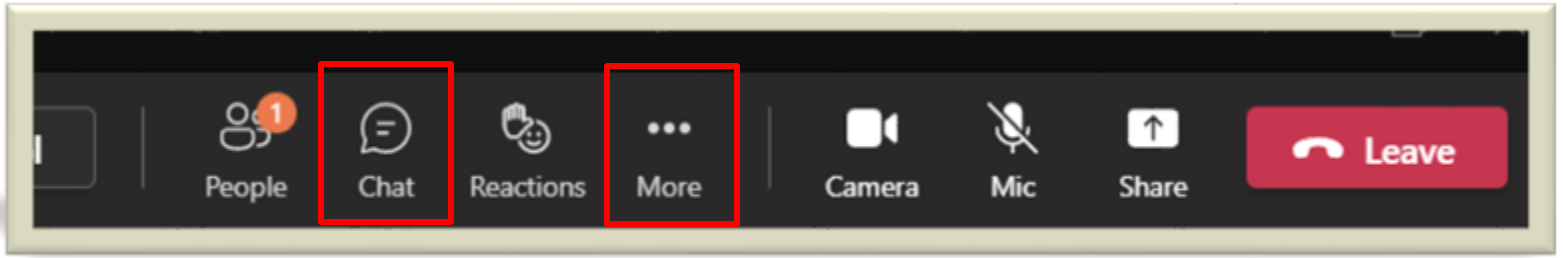
SOCIAL SECURITY'S FALL 2023 SEMI-ANNUAL MEETING

with IRS and the Wage Reporting Community

November 8, 2023

HOUSEKEEPING

- If you have a question or comment, please use the chat window.
- If you need captions, you can find that setting in the 'more' section.



TODAY'S TOPICS

- Welcome/opening statement
- Tax Year 2023
- Busy season reminders
- Activation codes
- Taxpayer First Act-final regulations
- W-2 Online
- Social Security's NEW authentication process for Business Services Online (BSO)
- Upcoming – NEW authorization process for BSO
- Outreach and support
- Q & A
- Closing statement

TAX YEAR 2023

System opens 12/04/2023

DON'T WAIT! Register today! This process may take 2 weeks or more as it includes receiving activation codes in the mail.

New maxes

COLA Fact Sheet (ssa.gov)

What's New in 2024 (ssa.gov)

Your cheat sheet for everything wage reporting!

START EARLY!

We receive our largest volume of calls during December, January, and February!

- *Registration*
- *W-2/W-2c Online*
- *Reconciliation*
- *Electronic Wage Reporting*
- *BSO Activation Code*
- *Self Employed & Household*
- *EFW2/EFW2C*
- *SSN Verification*

Call before the busy season to avoid long hold times!

REMINDERS FOR THIRD-PARTY PROVIDERS

If you verify names and SSNs on behalf of your clients, use our free Social Security Verification Service (SSNVS) for wage reporting purposes.

You only need one BSO User ID (even if you represent more than one company).

BSO WAGE REPORTING REMINDERS

Activation codes

- The new process requires that we mail an activation code before you can access our suite of services on behalf of your employer.
- Social Security uses the Internal Revenue Service (IRS) business address on file to mail activation codes.
- We recommend you start the registration and authentication process for BSO before W-2 reporting season in January.
- It can take up to 2 weeks to complete the registration process.

TAXPAYER FIRST ACT

FINAL REGULATIONS ISSUED

The Internal Revenue Service (IRS) has issued final regulations that reduce the electronic filing threshold from 250 W-2s to10, beginning January 2024.

EMPLOYER WAGE REPORTING JOURNEY (EWRJ)

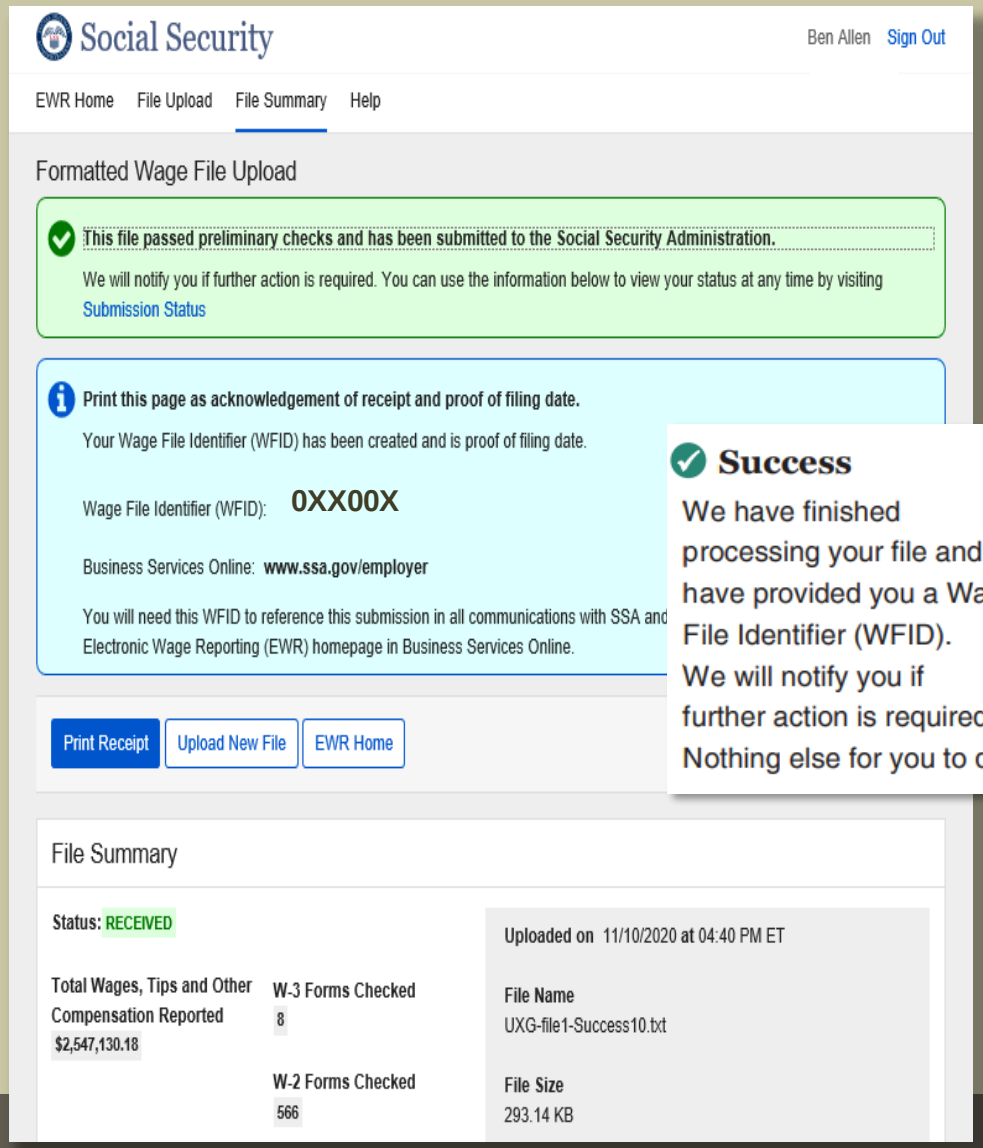
WAGE FILE UPLOAD APPLICATION

This is the first year the application is available for all users.

Benefits

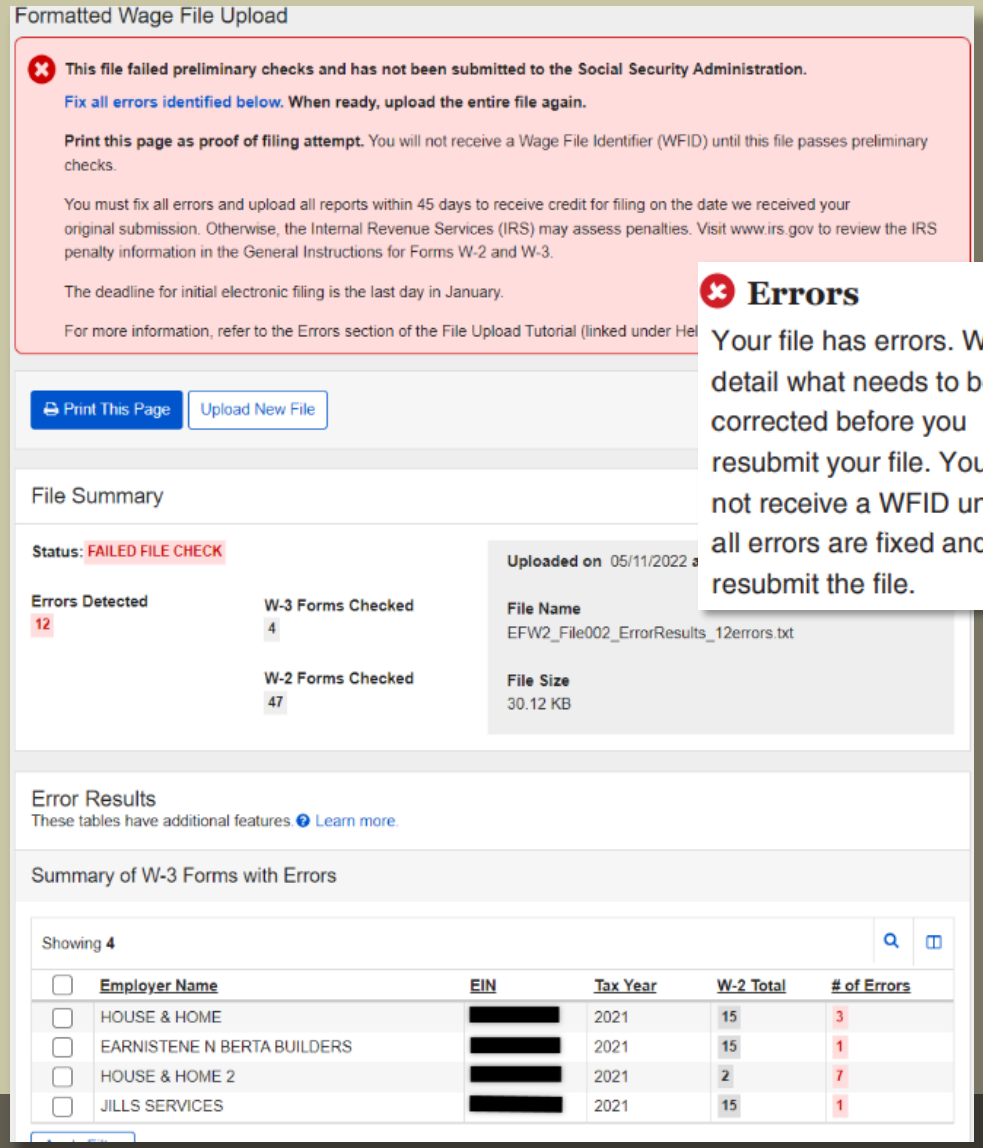
- Users receive their submission results in 1minute or less.
- Detailed error information provided.
- User-friendly navigation.
- Self-help features.
- Reduction in initial resubmission notices.

WAGE FILE UPLOAD



Success

We have finished processing your file and have provided you a Wage File Identifier (WFID). We will notify you if further action is required. Nothing else for you to do!



Errors

Your file has errors. We detail what needs to be corrected before you resubmit your file. You will not receive a WFID until all errors are fixed and you resubmit the file.

WHAT THE CUSTOMERS ARE SAYING?

"Very easy, user friendly, detailed results, less stressful."

"It was the absolute fastest method I have ever experienced in uploading the files."

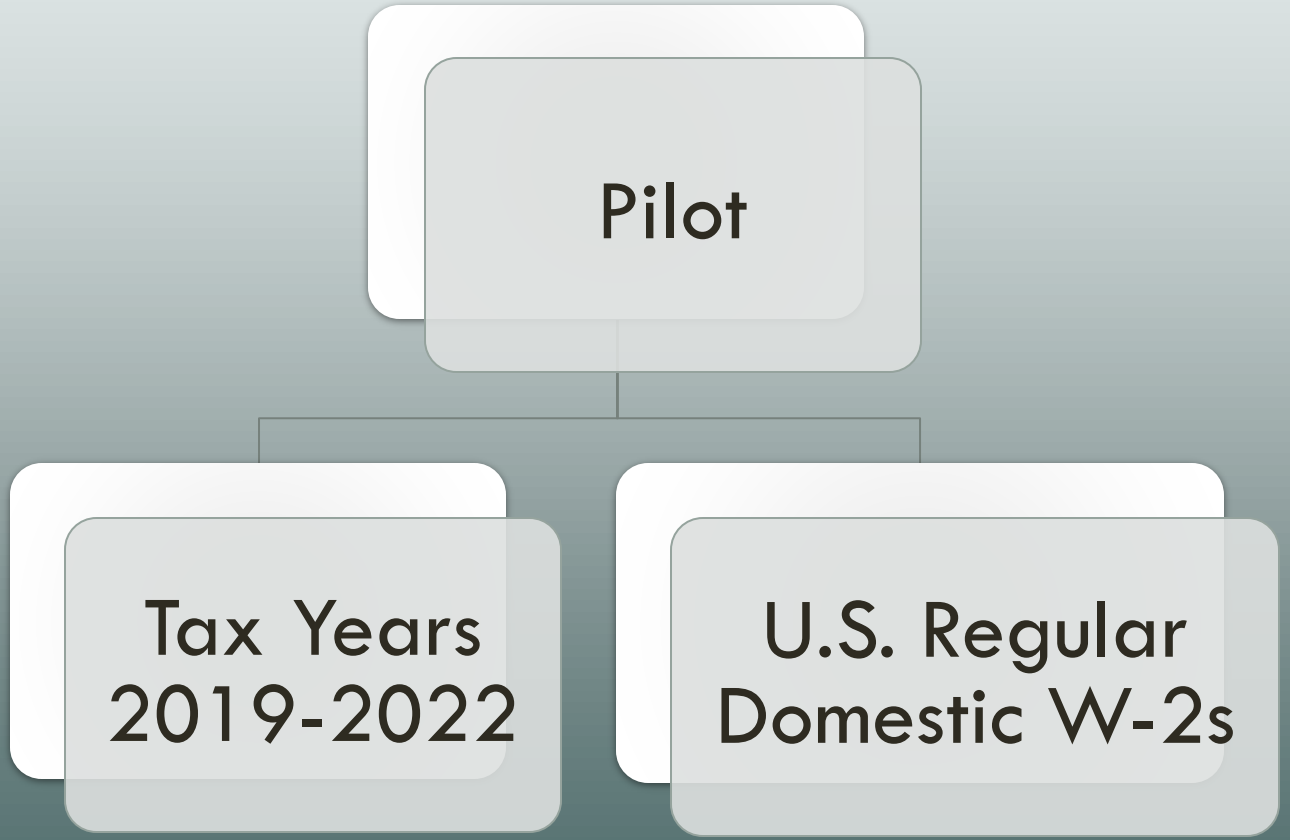
"Excellent job. Great improvement."

"Much better UI than the old system."

REMINDERS

- Include a valid file extension- .txt or .zip.
- Files over 350MB need to be split into smaller files to submit.
- Electronic W-2 Filing User Handbook (ssa.gov)

W-2 ONLINE PILOT



W-2 ONLINE PILOT

Benefits

- Simplified navigation.
- Modernized, easy-to-read screens.
- Box 12 code descriptions.
- Plain language instructions.
- Additional self-help functionality.
- Import and prefill data.
  (after first submission)

W-2 ONLINE PILOT

Upcoming Functionality

- W-2C.
- Modernized, easy to read screens.
- Plain language instructions.
- User friendly application.

REGISTRATION AND AUTHENTICATION CHANGES IMPACTING FILING

New Registration and Authentication Process for BSO Employer Services

WHY WE MADE CHANGES

We made enhancements to increase security for both our Social Security services and our customers.

BSO users must have additional security added to their account to submit W2's and for the following employer services:

- Wage file upload.
- W-2/W-2C online.
- AccuWage online.
- Social Security Number Verification Service (SSNVS).
- View wage report name/SSN errors.

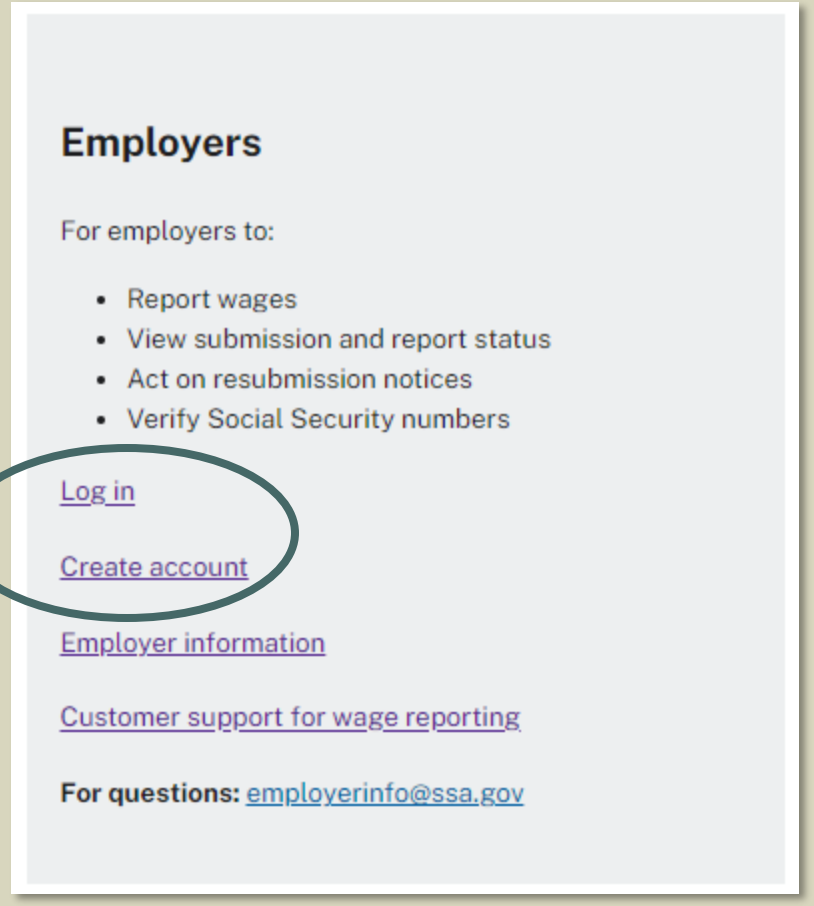
You will not be able to use the services above without adding enhanced security to your account.

START AT THE WELCOME PAGE FOR BSO

www.ssa.gov/bso

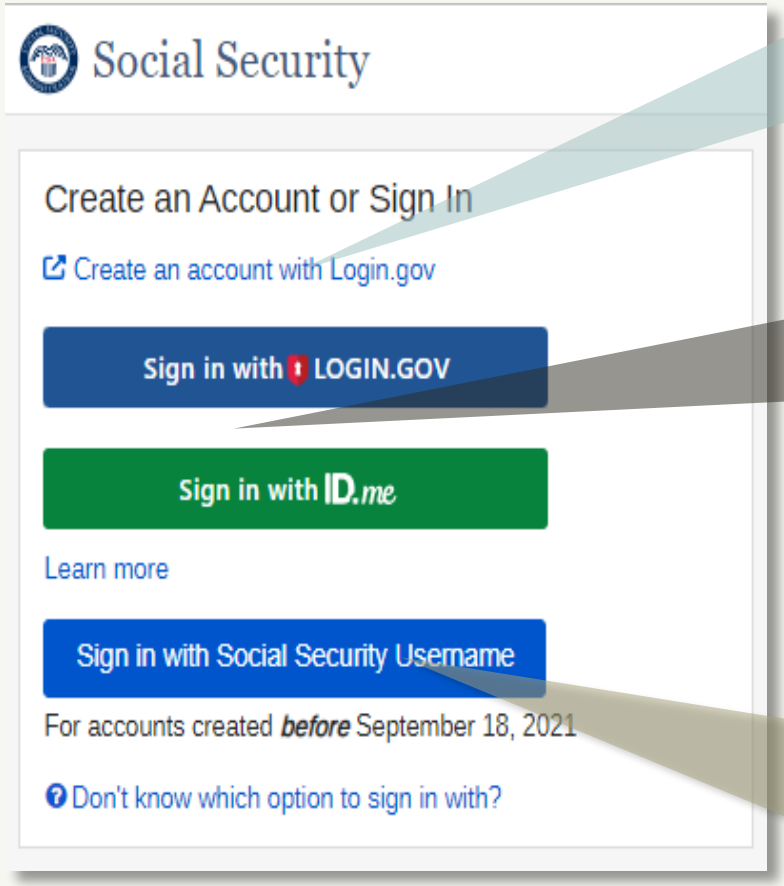
HELPFUL TIPS TO CREATE A NEW EMPLOYER SERVICES ACCOUNT

- DON'T WAIT! Register today! This process may take 2 weeks and includes receiving activation codes in the mail.
- To register, you **MUST** start at the BSO Welcome page www.ssa.gov/bso.
- If you have a Social Security Online account, Login.gov, or ID.me account you will need to select the ***'Log in'*** link.
- If you do not already have a Social Security Online account, Login.gov, or ID.me account, select the ***'Create account'*** link.
- For assistance with activation codes, review the Decoding the BSO Activation Codes (ssa.gov).



NAVIGATING THE NEW SIGN IN PROCESS

The initial Social Security sign in screen looks the same for a business and personal account.
It is important that you start from the BSO Welcome page to access BSO services. You will not be able to access BSO services otherwise.
www.ssa.gov/bso



If you do not have Social Security Online account, a Login.gov, or an ID.me account select **Create an account with Login.gov**.

If you already have a Login.gov or ID.me account, select the **Login.gov** or **ID.me button** to sign in.

If you have an existing Social Security Online account, you can enter it here.
Note: This is ***NOT*** your existing BSO User ID and password.

__NOTE__ You will no longer use your BSO User ID and password to log into BSO. However, your account still exists and will be available after you verify your identity.

REQUIREMENTS FOR CREATING AN ONLINE ACCOUNT

You may need the following to create an account:

- A valid email address.
- Your Social Security number (SSN).
- A U.S. mailing address.
- A working mobile device to receive text messages.
- Your driver's license information.
- Your full legal name (as listed on your Social Security card).

You may need to provide financial information such as:

- The last eight digits of a valid credit card (Visa, Mastercard, or Discover card).
- W-2 tax form information.
- 1040 Schedule SE (self-employment) tax form information.

CHALLENGES TO CREATING AN ONLINE ACCOUNT

You may not be able to create a Social Security Online account if you:

- Recently moved.
- Recently changed your name.
- Blocked electronic access to your personal information.
- Placed a freeze on your credit report.

If you are unable to create an account on your own, you can call 1-800-772-1213 or visit your local Social Security office for assistance.

For registration issues relating to the Social Security online accounts.

1-800-772-1213

ATTENTION!
SELF-EMPLOYED USERS WITHOUT AN EIN

Self-employed users without an EIN cannot currently register for business services online.

If you do not have an EIN, you will need to mail paper W-2/W-3 and W-2c/W-3c to our Wilkes-Barre Direct Operations Center. Visit the Paper Forms W-2 & Instructions page for address information.

Paper Forms W-2 & Instructions- www.ssa.gov/employer/paperFormInstr.htm

TIPS TO SUCCESSFULLY NAVIGATE THE AUTHENTICATION PROCESS

Slow down! Take your time. Please navigate through the authentication process carefully. A simple keying mistake could cause an authentication error and lock you out of the system.

When uploading images of your driver's license, please be sure to upload a clear picture of the front and back. A blurry picture may cause authentication issues.

Make sure you are using your full legal name that is recorded on your driver's license and Social Security card.

Be prepared to verify your identity and accept the Terms of Service every time you sign in for Business Services

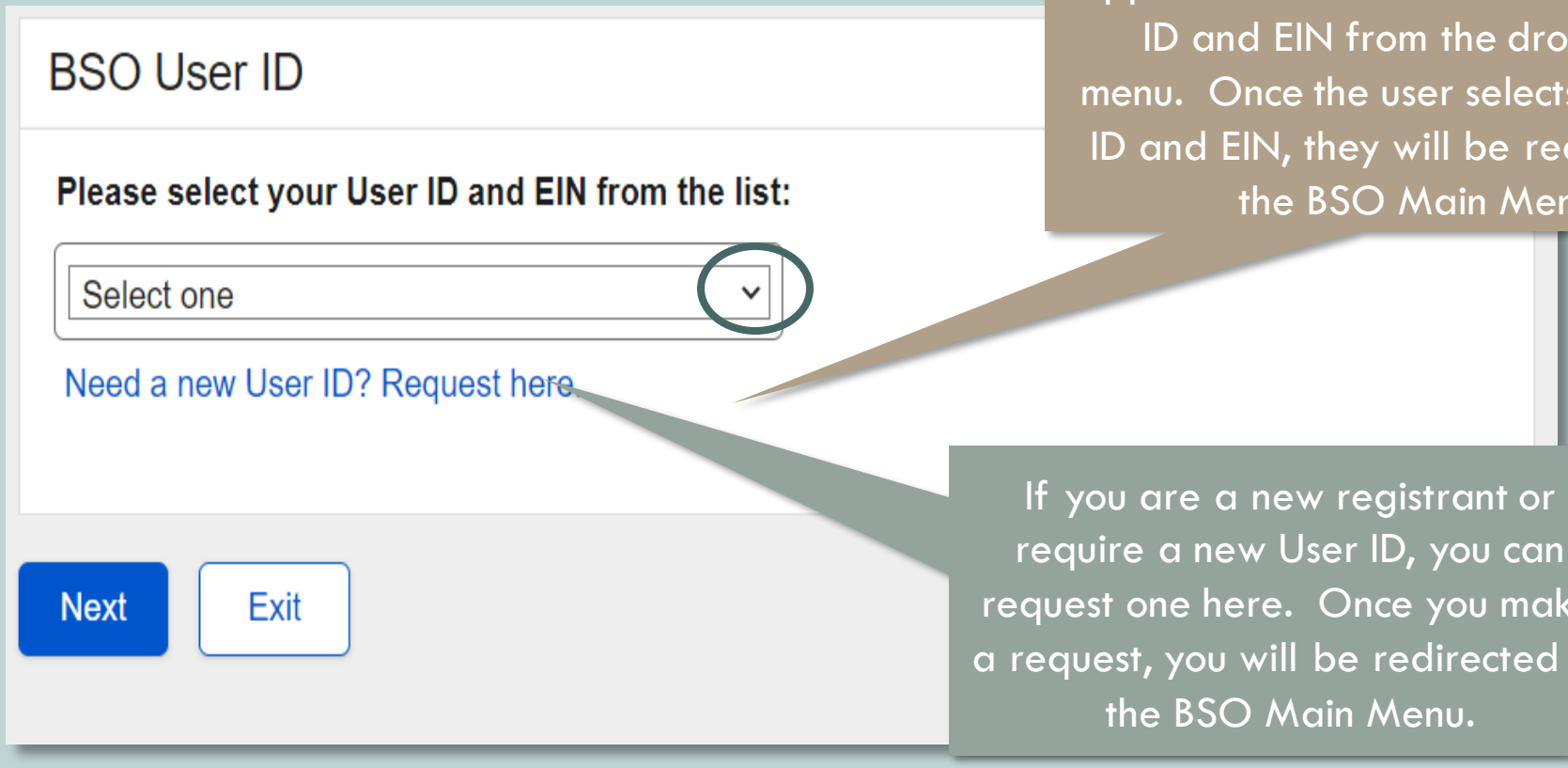
Your personal and business accounts will remain SEPARATE.

CREATE OR SELECT A BSO USER ID

You must start from www.ssa.gov/bso

After successfully logging in you can:

- Request a new User ID.
- Select an existing one.



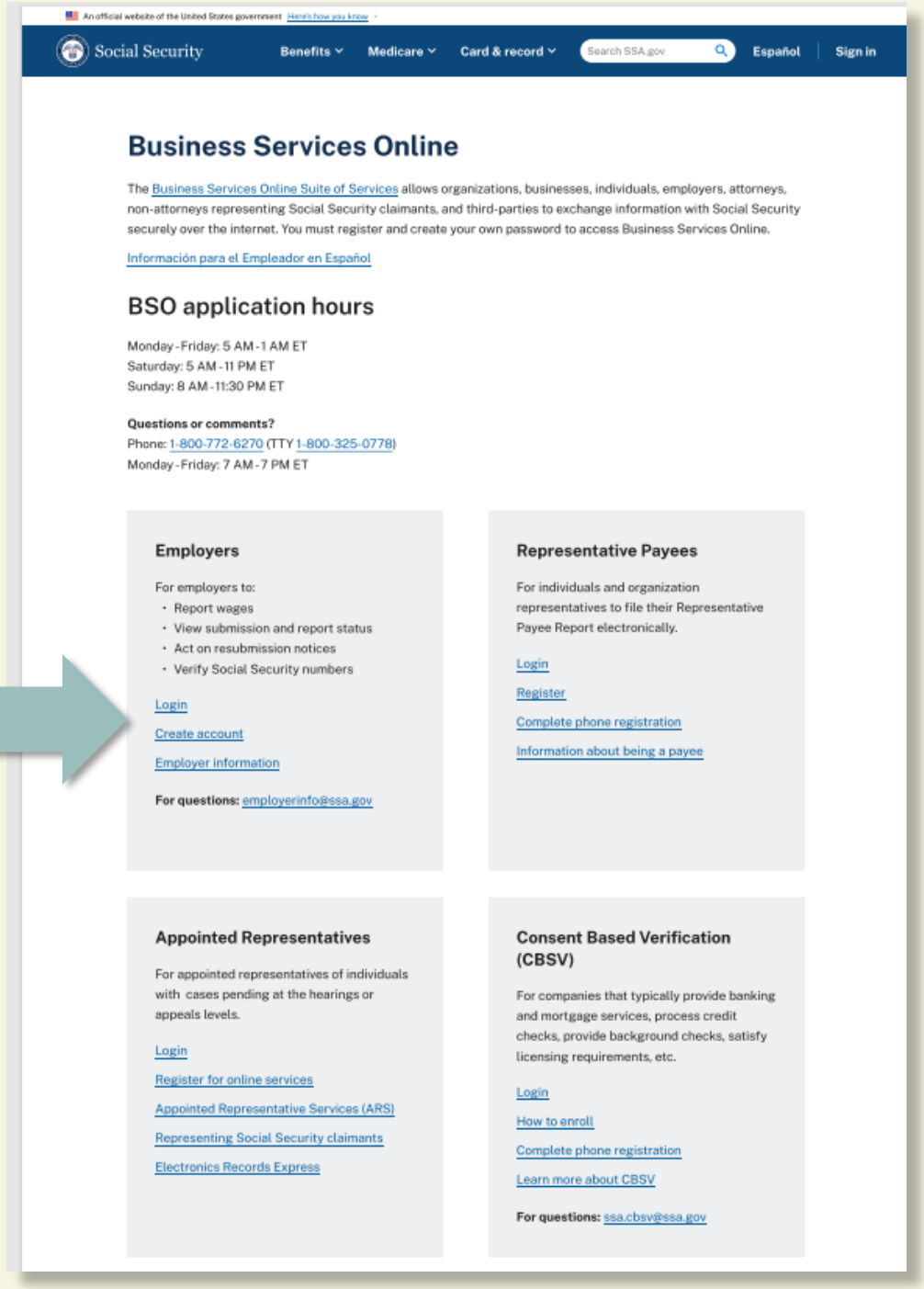
The BSO User ID will not automatically appear. The user must select their User ID and EIN from the drop-down menu. Once the user selects their User ID and EIN, they will be redirected to the BSO Main Menu.

If you are a new registrant or require a new User ID, you can request one here. Once you make a request, you will be redirected to the BSO Main Menu.

BSO WELCOME PAGE

YOU MUST START HERE FOR EMPLOYER SERVICES

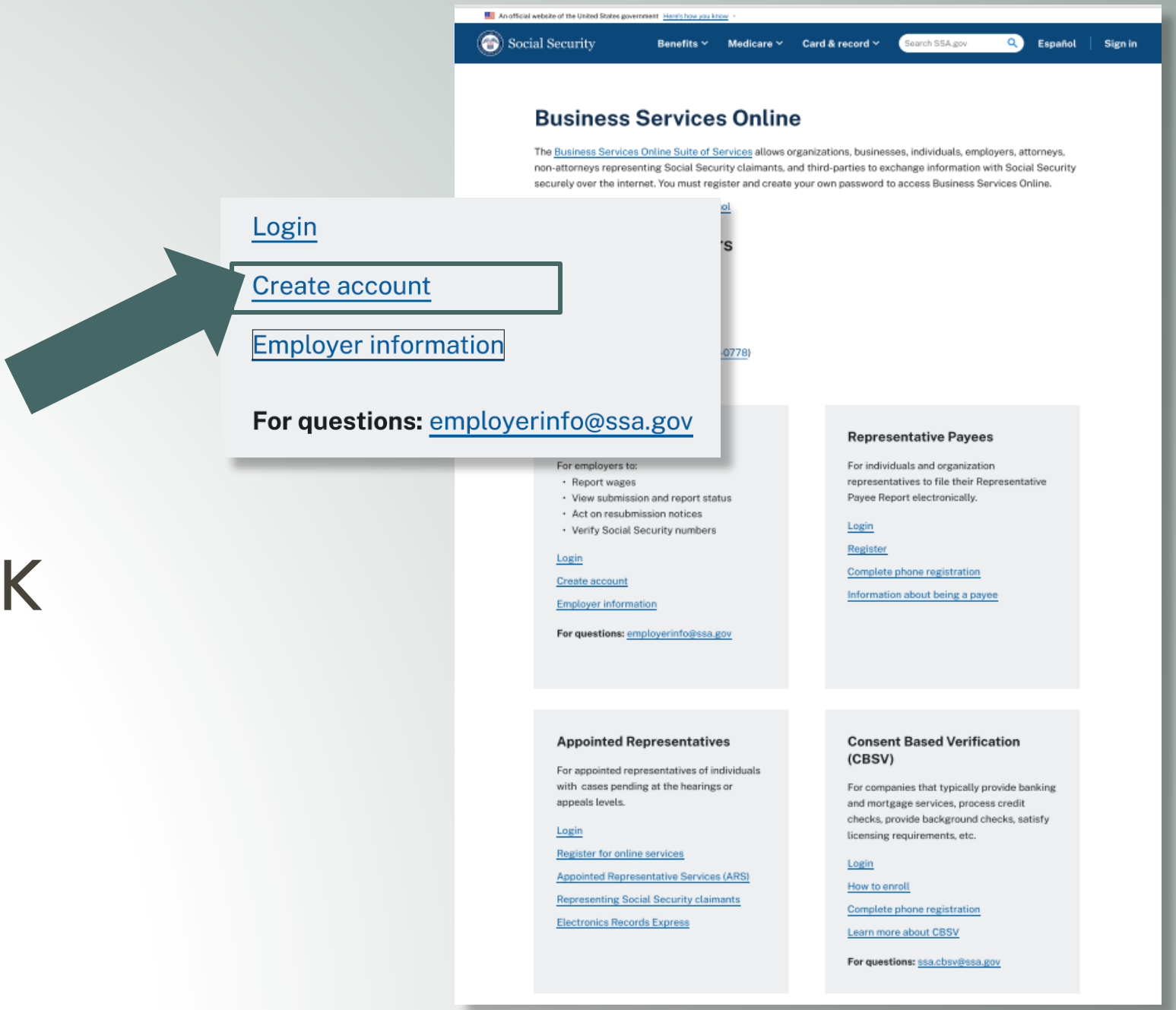
www.ssa.gov/bso



FIRST TIME USER PATH

SIGN IN WITH LOGIN.GOV

YOU MUST SELECT THE ‘CREATE ACCOUNT’ LINK



Employers

For employers to:

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

Log in

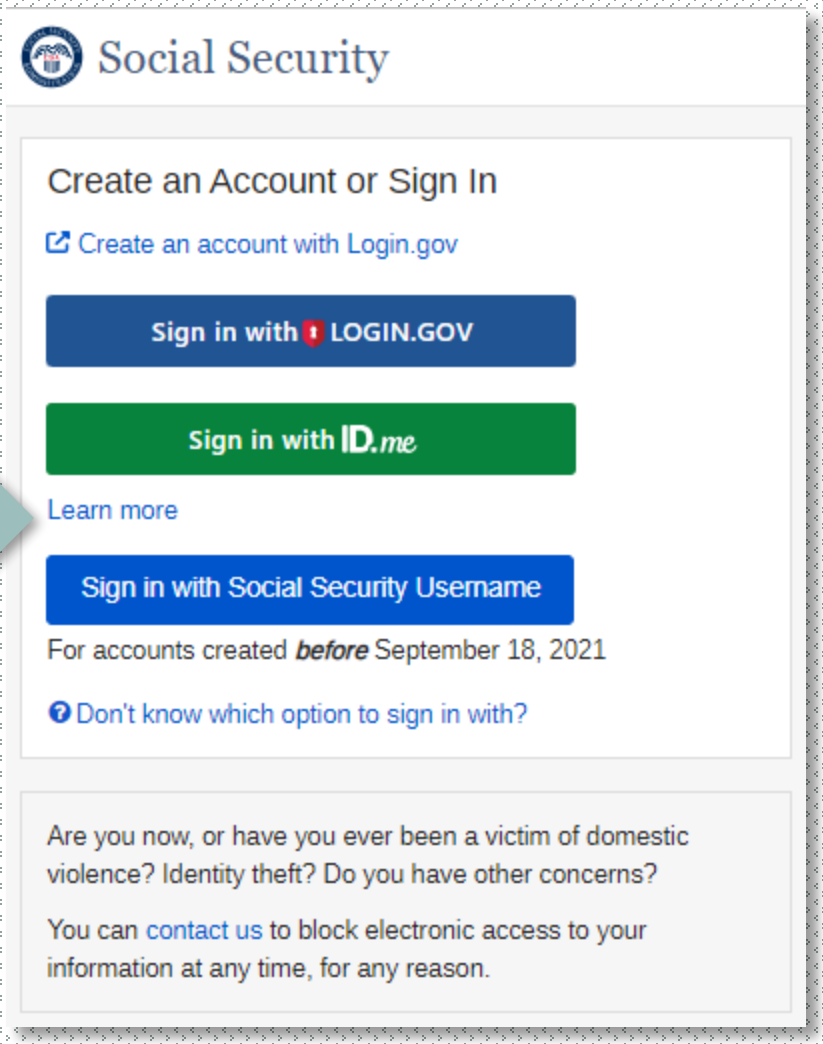
Create account

Employer information

Customer support for wage reporting

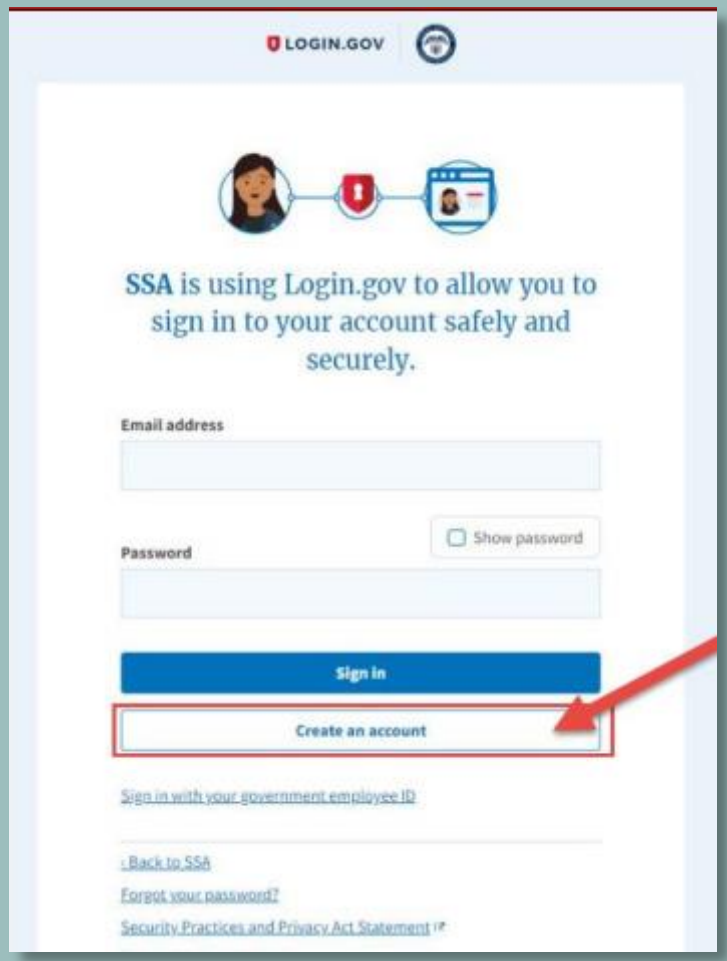
For questions: employerinfo@ssa.gov

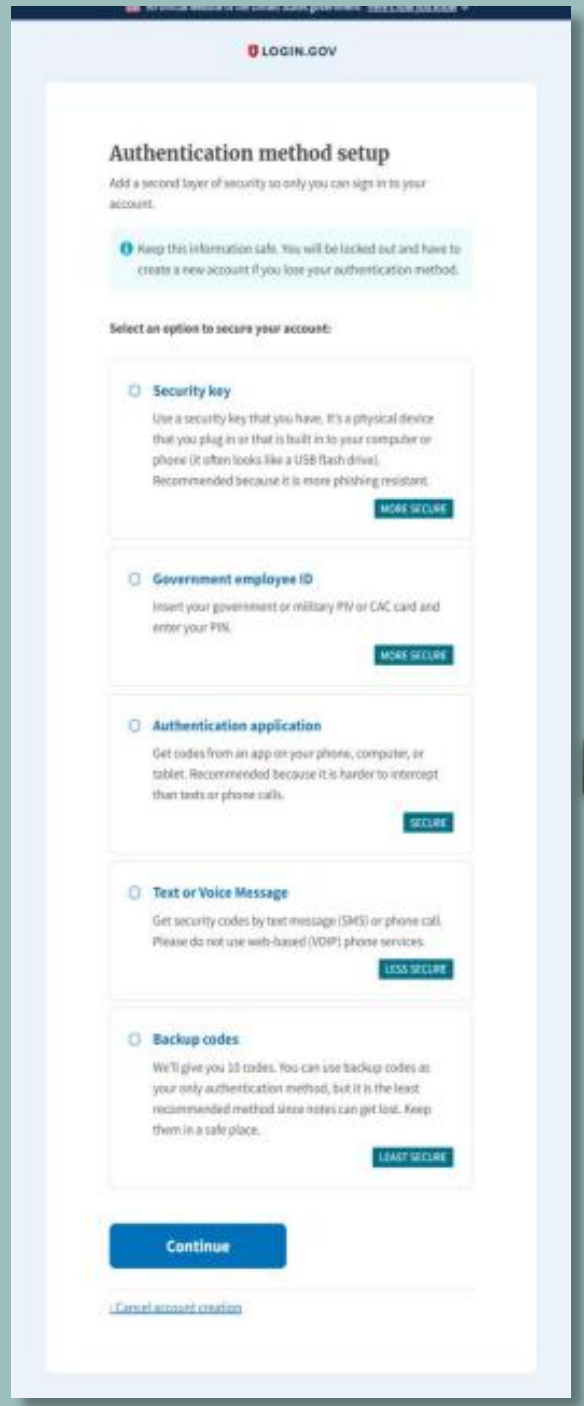
SELECTING CREATE AN ACCOUNT TAKES YOU TO THE SOCIAL SECURITY SIGN IN SCREEN.

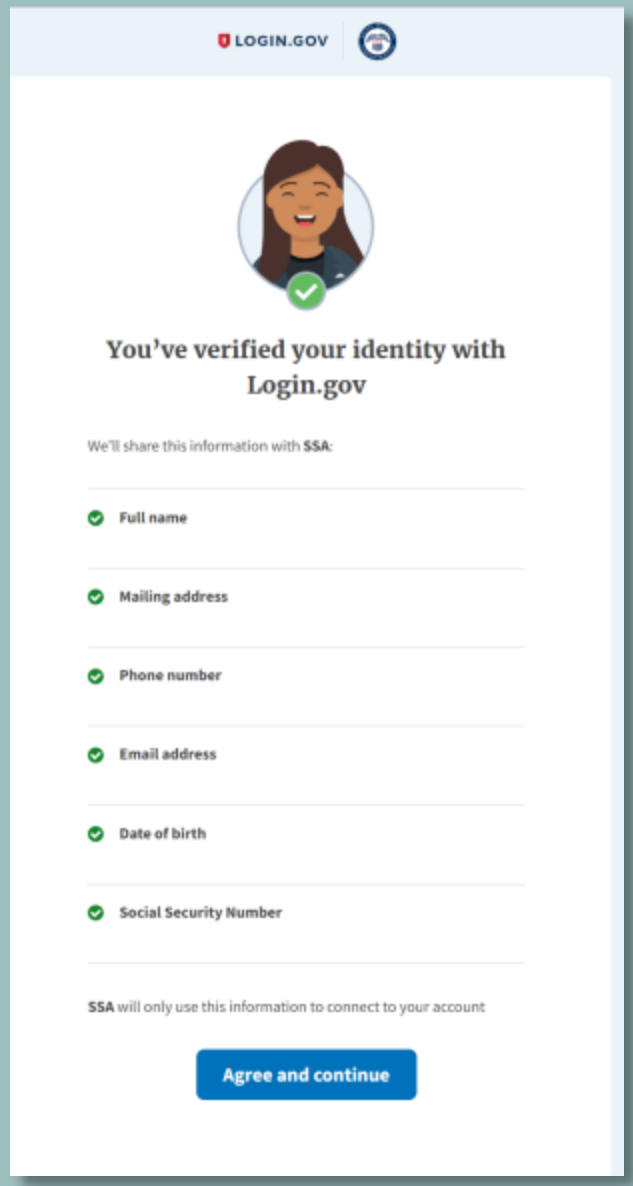


SELECT CREATE AN ACCOUNT WITH LOGIN.GOV

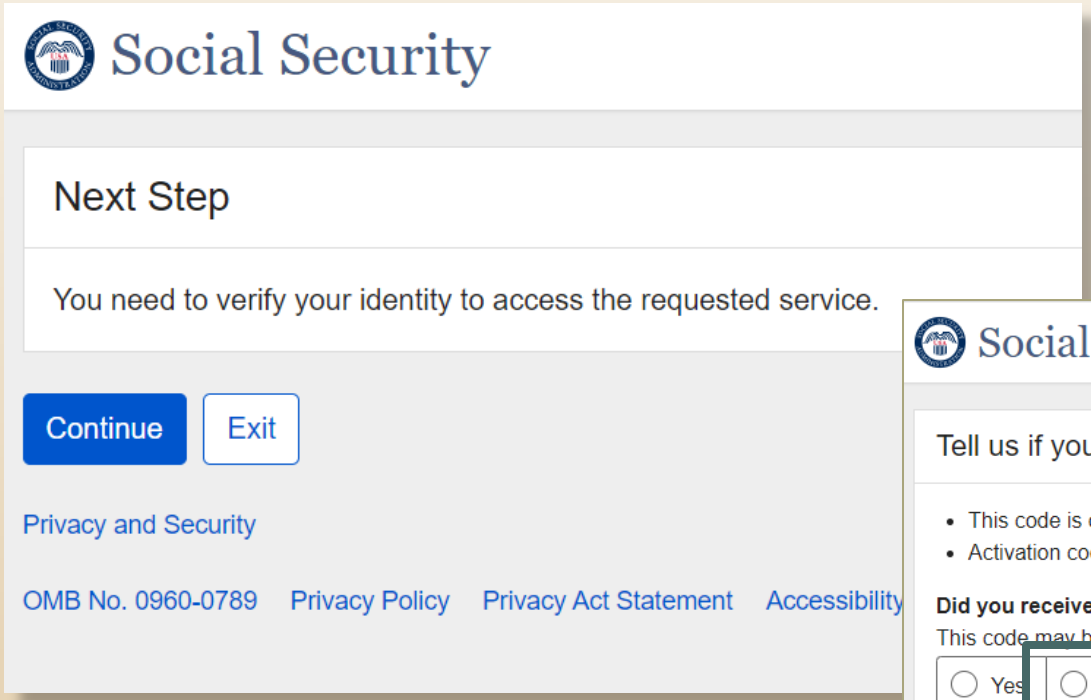
FOLLOW THE LOGIN.GOV PROCESS

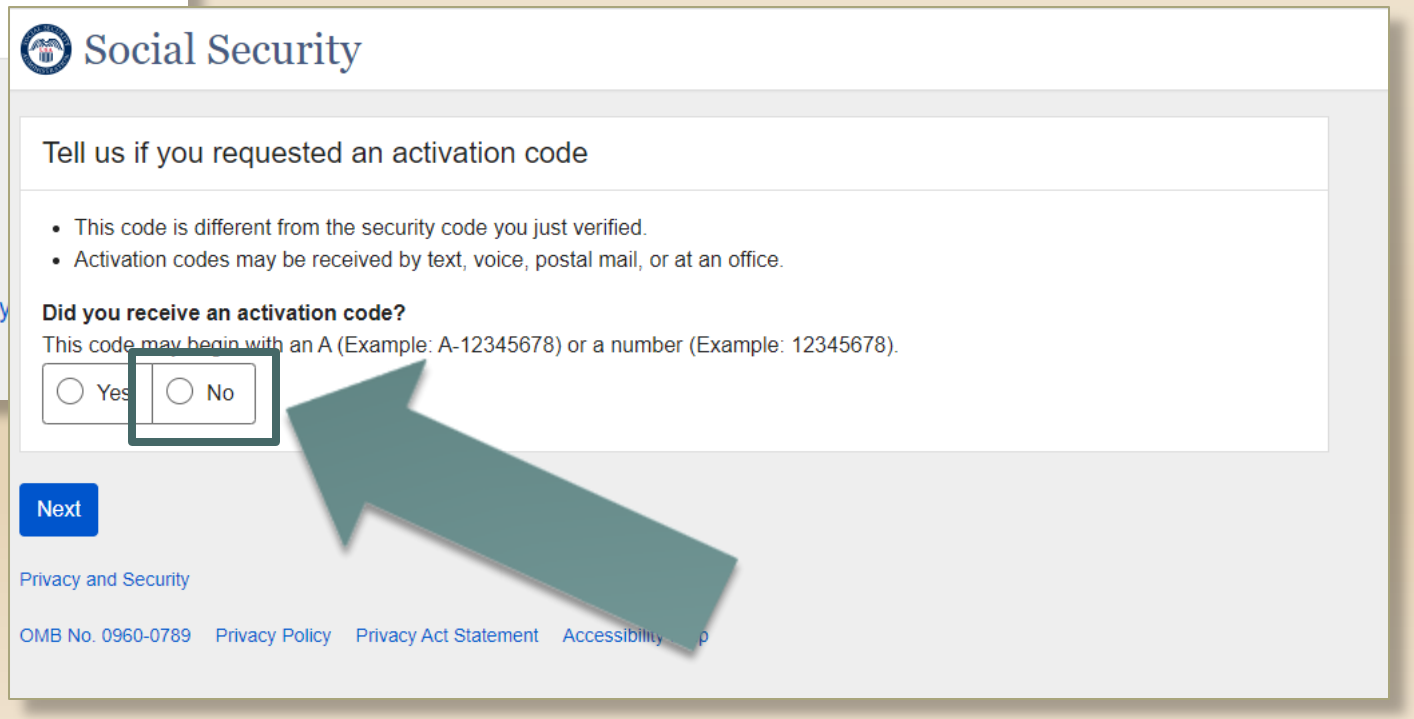


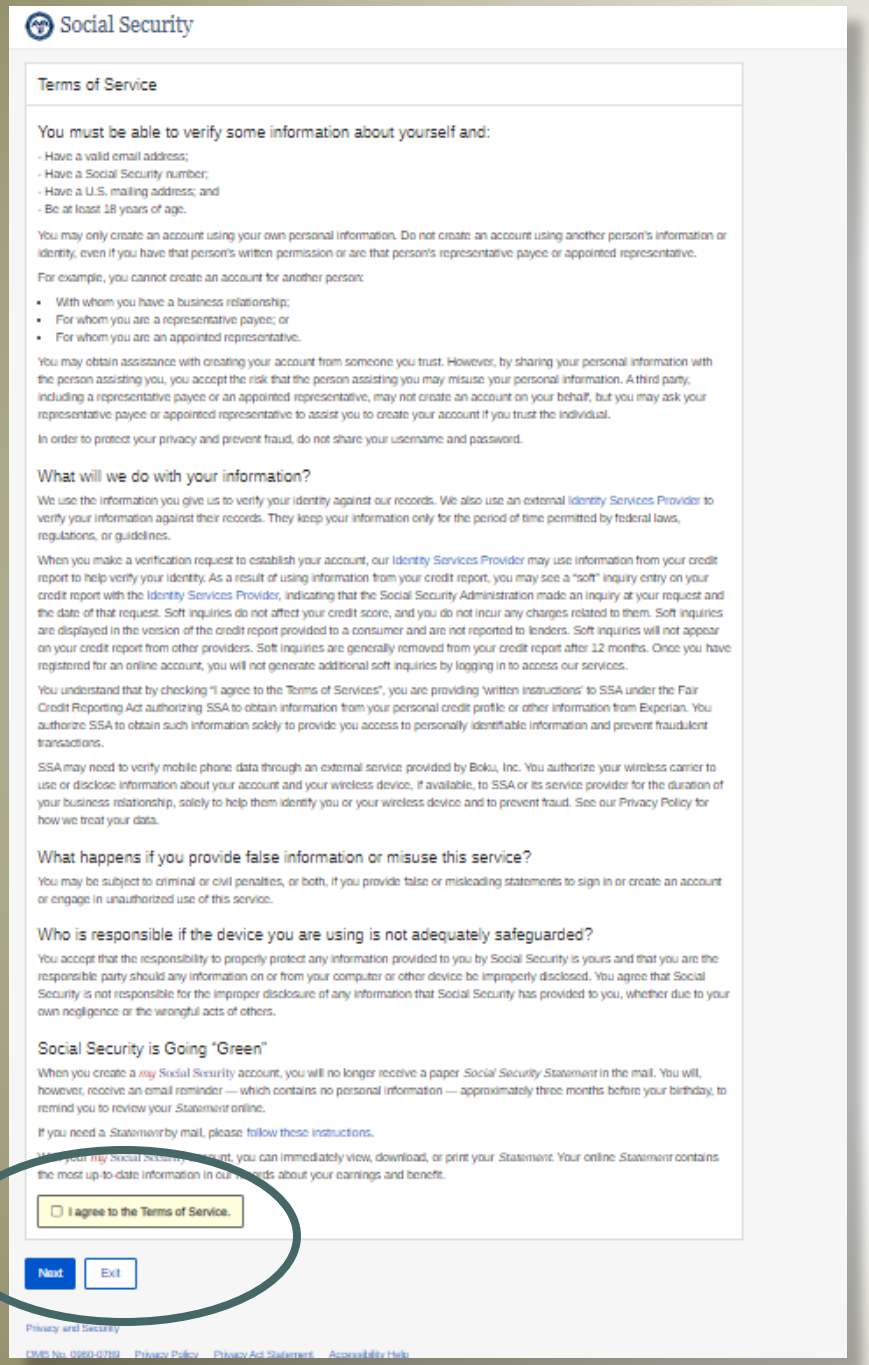




COMPLETE THESE ADDITIONAL STEPS TO FINALIZE THE PROCESS OF VERIFYING YOUR IDENTITY



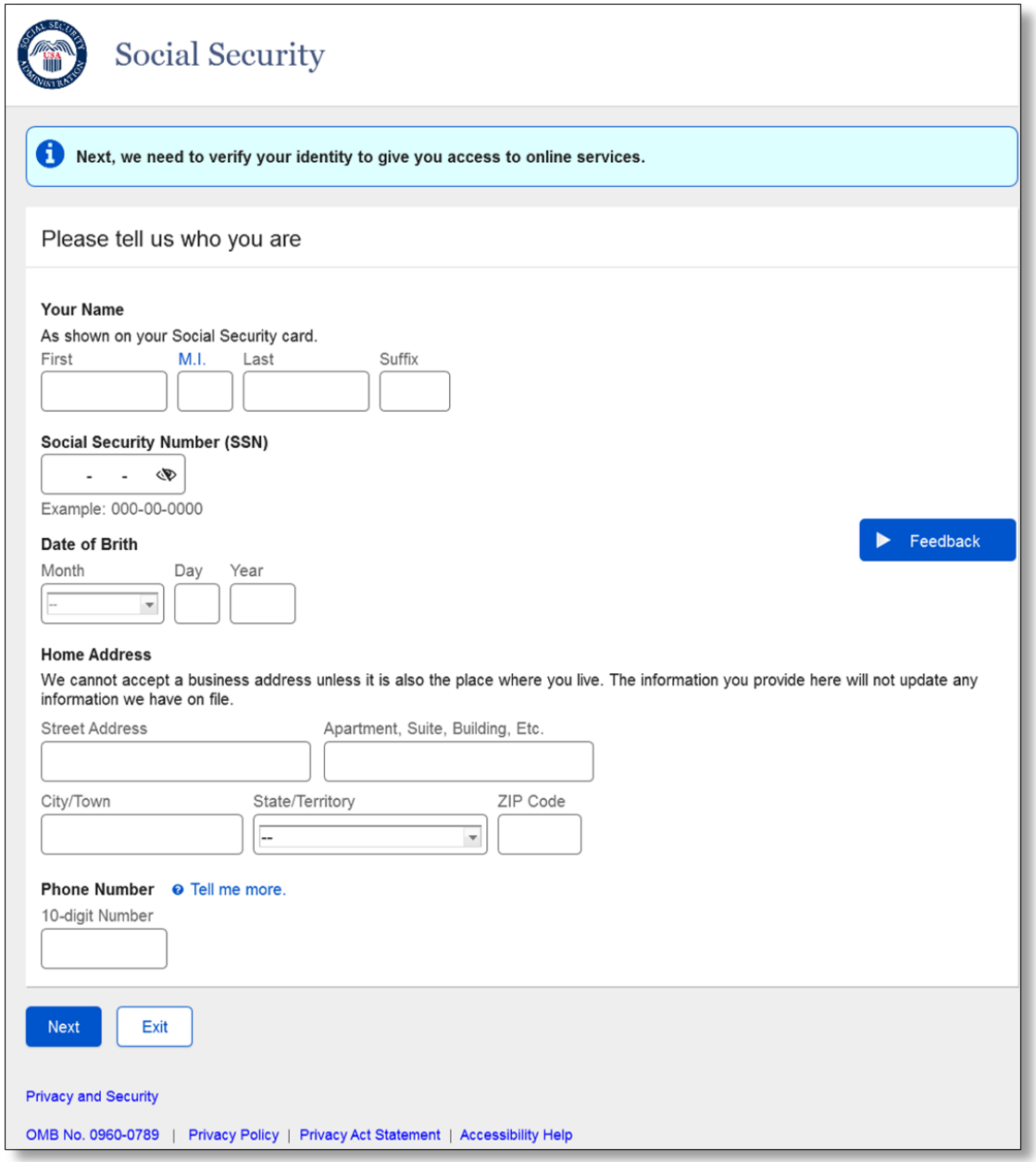


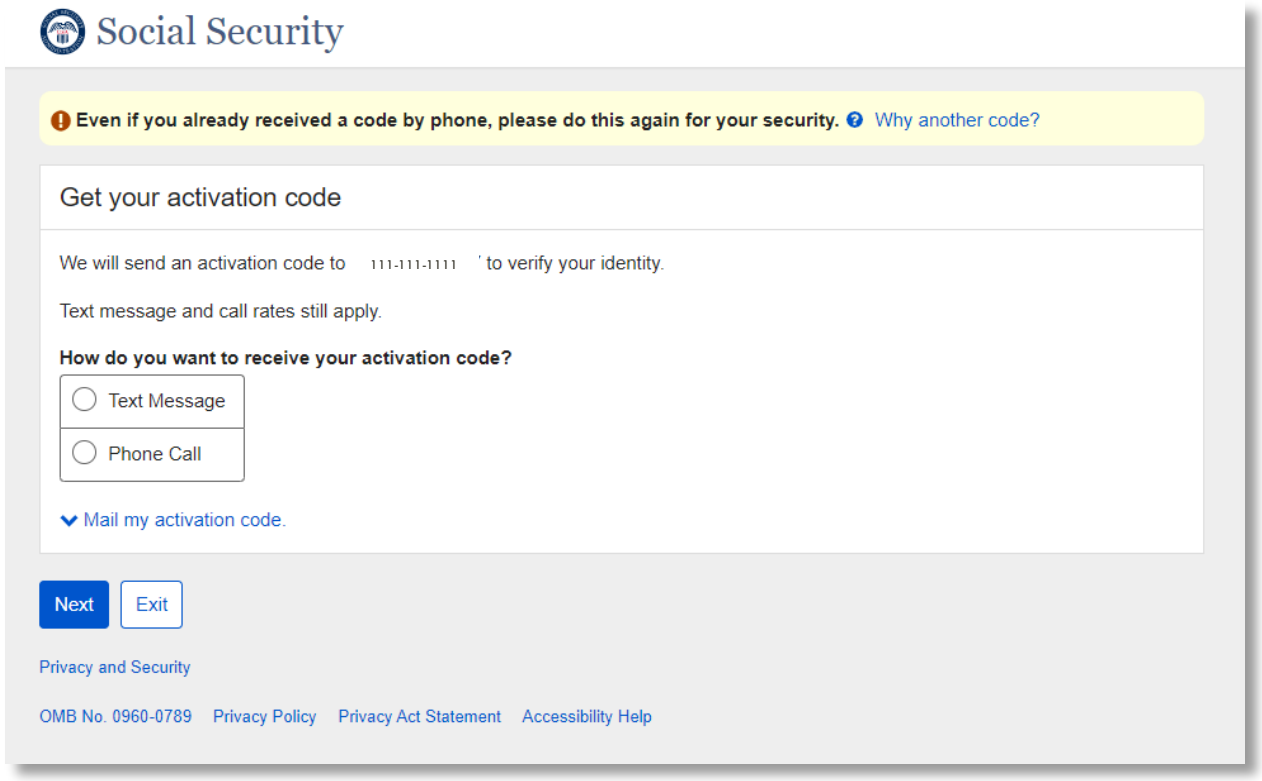


SELECT 'I AGREE TO THE TERMS OF SERVICE'

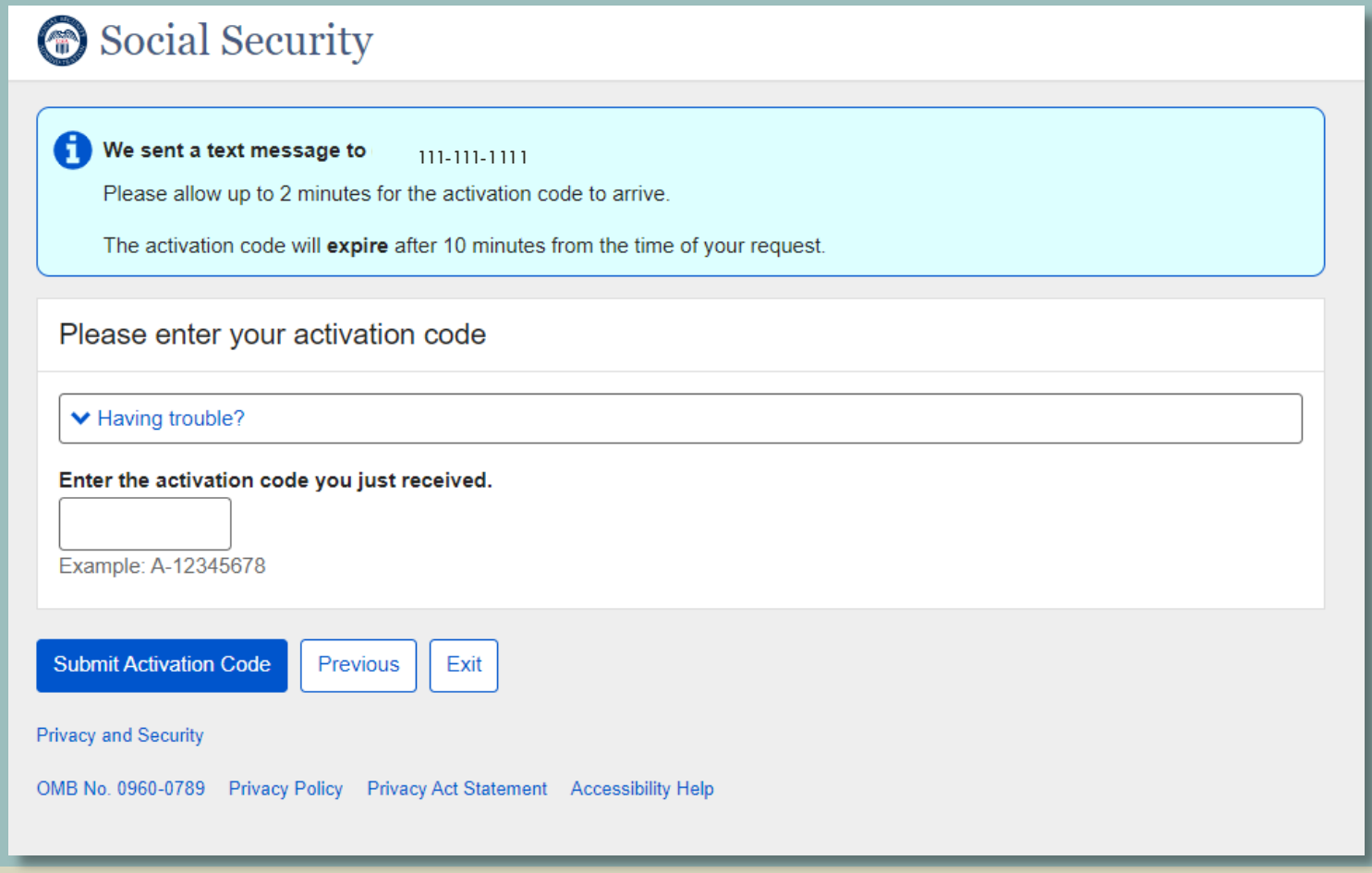
THEN SELECT 'NEXT'

VERIFY YOUR IDENTITY



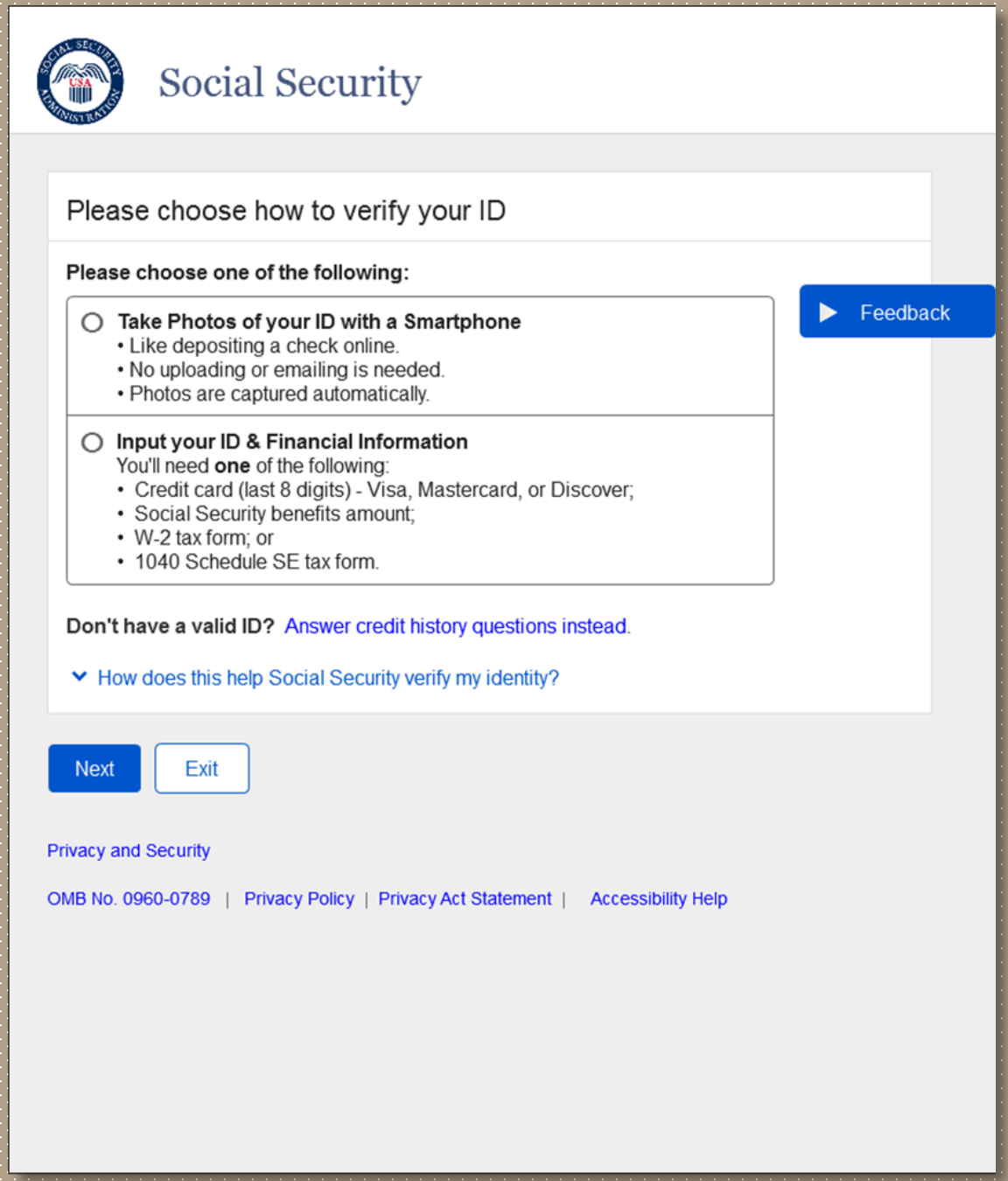


CHOOSE HOW YOU WANT TO RECEIVE THE ACTIVATION CODE

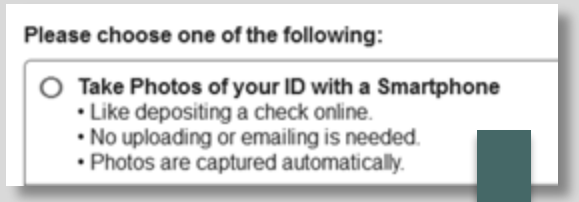


Enter the activation code and select 'Submit Activation Code'

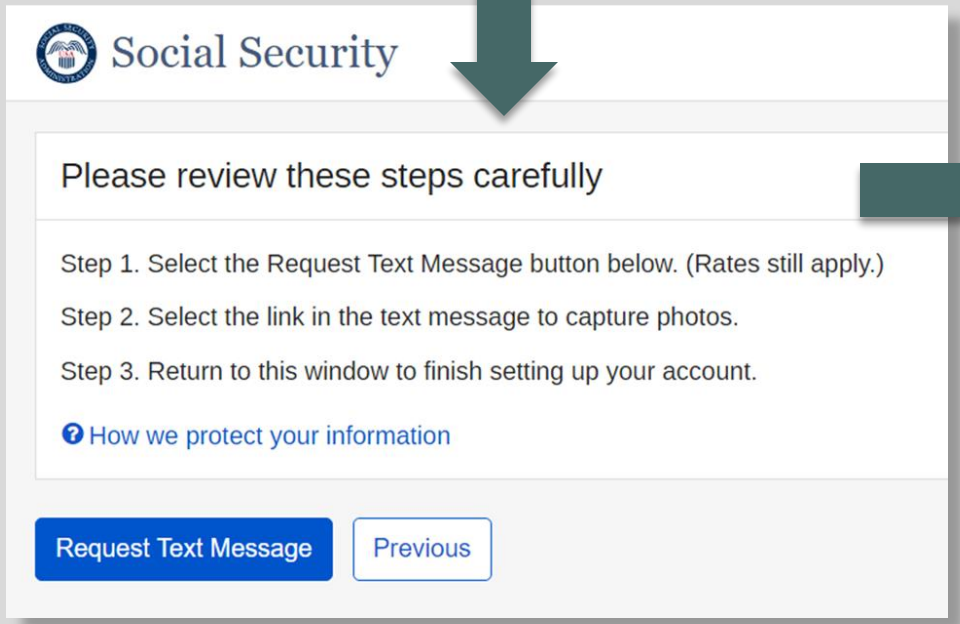
CHOOSE HOW TO VERIFY YOUR ID

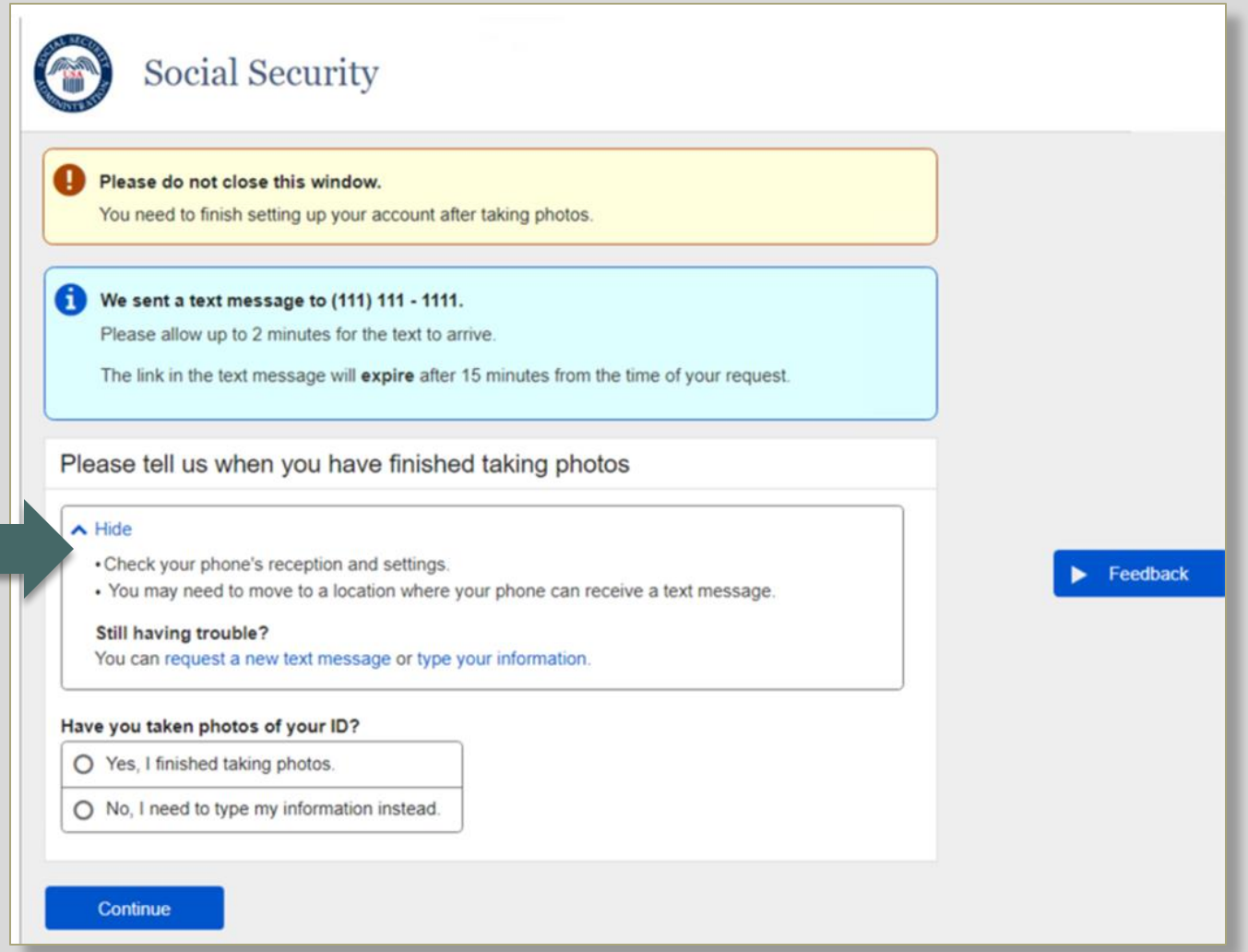


STEPS TO TAKE PHOTOS WITH YOUR SMART PHONE



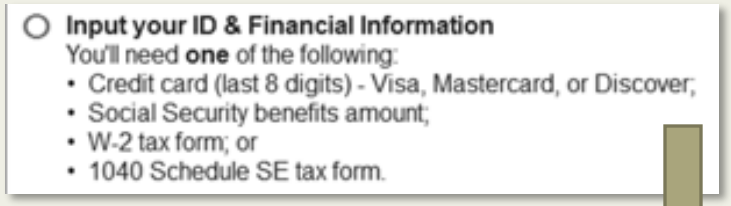
1ST RADIO BUTTON PATH



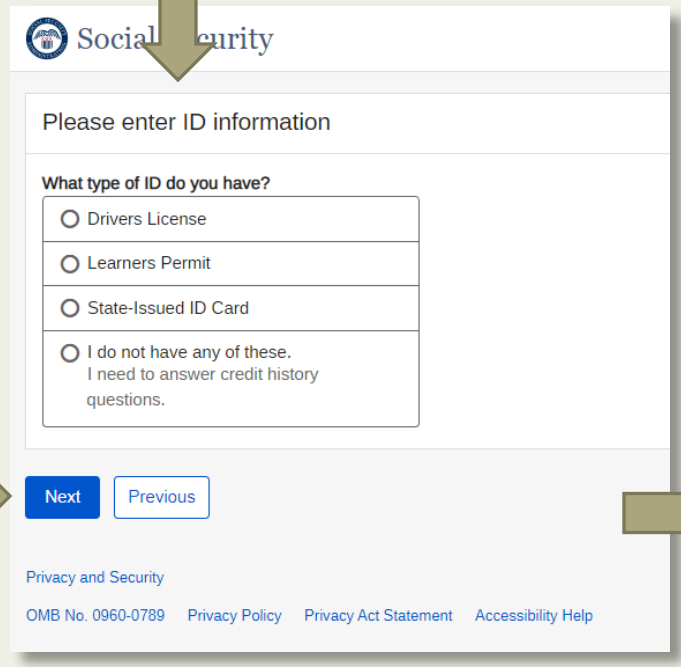


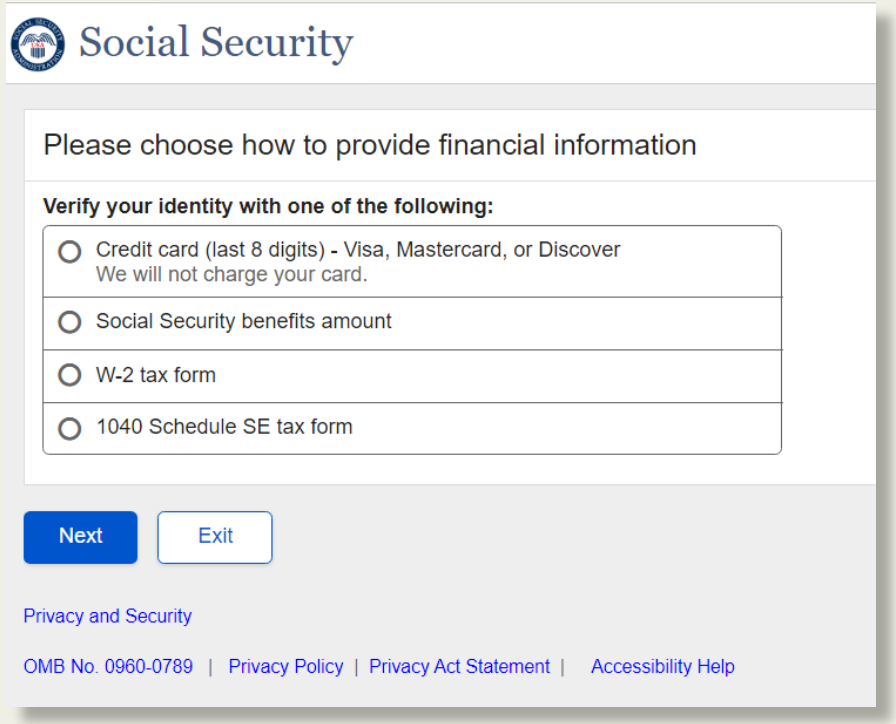
STEPS TO VERIFY YOUR FINANCIAL INFORMATION

2ND RADIO BUTTON PATH

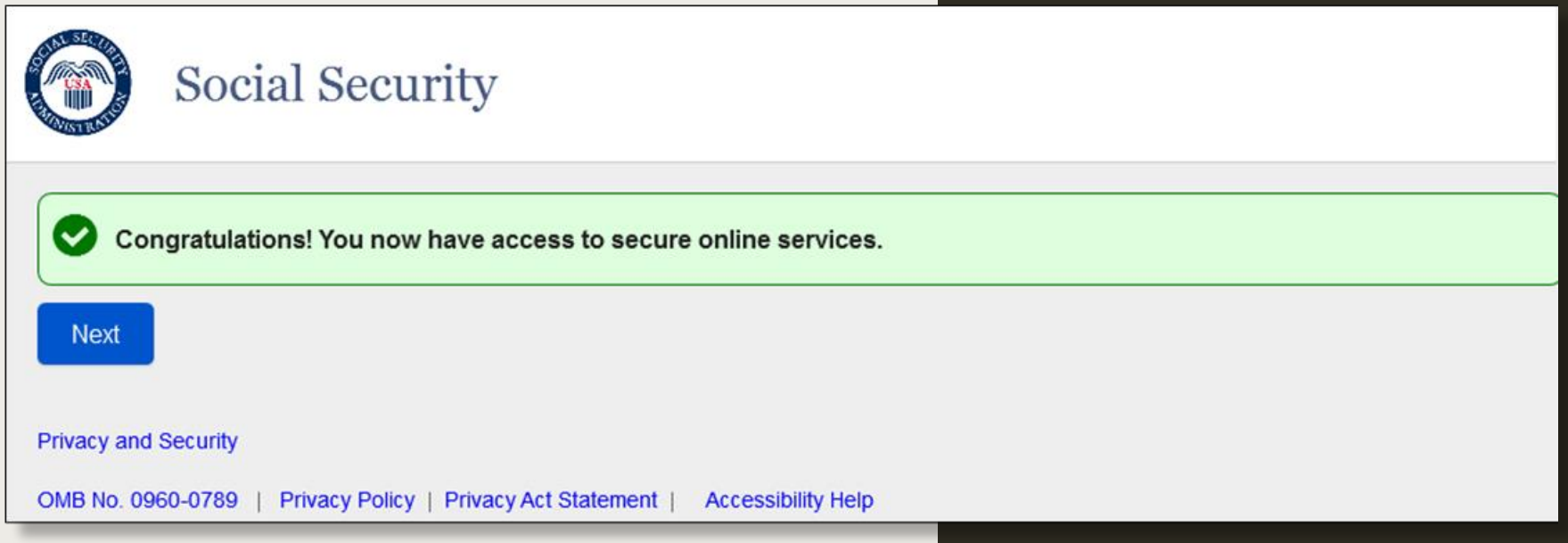


SELECT NEXT AS YOU PROVIDE THE REQUESTED INFORMATION

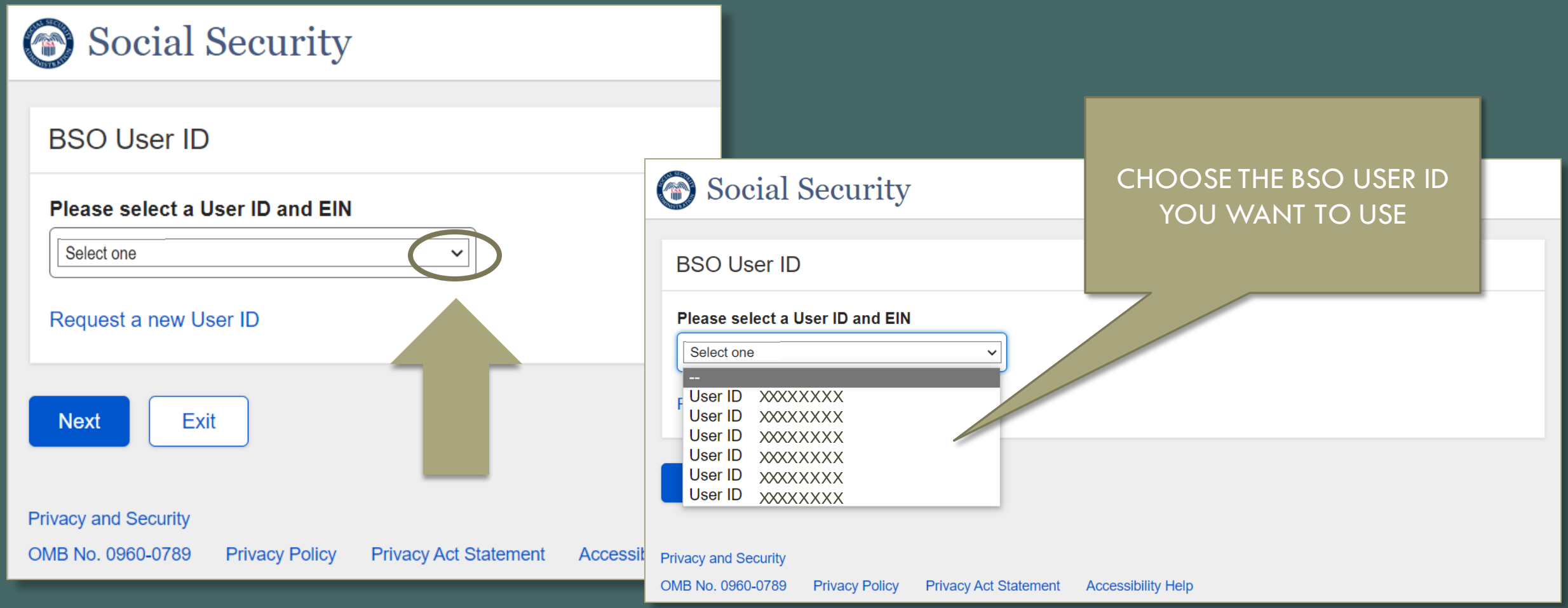


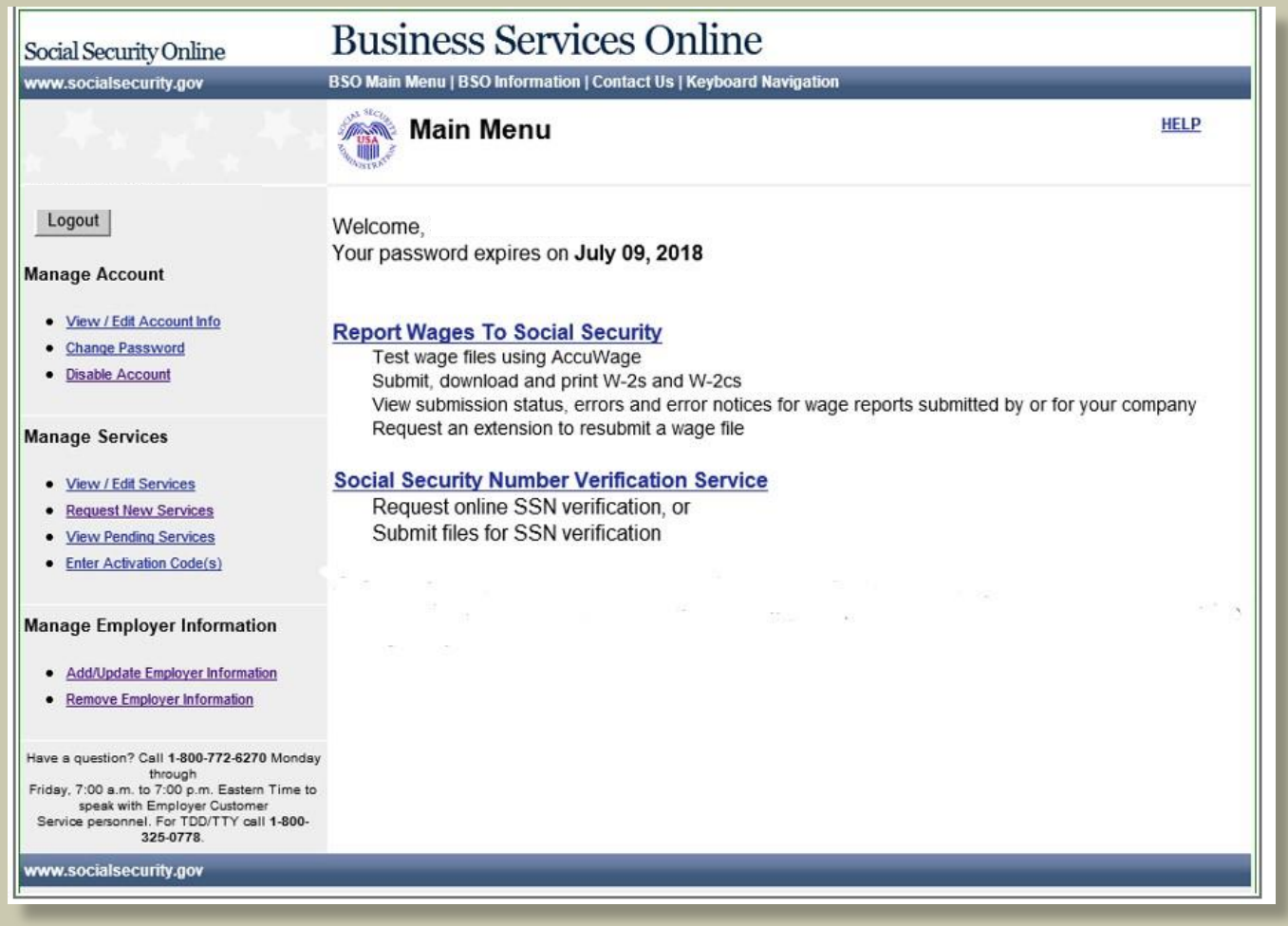


YOU HAVE SUCCESSFULLY AUTHENTICATED



CHOOSE YOUR EXISTING BSO USER ID BY SELECTING THE DROPDOWN ARROW





BSO MAIN MENU

NEW AUTHORIZATION PROCESS

FEATURES OF THE NEW PROCESS:

Registration is simplified. We will mail a single BSO registration code to the employer for the responsible entity officer's registration.

The responsible entity officer can designate others to have access to various BSO services or remove access.

Users will consent to the role assigned to them.

WHAT DOES THIS MEAN FOR YOU?

We are replacing the current registration and authorization process for BSO Wage Reporting. The new process will allow you to fully manage access for your users.

Each employer will designate a Responsible Entity Officer (REO) who has authority to act on behalf of the employer. This person will be responsible for delegating roles within your organization and will be able to provide authorization to third-party users.

NEW AUTHORIZATION PROCESS

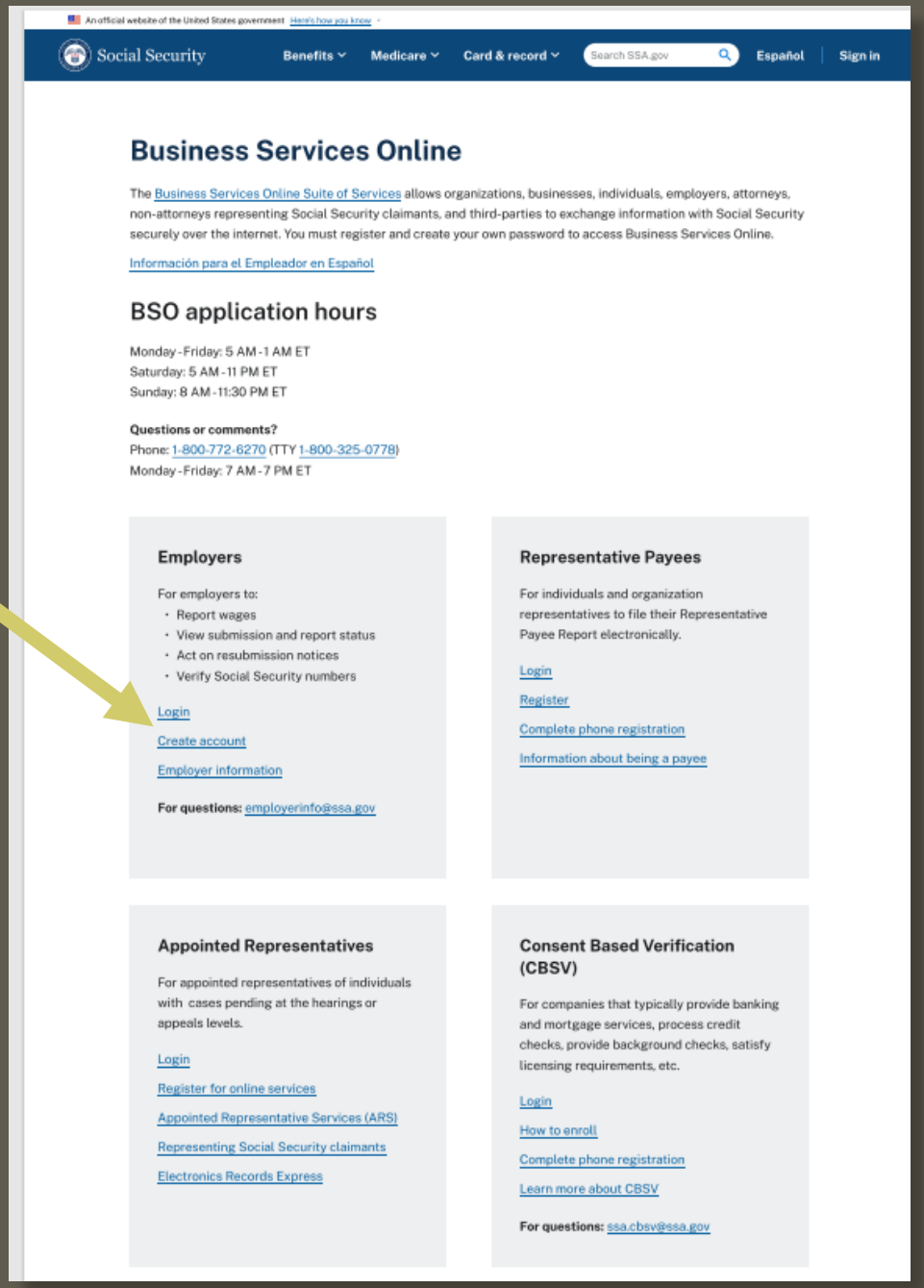
Walkthrough

LOG IN TO BSO

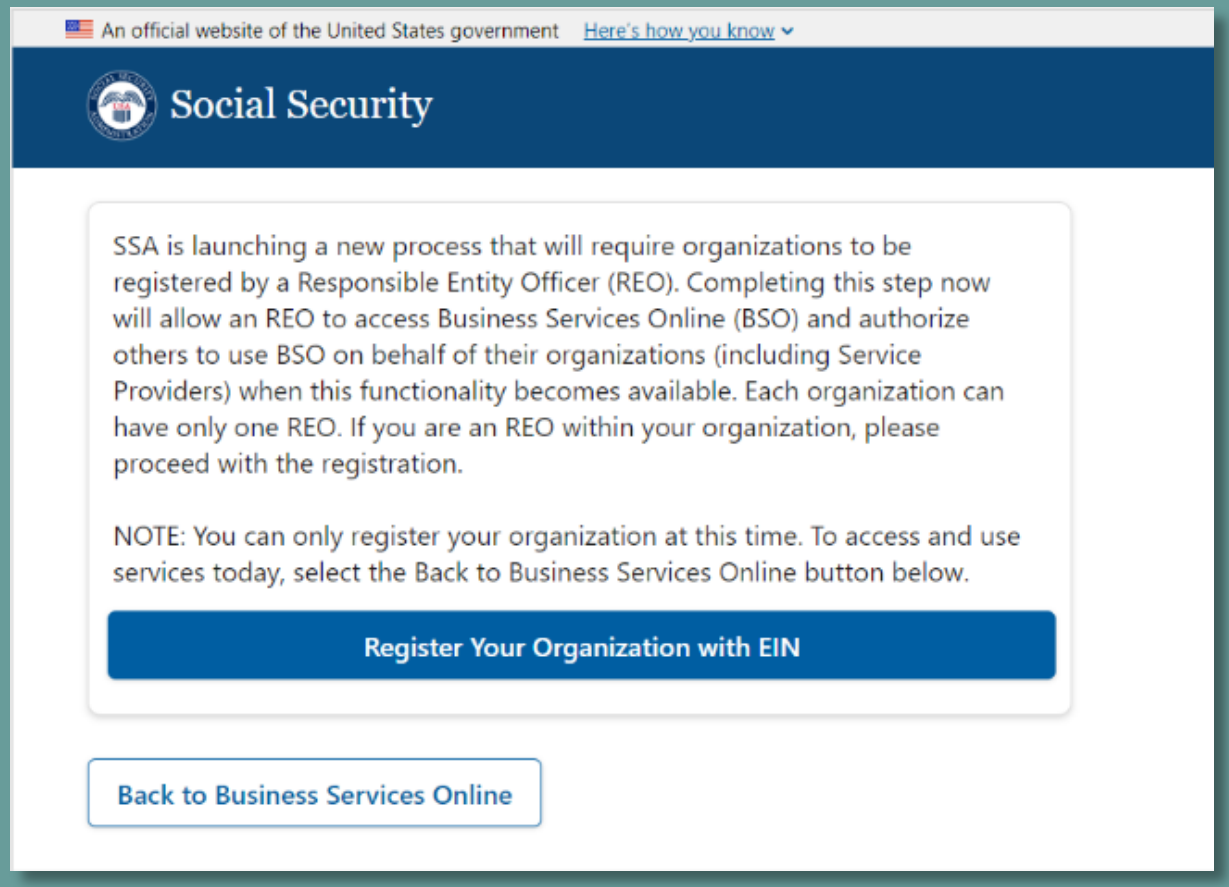
Select the appropriate link

The user (REO applicant) will go to the BSO Welcome page and log in with their existing credential or create a new account.

NOTE: for the limited release, Social Security will provide a URL for participants to use to directly access the new authorization process.



RESPONSIBLE ENTITY OFFICER (REO) APPLICANT REGISTERS THEIR ORGANIZATION



User selects the 'Register Your Organization with EIN' button if they want to complete the registration process or selects 'Back to Business Services Online' if they no longer want to register.

ENTER ORGANIZATION DETAILS

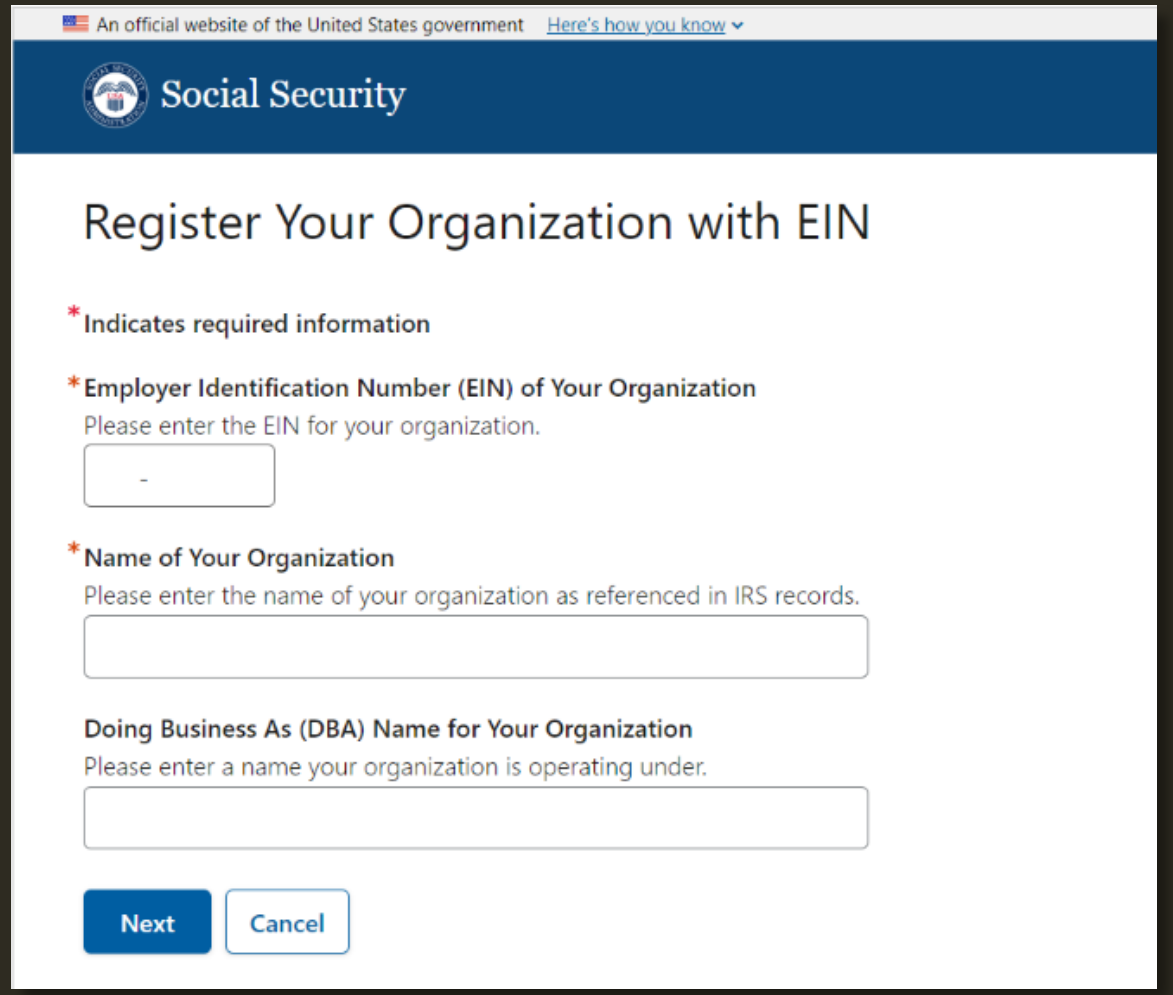
The user MUST enter the organization's EIN and name as it appears on IRS records.

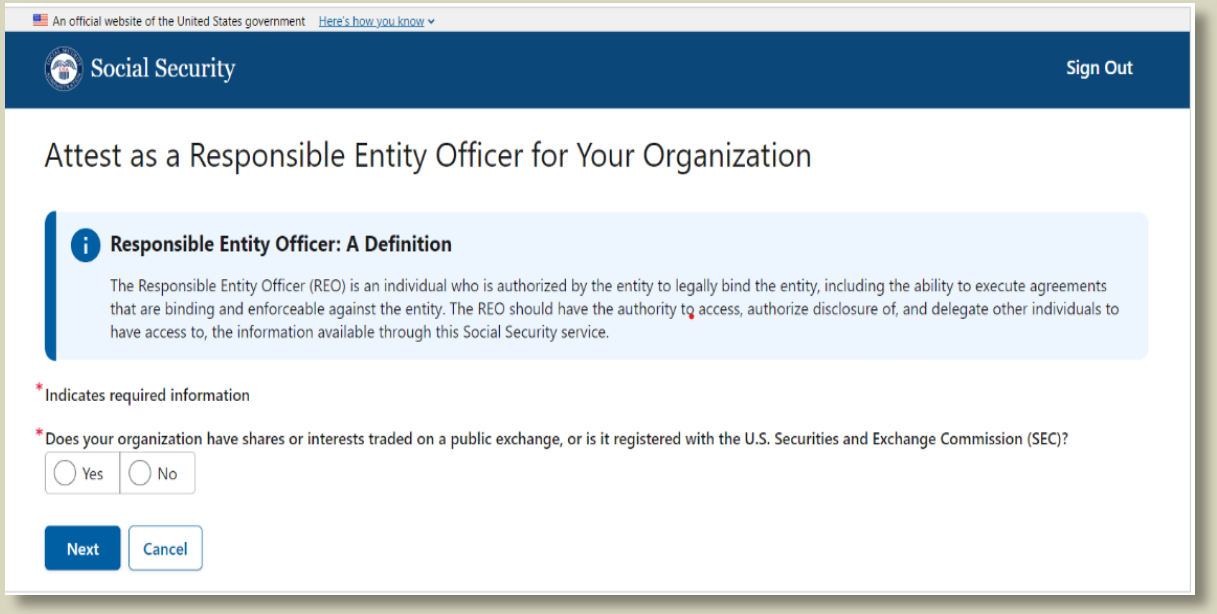
The system will verify that the EIN and name match before allowing the user to continue.

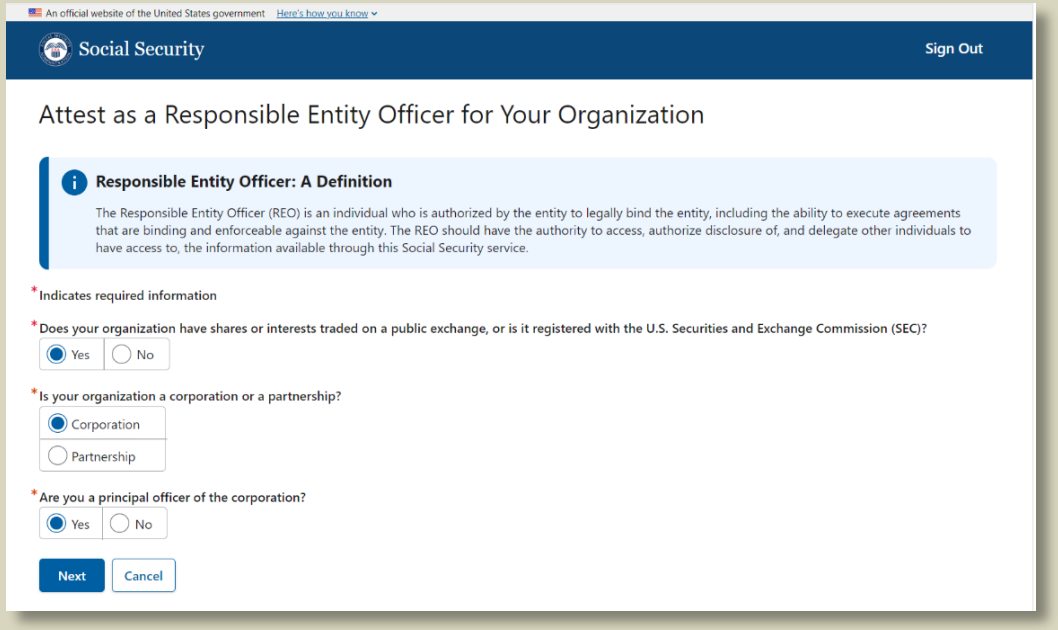
If the user submits an incorrect EIN/name combination 3 times, they receive a temporary block and must wait 24 hours before trying again.

If the user receives 2 temporary blocks within 7 days, they will receive a permanent block on their account. The user will not be able to proceed with registration.

If there is a duplicate attempt to register an organization, the system will display an error message and provide the user with an option to contact the help desk.

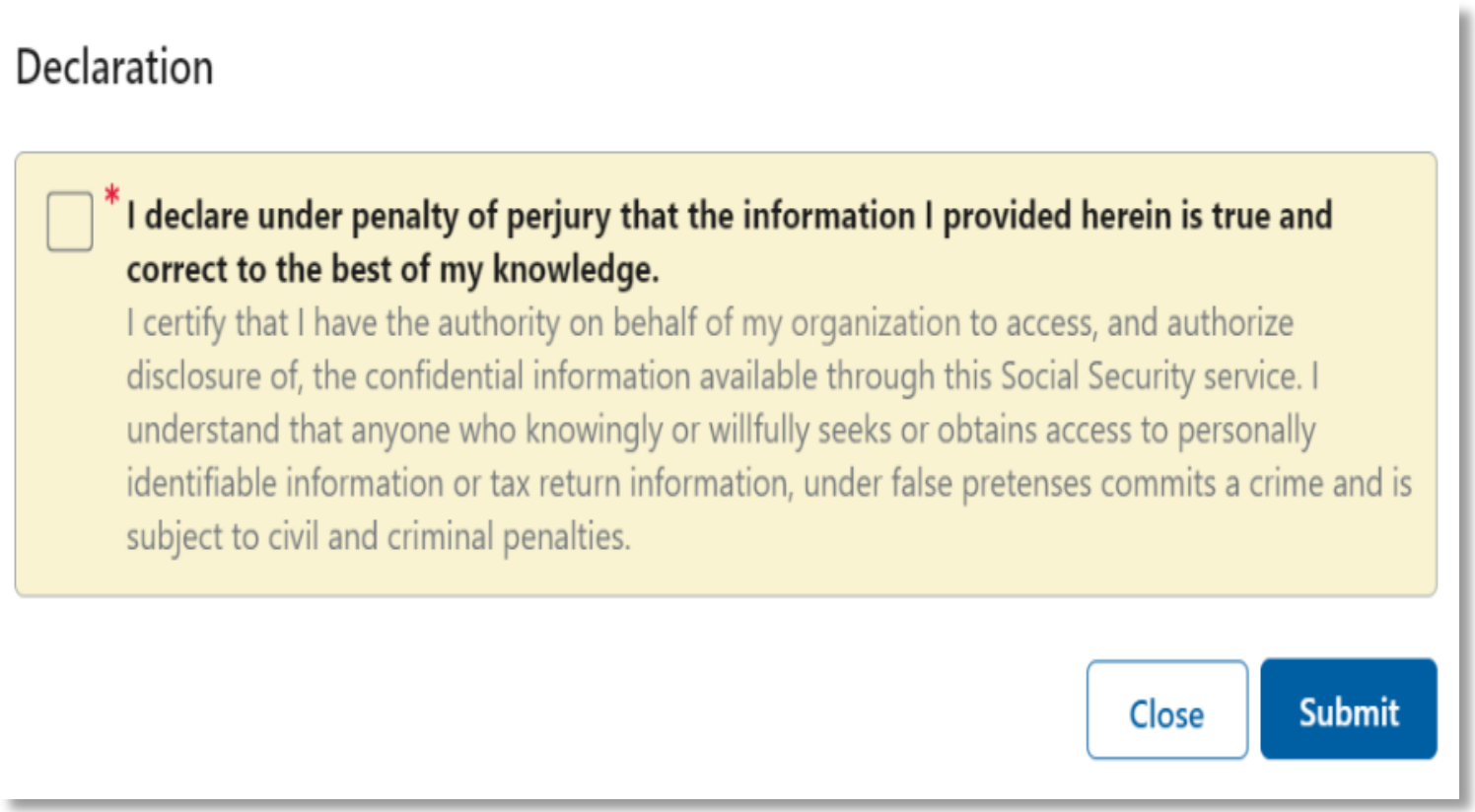






REO ATTESTATION ELIGIBILITY

- The system will display the definition of an REO and ask the user a series of dynamic questions to ensure they meet the criteria.
- If the REO candidate clicks “no” on any of the questions except the first one, they will be disqualified from registering as the REO.



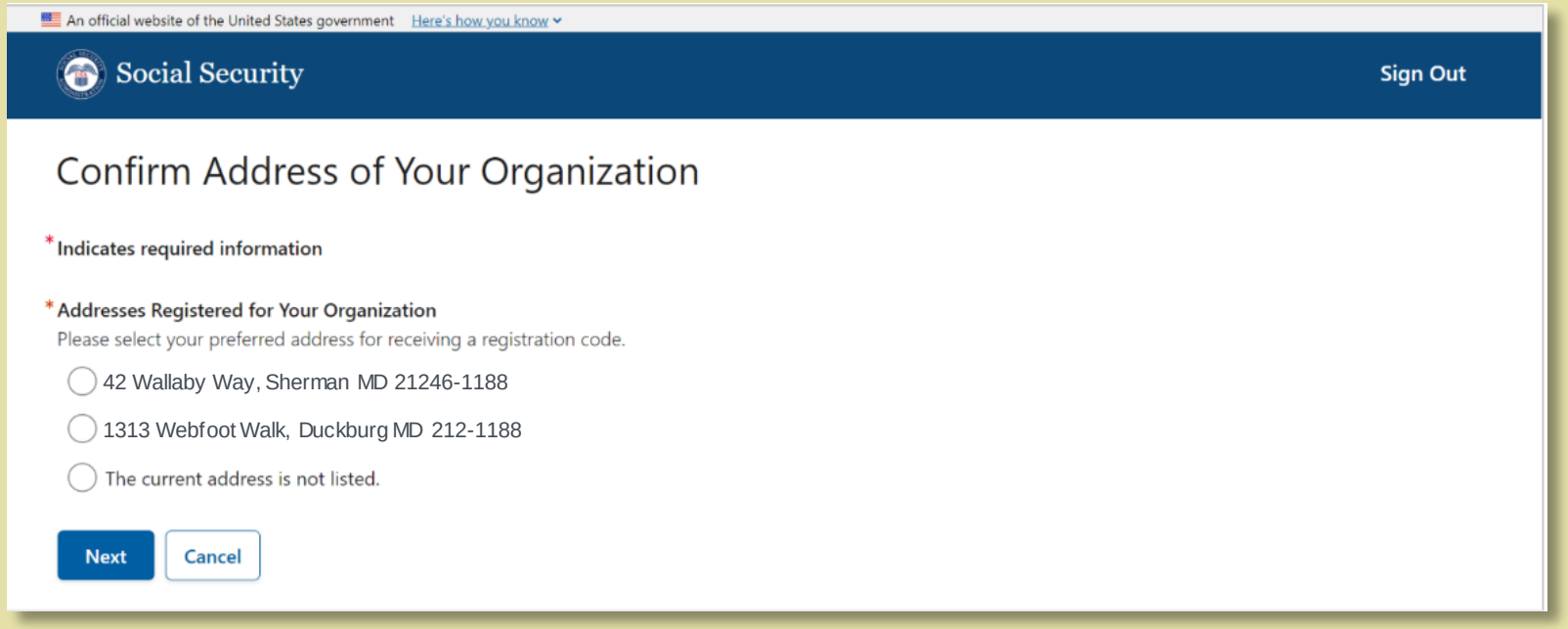
REO ATTESTATION - CONFIRMATION

- The user must check the attestation box to proceed with the registration.
- If the user selects "close" they will not be able to proceed with registration and will be taken to the previous screen.

CONFIRM ADDRESS OF YOUR ORGANIZATION

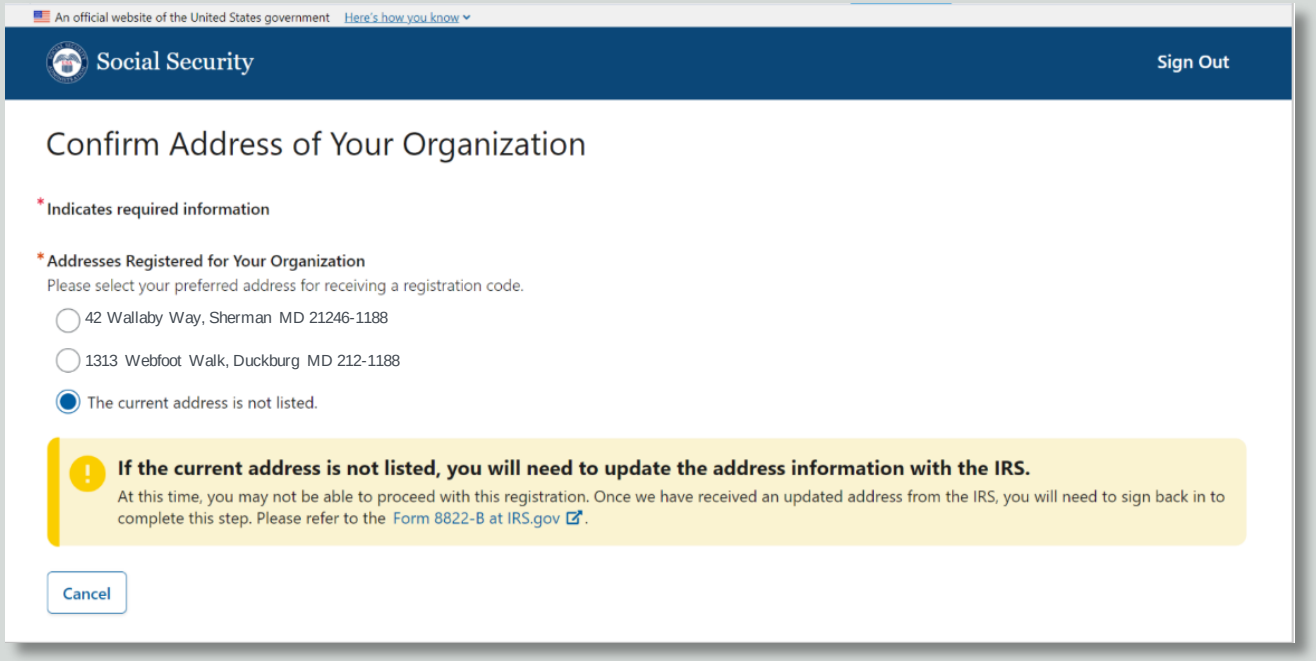
The user must select the address for the organization to receive a code in the mail. The address is provided by IRS records.

Sending the code by mail invokes U.S. postal laws and ensures that it arrives to the correct organization.

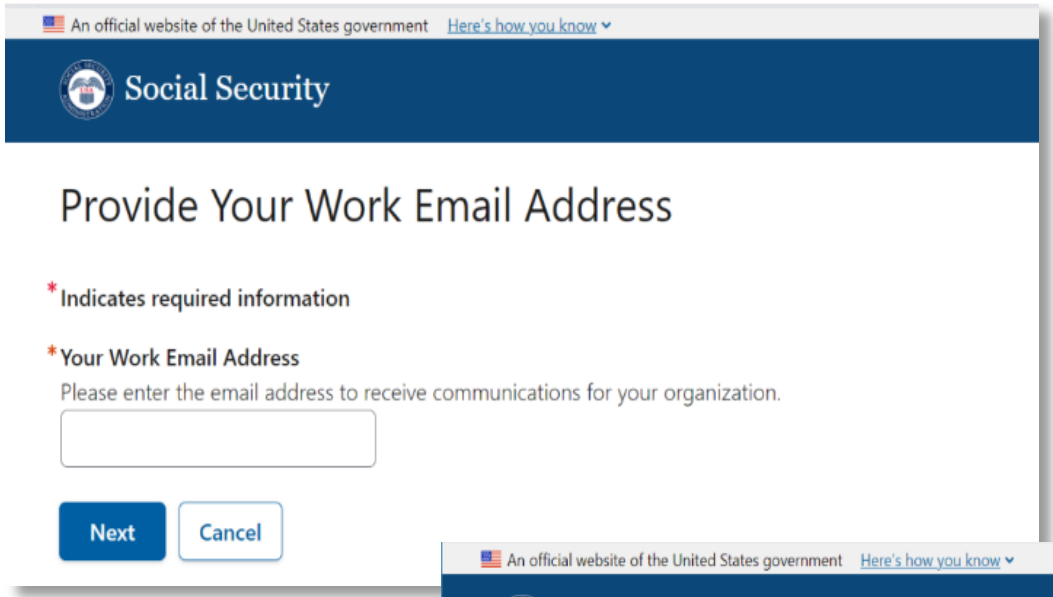


CONFIRM ADDRESS OF YOUR ORGANIZATION (CONTINUED)

If your organization's current address is not listed, the user will be informed via a pop-up message that the address must be updated with the IRS. They will not be able to proceed with registration. The user will be able to click a link that will take them to the appropriate form needed to complete the address update with IRS.

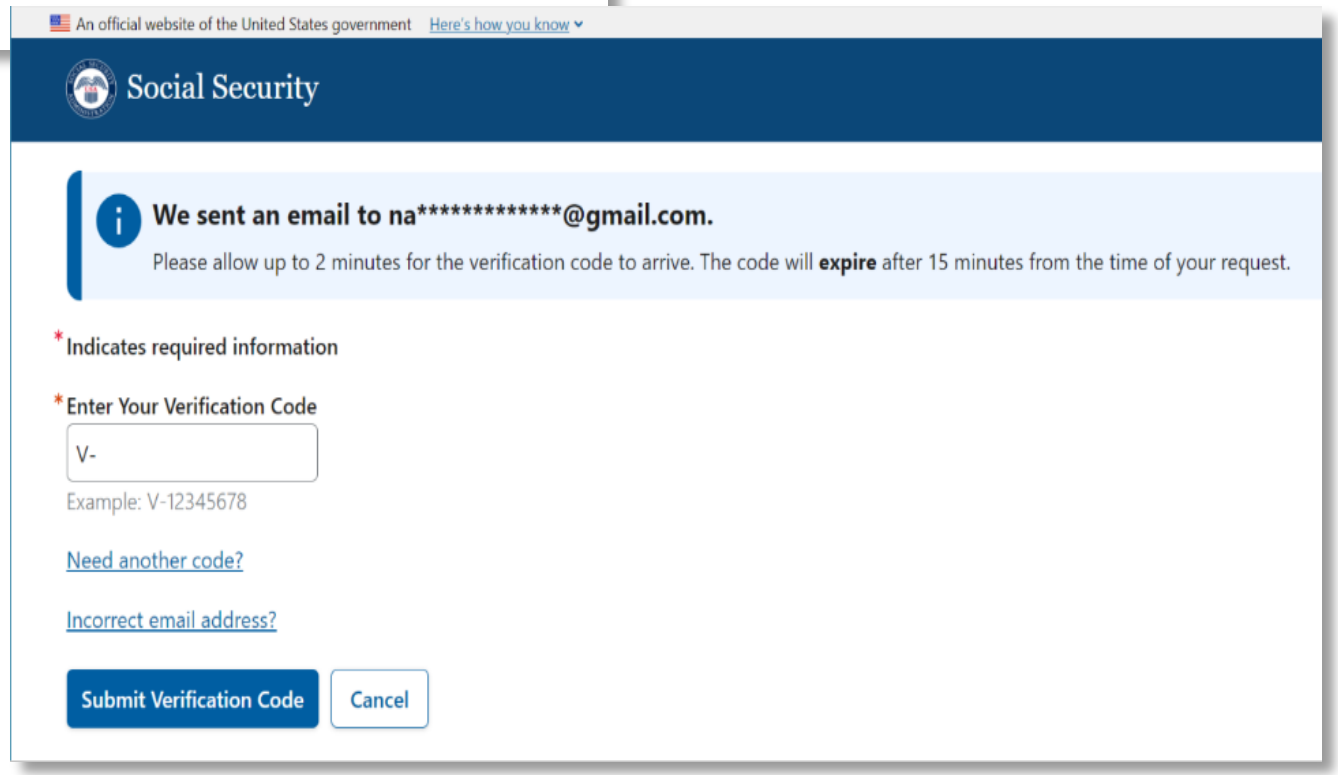


PROVIDE AND VERIFY WORK EMAIL ADDRESS



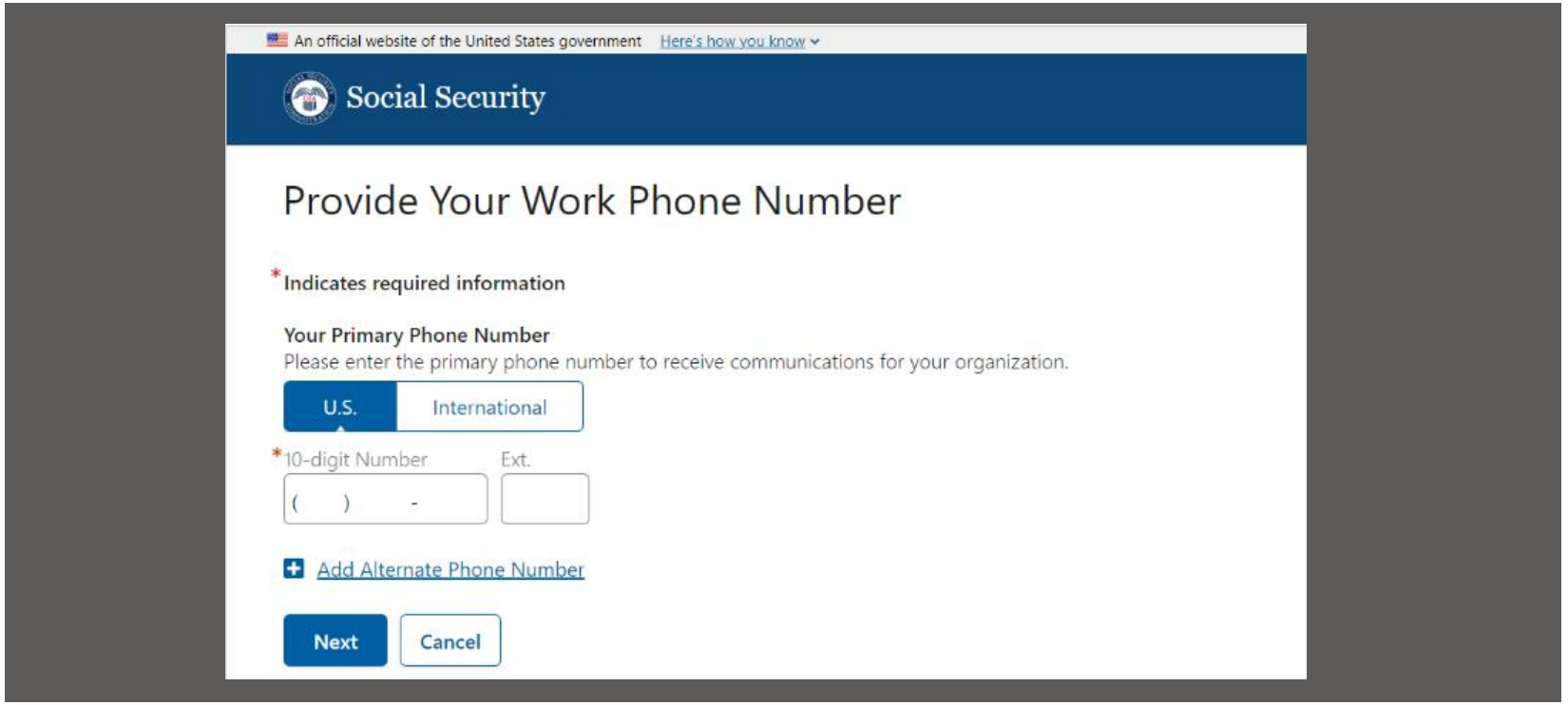
The user must provide their work email address and select "Next".

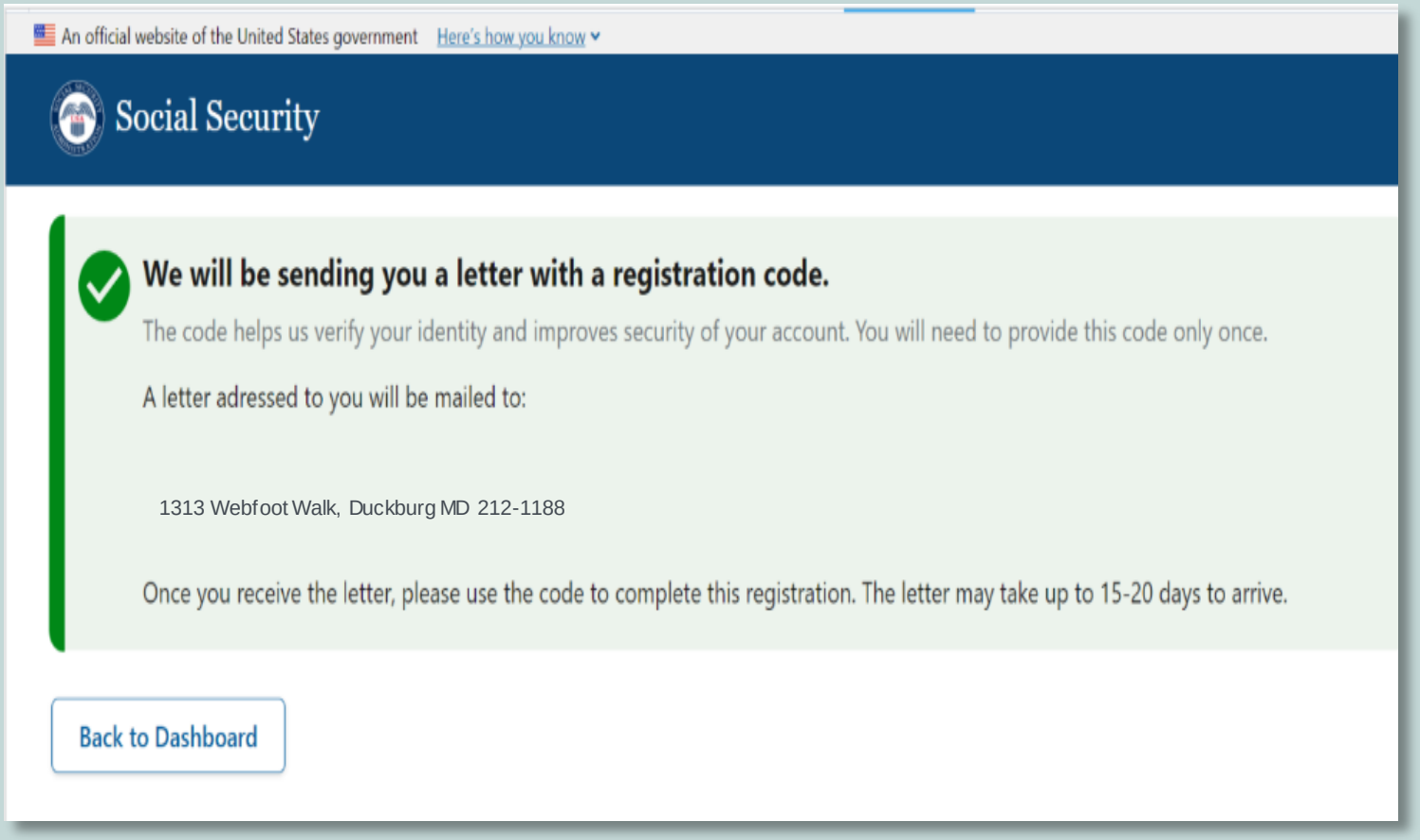
A 1-time verification code will be sent to the email address provided. The user must enter the verification code on the screen displayed and click "submit verification code."



PROVIDE WORK PHONE NUMBER

- The user must provide their work phone number (U.S. or international) to be included in their contact information. They have the option to add an alternate phone number as well.
- No activation code is sent to the telephone number.
- The user's phone number can be used as a potential fraud check, if necessary.
- NOTE: The user's email and phone number will be stored in our future customer support application.



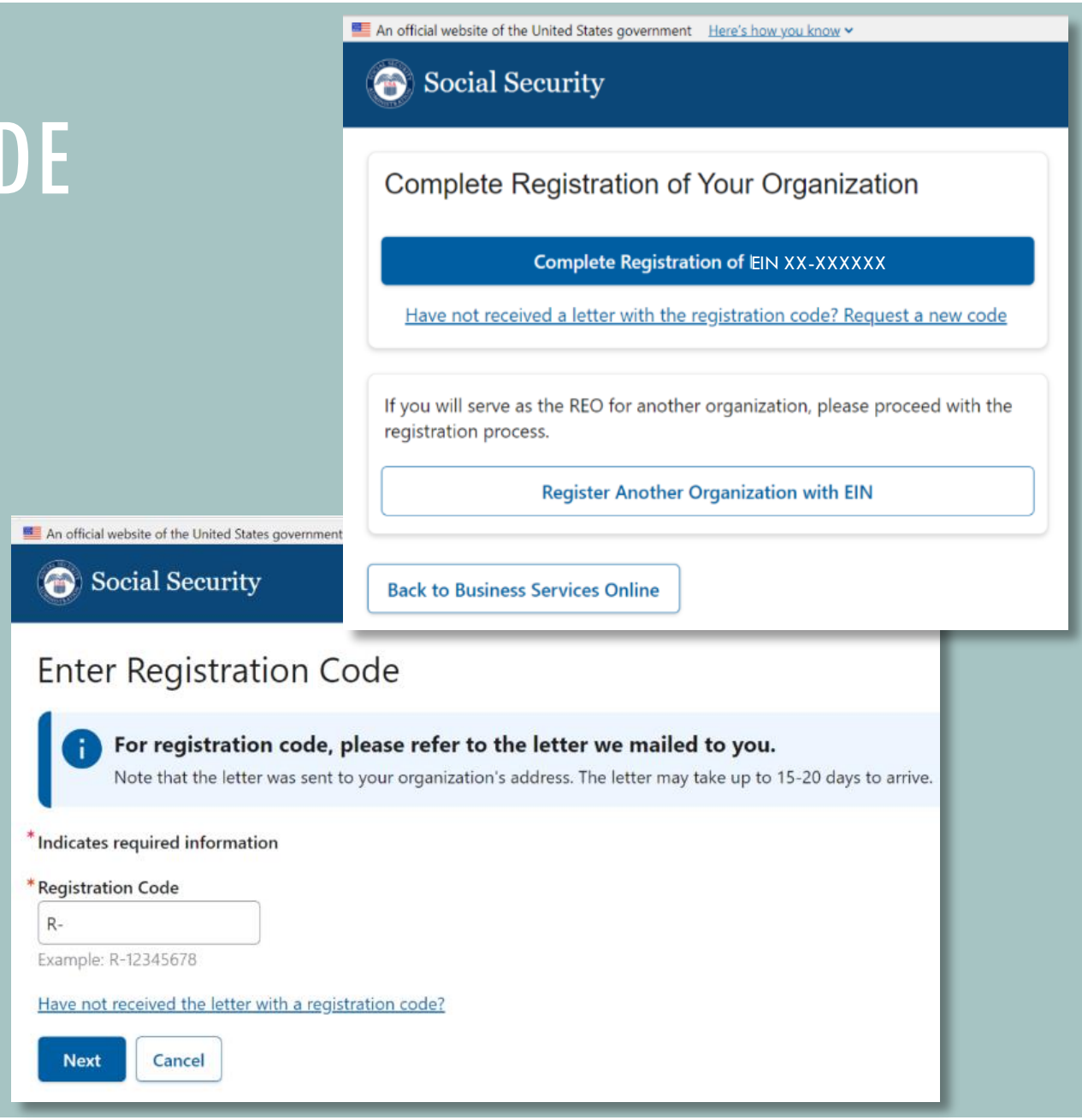


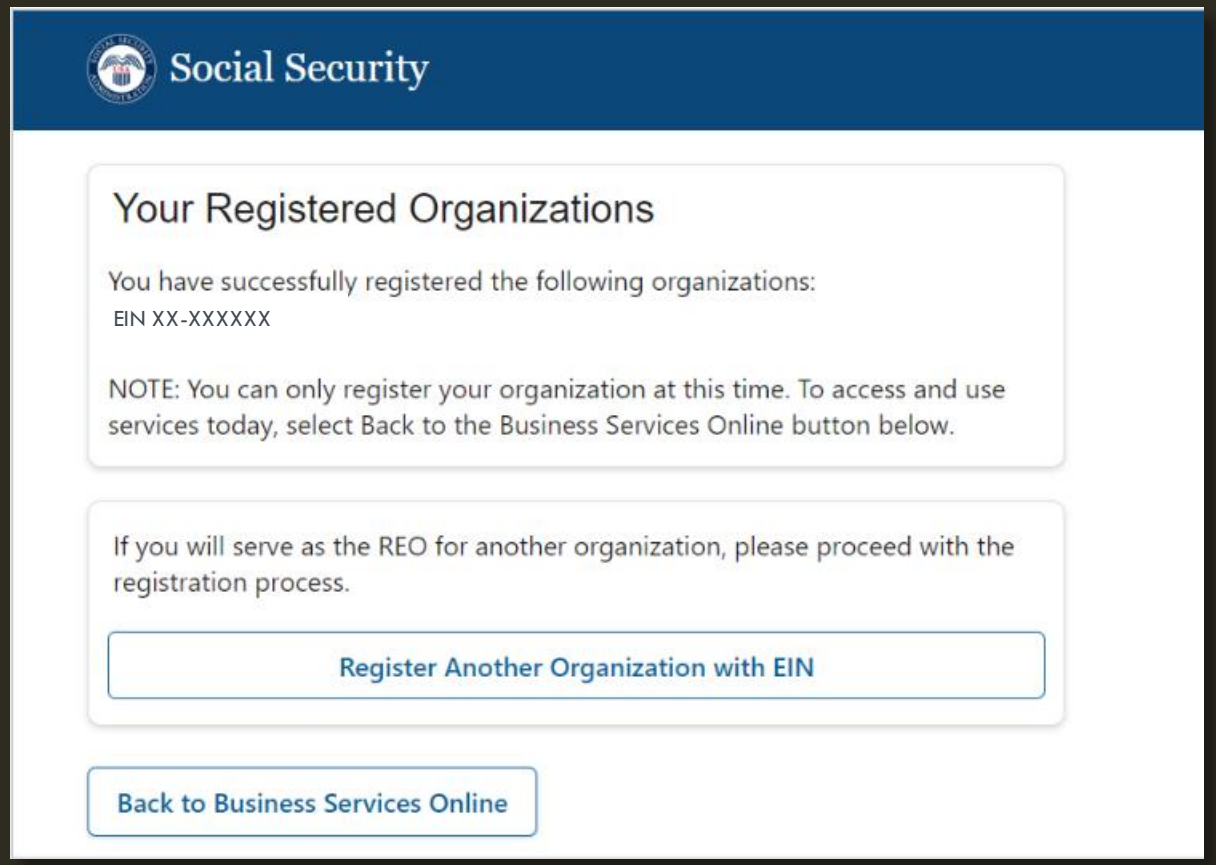
CONFIRMATION: REGISTRATION CODE TO BE MAILED

A confirmation page is displayed letting the user know that a registration code will be mailed to the address they previously selected. The registration is not complete until the user receives and enters the confirmation code. No further action can be taken at this time.

ENTER REGISTRATION CODE

- The next time the user accesses our new authorization process, a dashboard will display with a link to complete the registration for the organization. There will also be a link to register a new organization with a different EIN.
- If the user lost their registration code, they may request a new registration code after waiting 20 days for the code to arrive. Requesting a new code will void the code previously mailed.
- The mailed registration code is valid for 1 year.





REGISTERED ORGANIZATIONS

Whenever the user logs into the new authorization process, the dashboard will display a list of their registered organizations.

There is an option for the user to register another organization with a different EIN if the user will be serving as their REO.

The user can register all organizations that they meet the REO requirements for.

If the user has any pending EIN registrations, they will be displayed here as well.

ROLL OUT STRATEGY

In July 2023, we completed an initial study of the new authorization process with a small number of employers and organizations.

We will be implementing a new authorization process for Business Services Online (BSO) Wage Reporting. Before rolling out this new process to the entire wage reporting community in the near future, we are working with volunteers for a limited rollout of the new authorization service.

VOLUNTEER PARTICIPATION OPPORTUNITIES

Thank you for helping with past discovery sessions and pilots.

Upcoming volunteer opportunities:

- W-2 Online Pilot
  - Paper filers.
  - W-2 Online users.
- New Authorization Process

Email notification and an alert on the www.ssa.gov/employer

Prior Wage Reporting Meeting information

Wage Reporting Information - Prior Issues (ssa.gov)

PRIOR MEETING INFORMATION AND RESPONSES TO QUESTIONS

CUSTOMER OUTREACH & SUPPORT

- Employer Website
  - www.ssa.gov/employer
- General Wage Reporting Questions
  - 1-800-772-6270 or
  - employerinfo@ssa.gov
- BSO Technical Help
  - 1-888-772-2970
  - bso.support@ssa.gov

- Redesigned homepage
  - www.ssa.gov/bso
- Customer Support for Wage Reporting
  - www.ssa.gov/employer/empcontacts.htm
- Employer Services Liaison Officers (ESLO)
  - www.ssa.gov/employer/wage_reporting_specialists.htm

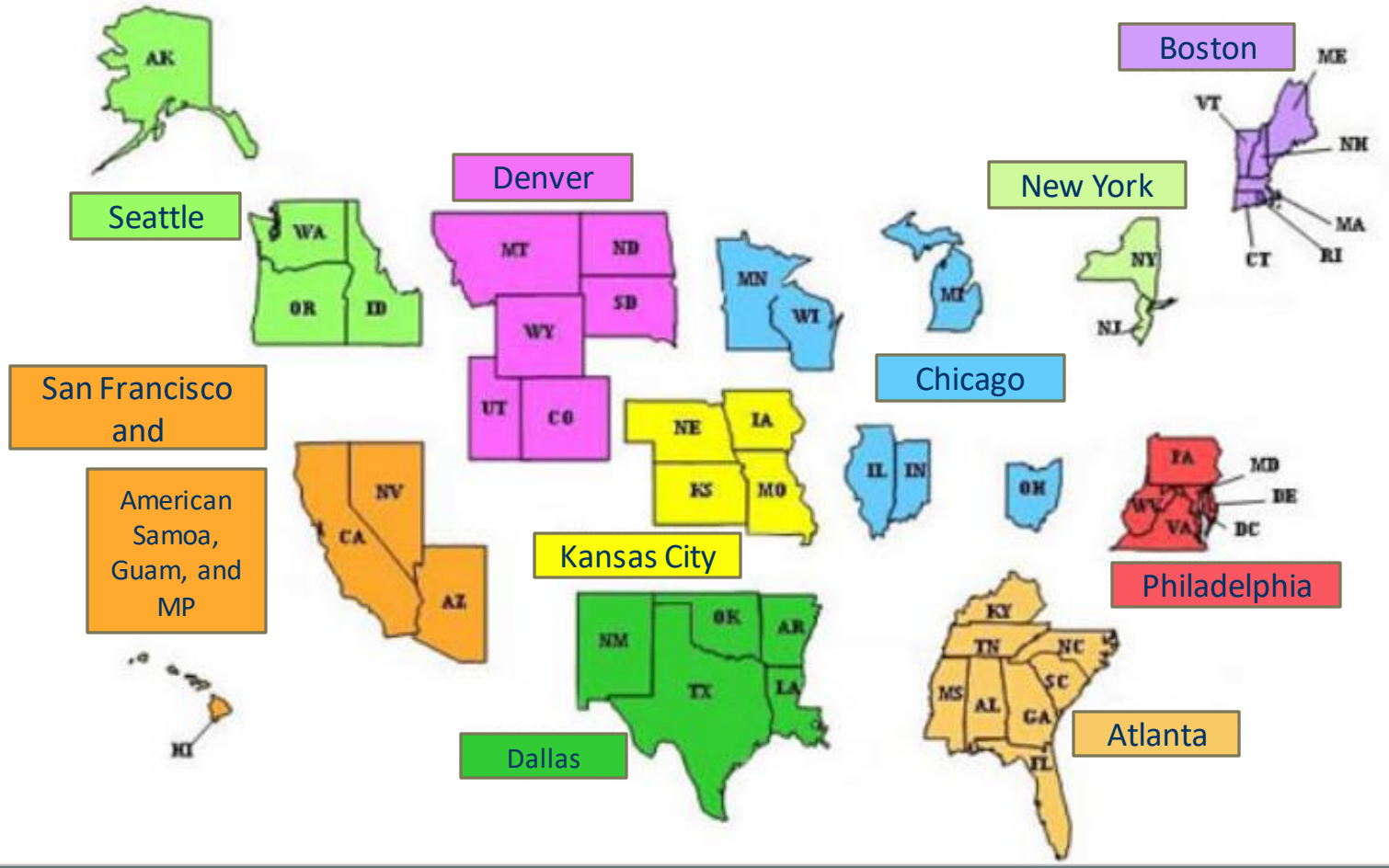
There are 10 Social Security regions for the country.

Each region has an Employer Services Liaison Officer (ESLO)

Regions:

Atlanta - Boston - Chicago - Dallas - Denver

Kansas City - New York - Philadelphia - San Francisco - Seattle



Questions?

THANK YOU FOR JOINING US TODAY

This information is current at the time of the presentation, but Social Security policy is subject to change. Please visit SSA.gov /BSO for up-to-date information on our programs.