. When you select this button, “Are you sure you want to save and exit W-2 Online without submitting your annual wage report to SSA” page will be displayed for your assistance.
STEP 16: On the Sign and Submit page:

- Select the check box to attest to the accuracy of the report and select the **Submit This Wage Report Correction** button to submit your wage report correction. The system will display the “Confirmation Receipt - Your W-2/W-3 File Was Received” page with a pop-up window.

- Select the **Save and Quit** button to exit W-2 Online without submitting your wage report correction to SSA. When you select this button, “Are you sure you want to save and exit W-2 Online without submitting your annual wage report to SSA” page will be displayed for your assistance.

- Select the **Previous** button to return to the “Print Unsubmitted Form(s) W-2 for Review” page.
STEP 17: On the pop-up window:

- Select the OK button to print the “Confirmation Receipt - Your W-2/W-3 File Was Received” page.
- Select the Cancel button to close the pop-up window.

STEP 18: On the Confirmation Receipt – Your W-2/W-3 File Was Received page:

- Select the Print this Page button to print the confirmation page.
- Select the Go to Save Official PDF button to go to the Save PDF page.
- Your wage file will be available for you to review under your BSO account until the date displayed on your “Save PDF” page.

**STEP 19:** On the Save PDF page:

- Right click the file name (<filename.pdf>) to view or save the submitted report.
- Select the **Start a New Report** button to return to the “Before You Create Your Form(s) W-2/W-3” page.
- Select the **View Unsubmitted Reports** button to go to the “Unsubmitted Reports” page.
- Select the **EWR Home** button to go to the EWR home page.
LESSON 2: DOWNLOAD SUBMITTED REPORTS

Follow the instructions below to download an Adobe file containing Forms W-2 and W-3 for a W-2 Online report submitted within the last 30 days.

Submitted wage report files are available for 30 days or until December 31, whichever comes first.

STEP 1: Select the **Save (or Print) Submitted W-2 Report(s)/PDF to Your Computer** link under the Forms W-2/W-3 Online tab on EWR home page. The system displays the “Download Submitted Reports” page.

STEP 2: Right-click the WFID link on the “Download Submitted Reports” page to display a menu including the following options:

- Select **Save Target As** to download the report onto your computer.
- Select **Open in New Window** to view the file.

**Note:** Adobe Acrobat Reader is required to view your downloaded wage file. If you do not have Adobe Acrobat Reader on your computer, you can download it at [https://www.adobe.com/#](https://www.adobe.com/#).

**Note:** If a submission has been deleted through the Submission Status application by the user, a message will be displayed to let the user know that the report is not downloadable.

Select the **Quit** button to return to the EWR home page.

Select the **Start a New Report** button to proceed to the “Before You Create Your Form(s) W-2/W-3” page.
Appendix: Other Pages

1. Are You Sure You Want to Delete this W-2 Page

If a user selects the “Delete This W-2” button on the “Enter W-2 Information” page, the system shall display the “Are you sure you want to delete this W-2” page.

2. Are You Sure You Want to Save and Exit W-2 Online Without Submitting Your Annual Wage Report to SSA Page

If a user selects the “Save and Quit” button on the “W-2 List for this Submission (ABC Limited)” page, “W-3 Preview for this Submission” page, the “Print Unsubmitted Form(s) W-2/W-3 for Review” page or on the “Sign and Submit” page, the system shall display the “Are you sure you want to save and exit W-2 Online without submitting your annual wage report to SSA” page.

3. Are You Sure You Want to Delete the Unsubmitted Report Page

If a user selects the “Delete” button on the “Unsubmitted Reports” page, the system shall display the “Are you sure you want to delete the unsubmitted report?” page.
4. **W-2 Online Restrictions Page**

   Users can access “W-2 Online Restrictions” page by selecting the “Continue” button on the “Before You Create Your Form(s) W-2/W-3” page when the check box “Yes, one or more of these situations apply to this wage report” is selected.