

BSO Tutorial for Tax Year 2008

Registration Services

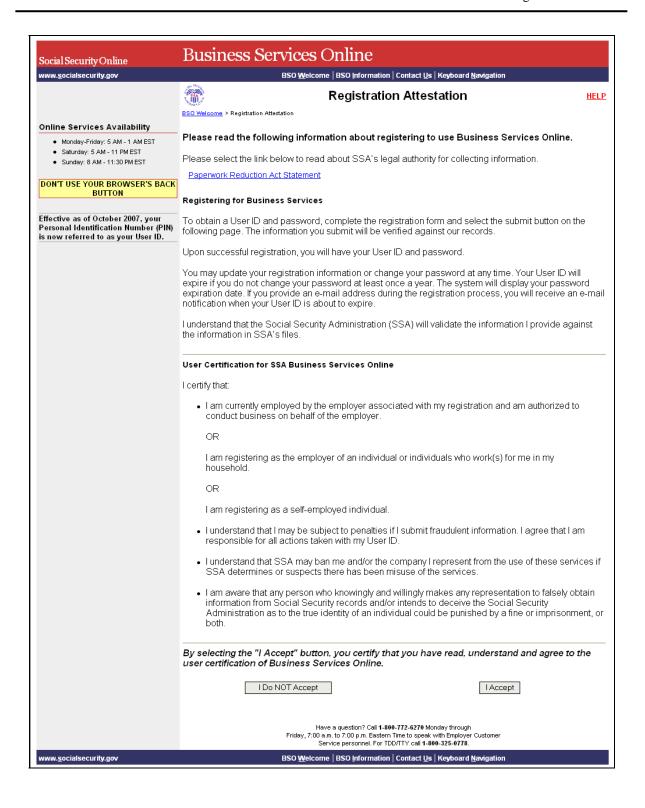
Contains the following lessons:

- Registration for <u>Domestic Registrants</u> and <u>Foreign</u> Registrants
- Complete Phone Registration
- Access to BSO Services: <u>Request</u>, <u>Activate</u>, <u>Re-Request</u>, and <u>Remove Access</u>
- Login and Logout Procedures
- Change and Forgotten Passwords
- Update Your Registration Information
- User ID Deactivation
- Contact SSA

LESSON 1: REGISTRATION FOR DOMESTIC REGISTRANTS

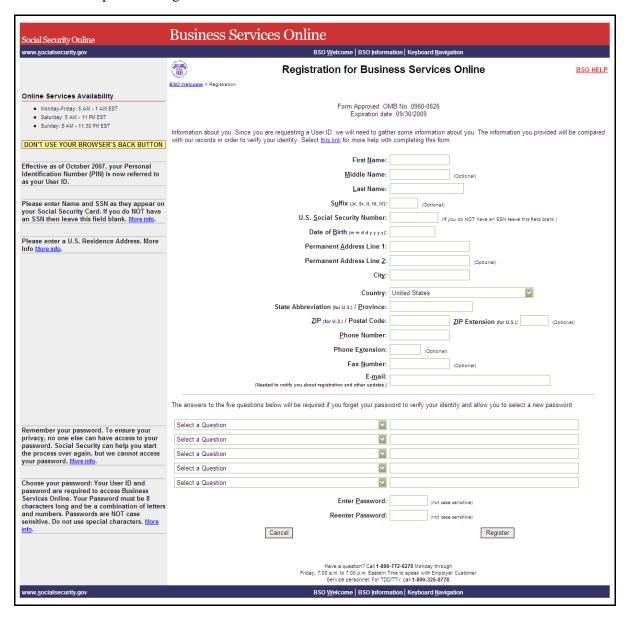
Follow the instructions below to register for a User ID and password if you are a domestic registrant.

- **STEP 1**:Point your browser to the Business Services Online (BSO) Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**:Select the **Register** button on the Business Services Online Welcome page. The system displays the Registration Attestation page.



STEP 3: Select the **I Accept** button after reading and agreeing to the conditions stated on the Registration Attestation page. The system displays the Registration for the BSO form. (Selecting the **I Do NOT Accept** button will display the Business Services Online Welcome page.)

STEP 4: Complete the Registration for Business Services Online form.



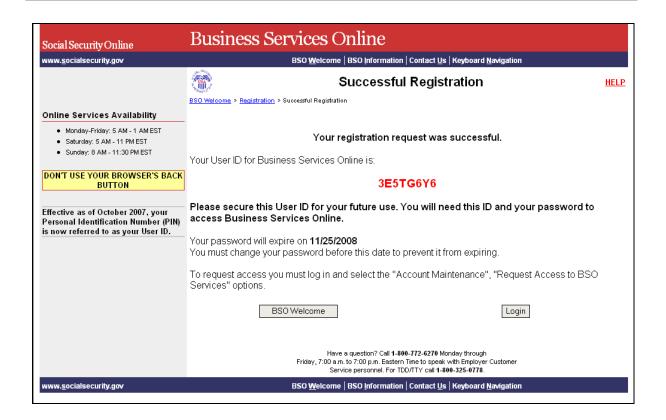


- Fields that are not required are marked with (Optional).
- An e-mail reminder to change your password will be sent two weeks before your password expires when a valid mandatory e-mail address is provided.
- Do not use punctuation in any field. This includes dashes in phone numbers.
- The Help button, which is located at the top of each page, links to additional help for each section.
- Passwords must be eight characters long and contain numbers and letters.
 Please remember your password.

STEP 5: Select the **Register** button to process the registration form. The system displays the Successful Registration page for your User ID. (To return to the Business Services Online Welcome page without registering, select the **Cancel** button.)



If any of your information is incorrect, the system re-displays the Registration for Business Services Online form with a list of any corrections you need to make before you can successfully register. If this occurs, make the necessary corrections and/or make the appropriate selections. Then, select the **Register** button. The system displays the Successful Registration page for your User ID.



STEP 6: Select the **Login** button to continue. The system displays the General Login Attestation page. Refer to <u>Lesson 8</u>: <u>Login Procedures</u> for information on how to log in to BSO.

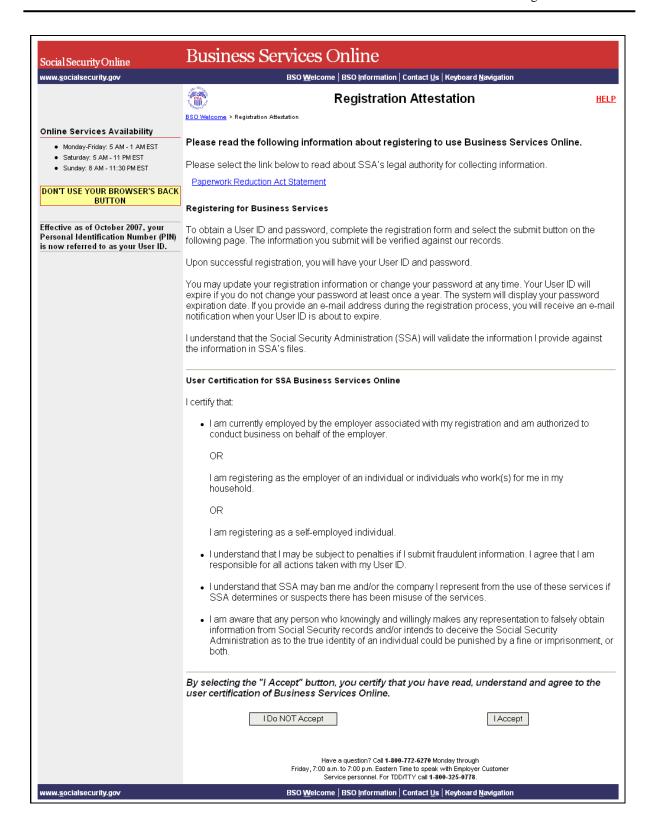
(To return to the Business Services Online Welcome page, select the **BSO Welcome** button.)

LESSON 2: REGISTRATION FOR FOREIGN REGISTRANTS

Follow the instructions below to register for a User ID and password if you do not have an SSN and you have a foreign address.

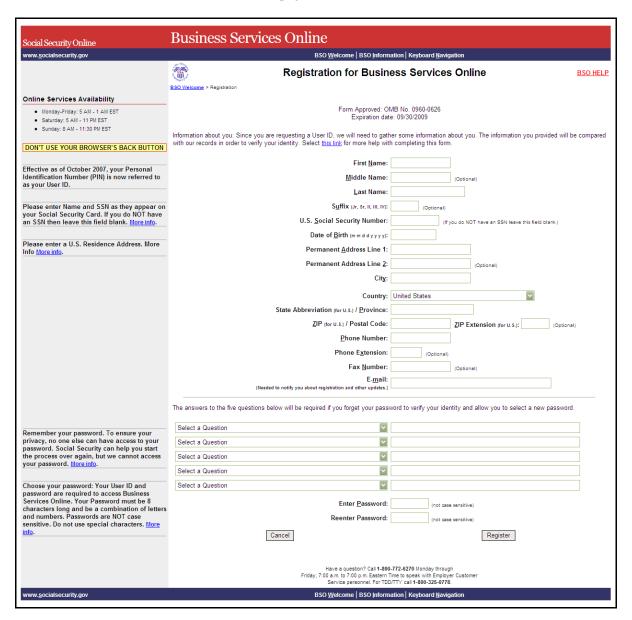
STEP 1:Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

STEP 2:Select the **Register** button on the Business Services Online Welcome page. The system displays the Registration Attestation page.



STEP 3: Select the **I Accept** button after reading and agreeing to the conditions stated on the Registration Attestation page. The system displays the Registration for Business Services Online form.

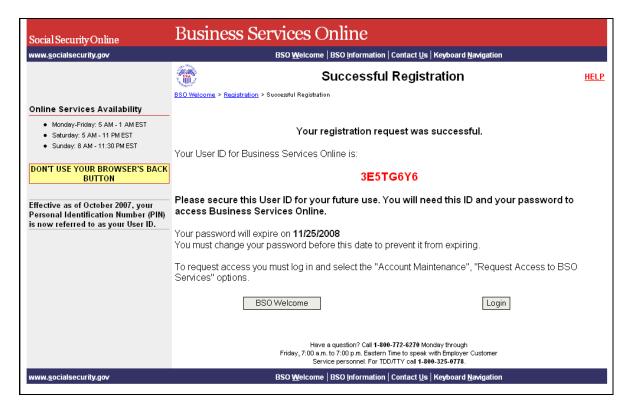
(To return to the BSO Main Menu page, select the I DO NOT Accept button.)



STEP 4: Complete the Registration for Business Services Online form.



- Fields that are not required are marked with (Optional).
- An e-mail reminder to change your password will be sent two weeks before your password expires when a valid mandatory e-mail address is provided.
- Do not use punctuation in any field.
- The Help button, which is located at the top of each page, links to additional help for each section.
- Passwords must be eight characters long and contain numbers and letters. Please remember your password.
- **STEP 5**: Select the **Register** button to process the registration form. The system re-displays the Registration for Business Services Online form with a list of any corrections you need to make before you can successfully register.
- **STEP 6:** Select the **Register** button to process the registration form. The system displays the Successful Registration page for your User ID. (To return to the Business Services Online Welcome page without registering, select the **Cancel** button.)



STEP 7: Select the **BSO Welcome** button to exit this page. The system displays the Business Services Online Welcome page.

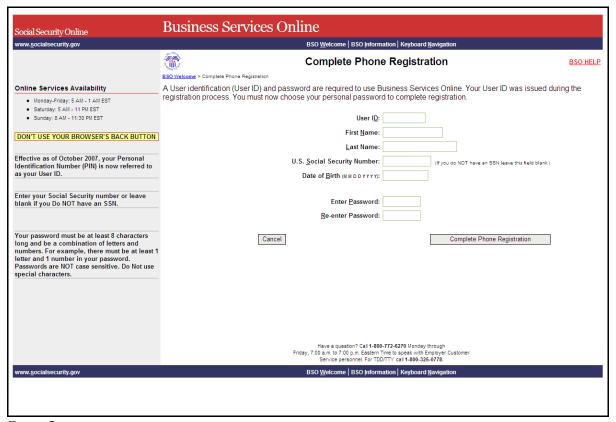


If you register without providing a U.S. Social Security Number (SSN), additional authentication will be required before you can use BSO.

LESSON 3: COMPLETE PHONE REGISTRATION

New users may have to complete their online registration by speaking with an Employer Customer Service representative. Follow the instructions below to complete your phone registration after speaking with Employer Customer Service personnel.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Complete Phone Registration** button on the Business Services Online Welcome page. The system displays the Complete Phone Registration page.



STEP 3: Enter the appropriate fields on the Business Services Online Complete Phone Registration page.



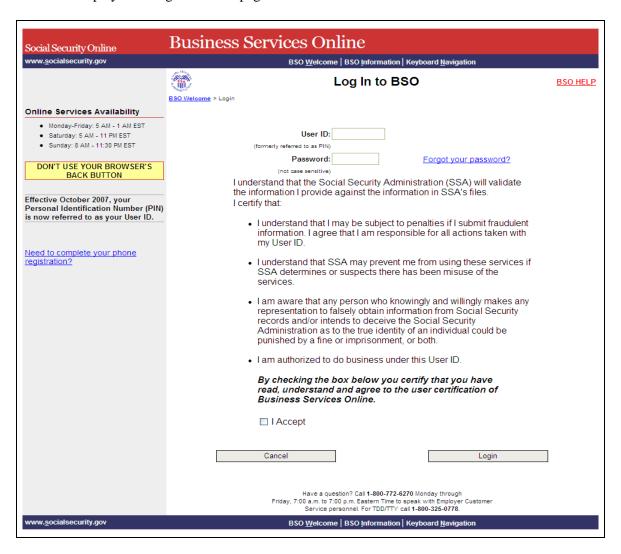
U.S. SSN may not be a required field, depending on how you intend to register.

- **STEP 4**: Select the **Complete Phone Registration** button. The system displays a message confirming that your phone registration is complete. (To return to the Business Services Online Welcome page without completing the registration process, select the **Cancel** button.)
- **STEP 5**: Select the **Login** button to display the Log In to BSO page. Otherwise, select the **BSO Welcome** button to display the Business Services Online Welcome page.

LESSON 4: REQUEST ACCESS TO BSO SERVICES

Follow the instructions below to log in to BSO with your User ID and password.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Login** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you and presents only the applications and services to which you have access.



STEP 5: Select the Account Maintenance link to display the Account Maintenance menu.

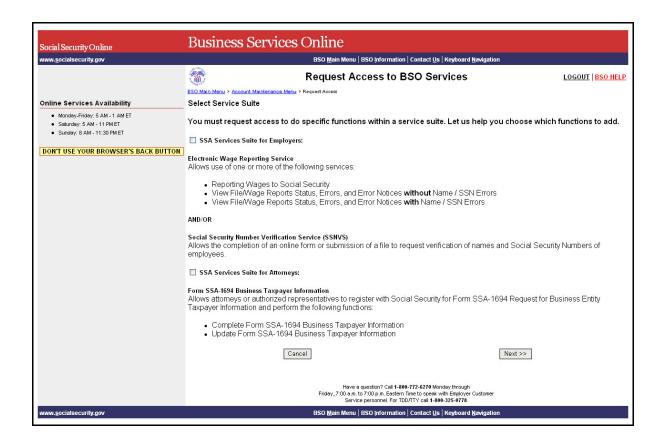


STEP 6: Select the Request Access to BSO Services link to display the Request Access to BSO Services page.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Request Access To BSO Services

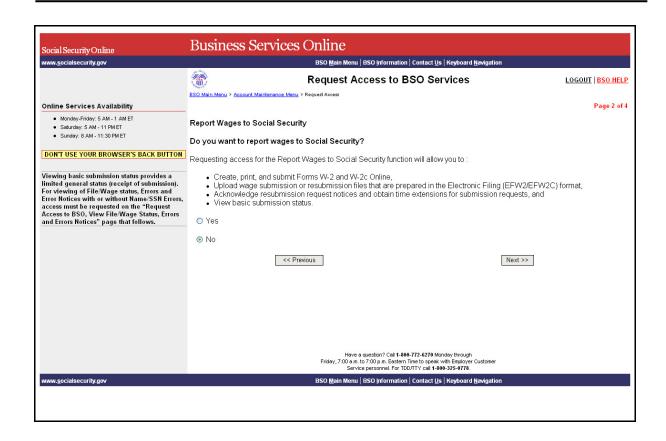
Select the option or options that best describe the type of business you plan to conduct with Social Security. Once you have completed your request, an activation code may be mailed.



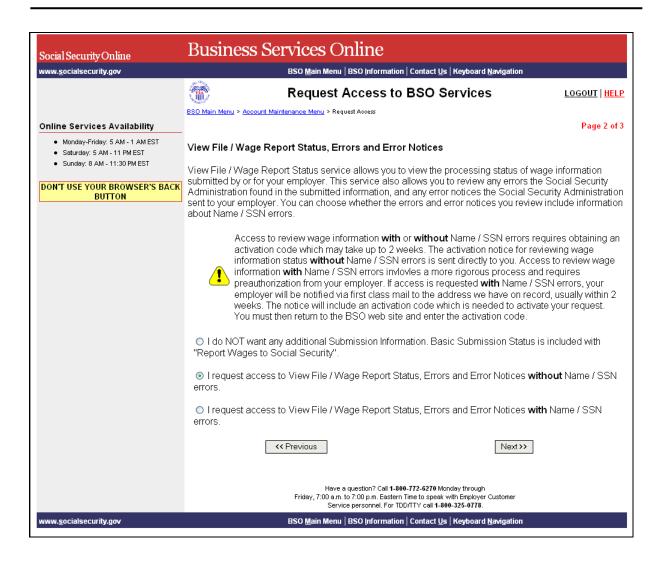
STEP 7: The Employer Services Suite is the first step of the BSO Request Access Wizard and will allow the request of access to the Employer Service Suite of services. Select the checkbox(es) for the service(s) to which you are requesting access.



If you do not see an option for a particular function, you may (1) have access already, (2) have requested access recently, or (3) not have the required permissions to gain access.



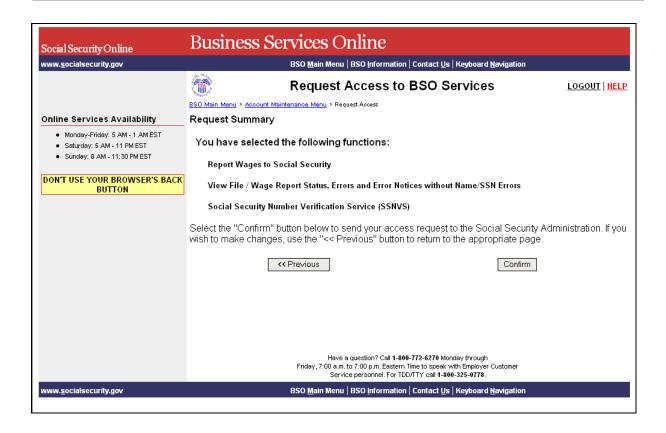
STEP 8: Request access to Report Wages to Social Security by selecting the "Yes" radio button and the "Next" button.



STEP 9: Request desired view of File/Wage Report Status by selecting one of the radio buttons and the "Next" button.



STEP 10: Request access to Social Security Number Verification Services (SSNVS) by selecting the "Yes" radio button and the "Next" button. The system will display the Request Summary on the Request Access to BSO Services page



STEP 11: Review the list of functions selected and select the "Confirm" button to confirm the selections. The system displays the Request Access to BSO Services Confirmation page.

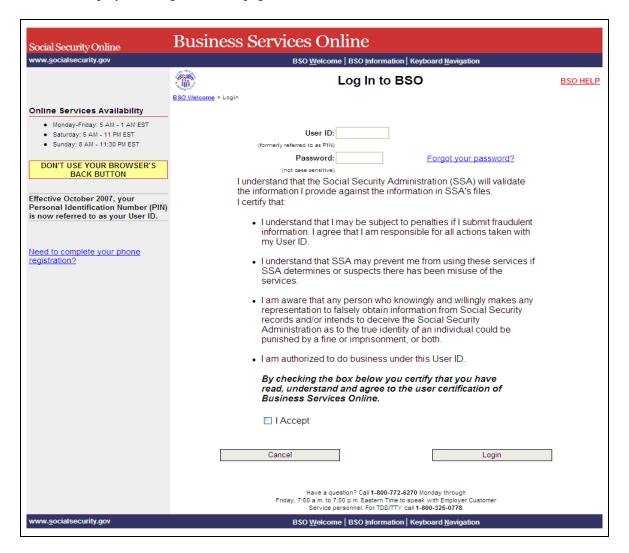


The confirmation screen shows what functions were selected, which are active immediately and which require activation codes. Activation codes will be mailed and usually received within two weeks.

STEP 12: Select the BSO Main Menu button to return to the BSO Main Menu.

LESSON 5: ACTIVATE ACCESS TO BSO SERVICES

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bos/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main

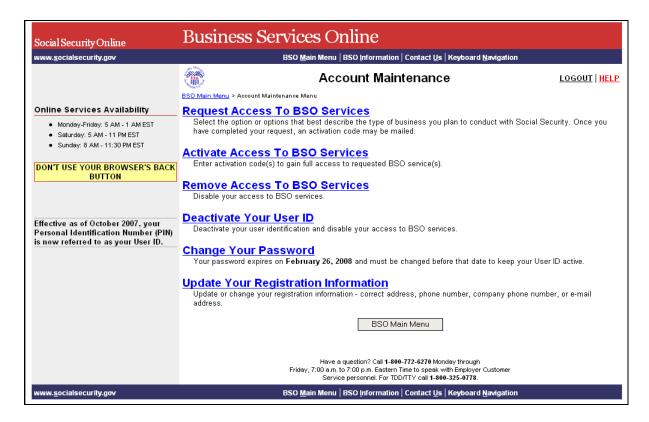
Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)Enter your User ID and password.



The menu selection on your BSO Main Menu page is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the Account Maintenance link to display the Account Maintenance menu.



STEP 6: Select the **Activate Access to BSO Services** link.

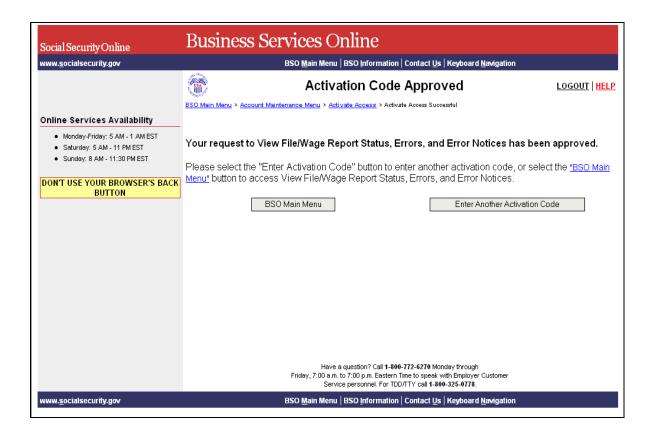
(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Activate Access To BSO Services Enter activation code(s) to gain full access to requested BSO service(s).

The system displays the Activate Access to BSO Services page.



STEP 7: Enter the activation code in the Enter Your Activation Code field. and select the **Activate** button. The system displays the Activation Code Approved page. (To return to the BSO Main Menu, select the **Cancel** button.)



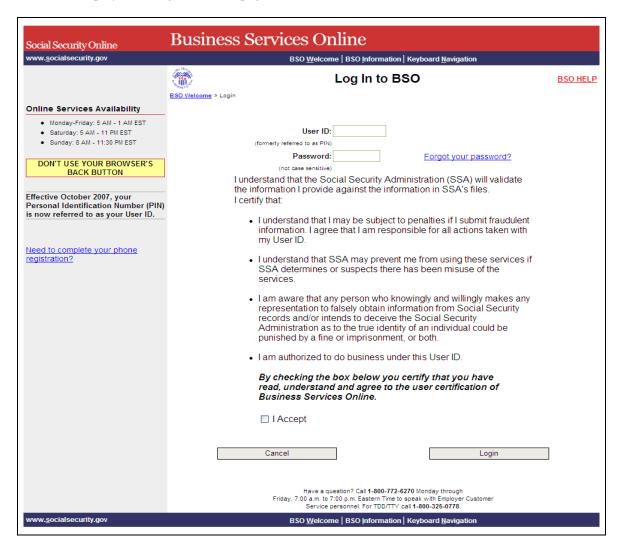
STEP 8: Select the **BSO Main Menu** link or button to return to the BSO Main Menu. The BSO Main Menu should display the newly activated service. Otherwise, select the **Enter Another Activation Code** link to enter another activation code.

LESSON 6: RE-REQUEST ACTIVATION CODES

Follow the instructions below to re-request activation codes for BSO services. Use this option if you have not received your activation codes from Social Security or if you have misplaced them. You may re-request activation codes if it has been at least 10 days since you requested access to BSO services. If you re-request any activation codes, previously issued codes will no longer be valid.

STEP 1: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

STEP 2: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



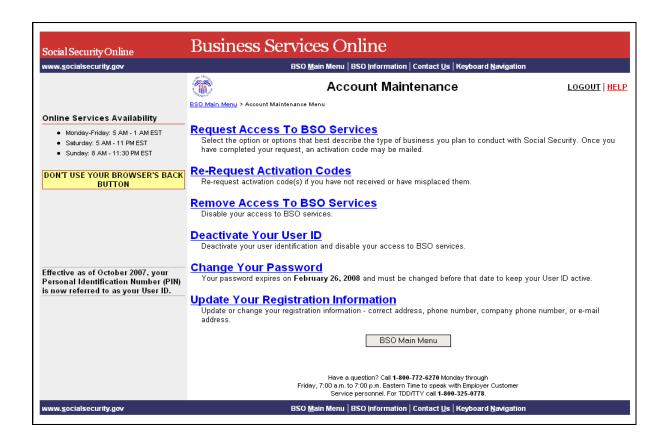
- **STEP 3**: Enter your User ID and password.
- **STEP 4**: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the Account Maintenance link to display the Account Maintenance menu.



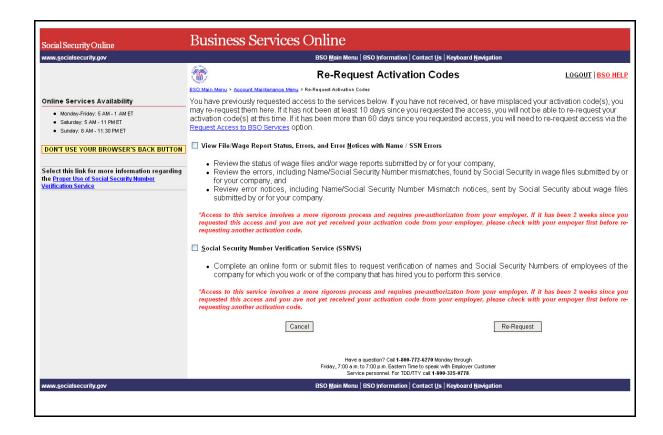
STEP 6: Select the **Re-Request Activation Codes** link.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

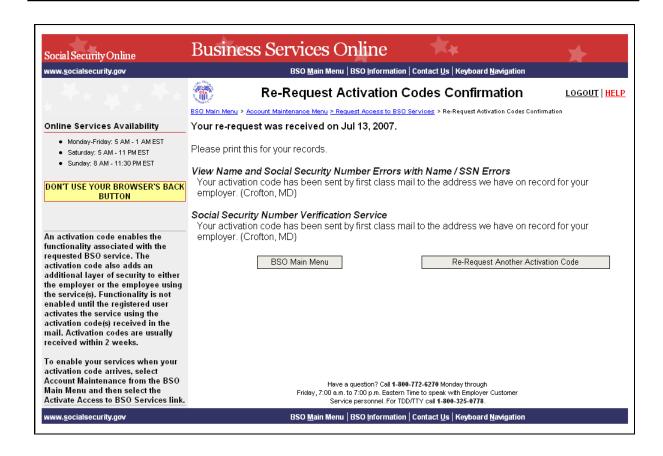
Re-Request Activation Codes

Re-request activation code(s) if you have not received or have misplaced them.

The system displays the Re-Request Activation Codes page.



- **STEP 7**: Select the checkbox (es) of the service(s) you recently requested.
- **STEP 8**: Select the **Re-Request** button. The system displays the Re-requested Activation Codes Confirmation page.

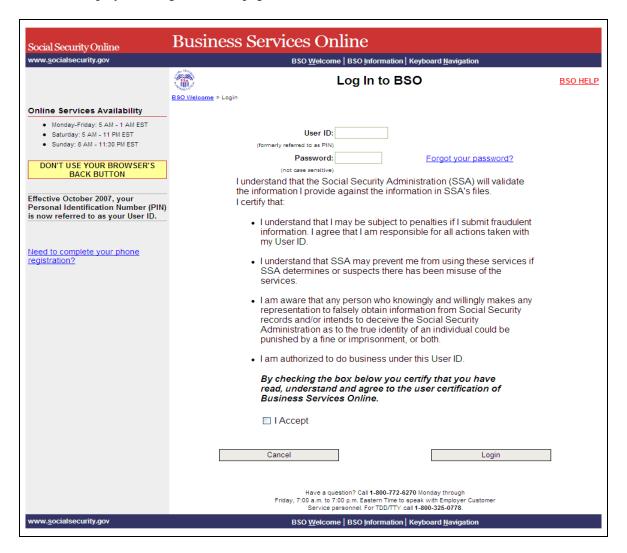


STEP 9: Select the BSO Main Menu button to return to the BSO Main Menu. Select the **Re-Request Another Activation Code** button to return to the Re-Request Activation Codes page.

LESSON 7: REMOVE ACCESS TO BSO SERVICES

Follow the instructions below to remove access to BSO services. Use this option if you no longer need to use a service in BSO.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

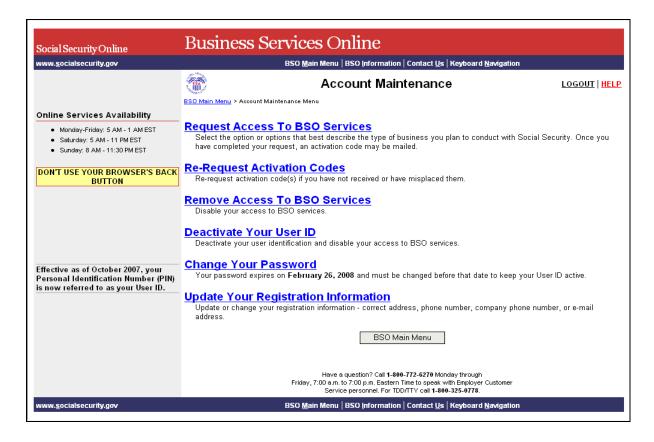
STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the Account Maintenance link to display the Account Maintenance menu.

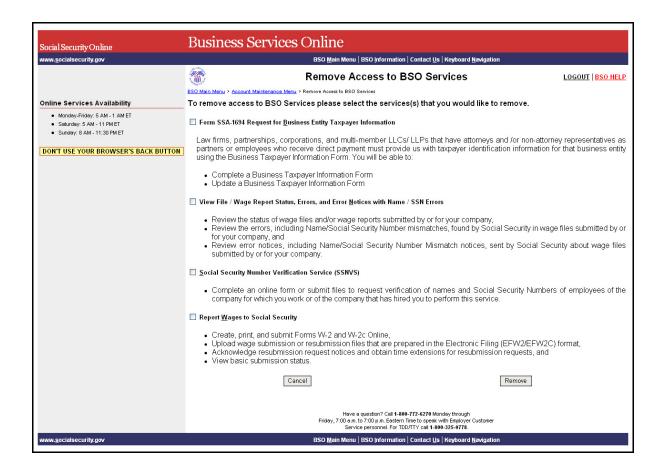


STEP 6: Select the Remove Access to BSO Services link.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Remove Access To BSO Services Disable your access to BSO services.

The system displays the Remove Access to BSO Services page.



STEP 7: Select the checkbox (es) of the service(s) you wish to remove and select the **Remove** button. The system displays the Remove Access to BSO Services Successful page.

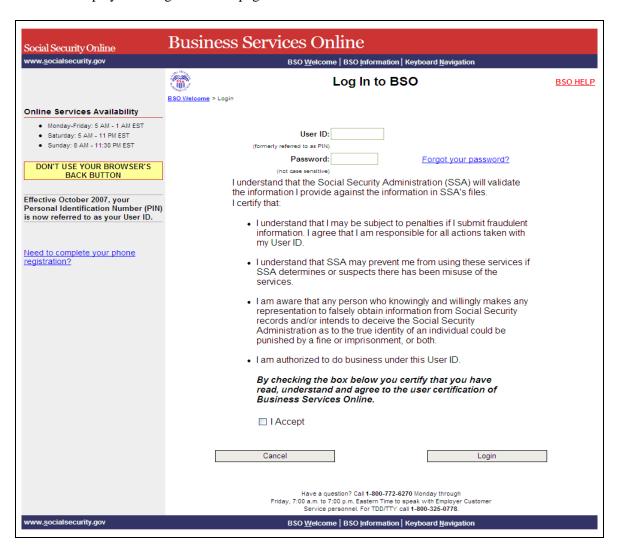


STEP 8: Select the **BSO Main Menu** button to go to the BSO Main Menu. Select the **Deactivate Another Service** button to return to the Remove Access to BSO Services page.

LESSON 8: LOGIN PROCEDURES

Follow the instructions below to log in to BSO with your User ID and password.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



LESSON 9: LOGOUT PROCEDURES

Follow the instructions below to log out of BSO.

STEP 1: Select any **Logout button** where displayed.

The system displays the Log Out of BSO page.



STEP 2: Select **Yes** to end the current session. The system displays the Customer Satisfaction Survey or the Business Services Online Welcome page. (To continue your session and return to the BSO Main Menu, select **No**.)

LESSON 10: CHANGE YOUR PASSWORD

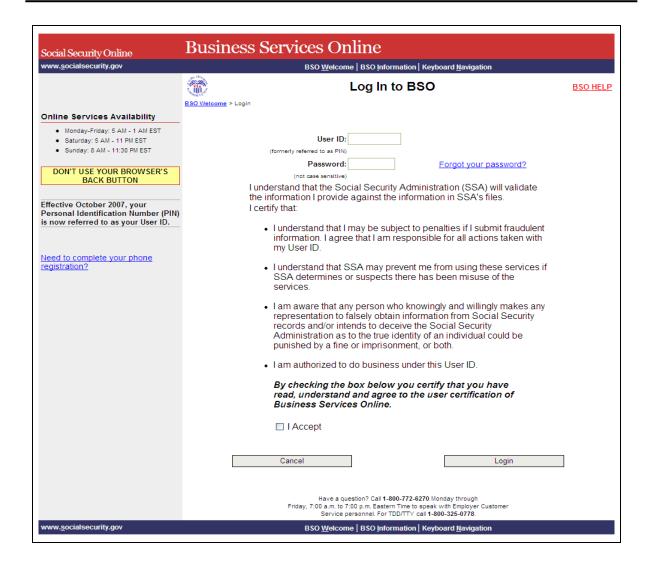
Passwords must be changed at least once a year in order to maintain an active User Identification Number (User ID). Follow the instructions below to change your password.



When you provide your e-mail address, the system will send you an e-mail reminder two weeks before your password expires. Refer to <u>Lesson 12: Update Your</u> <u>Registration Information</u> for information about entering your e-mail address which is mandatory.

STEP 1: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

STEP 2: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the Account Maintenance link to display the Account Maintenance menu.



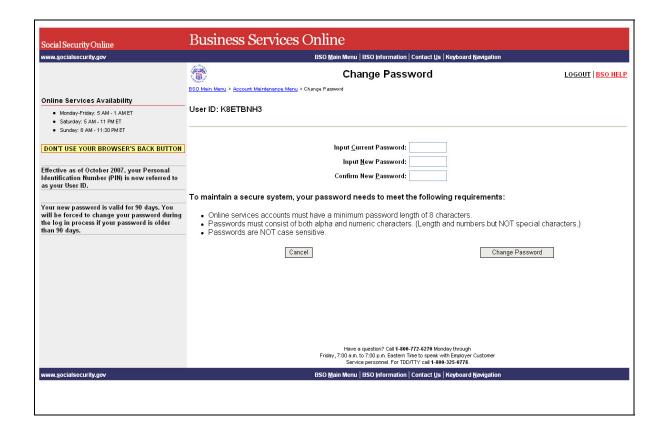
STEP 6: Select the **Change Your Password** link.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Change Your Password

Your password expires on February 26, 2008 and must be changed before that date to keep your User ID active.

The system displays the Change Password page





You must change your password at least once a year in order to keep your User ID active.

- **STEP 7**: Enter your current password and new password. Enter your new password again for verification purposes.
- **STEP 8**: Select the **Change Password** button. The system displays the Password Change Successful page.

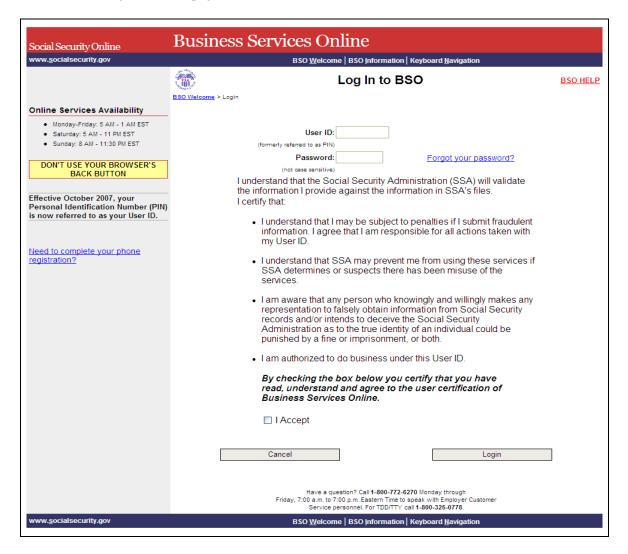


LESSON 11: FORGOTTEN PASSWORDS

BSO allows you to request a new password if you have forgotten your current password. To reduce the possibility of fraud, the new password will be mailed to the last address you provided. Until you receive your new password in the mail, you will not be able to log in to BSO. This functionality is not available to foreign registrants. Follow the instructions below to request a new password.

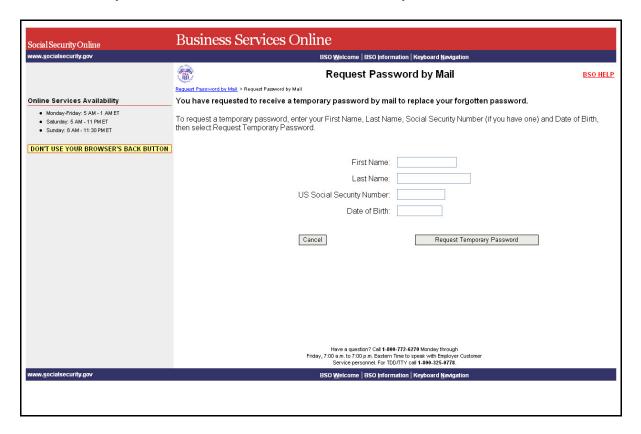
STEP 1:Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.

STEP 2: Select **Login** link from the Business Services Online Welcome page. The system displays the Log In to BSO page.



- **STEP 3**: Select the Forgot your password? link on the Log In to BSO page. The system displays the Forgot Password page.
- **STEP 4**: The system will prompt you to enter a new password to replace the forgotten password. If you wish to receive a temporary password by mail, select the **Request Password by Mail** button, and proceed to Step 5. Otherwise, proceed to Step 7.

STEP 5: Enter your First Name, Last Name, U.S. Social Security Number, and Date of Birth.



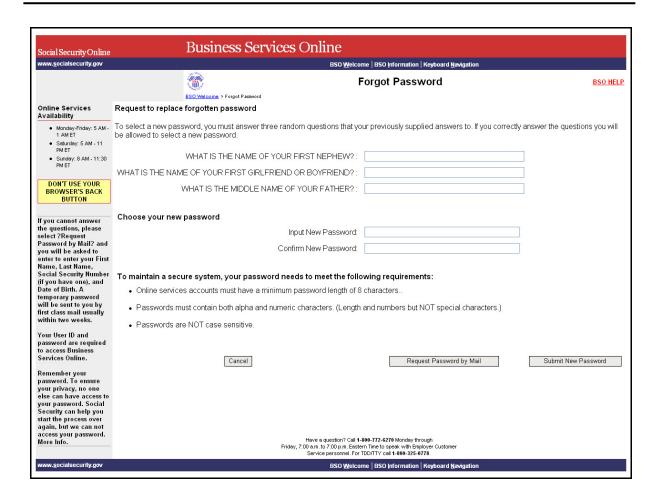
STEP 6: Select the **Request Temporary Password** button to send the request. The system displays the Request for New Password Successful page. (To return to the Business Services Online Welcome page without sending the request, select the **Cancel** button.)



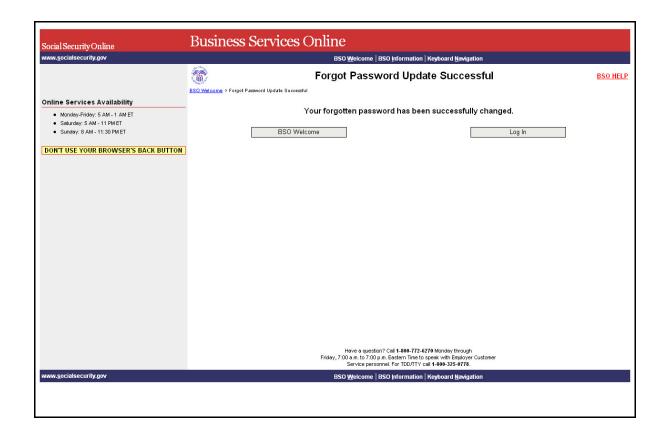


Until you receive your new password in the mail, you will not be able to log in to BSO.

- **STEP 7**: Enter the answers to the three randomly selected security questions that you previously supplied answers to. Next, input a new password and confirm that password by entering it a second time. Select the **Submit New Password** button to send the request.
- **STEP 8:** The system displays the Forgotten Password Update Successful page. (To return to the Business Services Online Welcome page without sending the request, select the **Cancel** button.).



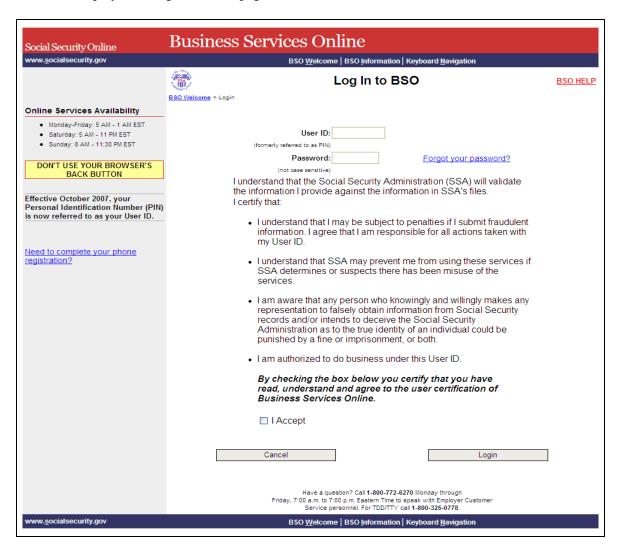
STEP 9: Select the **BSO Welcome** button to return to the Business Services Online Welcome page, or select the **Log In** button to log in using the updated password.



LESSON 12: UPDATE YOUR REGISTRATION INFORMATION

Follow the instructions below to update your registration information.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

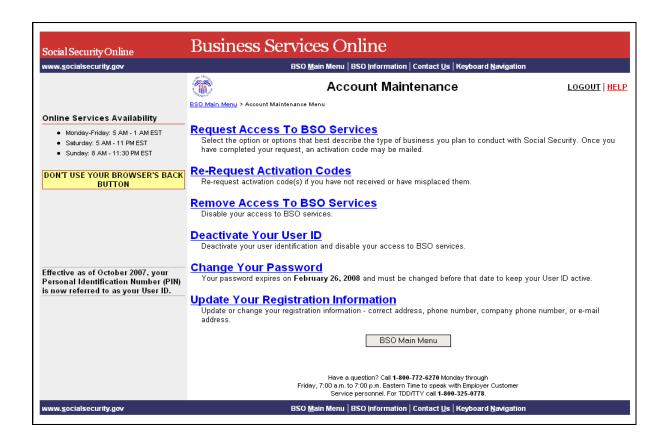
STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the Account Maintenance link to display the Account Maintenance menu.



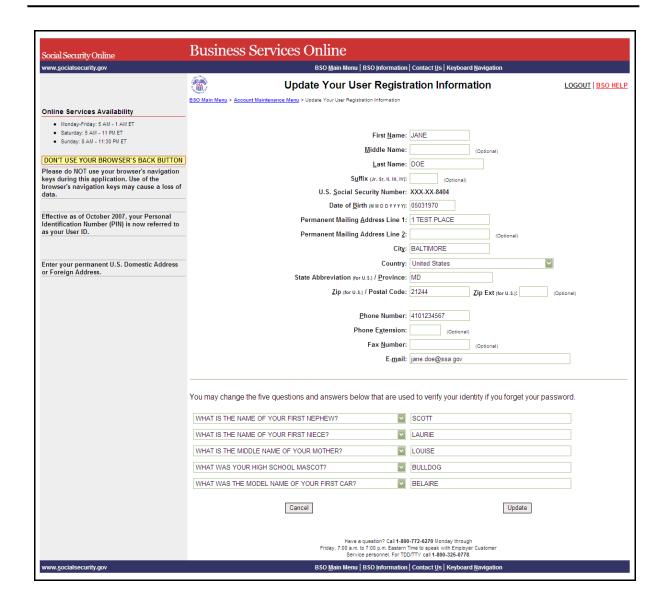
STEP 6: Select the **Update Your Registration Information** link.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Update Your Registration Information

Update or change your registration information - correct address, phone number, company phone number, or e-mail address.

The system displays the Update Your Registration Information form.



STEP 7: Update the information you wish to change.



You can only change the following information:

- Name (First, Middle and Last)
- Suffix
- Date of Birth
- Address
- Zip Code
- City
- State

- Country
- Zip Postal Code
- Zip Ext
- Work Number
- Fax Number
- E-mail Address
- The five questions and answers used to verify your identity if you forget your password.

STEP 8: Select the **Update** button to update the registration information. The system displays the Update Your Registration Successful page. (To cancel the update and return to the BSO Main Menu, select the **Cancel** button.)

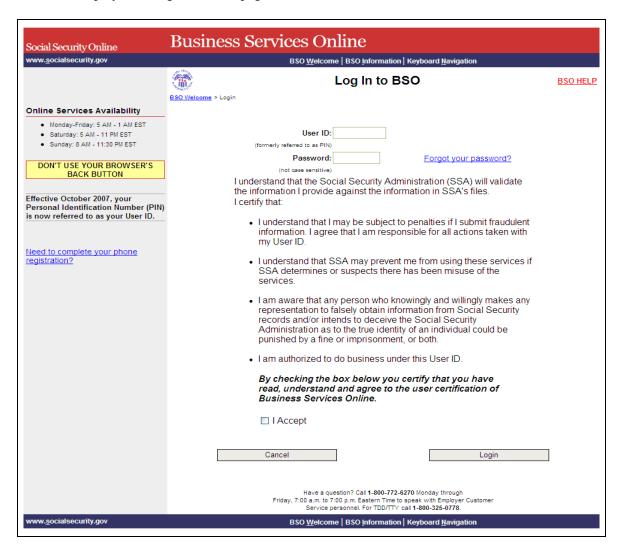
(To return to the BSO Main Menu page, select the BSO Main Menu button.)



LESSON 13: DEACTIVATE YOUR USER ID

Follow the instructions below to deactivate your User ID.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Enter your User ID and password.

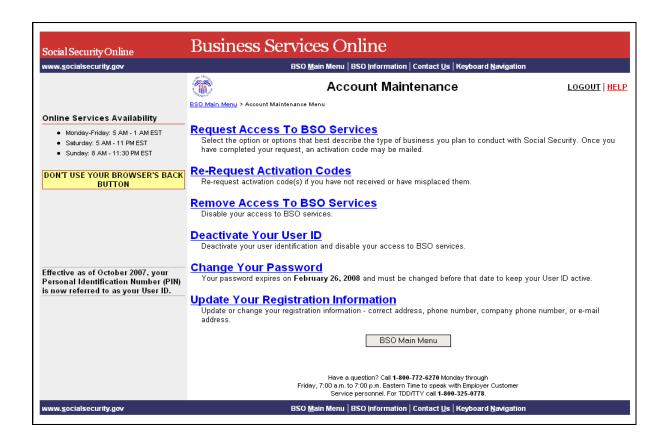
STEP 4: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the **Account Maintenance** link to display the Account Maintenance menu.



STEP 6: Select the **Deactivate Your User ID** link.

(To return to the BSO Main Menu page, select the **BSO Main Menu** button.)

Deactivate Your User ID

Deactivate your user identification and disable your access to BSO services.

The system displays the Deactivate User ID page.



- **STEP 7**: Enter your password in the Password field and select the reason for deactivating your User ID.
- **STEP 8**: Select the **Deactivate** button to process the request. The system displays the User ID Deactivated page. (To cancel the request and return to the BSO Main Menu, select the **Cancel** button.)

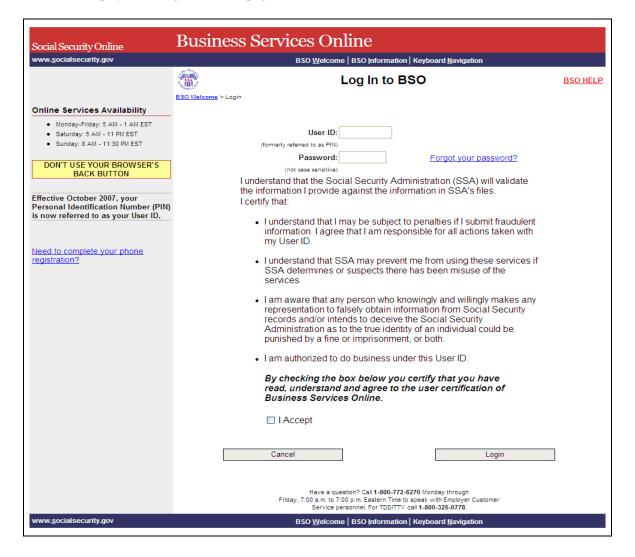


(To return to the BSO Main Menu page, select the **BSO Welcome** button.)

LESSON 14: CONTACT SOCIAL SECURITY ADMINISTRATION (SSA)

Follow the instructions below to submit a question or statement to the SSA.

- **STEP 1**: Point your browser to the Business Services Online Welcome page: www.socialsecurity.gov/bso/bsowelcome.htm.
- **STEP 2**: Select the **Log In** button on the Business Services Online Welcome page. The system displays the Log In to BSO page.



STEP 3: Check the checkbox saying "I Accept" and select the **Login** button after reading and agreeing to the conditions stated on the Log In to BSO page. This displays the BSO Main Menu page (To return to the Business Services Online Welcome page, select the **Cancel** button.)

STEP 4: Enter your User ID and password.



The menu selection on your BSO Main Menu is unique to you, and only presents the applications and services to which you have access.



STEP 5: Select the **Contact Us** link from the header or footer.

www.socialsecurity.gov BSO Welcome | BSO Information | Contact Us | Keyboard Navigation

The system displays the Contact SSA pop-up window.





Your name, telephone number, and e-mail address should automatically appear in the appropriate fields.

- **STEP 6**: Enter your telephone number in the Phone Number field if it is not populated. If your phone number is in the field, verify that it is correct.
- **STEP 7**: Enter your e-mail address in the E-mail field if it is not populated. If your e-mail address is in the field, verify that it is correct.



You must provide your telephone number and e-mail address.

- **STEP 8**: Select the desired organization in the **Recipient** drop-down menu. This is a required field.
- **STEP 9**: Type your message in the Message field. This is a required field.
- **STEP 10**: Select the **Send Your Message** button. (Select the Close Browser Window to cancel the message.)
- **STEP 11**: Select the **Close Browser Window** button to close the pop-up window and return to the BSO Main Menu.