BSO Tutorial Registration Services

**BSO Tutorial**

# Registration Services

Contains the following lessons:

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* Manage Employer Information
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  + [Remove Employer Information](#_LESSON_18:_REMOVE)

## LESSON 1: REGISTER USER – Wage Reporting and Employer Services

Your BSO User ID and password is no longer used to access Business Services Online

(BSO) wage reporting services. You must use a Social Security online account, ID.*me* or

Login.gov credential to gain access to the BSO application.

Extra security is a requirement to access the following BSO wage reporting services:

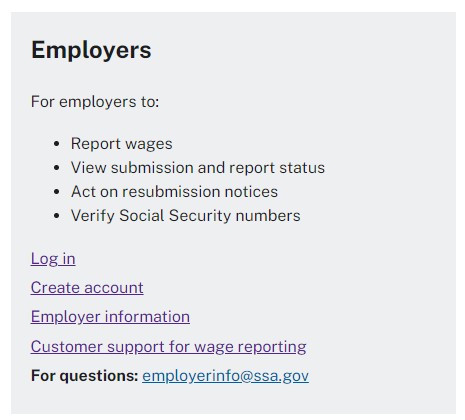
* Wage file upload
* W-2/W-2C online
* AccuWage online
* Social Security Number Verification Service (SSNVS)
* View wage report name/SSN errors.

Follow the instructions below to register for a BSO User ID. After completing the steps, you can

request to wage reporting services.

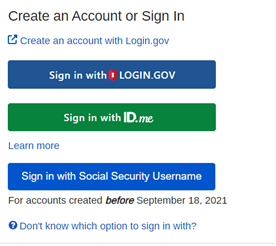
**STEP 1:** Point your browser to the BSO Welcome page:

[www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

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**STEP 2:** Select the **Create account** link on the BSO Welcome page from the **Employers** box

above.

****

**STEP 3:** You must use a ID.*me*, Login.gov or a Social Security online credential to gain access

to the BSO application. Select **Create an account with Login.gov** to create an account. Please

note that you do not need to create a new Login.gov or ID.*me* credential specifically for SSA

purposes. You can use your existing Login.gov or ID.*me* credentials to log into SSA services too.

You will have the option to create a new BSO User ID or select an existing BSO User ID.

## LESSON 2: REGISTER/LOG IN - For Appointed Representatives

## (AR), Consent Based Social Security Number Verification (CBSV),

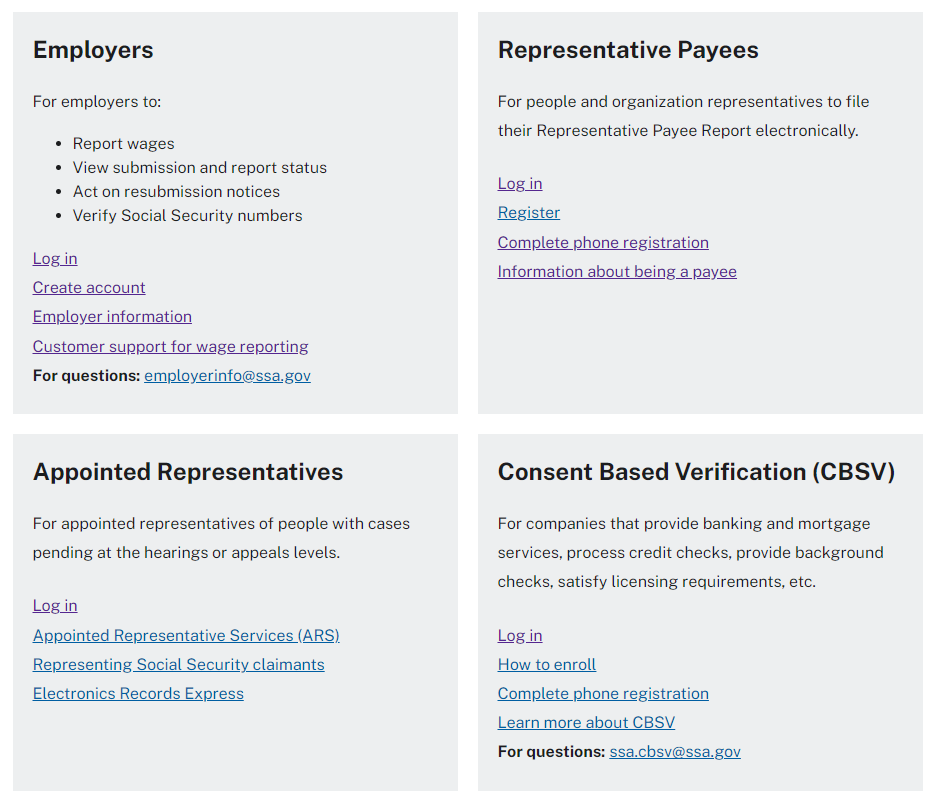
## and Representative Payees (IRPA) Only

Follow the instructions below to register for Business Online Services. After completing the

steps, you will receive a User ID and set a password so that you can log in to Business Services

Online (BSO) and request online services.

**STEP 1:** Point your browser to the Business Services Online (BSO) Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

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**STEP 2: For AR, CBSV, or IRPA only** select the **Register or Log in** link on the

Business Services Online Welcome page in the appropriate box. The system displays

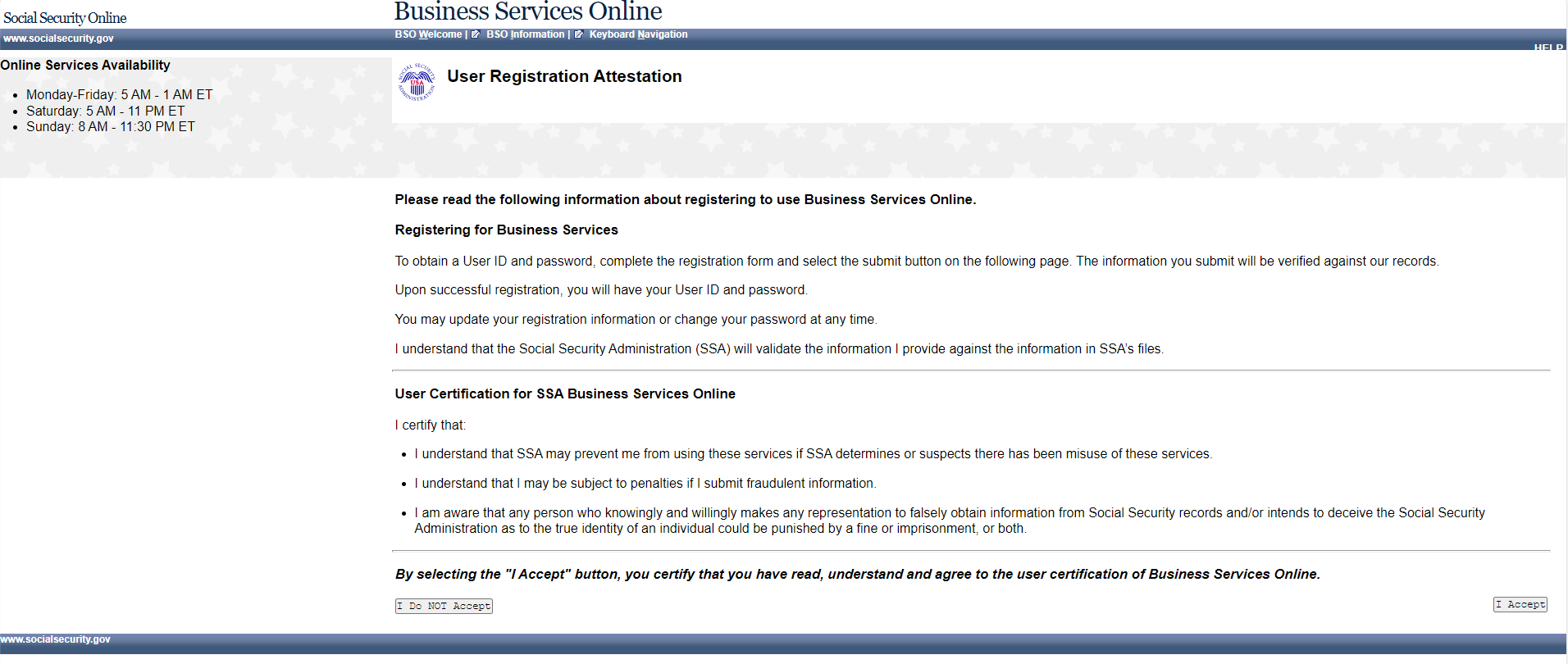
the Log in to Online Services page.



**STEP 3:** In the New User? column on the Log in to Online Services page, select the Create Log

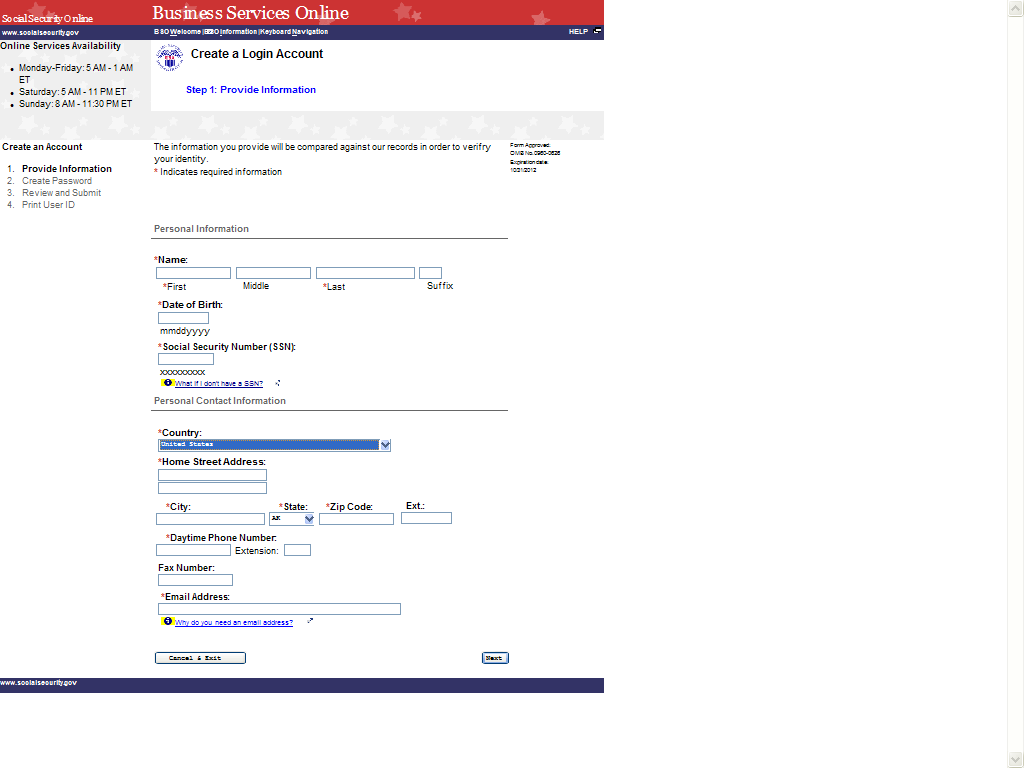
In Account link. The system displays the Create a Login Account. Below is the User

Registration Attestation screen. Select **I Accept** to continue.

****

Step 1: Provide Information page. (To return to the Business Services Online Welcome page,

select the BSO Welcome link in the page footer.)



**STEP 4**: Enter information in the Create a Login Account, Step 1: Provide Information page.

**TIPS**

* **Fields that are required are marked with a red asterisk (\*).**
* **Links to informational pages are indicated with a blue information (i) link. Clicking on the link will display an informational page in a separate**

**window.**

* **Do not use punctuation in any field. This includes dashes or slashes in date**

**of birth, social security number, zip code, and phone or fax numbers.**

* **Date of birth must be entered in the format mmddyyyy. For example, if**

**your date of birth is January 1, 1990, you would enter 01011990.**

* **If you do not have an SSN and work outside the United States for a business**

**or organization that has an Employer Identification Number (EIN), you may**

**leave the SSN field blank.**

* **If you live outside of the United States, when you select your country, text**

**areas for you to enter Province and Postal Code information will appear.**

* **The Social Security Administration will use your email address to send you**

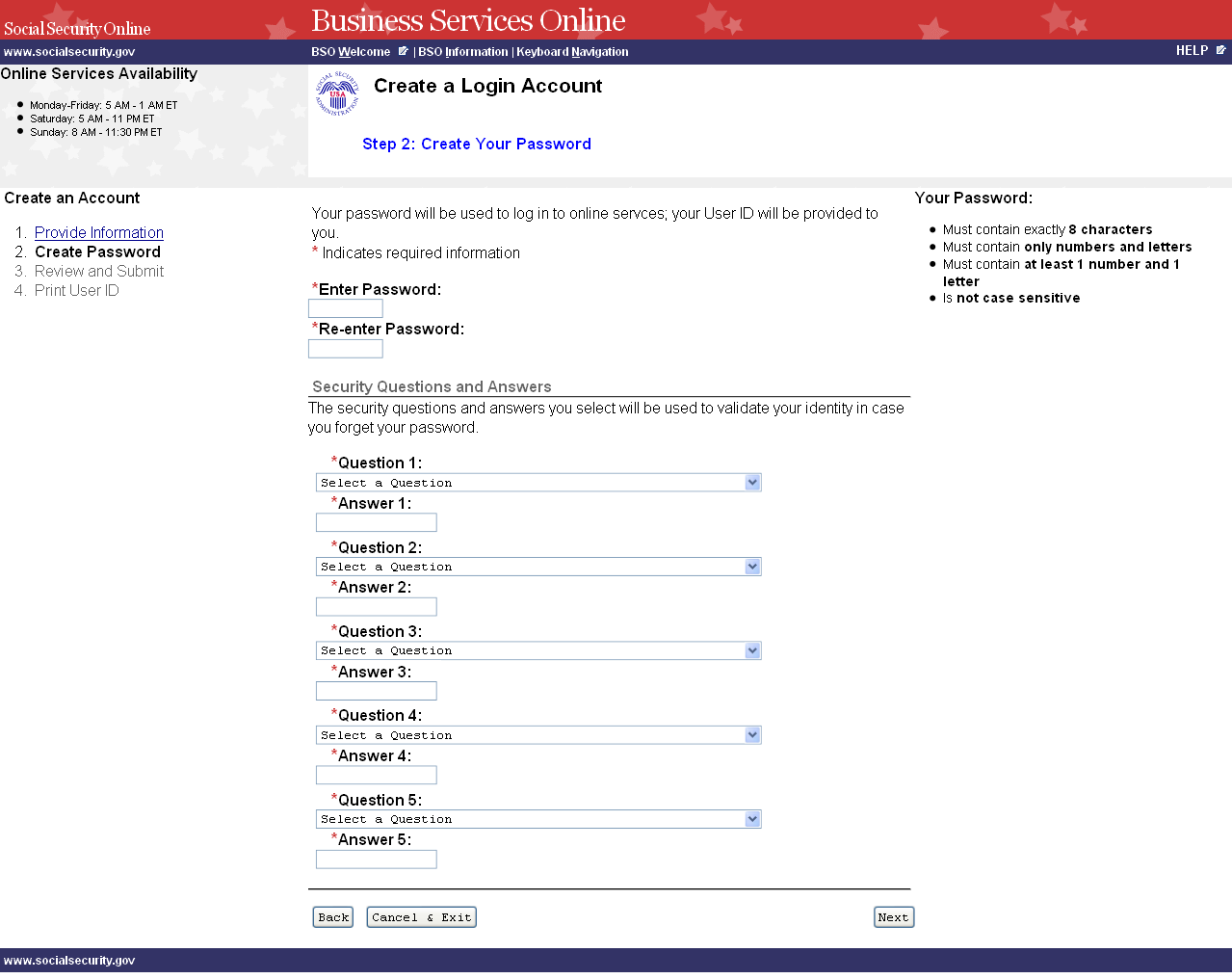
**any important information affecting Business Service Online users.**

**STEP 5:** Select the **Next** button to continue registering. The system displays the Create a Login

Account, Step 2: Create Your Password page. (Select the **Back** button to return to

Create a Log in Account, Step 1: Provide Information. To return to the Business

Services Online Welcome page without registering, select the **Cancel & Exit** button.)



**STEP 6:** Enter a password to use when you log in to Business Services Online. Re-enter the

password for confirmation. Your password:

* Must contain exactly 8 characters.
* Must contain only numbers and letters (no special characters)
* Must contain at least 1 number and 1 letter.
* Is not case sensitive.

**STEP 7:** Select 5 questions and enter your answers. You will be asked to enter the same

answers if you need to change your password later.

* You may not select the same question more than once.
* Answers to questions are not case sensitive; they cannot contain any special

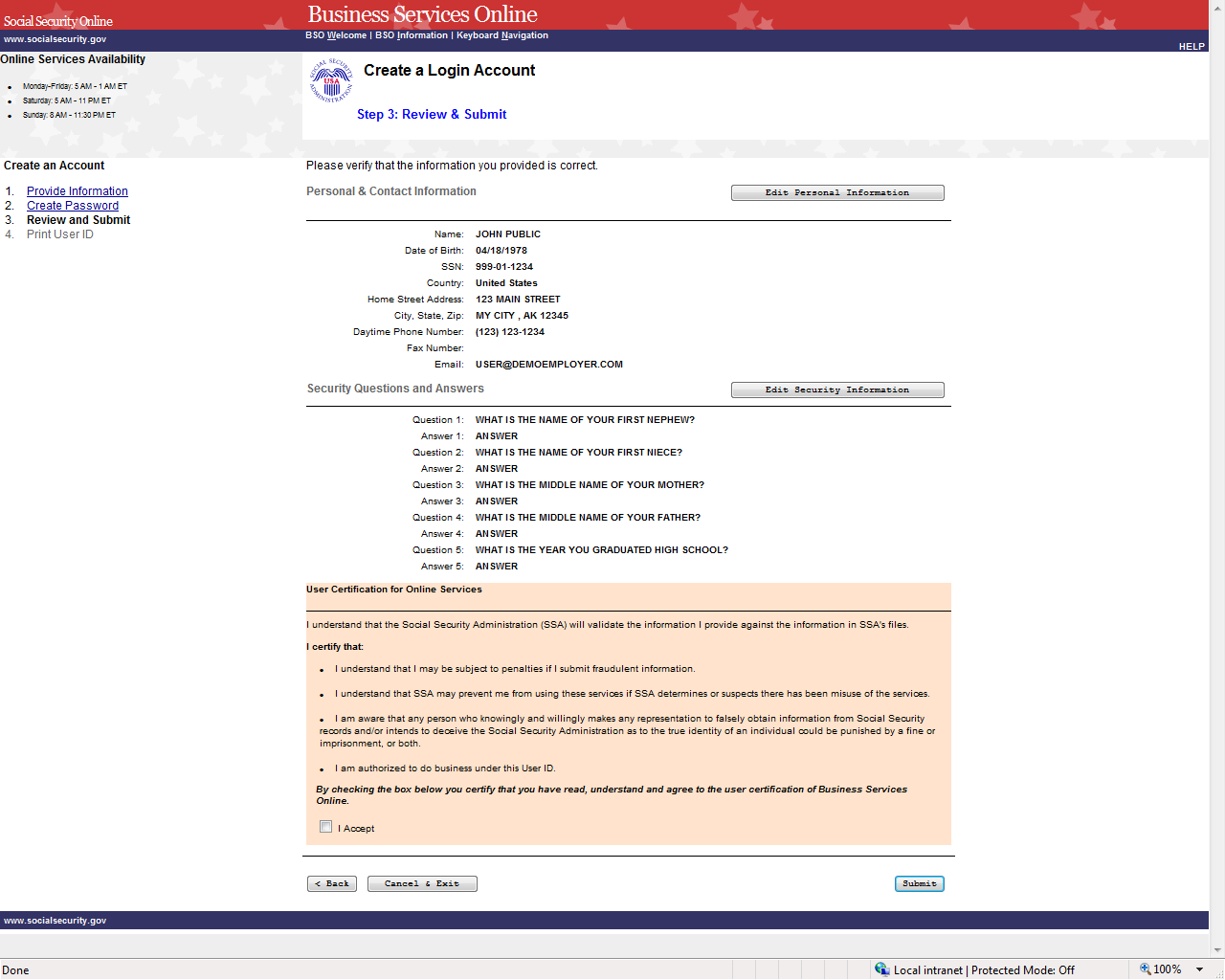
characters.

**STEP 8:** Select the **Next** button to continue. The system displays the Create a Login Account,

Step 3: Review and Submit page. (Select the Back button to return to the Create a Log

in Account, Step 1: Provide Information. To return to the Business Services Online

Welcome page without registering, select the **Cancel & Exit** button.)



**STEP 9:** The information you entered on the previous two pages is displayed for your review. To make corrections, select the **Edit Personal Information** button to return to the

Create a Log in Account, Step 1: Provide Information page. Or select the **Edit Security**

**Questions** button or the **Back** button at the bottom of the page to return to the Create a

Login Account, Step 2: Create your Password page.

**STEP 10:** After making any corrections, read the conditions stated in the User Certification for

Online Services section of the page. You must agree to these conditions by checking

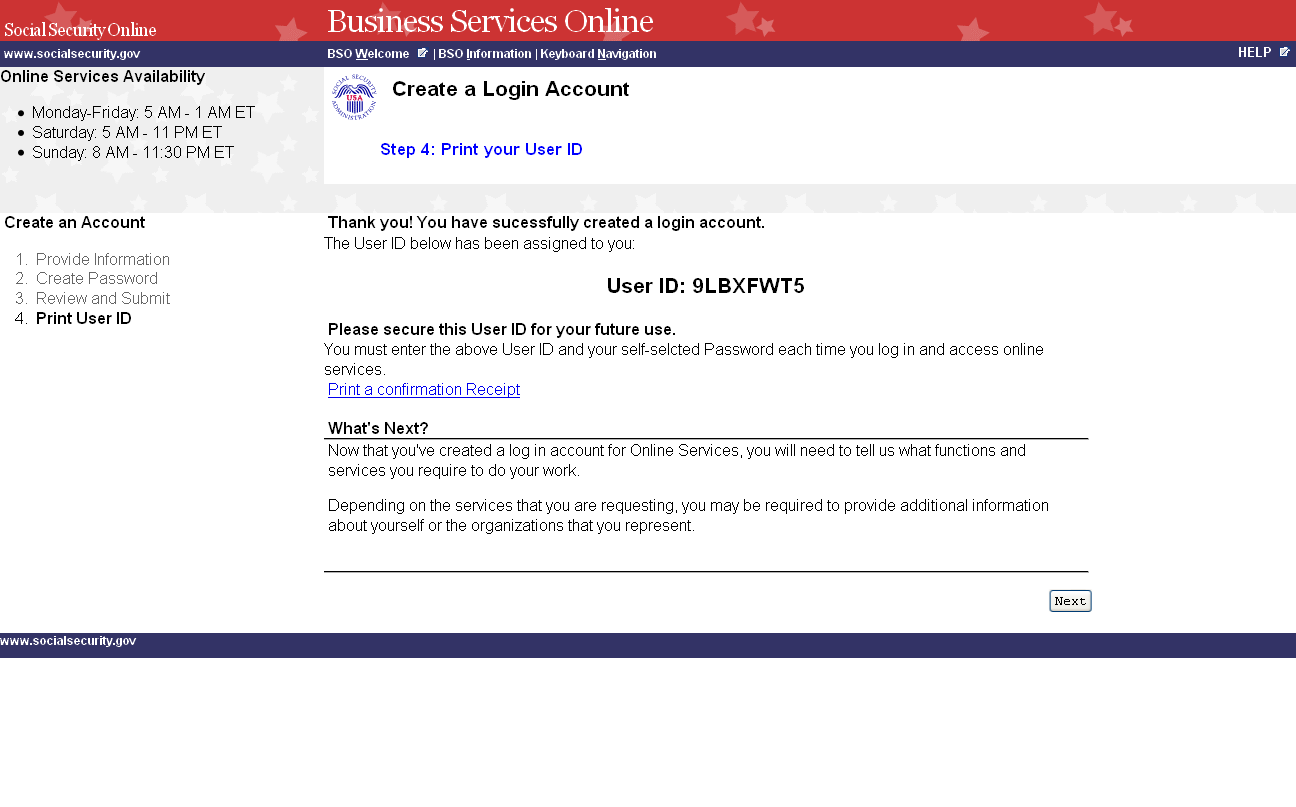
the **I Accept** checkbox to proceed. Select the **Submit** button to process the

registration. The system displays the Create a Login Account, Step 4: Print your User

ID. (Select the **Back** button at the bottom of the page to return to Create a Login

Account, Step 2: Create Your Password page. To return to the Business Services

Online Welcome page without registering, select the **Cancel & Exit** button.)



**STEP 11:** You may click on the Print a Confirmation Receipt link to print your User ID for

your records. You will need your User ID and password to log in to Business Services

Online to request services and perform other functions. Refer to other lessons in this Tutorial for guidance.

## LESSON 2: COMPLETE PHONE REGISTRATION - For AR, CBSV

## IRPA Only

If you started your registration for online services by speaking with an Employer Customer

Service representative or completing a form, follow the instructions below to complete your

registration.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://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 sign into Online Services page.

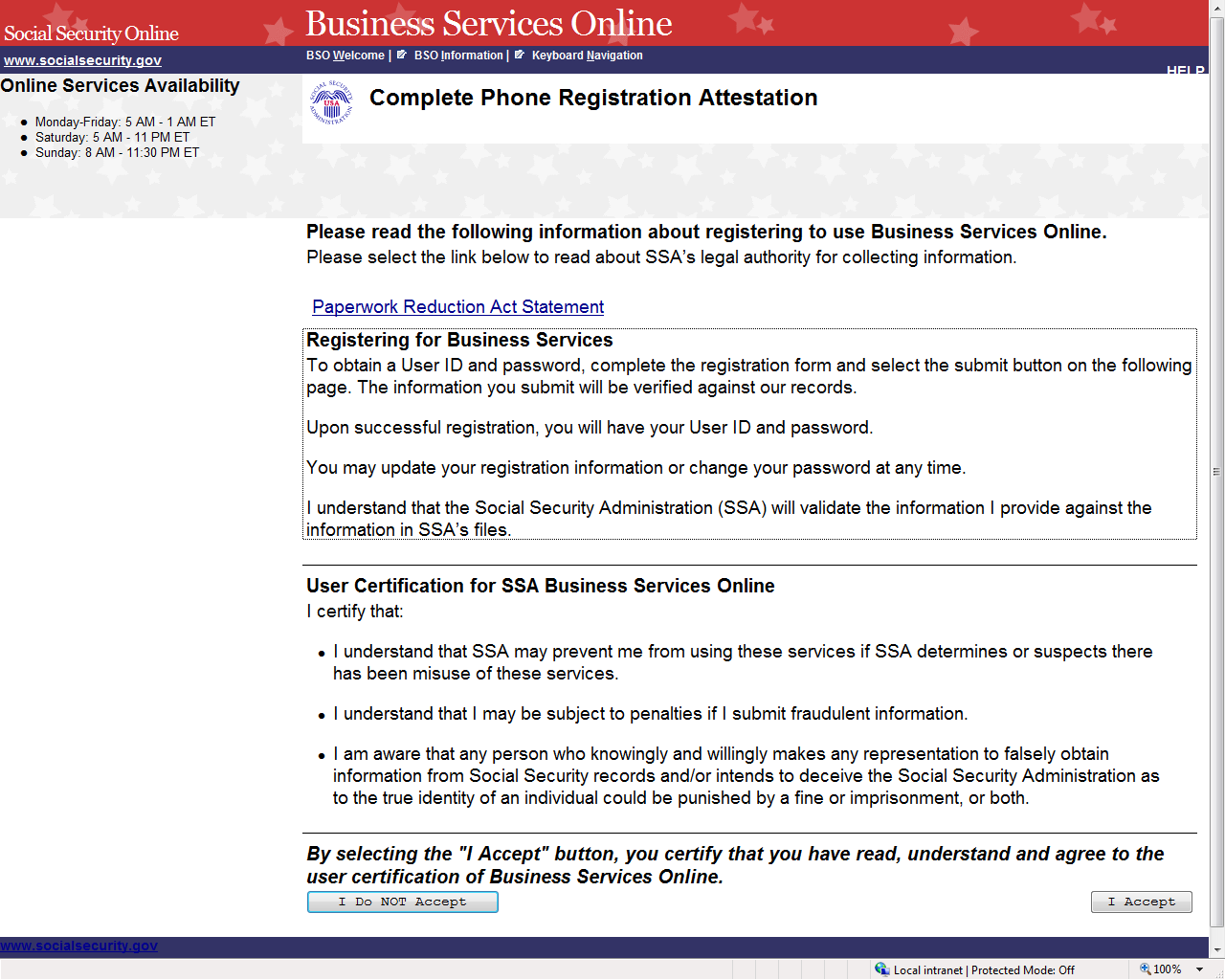


**STEP 3:** In the New User? column of the Log in to Online Services page, select the link portion

of Need to complete a phone/form registration? The system displays the Complete

Phone Registration Attestation page. (To return to the Business Services Online

Welcome page, select the BSO Welcome link in the page footer.)

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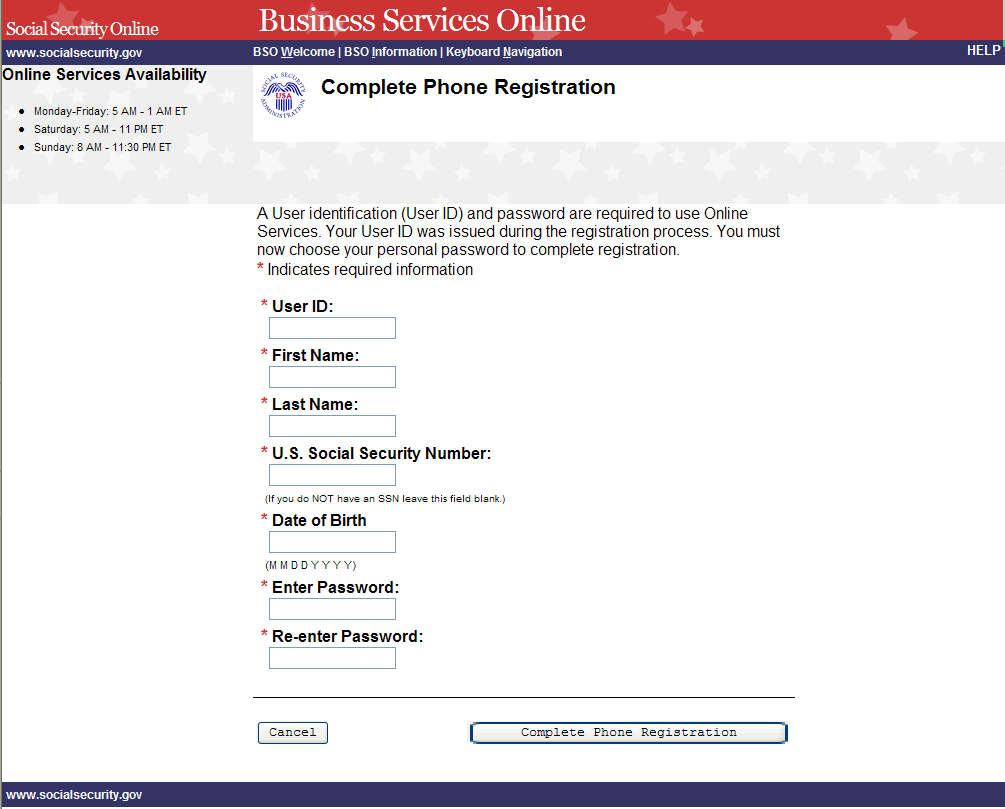
**STEP 4:** Read the conditions stated in the User Certification for SSA Business Services Online

section of the page. You must agree to these conditions by selecting the **I Accept**

button to proceed. The system displays the Complete Phone Registration page.

(Selecting the **I Do NOT Accept** button will display the Business Services Online

Welcome page.)

****

**STEP 5:** Enter the registration information.

**TIPS**

* **Fields that are required are marked with a red asterisk (\*).**
* **Enter your User ID that was given to you when you registered over the**

**phone or in person.**

* **Do not use punctuation in any field. This includes dashes or slashes in date**

**of birth and social security number.**

* **If you do not have a U. S. Social Security Number, leave the SSN field blank.**
* **Date of birth must be entered in the format mmddyyyy. For example, if your**

**date of birth is January 1, 1990, you would enter 01011990.**

* **Your password must contain any combination of eight letters and numbers**

**(e.g., 9580859A or frog2828). Special characters are not allowed, and**

**passwords are not case sensitive. Do not share your password with anyone.**

* **When you tab off or click out of a field, the system will check the format of**

**what was entered and display a message if it needs to be corrected.**

**STEP 6:** Select the **Complete Phone Registration** button to complete the registration process.

The **Log in** to Online Services page will be displayed. (To return to the Business

Services Online Welcome page without completing the registration process, select the

**Cancel** button.)

## 

## LESSON 3: LOGIN - For AR, CBSV, and IRPA Only

Follow the instructions below to log in to Business Services Online with your User ID and

password.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

****

**STEP 2:** Select the **Log In or Register** link on the Business Services Online Welcome page.

The system displays the Log in to Online Services page.



**STEP 3:** Under the Existing User? column, enter your User ID and password. Read the terms

stated under the User Certification heading. You must agree to these conditions by

checking the “I have read & agree to these terms.” checkbox to proceed. Select the **Log**

**In** button. The system displays the Business Services Online Main Menu page.

* If you have forgotten your User ID, please call 1-800-772-6270 Monday through

Friday, 7:00 a.m. to 5:30 p.m. Eastern Time to speak with Employer Customer

Service personnel. For TDD/TTY, call 1-800-325-0778.

* If you have forgotten your password, select the Forgot your password? link beneath

the Password field. Refer to the Forgot Password lesson in this Tutorial for further

guidance.

(To return to the Business Services Online Welcome page, select the BSO Welcome

link on the page footer.)

**NOTE**

*The menu selection on your BSO Main Menu is unique to you and presents only the*

*applications and services to which you have access.*



## 

## LESSON 4: FORGOT PASSWORD - For AR, CBSV, and IRPA Only

Follow the instructions below if you have forgotten your password and wish to get a new one.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

****

**STEP 2:** Select the **Log In or Register** button on the Business Services Online Welcome page.

The system displays the Log in to Online Services page.

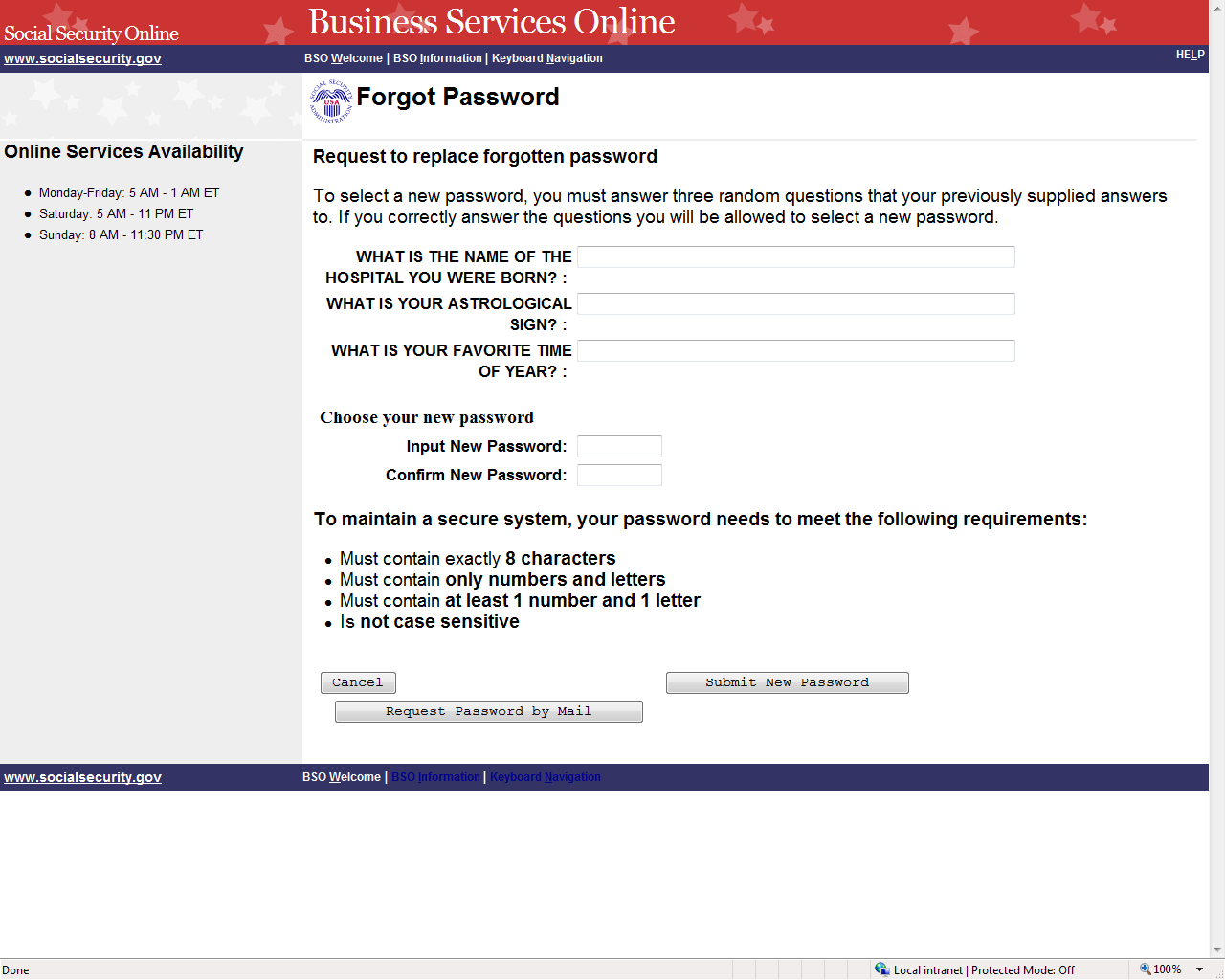


**STEP 3:** Under the Existing User? column, enter your User ID. Select the Forgot your

password? link under the Password field. The system displays the Forgot Password

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

Welcome link on the page footer.)



**STEP 4:** The Forgot Password page presents you with the choice of entering and submitting a

new password online or requesting a temporary password by mail.

* If you would like to change your password online immediately, continue to Step 5.
* If you would rather receive a temporary password by mail, you do not have to enter

anything on the Forgot Password page. Just select the **Request Password by Mail**

button and proceed to Step 7.

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

**STEP 5:** Enter the answers to three security questions randomly selected from the five you

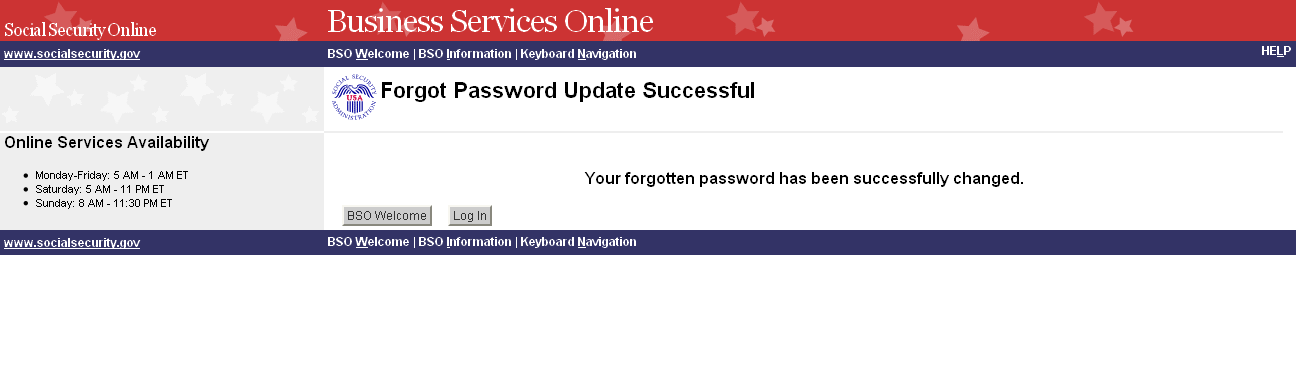
chose and answered during registration. Next, enter a new password and confirm that

password by entering it a second time. Select the **Submit New Password** button. The

system displays the Forgot Password Update Successful page. (To return to the

Business Services Online Welcome page without submitting the new password, select

the **Cancel** button.)



**STEP 6:** Select the **Log In** button to log in using the new password. Select the **BSO Welcome**

button to return to the Business Services Online Welcome page.

**STEP 7:** If you selected the **Request Password by Mail** button on the Forgot Password page,

the system displays the Request Password by Mail page.

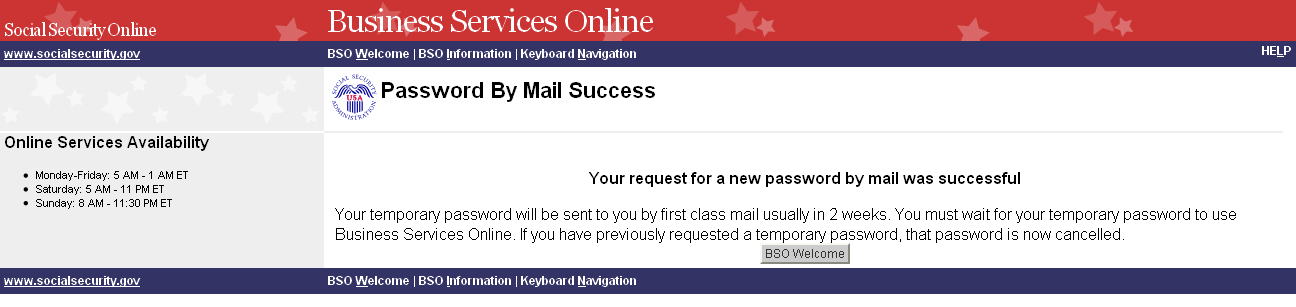


**STEP 8:** Enter your First Name, Last Name, U.S. Social Security Number, and Date of Birth.

Select the **Request Temporary Password** button to send the request. The system

displays the “Password By Mail Success” page. (To return to the Business Services

Online Welcome page without sending the request, select the **Cancel** button.)



NOTE

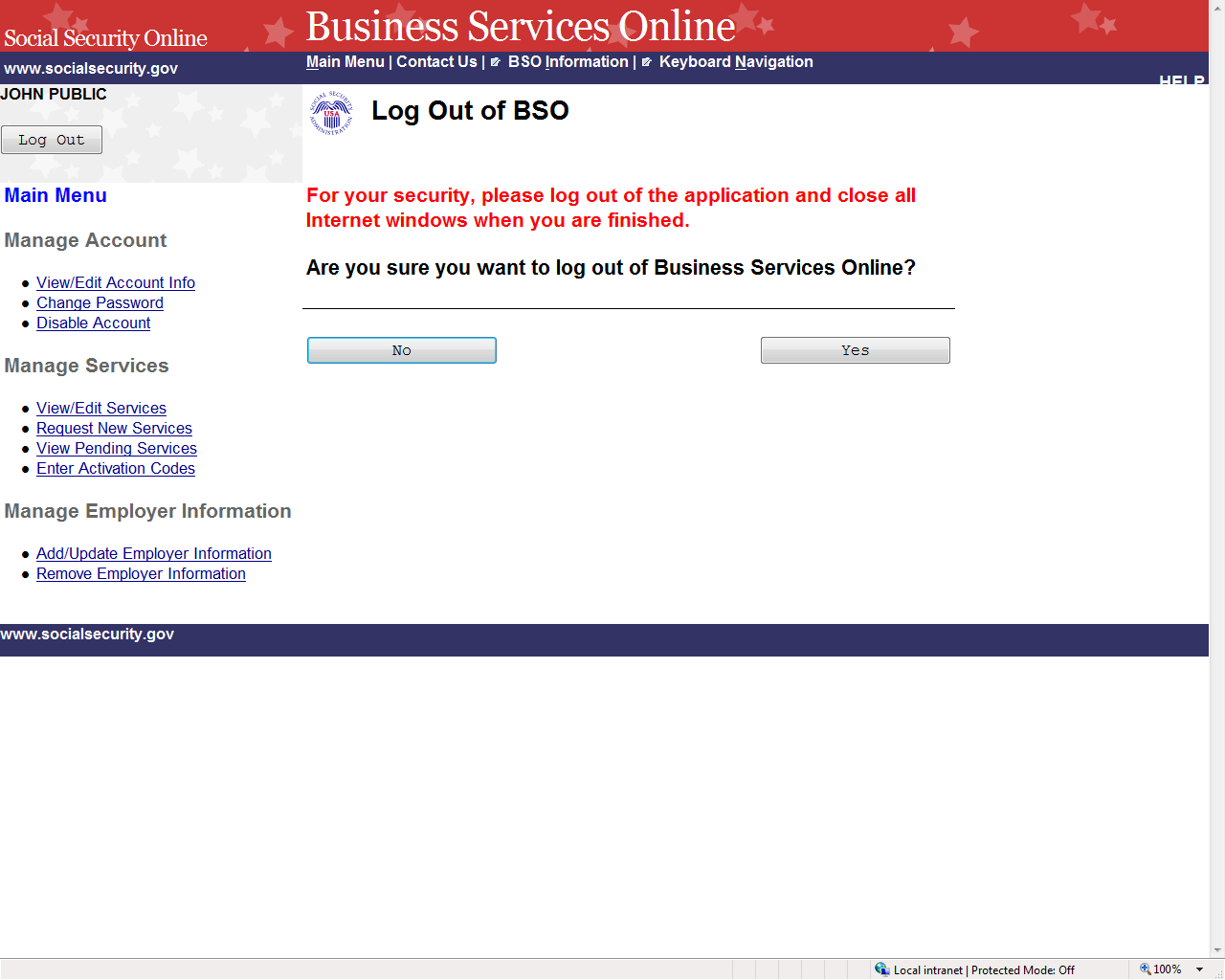
*Until you receive your new password in the mail, you will not be able to log in to BSO.*

## LESSON 5: LOGOUT

Follow the instructions below to log out of Business Services Online (BSO).

**STEP 1:** Select any **Log Out** buttonwhere displayed.

The system displays the Log Out of BSO page.



**STEP 2:** Select the **Yes** button 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 the **No** button.)

## LESSON 6: CONTACT SOCIAL SECURITY ADMINISTRATION

**(SSA)**

**Please visit** [**https://www.ssa.gov/employer/empcontacts.htm**](https://www.ssa.gov/employer/empcontacts.htm) **to contact SSA.**

## LESSON 7: EDIT ACCOUNT INFORMATION

Follow the instructions below to update your account information.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** link on the Business Services Online Welcome page.

**STEP 3:** Under the Existing User? column, enter your User ID and password (AR, CBSV, and

IRPA only). Read the terms stated under the User Certification heading. You must agree to these

conditions by checking the “I have read & agree to these terms.” checkbox to proceed. Select the

**Log In** button. The system displays the Business Services Online Main Menu page. (To return to

the Business Services Online Welcome page, select the BSO Welcome link on the page footer.)

**NOTE**

*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 4:** Under the Manage Account section of the left navigation panel, select the View/Edit

Account Info link. The system displaysthe View/Edit Account Information page. (To

return to the Business Services Online Main Menu, select the BSO Main Menu link in

the second line of the page header.)

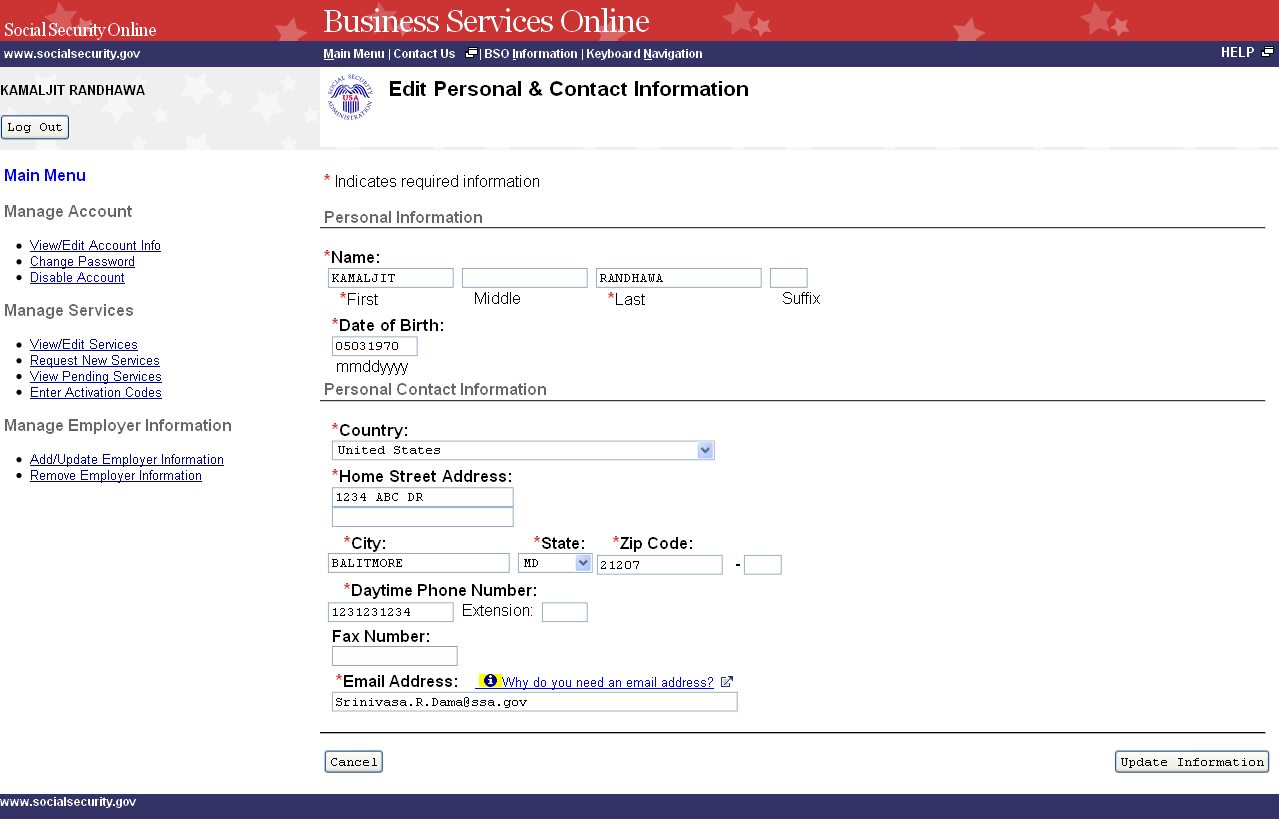


**STEP 5:** Select the **Edit Personal Information** button to edit personal and contact information.

The system displays the Edit Personal & Contact Information page. (To return to the

Business Services Online Main Menu, select the BSO Main Menu link in the second

line of the page header.)



**STEP 6:** Edit the information you wish to change. Select the **Update Information** button to

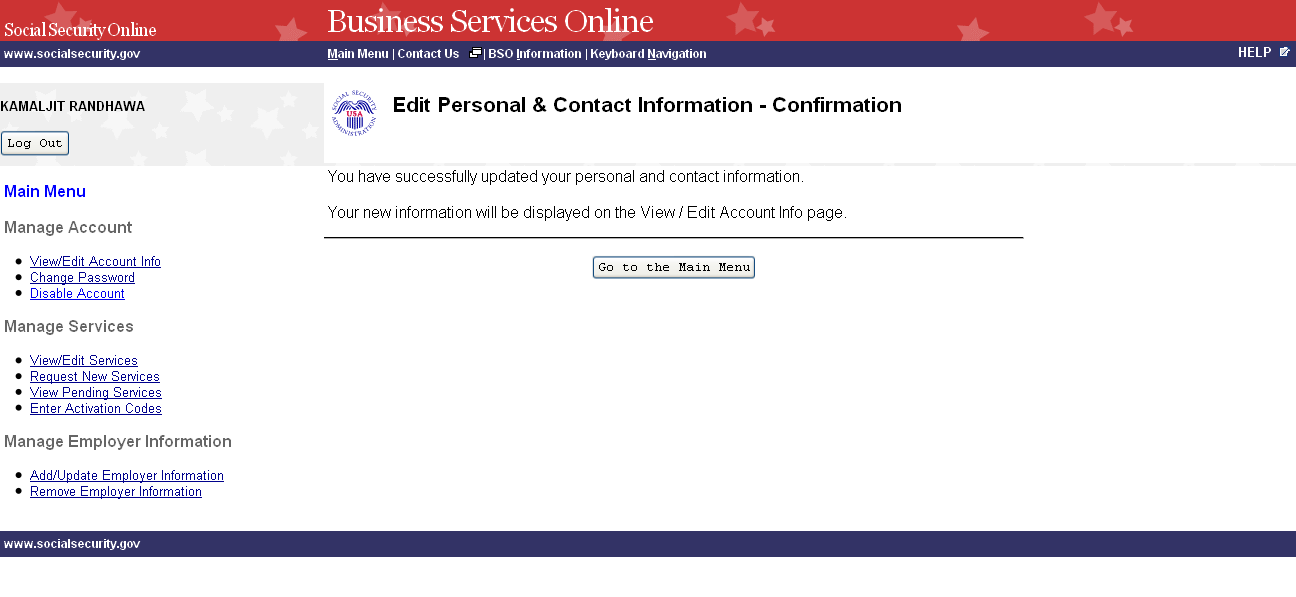
update the account information. The system displays the Edit Personal & Contact

Information – Confirmation page. (Select the **Cancel** button to cancel the update and

return to theView/Edit Account Information page. To return to the Business Services

Online Main Menu, select the BSO Main Menu link in the second line of the page

header.)



**STEP 7:** To edit other account information, select the View/Edit Account Info link under the

Manage Account section of the left navigation panel. The system displays the

View/Edit Account Information page. (Select the **Go to the Main Menu** button to

return to the Business Services Online Main Menu.)

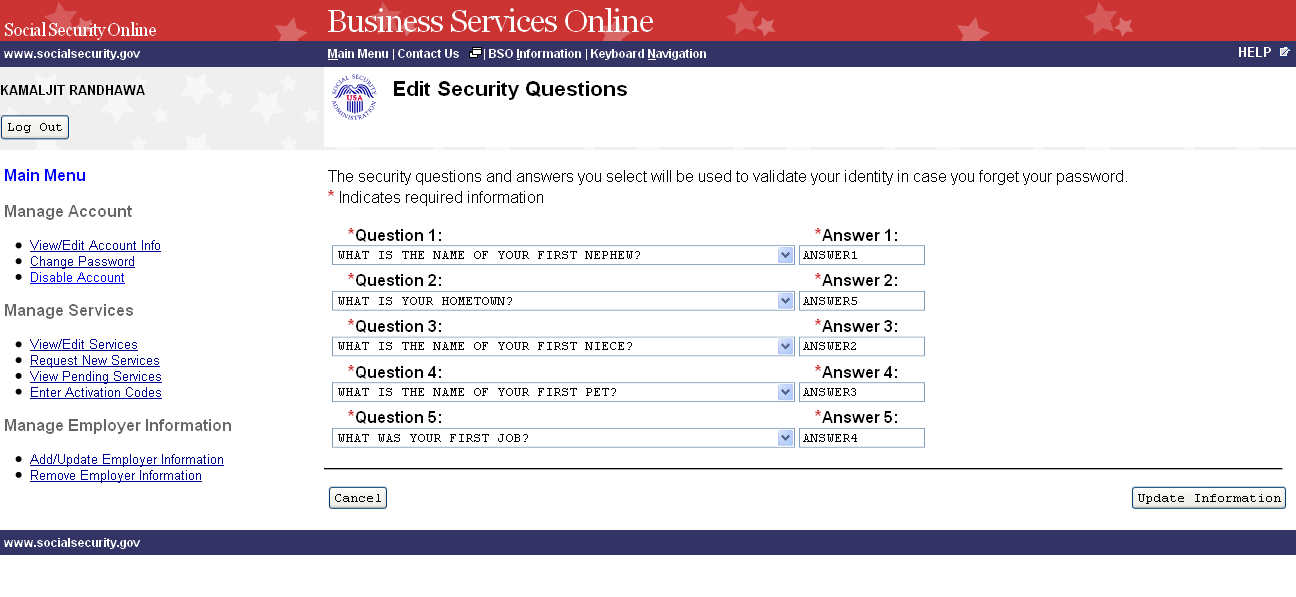


**STEP 8:** Select the **Edit** **Security Questions** button to edit the five questions and answers used

to verify your identity if you forget your password. The system displays the Edit

Security Questions page. (To return to the Business Services Online Main Menu,

select the BSO Main Menu link in the second line of the page header.)



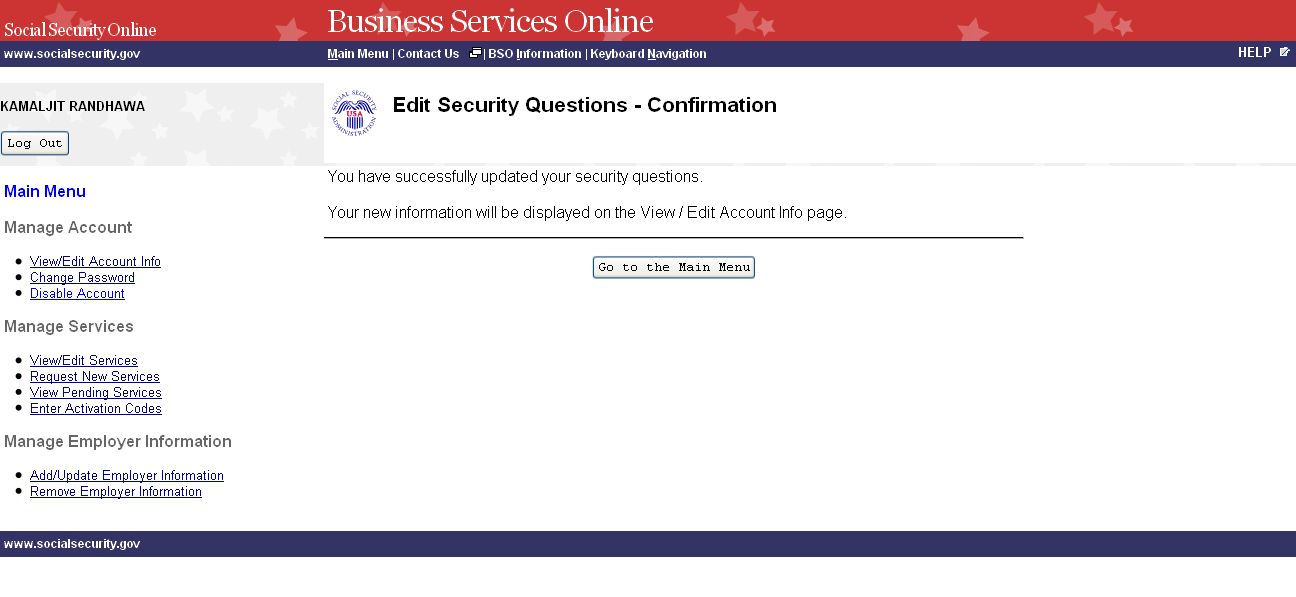
**STEP 9:** Edit the information you wish to change. Select the **Update Information** button to

update the account information. The system displays the Edit Security Questions –

Confirmation page. (Select the **Cancel** button to cancel the update and return to the

View/Edit Account Information page. To return to the Business Services Online Main

Menu, select the BSO Main Menu link in the second line of the page header.)



**STEP 10:** Select the **Go to the Main Menu** button to return to the Business Services Online

Main Menu.

## LESSON 8: CHANGE YOUR PASSWORD – AR, CBSV, and IRPA

**Only**

You can change your password at any time. For security purposes, you are required to change

your password at least once every 90 days in order to maintain an active User Identification

Number (User ID). Follow the instructions below to change your password.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** link on the Business Services Online Welcome page.

**NOTE**

*When your password is more than 90 days old, the following message will display at*

*the top of the page:*

*It has been more than 90 days since your password has been changed. You must*

*change your password to continue with Online services.*

*The system will then automatically display the Change Password page. (Go to Step 5.)*

**STEP 3:** Under the Existing User? column, enter your User ID and password. Read the terms

stated under the User Certification heading. You must agree to these conditions by

checking the “I have read & agree to these terms.” checkbox to proceed. Select the **Log**

**In** button. The system displays the Business Services Online Main Menu page. (To

return to the Business Services Online Welcome page, select the BSO Welcome link in

the page footer.)

**NOTE**

*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 4:** Select the Change Password link from the left navigation panel. The system displays

theChange Password page.

****

**STEP 5:** Enter your current password and new password. Enter your new password again for

verification purposes. Your new password:

* Must contain exactly 8 characters.
* Must contain only numbers and letters (no special characters)
* Must contain at least 1 number and 1 character.
* Is not case sensitive.

**STEP 6:** Select the **Change Password** button. The system displays the Password Change

Successful page. (To return to the Business Services Online Main Menu without

changing your password, select the **Cancel** button.)



**STEP 7:** Select the **Go to the Main Menu** button to return to the Business Services Online

Main Menu.

## LESSON 7: DISABLE YOUR ACCOUNT

Follow the instructions below to disable your account. When you disable your account, you will

no longer be able to use your User ID to access online services.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** link on the Business Services Online Welcome page.

**STEP 3:** Under the Existing User? column, enter your User ID and password (**for AR, IRPA,**

**and CBSV only**). Read the terms stated under the User Certification heading. You

must agree to these conditions by checking the “I have read & agree to these terms.”

checkbox to proceed. Select the **Log In** button. The system displays the Business

Services Online Main Menu page. (To return to the Business Services Online Welcome

page, select the BSO Welcome link on the page footer.)

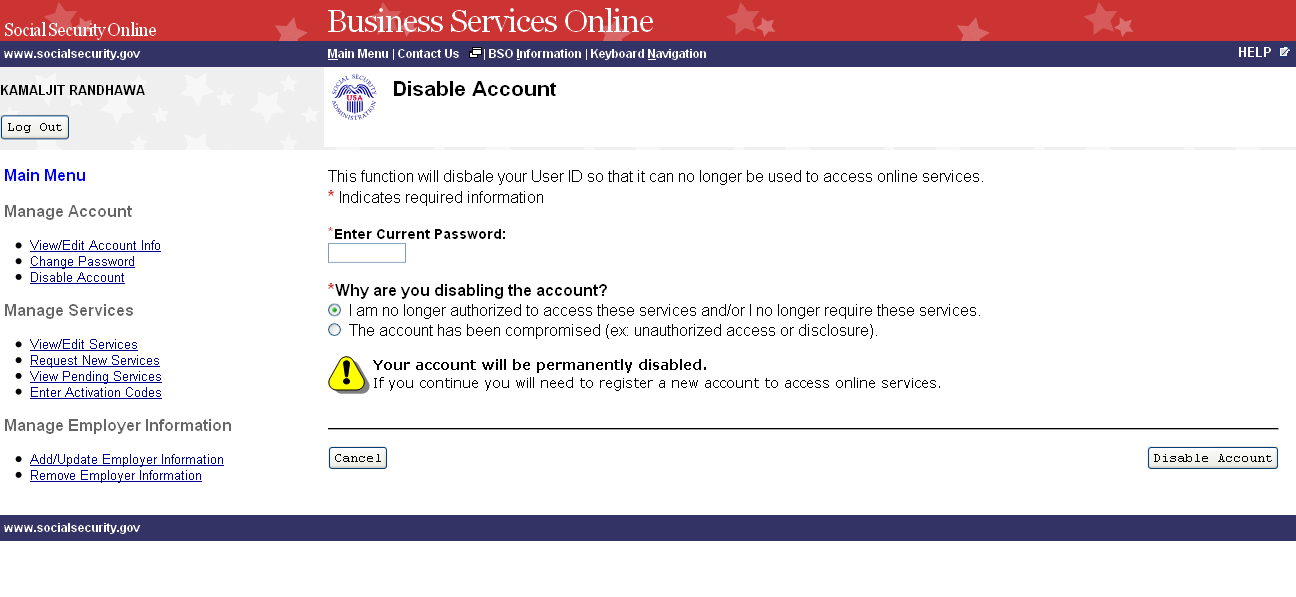
**NOTE**

*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 4:** Under the Manage Account section of the left navigation panel, select the Disable

Account link. The systemdisplays the **Disable Account** page.



**STEP 5:** Enter your password in the Enter Current Password field and select the radio button

beside the reason for disabling your User ID. Select the **Disable Account** button. The

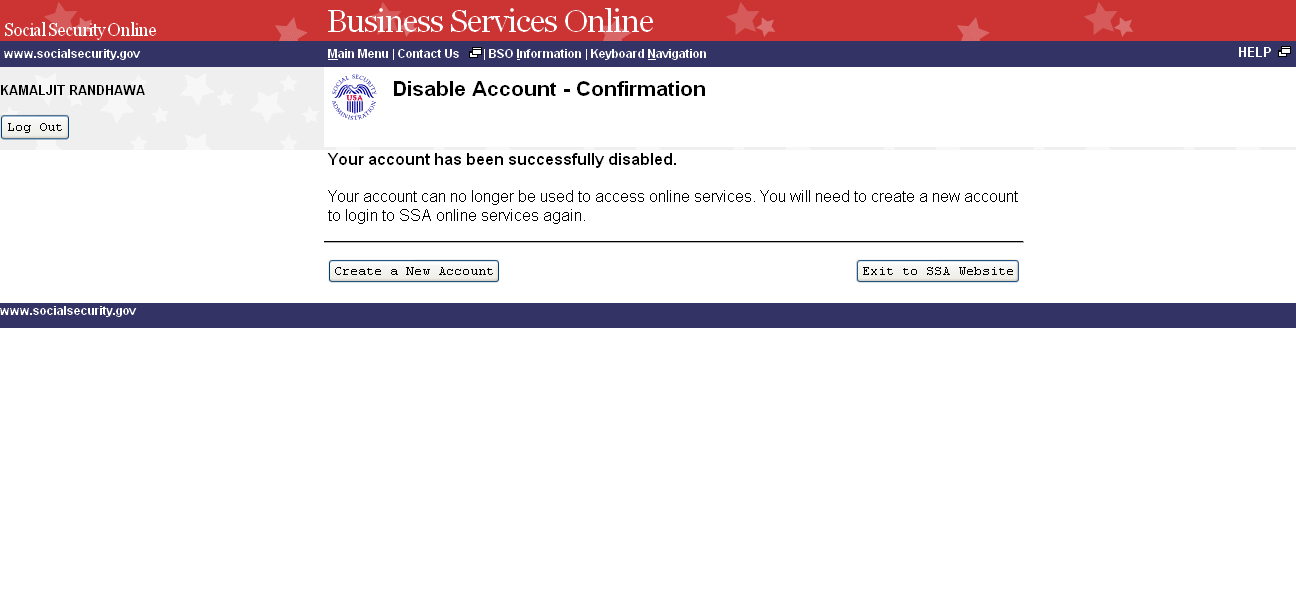
system displays the Disable Account – Confirmation page. (To return to the Business

Services Online Main Menu without disabling your user id, select the **Cancel** button.)

**NOTE**

***If you select the Disable Account button, your account will be permanently disabled.***

***You will need to register a new account to access online services.***



**STEP 6:** Select the **Exit to SSA Website** button to go to the Social Security Online page. To

register a new account to access online services, select the **Create a New Account**

button.

## LESSON 8: REMOVE ACCESS TO BSO SERVICES

Follow the instructions below to remove access to one or more BSO services. Use this option if

you no longer need to use a service(s) in BSO.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** link on the Business Services Online Welcome page.

**STEP 3:** Under the Existing User? column, enter your User ID and password (**for AR, CBSV,**

**and IRPA only**). Read the terms stated under the User Certification heading. You must

agree to these conditions by checking the “I have read & agree to these terms.”

checkbox to proceed. Select the **Log In** button. The system displays the Business

Services Online Main Menu page. (To return to the Business Services Online Welcome

page, select the BSO Welcome link in the page footer.)

**NOTE**

*The menu selection on your BSO Main Menu is unique to you and presents only the*

*applications and services to which you have access.*



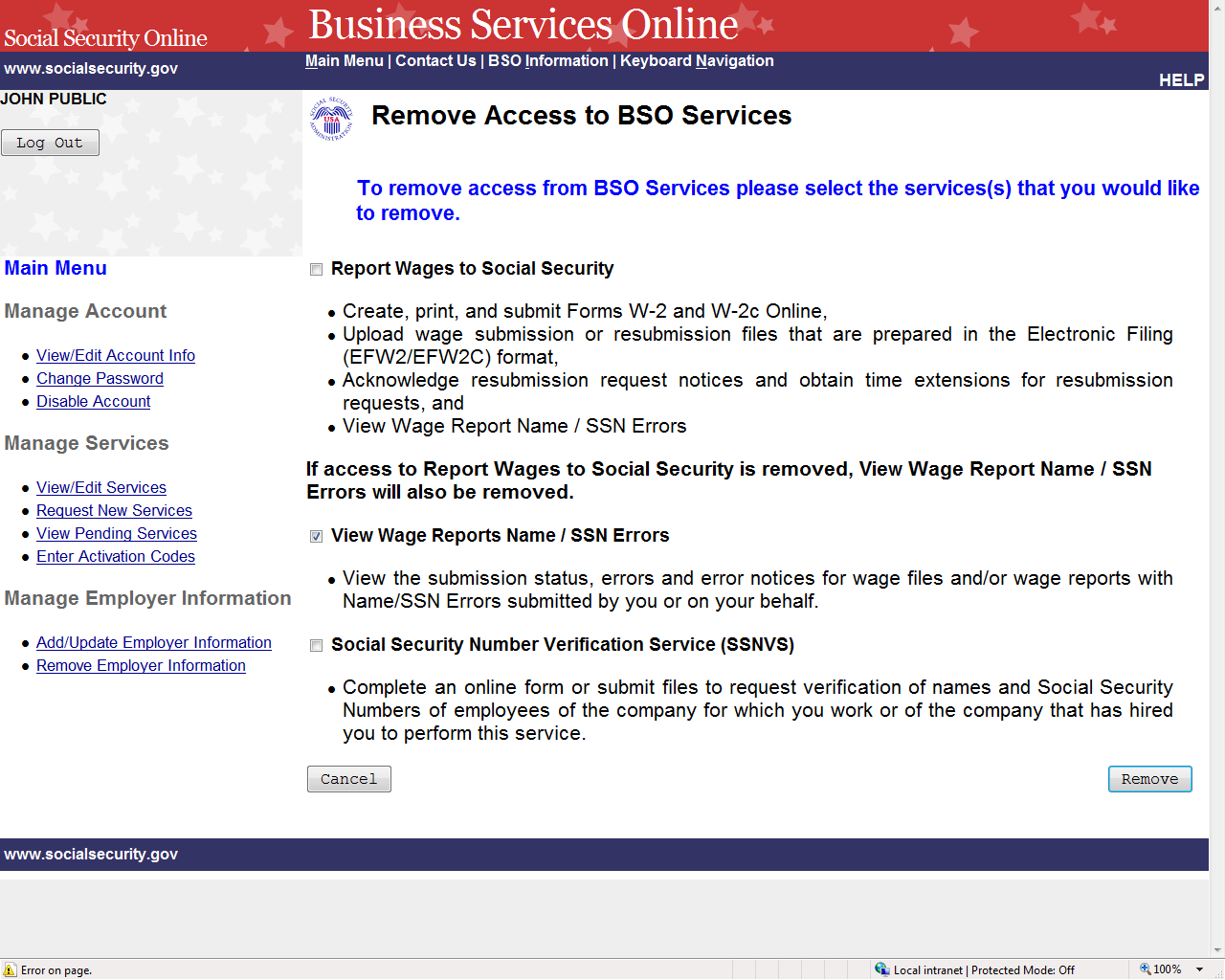
**STEP 4:** Under the Manage Services section of the left navigation panel, select the View/Edit

Services link. The system displaysthe Remove Access to BSO Services page. This

page lists the services to which you currently have access. (To return to the Business

Services Online Main Menu, select the BSO Main Menu link in the second line of the

page header.)



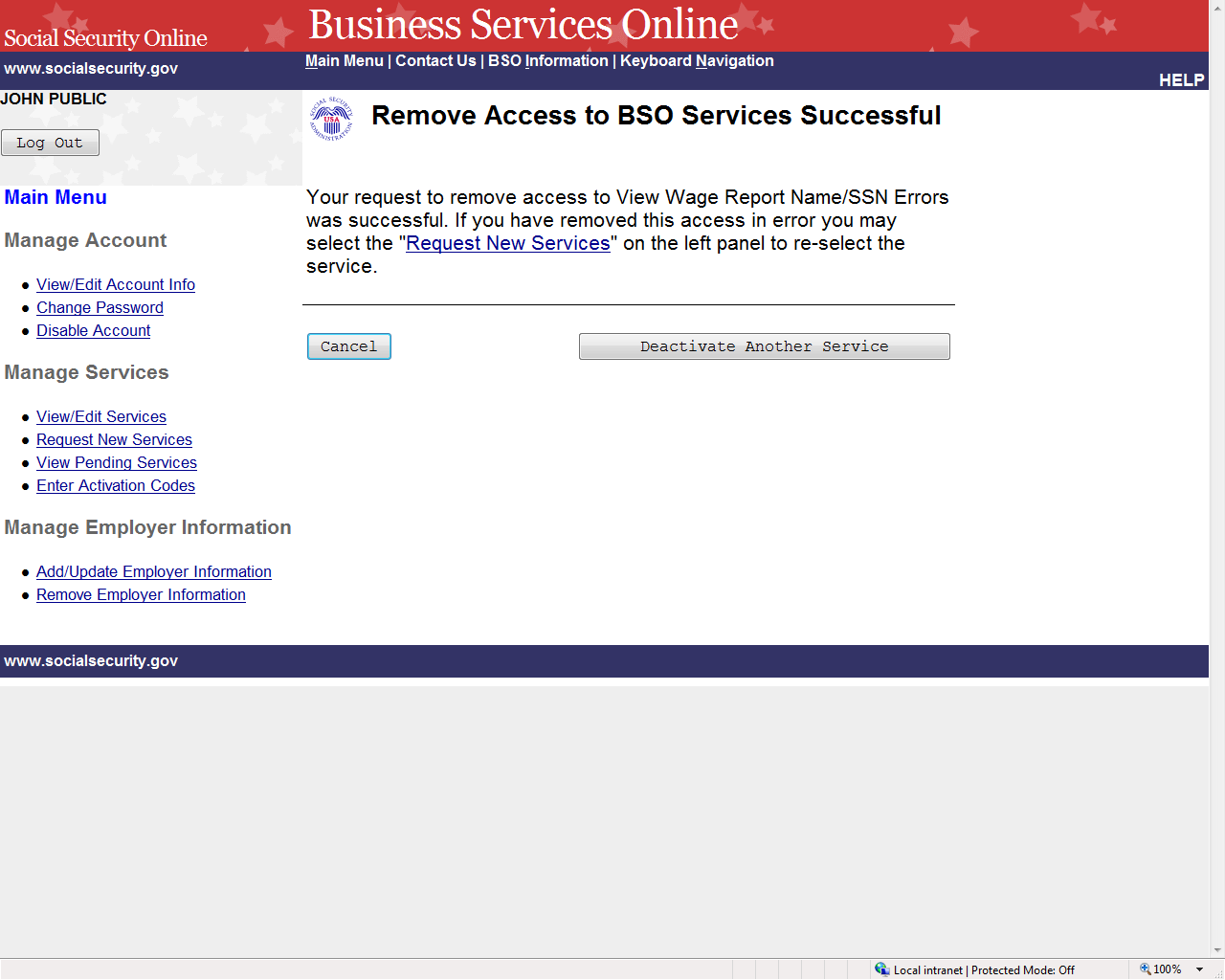
**STEP 5:** Select the checkbox(es) of the service(s) you wish to remove and select the **Remove**

button. The system displays the Remove Access to BSO Services Successful page.

(Select the **Cancel** button to return to the Business Services Online Main Menu without

removing any services. To return to the Business Services Online Main Menu, select

the BSO Main Menu link in the second line of the page header.)



**STEP 6:** Select the **Deactivate Another Service** button to return to the Remove Access to BSO

Services page. Select the **Cancel** button to return to the Business Services Online Main

Menu.

## LESSON 9: REQUEST SERVICES SUITE FOR EMPLOYERS

Follow the instructions below to log in to request access to the SSA Services Suite for Employers.

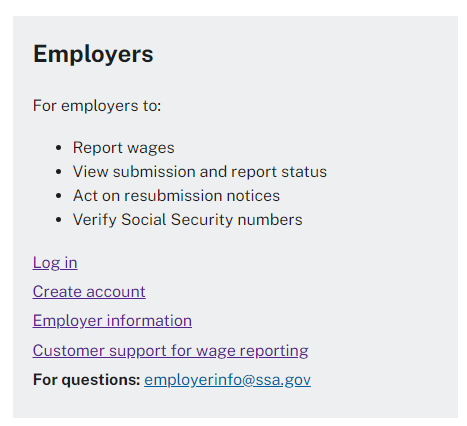
Note that the request for this suite can be combined with requests for other services. For guidance

in accessing a different service(s), refer to another lesson(s) in this Tutorial that specifically

addresses the service(s).

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select “Log in” from the “Employers” box.



**STEP 3:** Select one of the options below to sign in.

**Create an Account or Sign In
Sign in with LOGIN.GOV
Sign in with ID.me
Learn more
Sign in with Social Security Username
For accounts created before September 18, 2021
? Don't know which option to sign in with?**

**NOTE**

*The menu selection on your BSO Main Menu is unique to you and presents only the*

*applications and services to which you have access. Once the credentialing and*

*authentication process has been completed, current BSO User ID(s) will be associated*

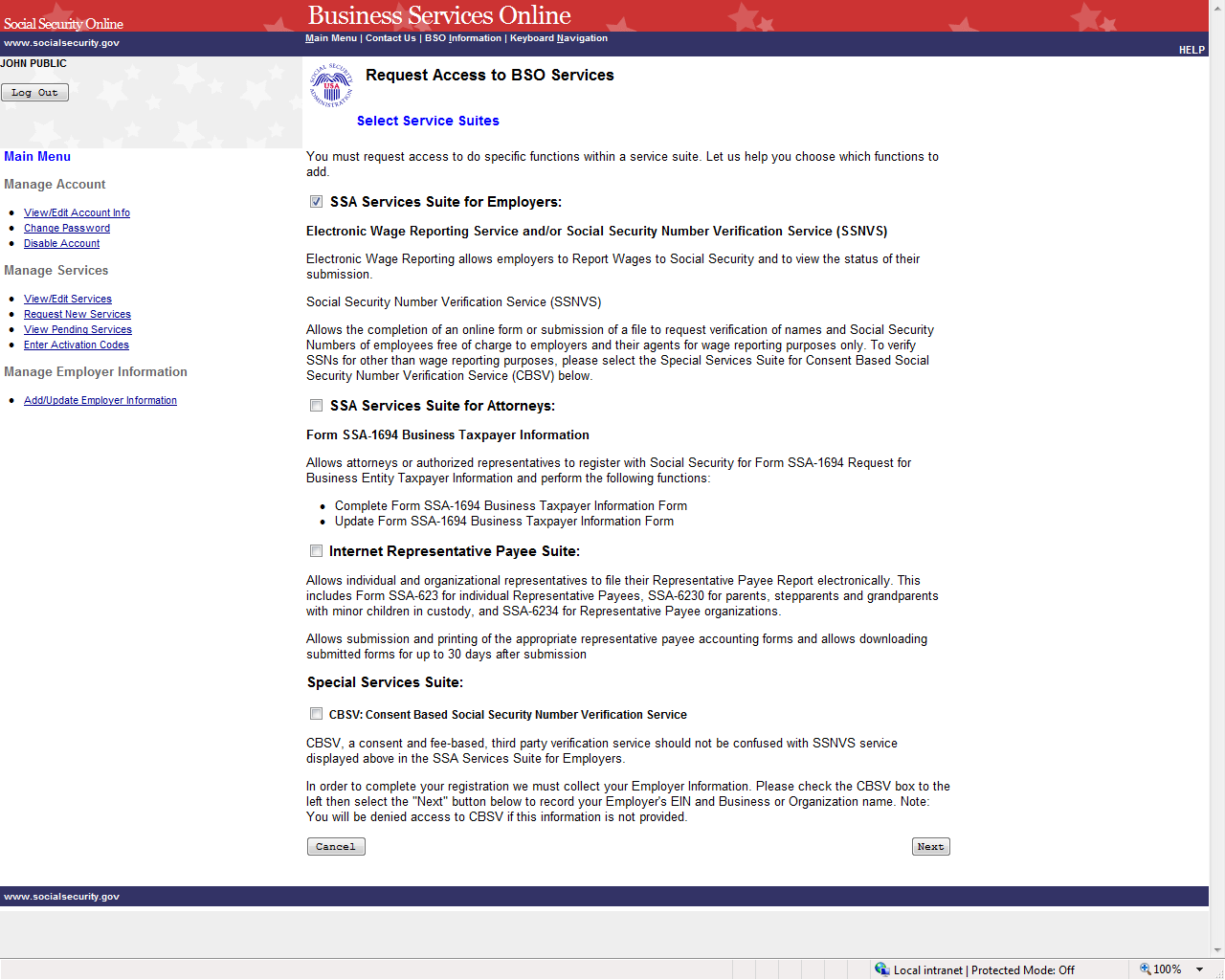
*with your new credential.*



**STEP 4:** Select the Request New Services link in the Main Menu or the left navigation panel.

The system displays the Request Access to Services page. (To return to the Business

Services Online Welcome page, select the **Logout** button.)



**STEP 5:** Continue with this lesson if you wish to request access to the Suite for Employers. If

a different or additional suite(s) of services is needed, refer to another lesson that

specifically addresses requesting that suite.

Check the checkbox saying “SSA Services Suite for Employers:” and select the **Next**

button.

* If Employer information has not been entered, the Request Access to BSO

Services page is re-displayed with the message “Employer Information is

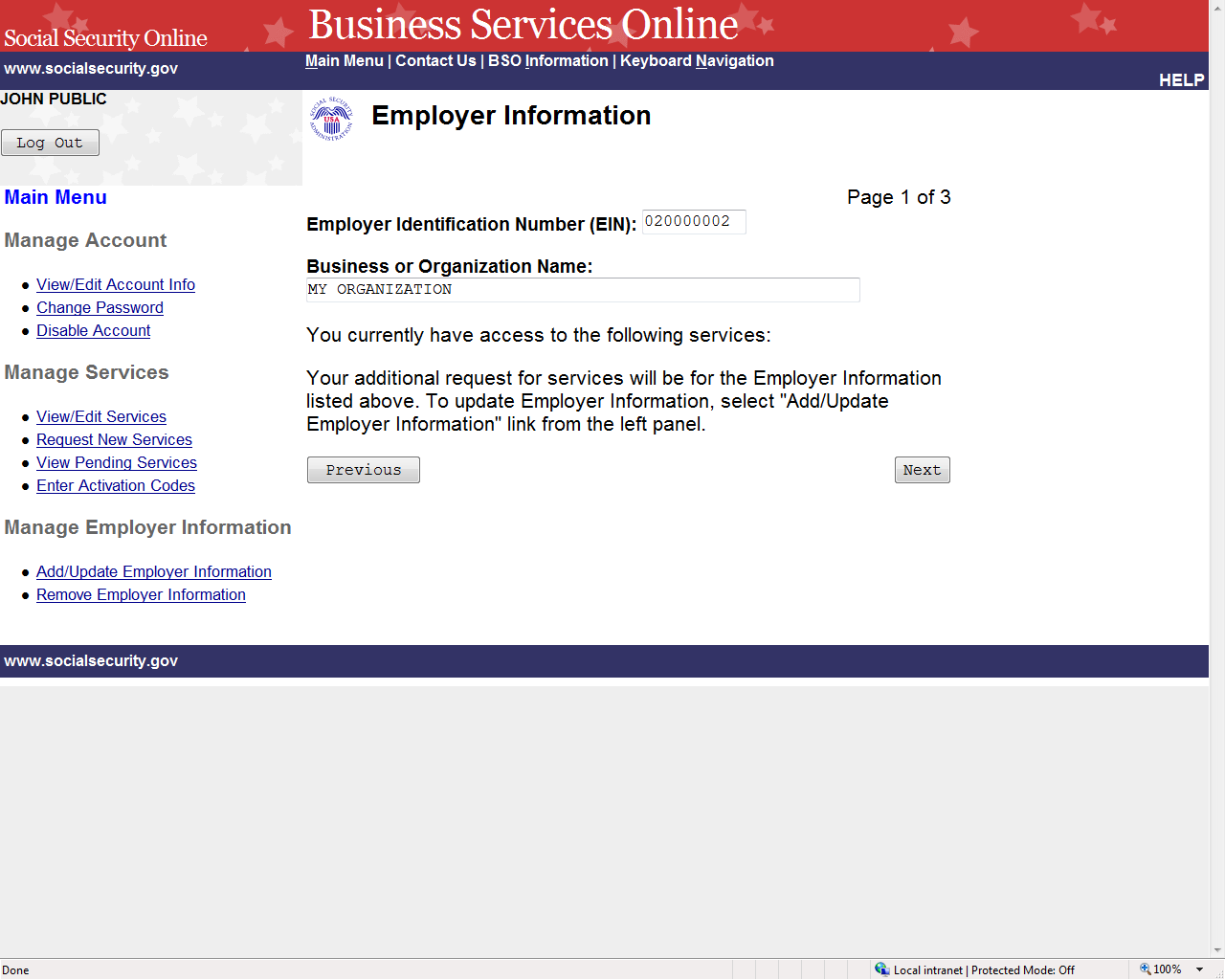
required for the selected suite(s). Please select this link Add Your Employer

Information to continue.”

* If Employer information has already been entered, the system displays the

Adding Services Wizard pages for the suite(s) of services you selected.   
  
(To return to the Business Services Online Main Menu page, select the **Cancel**

button.)



**STEP 6:**  The Employer Identification Number (EIN) and Business or Organization name

associated to your User ID will be displayed. The services listed are only the ones to

which you have access. Select the Next button to continue. The system displays the

Report Wages to Social Security page of the adding services wizard. (Select the

Previous button at the bottom of the page to return to the Request Access to BSO

Services page. To return to the Business Services Online Main Menu, select Main

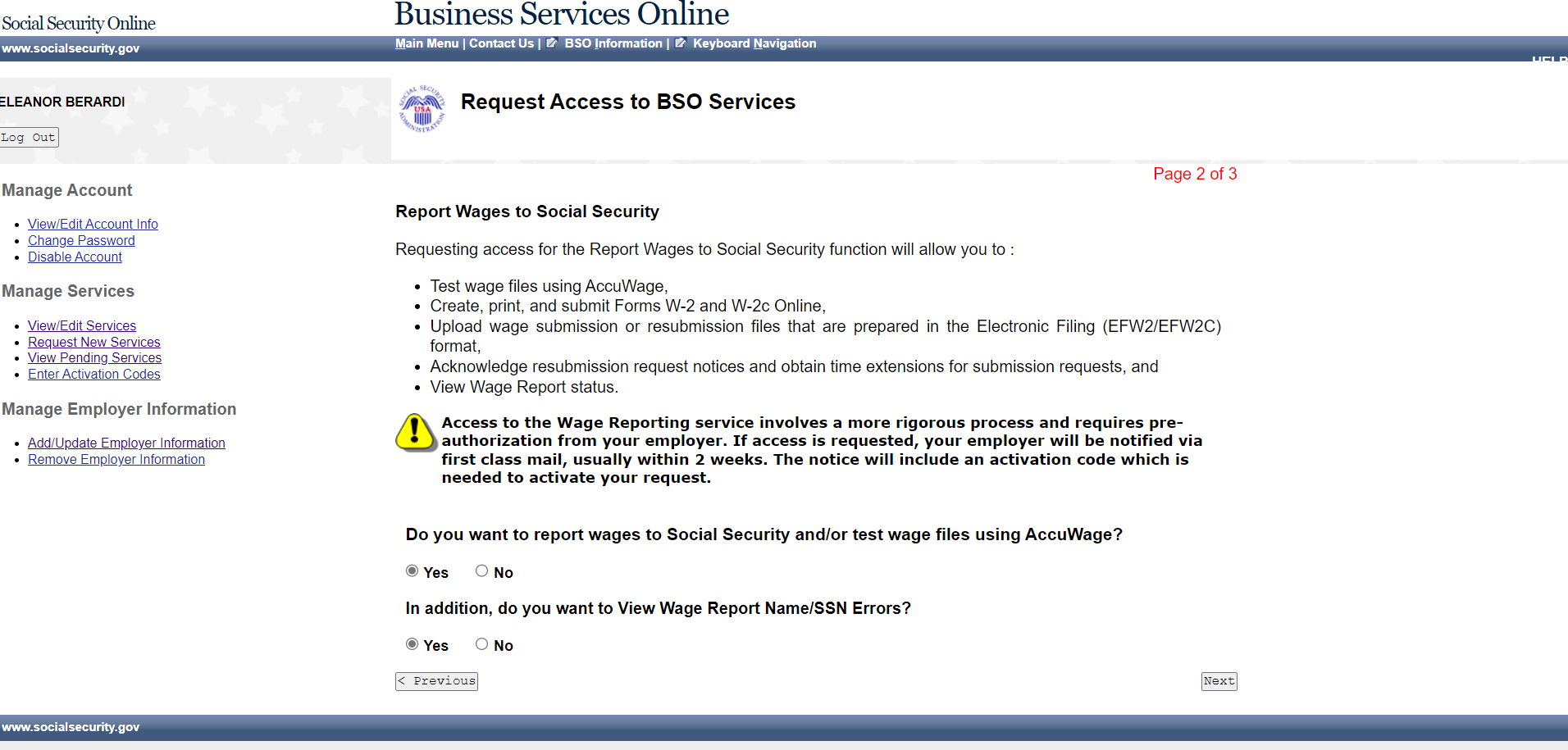
Menu on the second line of the page header.)

**PLEASE NOTE:** Access to the wage reporting service(s) involves a rigorous process and

requires pre-authorization from your employer. If access is requested, your employer will be

notified via first class mail, usually within 2 weeks. The notice will include an activation code

which is needed to activate your request.



**STEP 7:**  Request access to any service requires preauthorization from your employer. If access

is requested, your employer will be notified via first class mail, usually within 2 weeks. The

notice will include an activation code which is needed to activate your request.

If Report Wages is selected, the View Wage Report Name/SSN Errors may also be selected.

Select the Next button to continue.

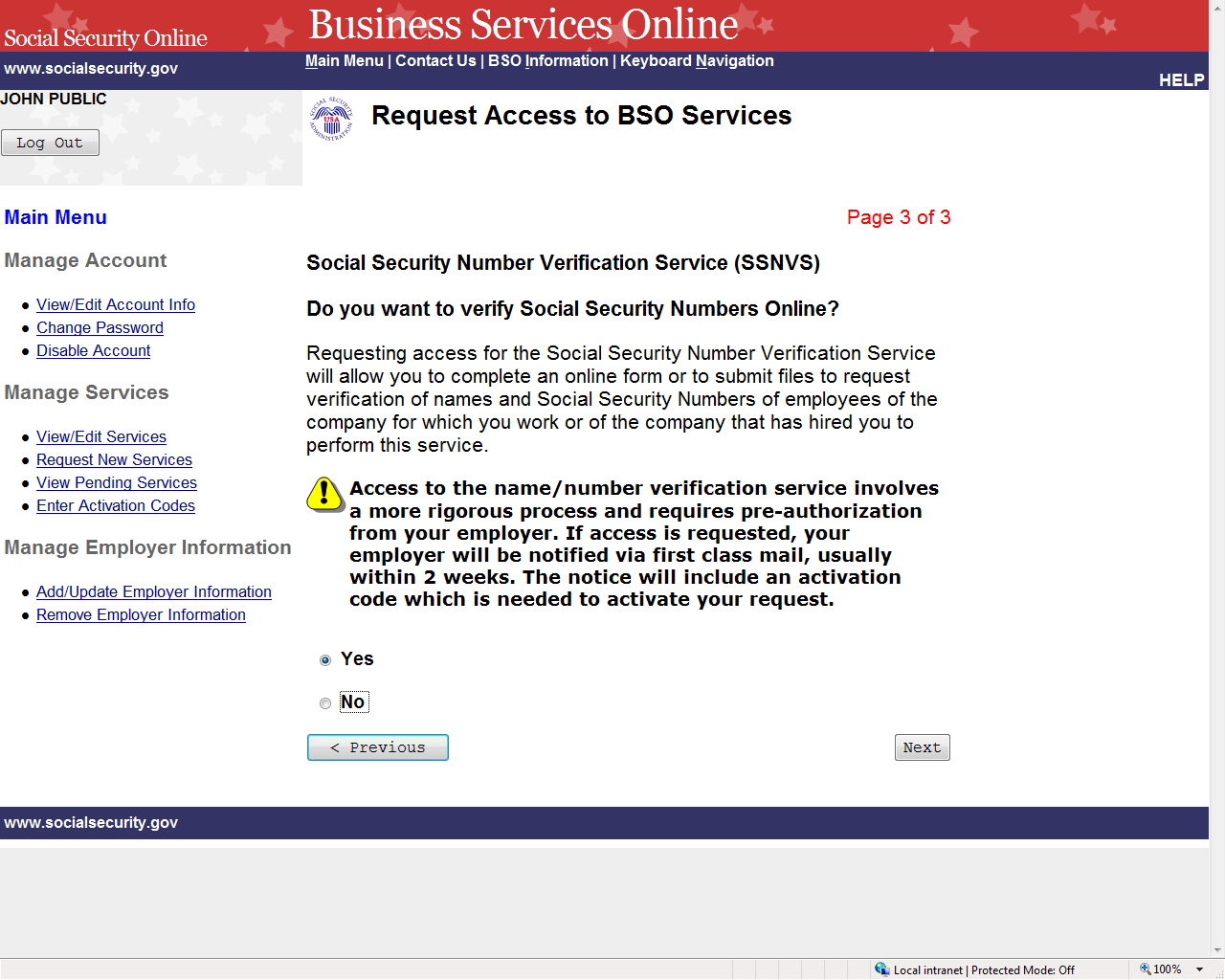
The system displays the Social Security Number Verification Service (SSNVS) page of the

adding services wizard. (To return to the Employer Information page of the adding services

wizard, select the Previous button at the bottom of the page. To return to the Business Services

Online Main Menu without adding services, select Main Menu on the second line of the page

header.)



**STEP 8****:** Request access to any service requires preauthorization from your employer. If access is

requested, your employer will be notified via first class mail, usually within 2 weeks. The notice

will include an activation code which is needed to activate your request.

Request access to Social Security Number Verification Service (SSNVS) by selecting the “Yes”

radio button and the Next button. The system displays the Request Summary page. (To return to

the Report Wages to Social Security page of the adding services wizard, select the Previous

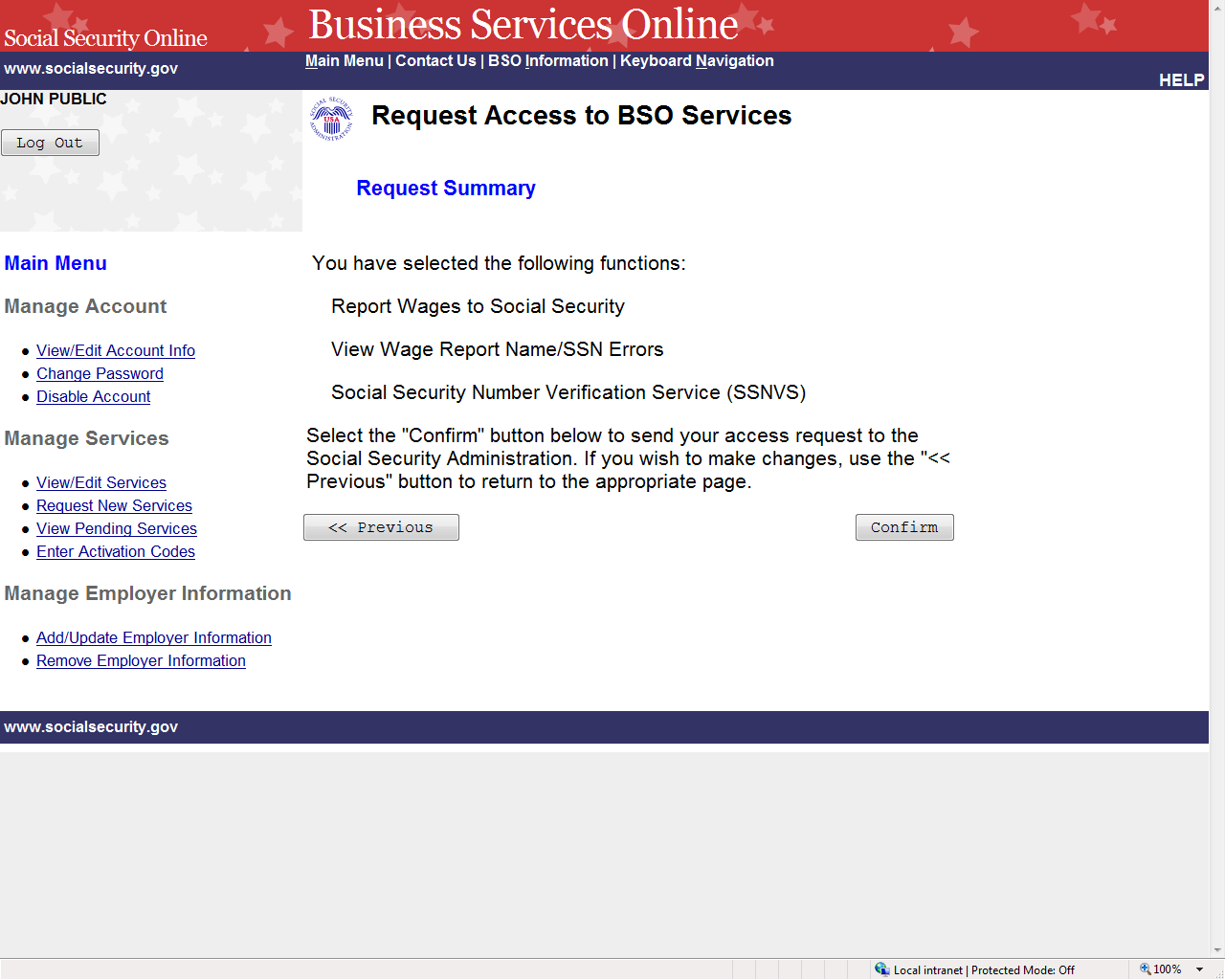
button at the bottom of the page. To return to the Business Services Online Main Menu without

adding services, select Main Menu on the second line of the page header.)

**NOTE**

*The functions listed on your Request Summary page is unique to you and presents only*

*the services which you have requested access.*



**STEP 9:** Review the list of functions and select the **Confirm** button to submit your access

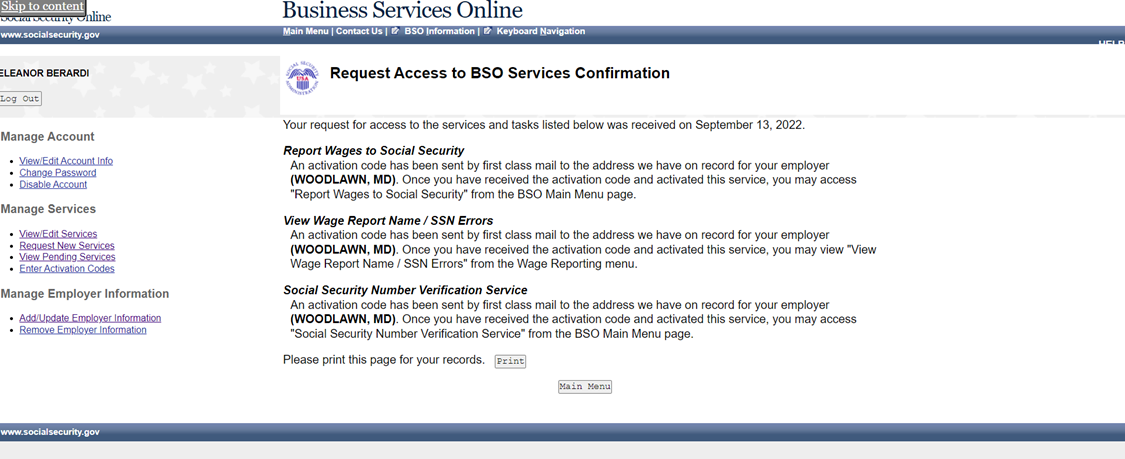
request. The system will display the Request Access to BSO Services Confirmation

page. (To return to the Social Security Number Verification Service (SSNVS) page of

the adding services wizard, select the **Previous** button at the bottom of the page. To

return to the Business Services Online Main Menu without adding services, select

**Main Menu** on the second line of the page header.)

****

**STEP 10:** The confirmation page shows what services were selected. Please print this page for

your records. Activation codes will be mailed to the address we have on record for

your employer (please note the city and state shown) and are usually received within

two weeks. To return to the Business Services Online Main Menu, select the **Main**

**Menu** button.

**NOTE**

***If the activation code(s) do not arrive at the address shown for your employer within***

***two weeks, you may re-request them. Refer to the Re-Request Activation Codes***

***lesson in this Tutorial for guidance.***

## LESSON 10: REQUEST SERVICES SUITE FOR ATTORNEYS

Follow the instructions below to request access to the SSA Services Suite for Attorneys. Note that

the request to this suite can be combined with requests to other services. For guidance in

accessing a different suite(s), refer to another lesson(s) in this Tutorial that specifically addresses

the service(s).

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Login** link on the Business Services Online Welcome page. The system

displays the Log in to Online Services page.



**STEP 3:** Under the Existing User? column, enter your User ID and password (**for AR, CBSV,**

**or IRPA only**). Read the terms stated under the User Certification heading. You must

agree to these conditions by checking the “I have read & agree to these terms.”

checkbox to proceed. Select the **Log In** button. The system displays the Business

Services Online Main Menu page. (To return to the Business Services Online Welcome

page, select the BSO Welcome link in the page footer.)

**NOTE**

***The menu selection on your BSO Main Menu is unique to you and presents only the***

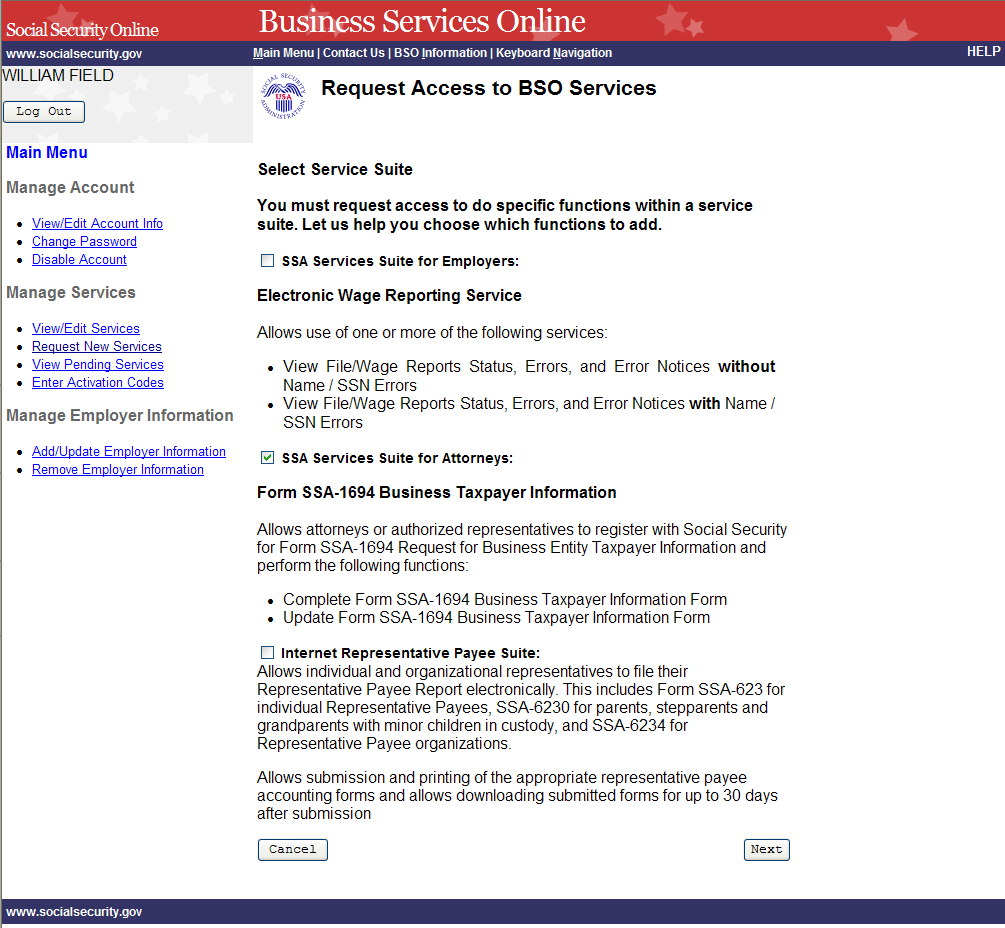
***applications and services to which you have access.***



**STEP 4:** Under the Manage Services section in the left navigation panel, select the Request

New Services link. The system displays the Request Access to BSO Services page. (To

return to the Business Services Online Welcome page, select the Logout button.)



**STEP 5:** Continue with this lesson if you wish to request access to the SSA Services Suite for

Attorneys. If a different or additional suite(s) of services is needed, refer to another

lesson that specifically addresses requesting that suite.

Check the checkbox saying “SSA Services Suite for Attorneys:” and select the **Next**

button.

* If Employer information has not been entered, the Request Access to BSO

Services page is re-displayed with the message “Employer Information is

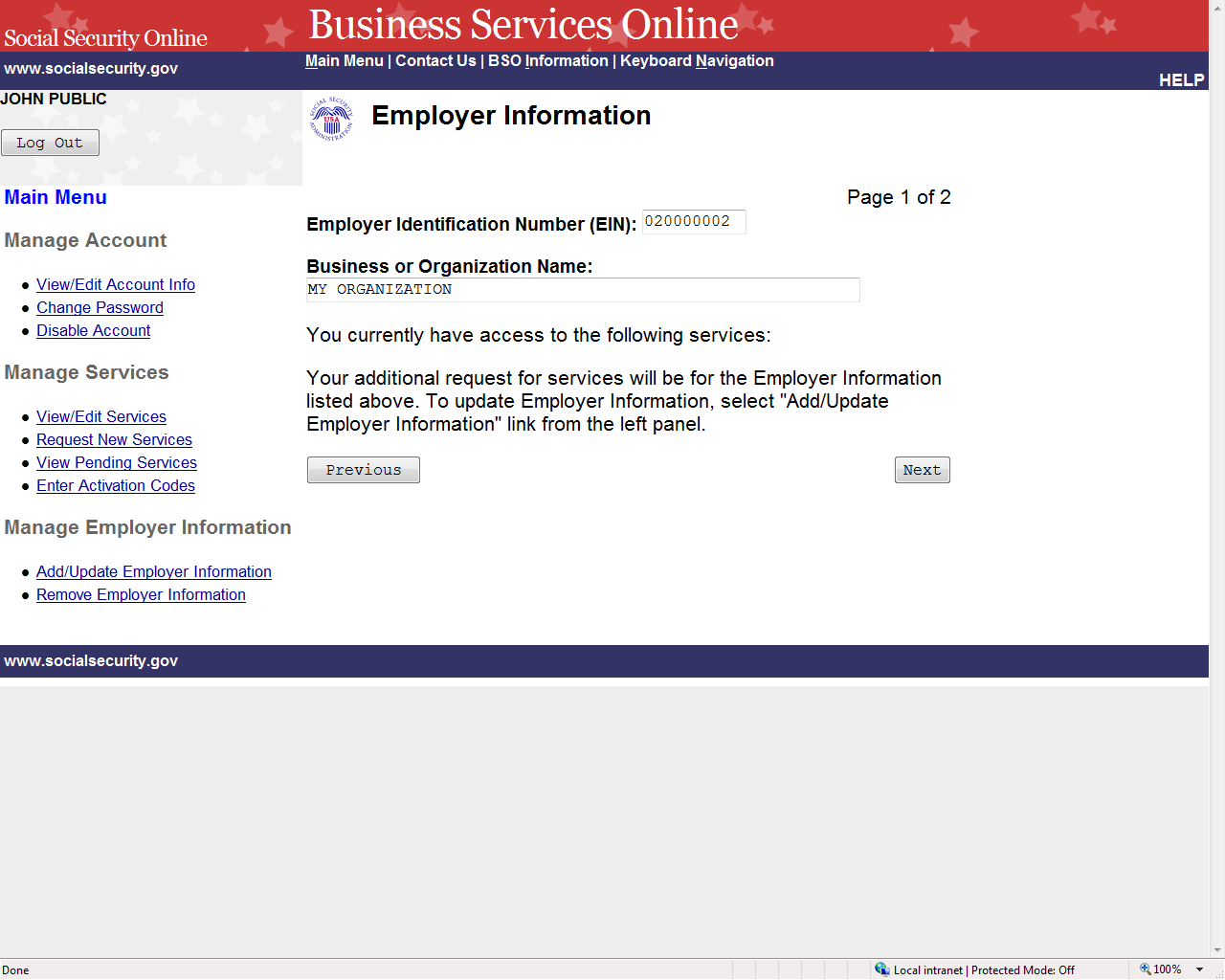
required for the selected suite(s). Please select this link Add Your Employer

Information to continue.”

* If Employer information has already been entered, the system displays the

Adding Services Wizard pages for the suite(s) of services you selected.   
  
(To return to the Business Services Online Main Menu page, select the **Cancel**

button.)

****

**STEP 6:** Review the employer information displayed.

* If the employer information displayed is incorrect, you may update your

employer information by selecting the Add/Update Employer Information link

on the left navigation panel.

* If the employer information displayed is correct, select the Next button. The

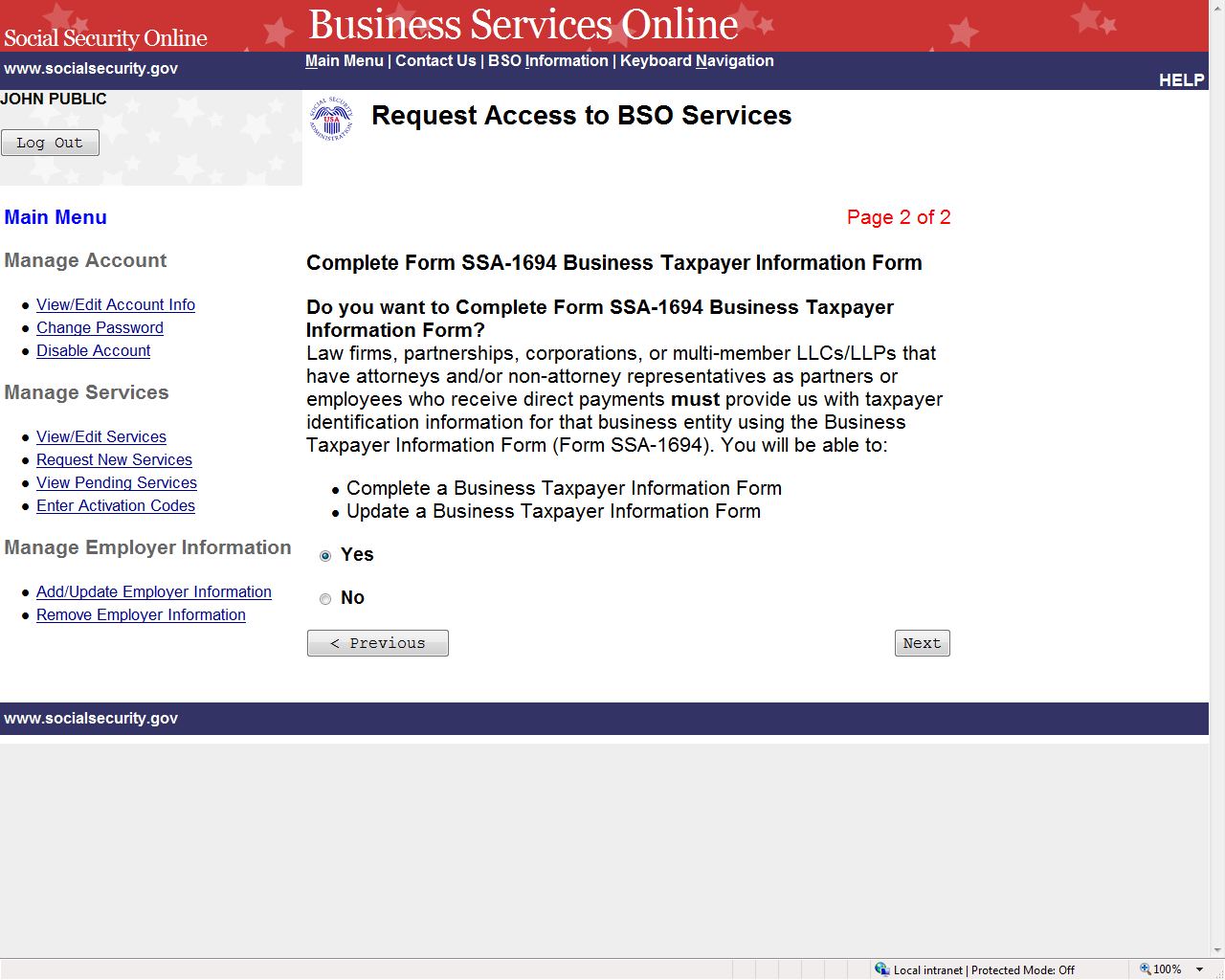
system displays the Complete Form SSA-1694 Business Taxpayer Information

Form page of the adding services wizard.

(Select the **Previous** button at the bottom of the page to return to the Request Access

to BSO Services page. To return to the Business Services Online Main Menu, select

**Main Menu** on the second line of the page header.)

****

**STEP 7:** Request access to Complete Form SSA-1694 Business Taxpayer Information Form by

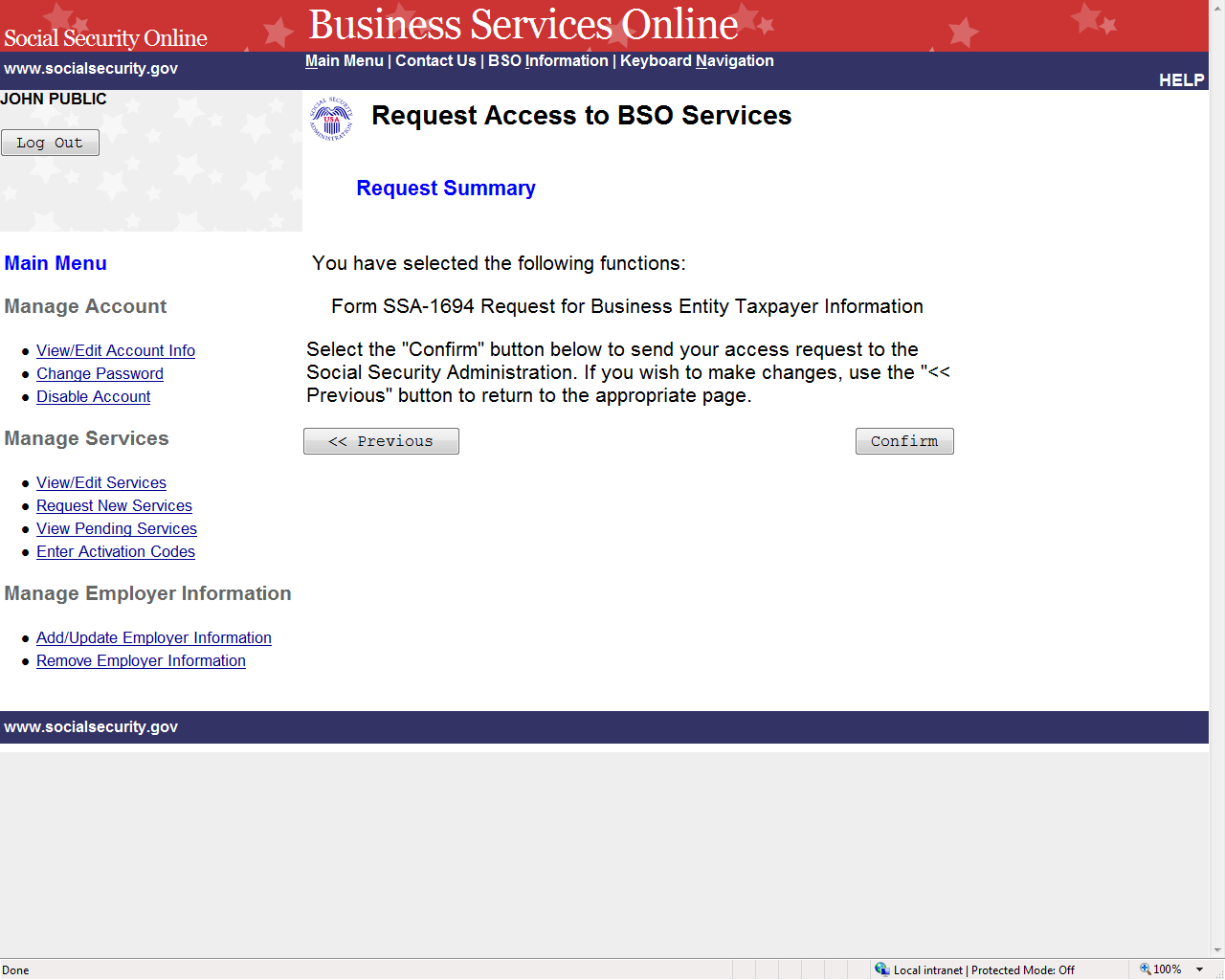
selecting the “Yes” radio button and the **Next** button. The system displays the Request

Summary page. (To return to the Employer Information page of the adding services

wizard, select the **Previous** button at the bottom of the page. To return to the Business

Services Online Main Menu without adding services, select **Main Menu** on the second

line of the page header.)

****

**STEP 8:** Review the list of services and select the **Confirm** button to submit your access

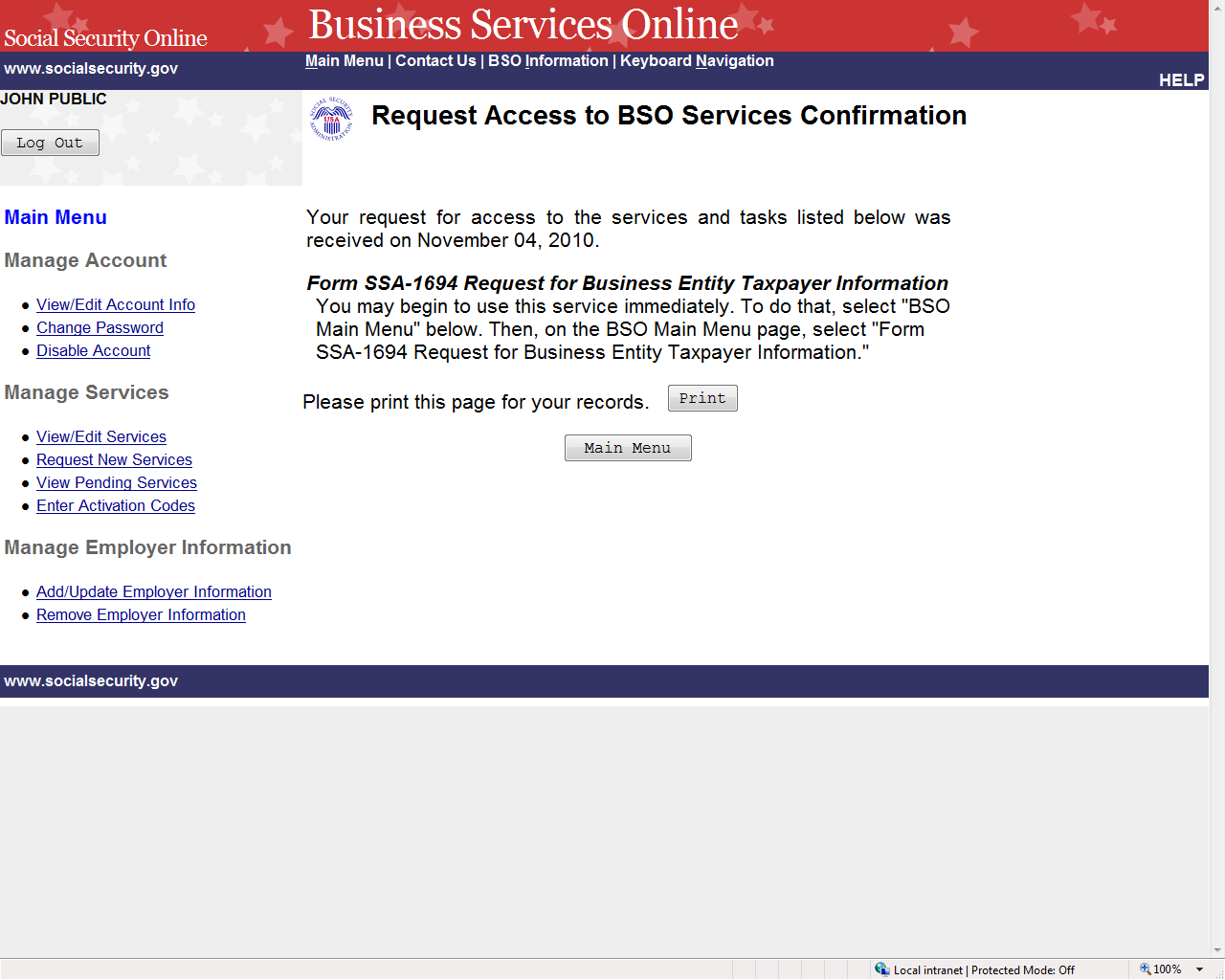
request. The system will display the Request Access to BSO Services Confirmation

page. (To return to the Complete Form SSA-1694 Business Taxpayer Information

Form page of the adding services wizard, select the **Previous** button at the bottom of

the page. To return to the Business Services Online Main Menu without adding

services, select **Main Menu** on the second line of the page header.)

****

**STEP 9:** The confirmation screen shows the selected service. A print button may be selected to

print the confirmation. To return to the Main Menu, select the **Main Menu** button.

## LESSON 11: REQUEST INTERNET REPRESENTATIVE PAYEE

**SUITE**

Follow the instructions below to request services in the Internet Representative Payee Suite. Note

that the request to this suite can be combined with requests to other services. For guidance in

accessing a different suite(s), refer to another lesson(s) in this Tutorial that specifically addresses

that service(s).

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Login** link on the Business Services Online Welcome page. The system

displays the Log in to Online Services page.



**STEP 3:** Under the Existing User? column, enter your User ID and password. Read the terms

stated under the User Certification heading. You must agree to these conditions by

checking the “I have read & agree to these terms.” checkbox to proceed. Select the **Log**

**In** button. The system displays the Business Services Online Main Menu page. (To

return to the Business Services Online Welcome page, select the BSO Welcome link on

the page footer.)

**NOTE**

***The menu selection on your BSO Main Menu is unique to you and presents only the***

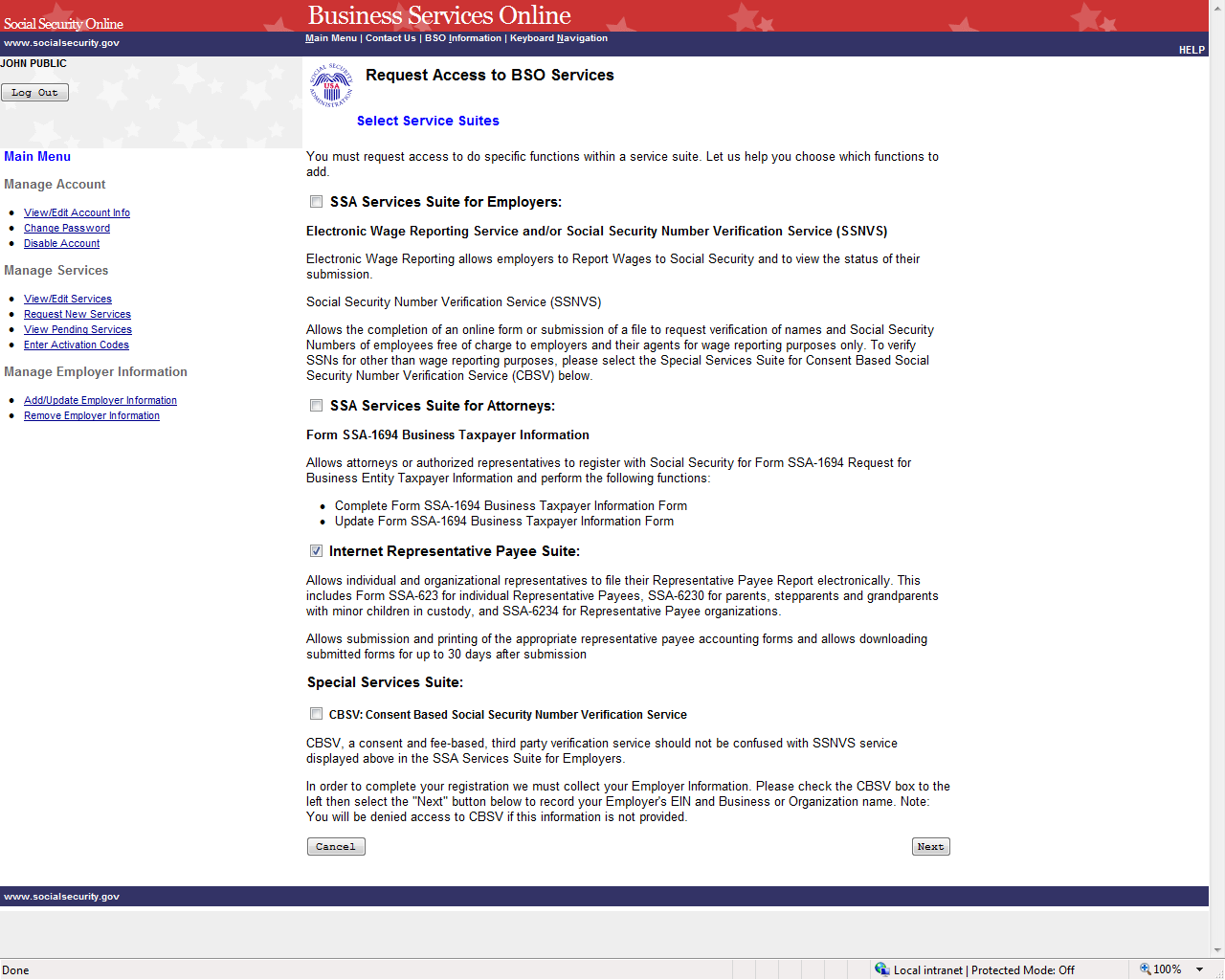
***applications and services to which you have access.***



**STEP 4:** Under the Manage Services section in the left navigation panel, select the Request

New Services link. The system displays the Request Access to BSO Services page. (To

return to the Business Services Online Welcome page, select the Logout button.)



**STEP 5:** Continue with this lesson if you wish to request access to the Internet Representative

Payee Suite. If a different or additional suite(s) of services is needed, refer to another

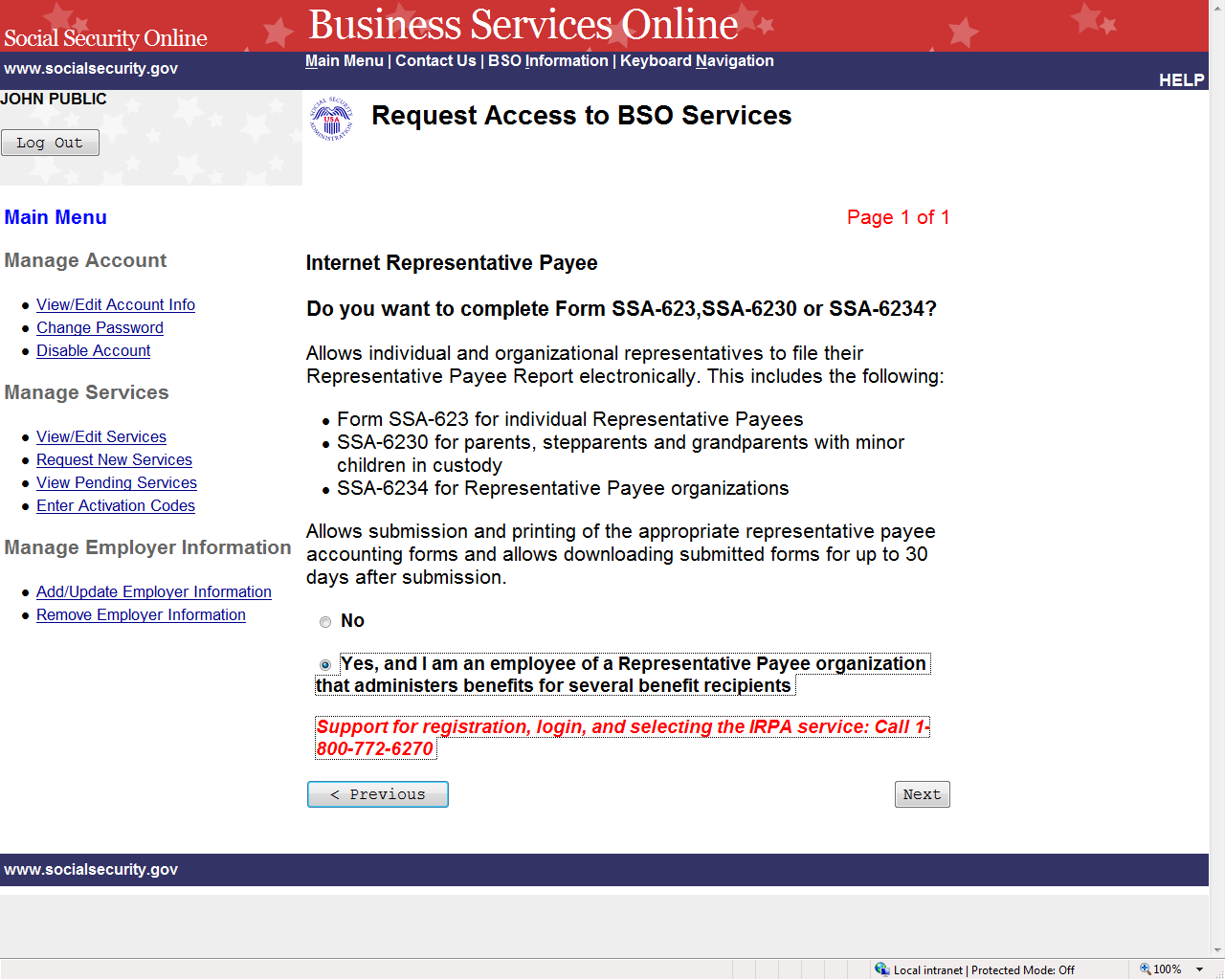
lesson that specifically addresses requesting that suite.

Check the checkbox saying, “Internet Representative Payee Suite:” and select the **Next**

button. The system displays the Internet Representative Payee page of the adding

services wizard. (To return to the Business Services Online Main Menu page, select the

**Cancel** button.)

****

**STEP 6:** Request access to complete the forms to file the Representative Payee Report

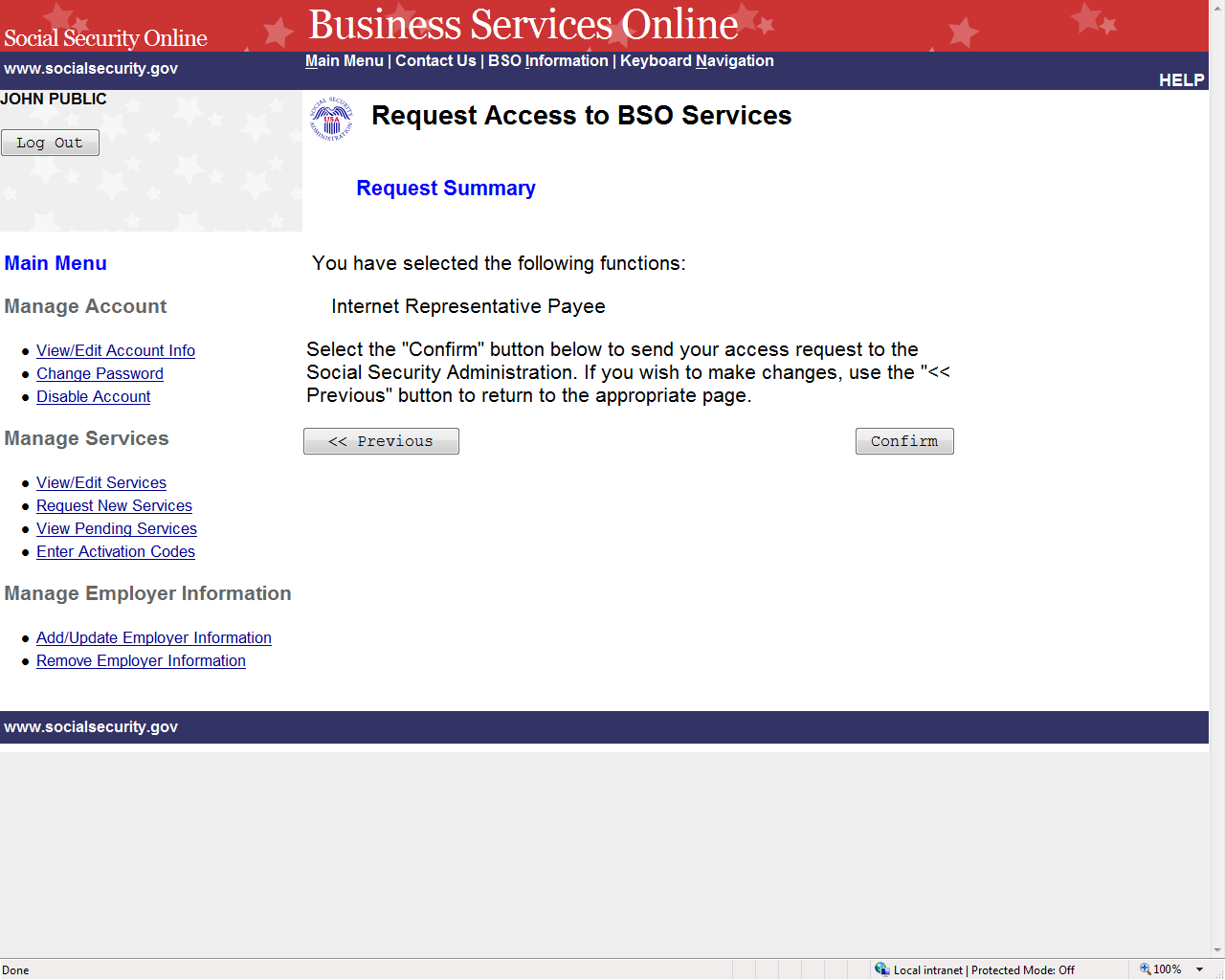
electronically by selecting the “Yes” radio button and the **Next** button. The system

displays the Request Summary page. (To return to the Select Access to BSO Services

page, select the **Previous** button at the bottom of the page. To return to the Business

Services Online Main Menu without adding services, select **Main Menu** on the second

line of the page header.)

****

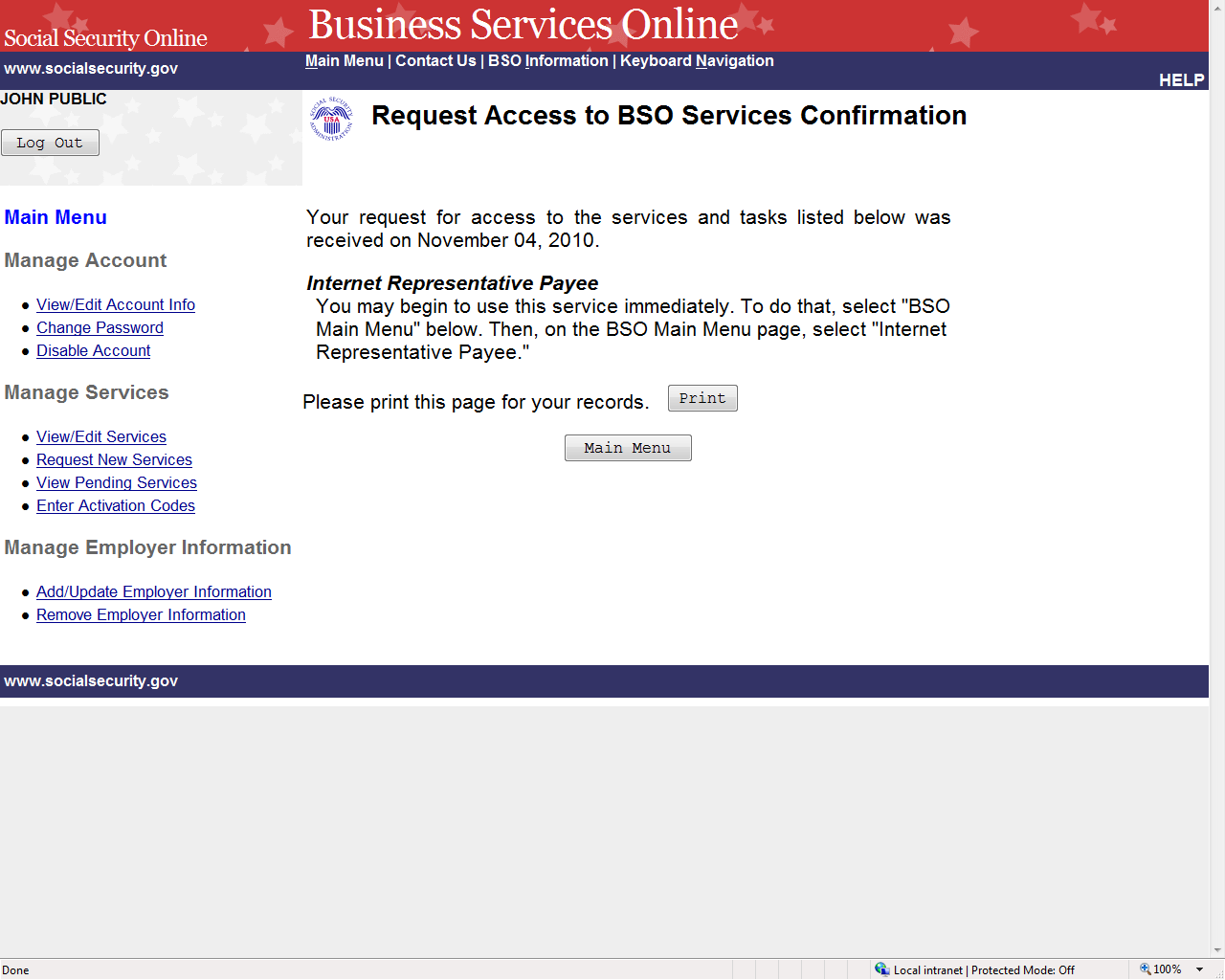
**STEP 7:** Select the **Confirm** button to submit your access request. The system will display the

Request Access to BSO Services Confirmation page. (To return to the Internet

Representative Payee page of the adding services wizard, select the **Previous** button at

the bottom of the page. To return to the Business Services Online Main Menu without

adding services, select **Main Menu** on the second line of the page header.)

****

**STEP 8:** The confirmation screen informs you that you may begin to use this service

immediately. To return to the Main Menu, select the **Main Menu** button.

## 

## LESSON 12: 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](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** link on the Business Services Online Welcome page. The system

displays the Log in to Online Services page.



**STEP 3:** Under the Existing User? column, enter your User ID and password. Read the terms

stated under the User Certification heading. You must agree to these conditions by

checking the “I have read & agree to these terms.” checkbox to proceed. Select the **Log**

**In** button. The system displays the Business Services Online Main Menu page. (To

return to the Business Services Online Welcome page, select the BSO Welcome link in

the page footer.)

**NOTE**

*The menu selection on your BSO Main Menu is unique to you and presents only the*

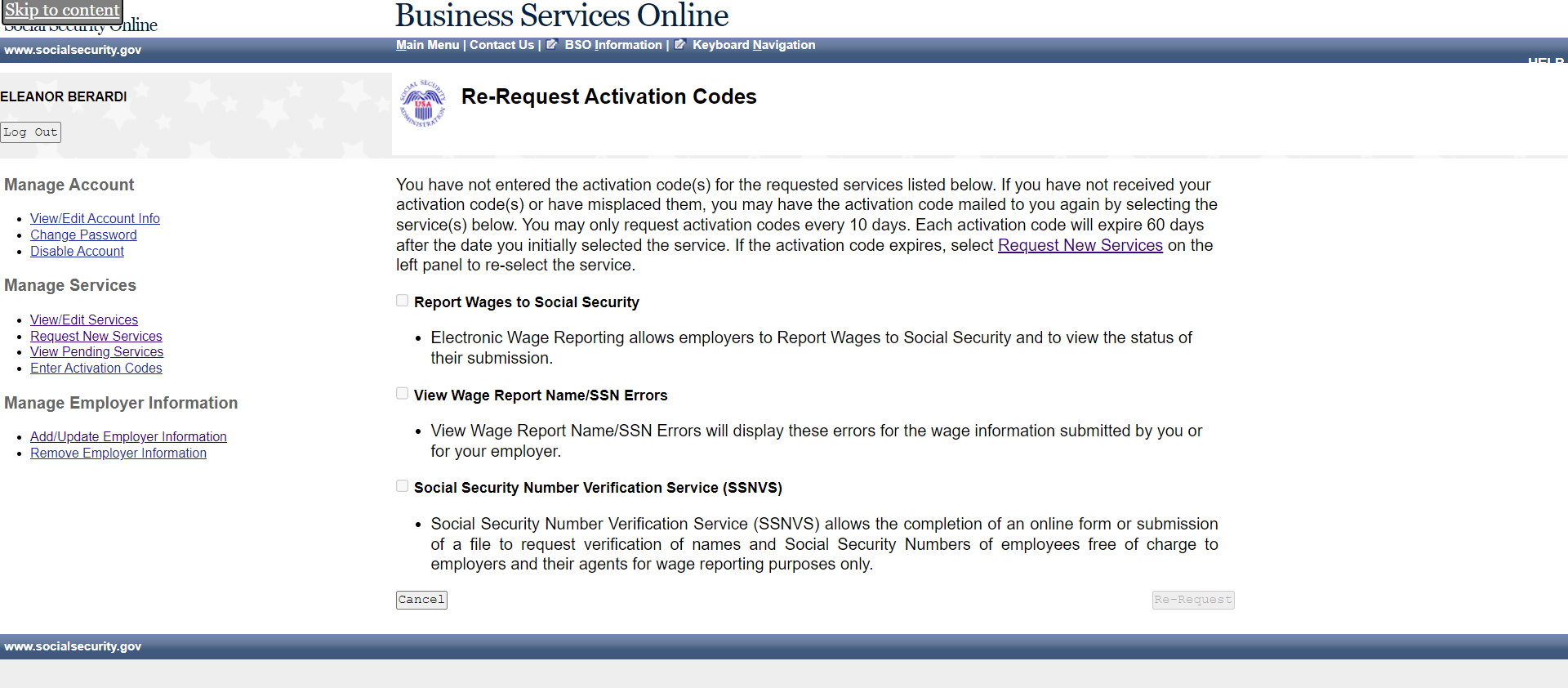
*applications and services to which you have access.*



**STEP 4:** Under the Manage Services section of the left navigation panel, select the View

Pending Services link. The system displaysthe Re-Request Activation Codes page.

This page lists the services for which you are awaiting activation codes.



**STEP 5:** The actions you can take at this time will depend on when you last requested access to

a service.

* If it has not been at least 10 days since you requested the access to the service(s),

you will not be able to re-request your activation code(s) at this time.

* If it has been more than 60 days since you requested the access to the service(s),

you will need to re-request access to the service(s) by selecting the Request

Access to BSO Services link in the first paragraph of the current page.

* If it has been between 10 and 60 days since you requested the access to the

service(s), you may select the checkbox(es) of the service(s) and select the **Re-**

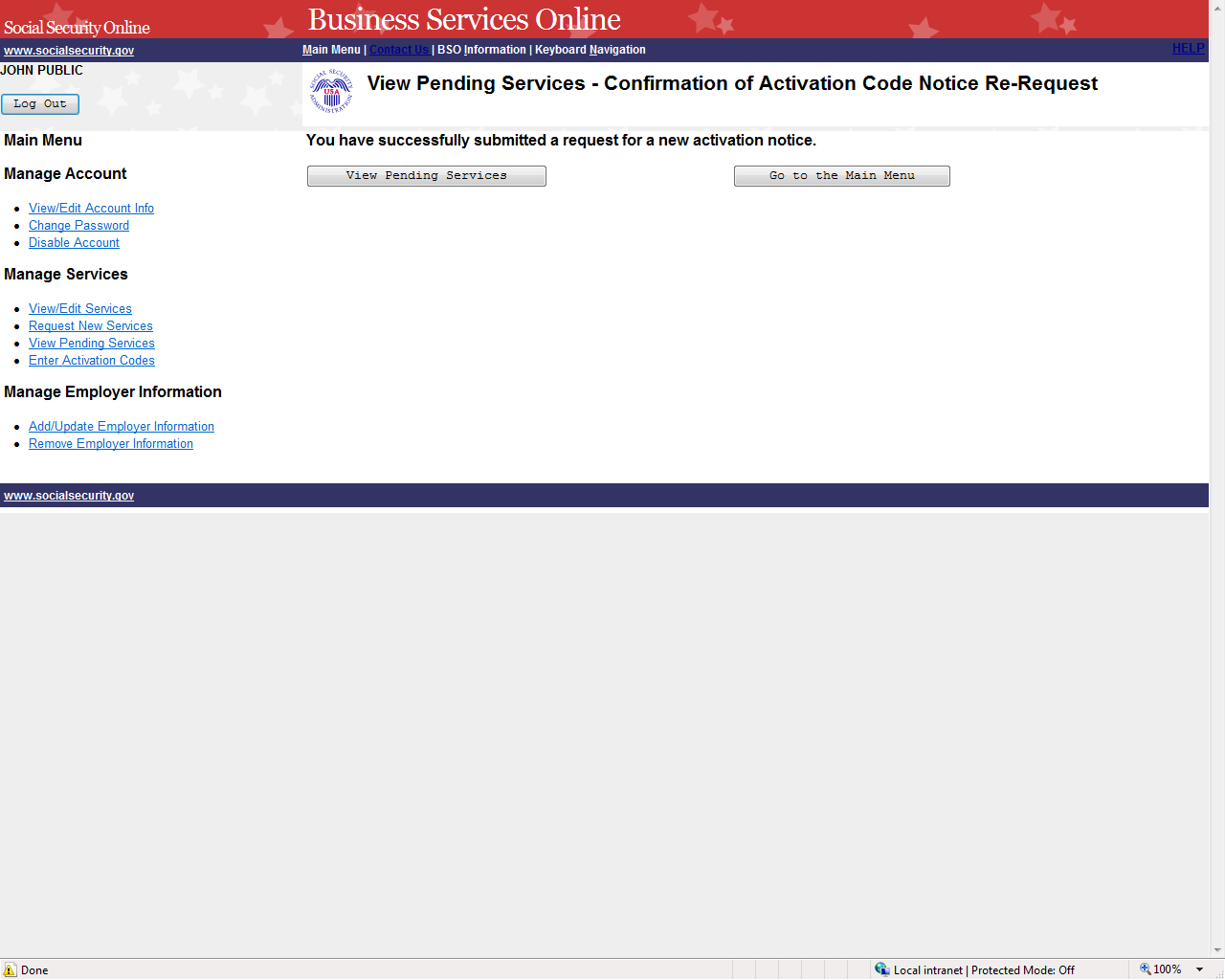
**Request** button. The system displays the View Pending Services – Confirmation

of Activation Code Notice Re-Request page.

(Select the **Cancel** button to return to the Business Services Online Main Menu without

re-requesting any activation codes. To return to the Business Services Online Main

Menu, select the BSO Main Menu link in the second line of the page header.)



**STEP 6:** Select the **View Pending Services** button to return to the Re-Request Activation

Codes page. To return to the Business Services Online Main Menu, select the **Go to**

**the Main Menu** button.

## LESSON 13: ENTER ACTIVATION CODE(S)

Follow the instructions below to enter the activation codes received by you directly or from your

employer. Certain services that you requested require you to enter an activation code before you

can use the online service.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log in** link on the Business Services Online Welcome page. The system

displays the Log in to Online Services page.

**STEP 3:** Under the Existing User? Column, enter your User ID and password (**for AR, CBSV,**

**and IRPA only**). Read the terms stated under the User Certification heading. You must

agree to these conditions by checking the “I have read & agree to these terms.”

Checkbox to proceed. Select the **Log In** button. The system displays the Business

Services Online Main Menu page. (To return to the Business Services Online Welcome

page, select the BSO Welcome link in the page footer.)

**NOTE**

***The menu selection on your BSO Main Menu is unique to you and presents only the***

***applications and services to which you have access.***



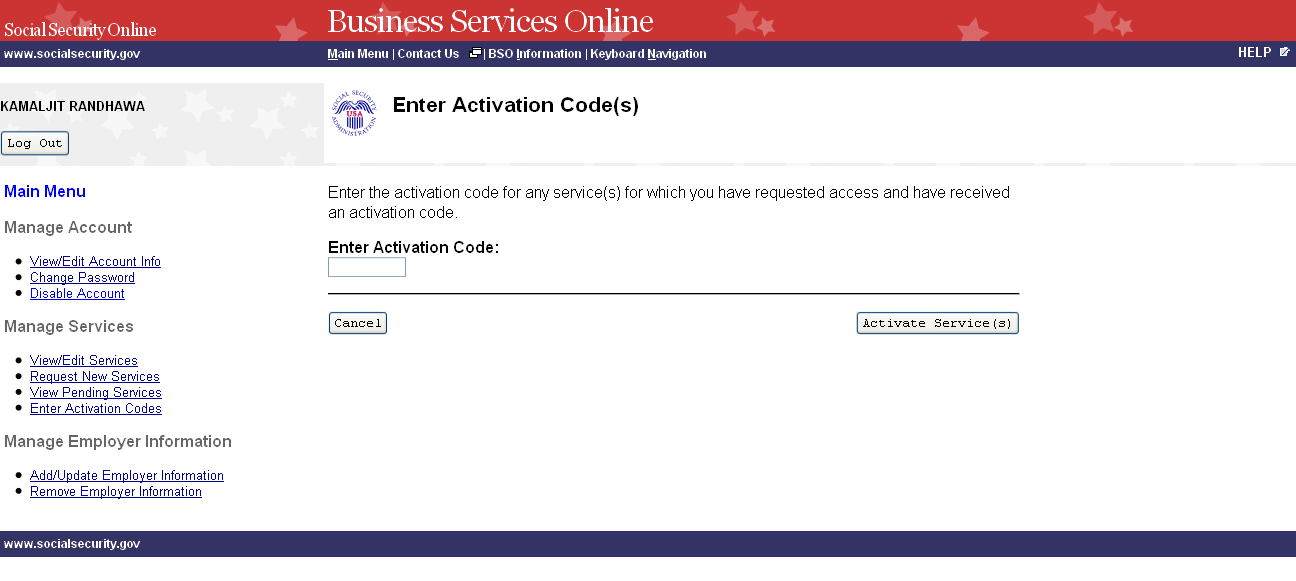
**STEP 4:** Select the Enter Activation Code(s) link on the left navigation panel. The system

displays the Enter Activation Code(s) page. (Select the **Cancel** button to return to the

Business Services Online Main Menu page without activating a service.)

**NOTE**

***If you have more than one activation code to enter, repeat Steps 4 and 5.***

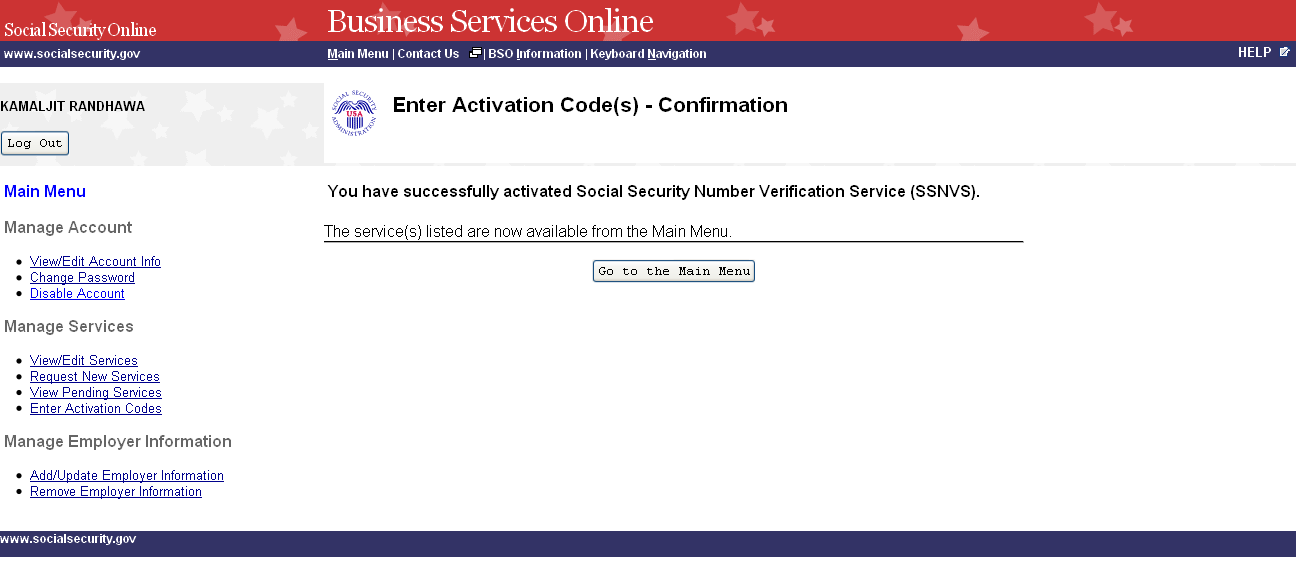


**STEP 5:** Enter the activation code in the Enter Activation Code field and select the **Activate**

**Service(s)** button. The system displays the Enter Activation Code(s) – Confirmation

page. (Select the **Cancel** button to return to the Business Services Online Main Menu

page without activating a service.)



**STEP 6:** Select the **Go to the Main Menu** button to return to the Business Services Online

Main Menu page. The activated service will be listed.

## LESSON 14: ADD EMPLOYER INFORMATION

Follow the instructions below to add employer information. Employer information is required in

order to request certain business services.

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



**STEP 3:** Under the Existing User? Column, enter your User ID and password (**for AR, CBSV,**

**and IRPA only**). Read the terms stated under the User Certification heading. You must

agree to these conditions by checking the “I have read & agree to these terms.”

checkbox to proceed. Select the **Log In** button. The system displays the Business

Services Online Main Menu page. (To return to the Business Services Online Welcome

page, select BSO Welcome link in the page footer.)

**NOTE**

*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 4:** Select the Add/Update Employer Information link from the left navigation panel. The

system displays the Employer Information Attestation page. (Select the Logout button to return

to the Business Services Online Welcome page.)

**NOTE**

*Certain services require Employer information to have been added before you request*

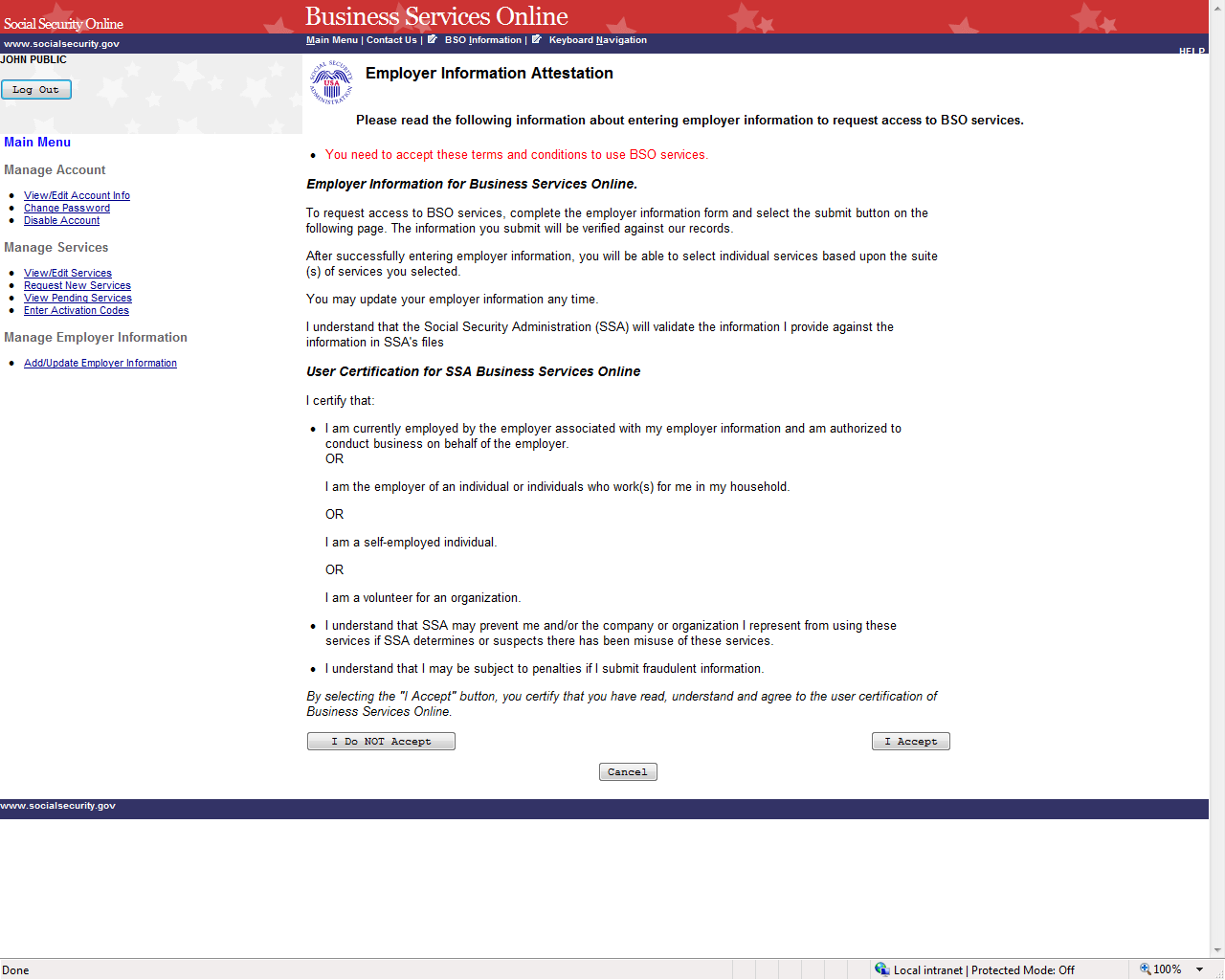
*the service. If you have not previously added Employer information, the Request Access*

*to BSO Services page is re-displayed with the message “*Employer Information is

required for the selected suite(s). Please select this link Add Your Employer

Information to continue*.” When you select the* *link, the system displays the Employer*

*Information Attestation page.*

****

**STEP 5:** Read the statements located under the User Certification for Business Services Online

heading. You must agree to these terms by selecting the **I Accept** button to proceed.

The system displays the Add Employer Information page.

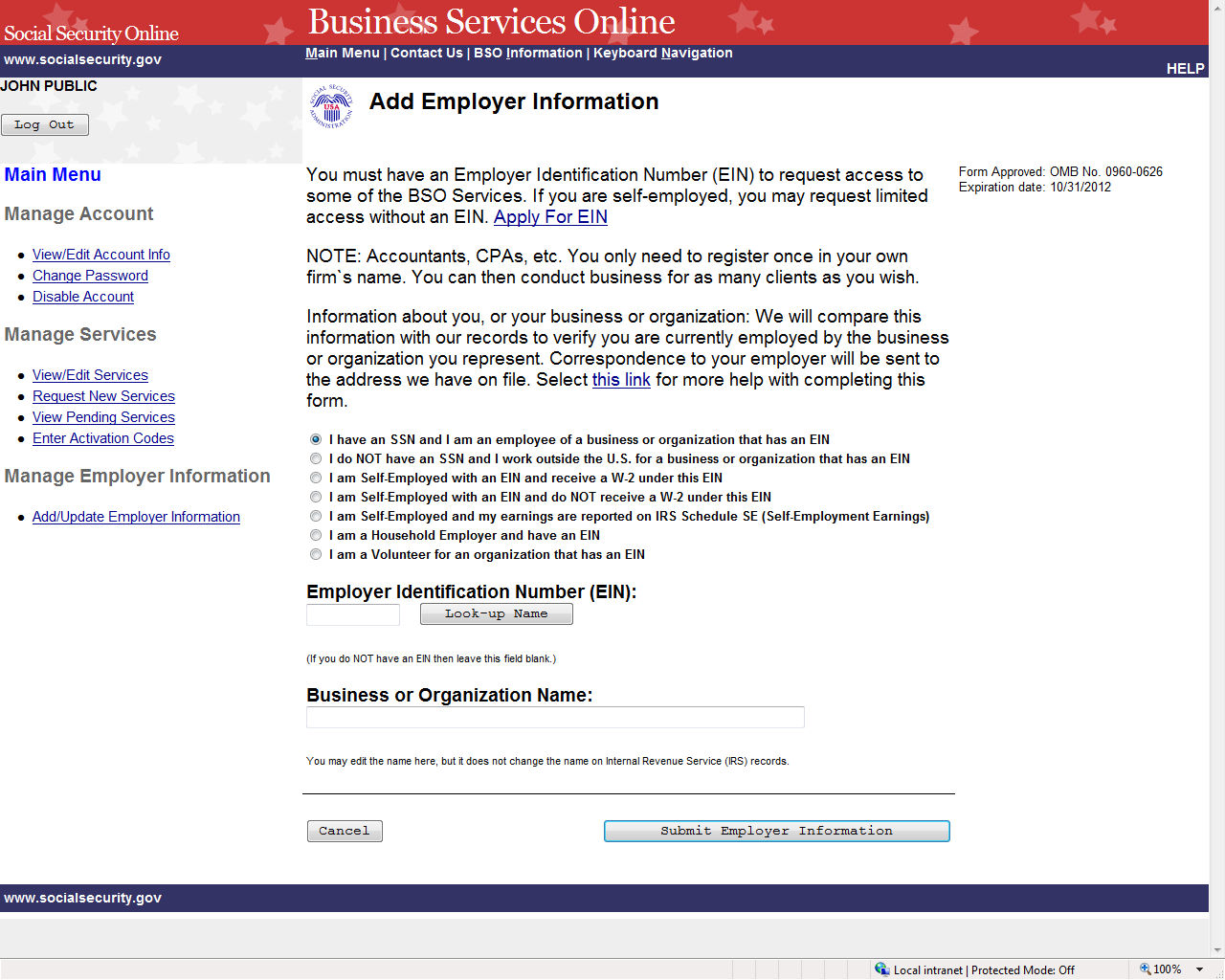
(Selecting the **I Do NOT Accept** button will display again the Employer Information

Attestation page with the message in red “You need to accept these terms and

conditions to use BSO services.”)

(Select the **Cancel** button to return to the Business Services Online Main Menu page.

To return to the BSO Welcome page, select the **Log Out** button.)

****

**STEP 6:** Select the radio button beside the description that best describes you and enter the

Employer Identification Number (EIN) and Business or Organization Name.

**TIPS**

* **Do not enter dashes in the EIN.**
* **If you do not have an EIN, leave the EIN field blank.**

**STEP 7:** The look-up button may be used to retrieve the name of the business or organization

that the IRS has provided to SSA to help you verify that the entered EIN is yours. You may edit

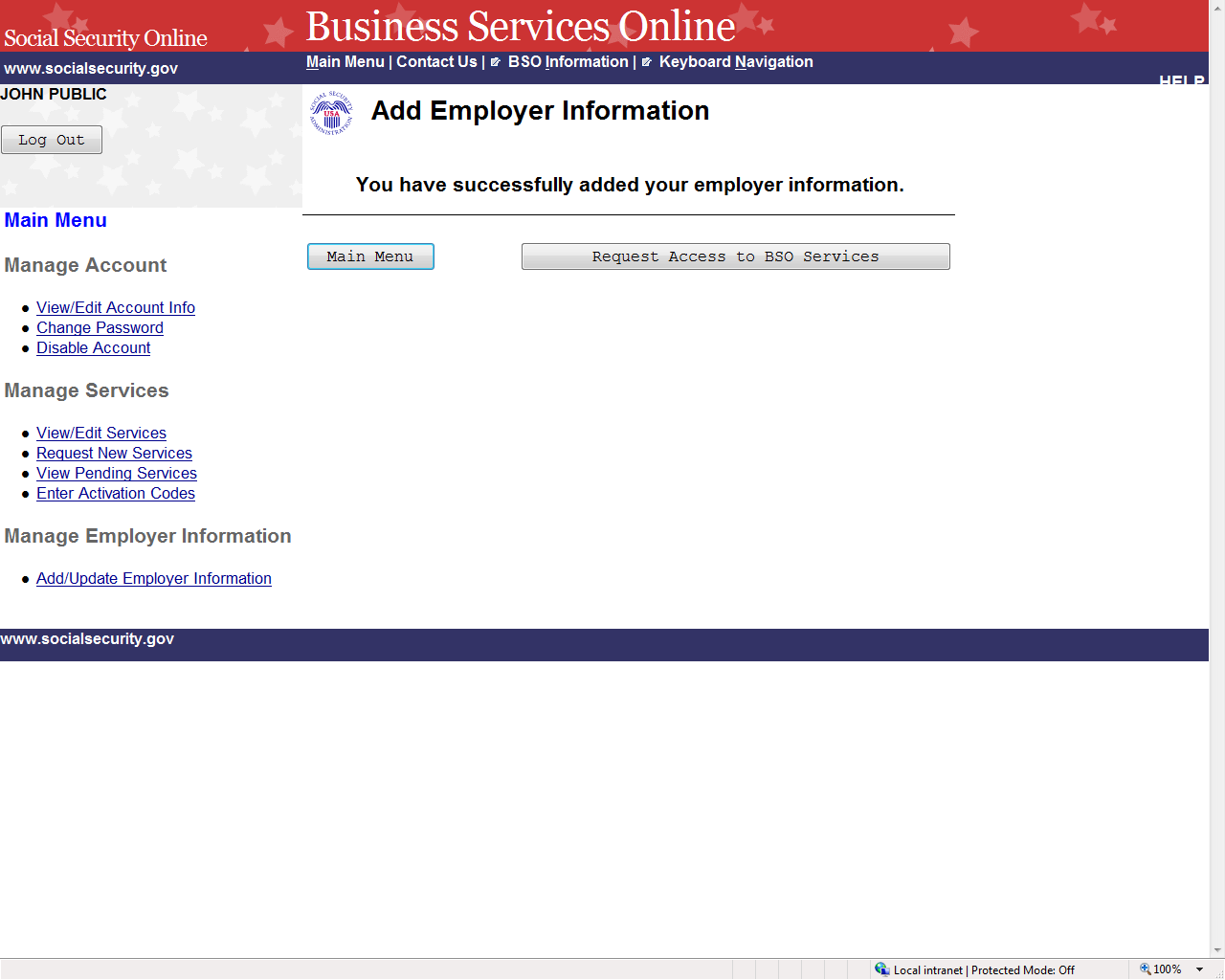
the name, but it does not change the name on Internal Revenue Service (IRS) records. Select the

**Submit Employer Information** button to process the employer information. The system displays

the Add Your Employer Information Successful page. (Select the **Cancel** button to return to the

Business Services Online Main Menu page. To return to the BSO Welcome page, select the **Log**

**Out** button.)



**STEP 8:** Select the **Request Access to BSO Services** button to select services you need to

access. The system displays the Request Access to BSO Services page. (Select the

**Main Menu** button to return to the Business Services Online Main Menu page. To

return to the BSO Welcome page, select the Logout link.)

## LESSON 15: UPDATE EMPLOYER INFORMATION

Follow the instructions below to update employer information. To change your Employer

Identification Number (EIN) you must first "Remove Your Employer Information" which will

deactivate all active services with this employer and then re-request services by selecting the

Request New Services link under the Manage Services section on the left navigation panel.

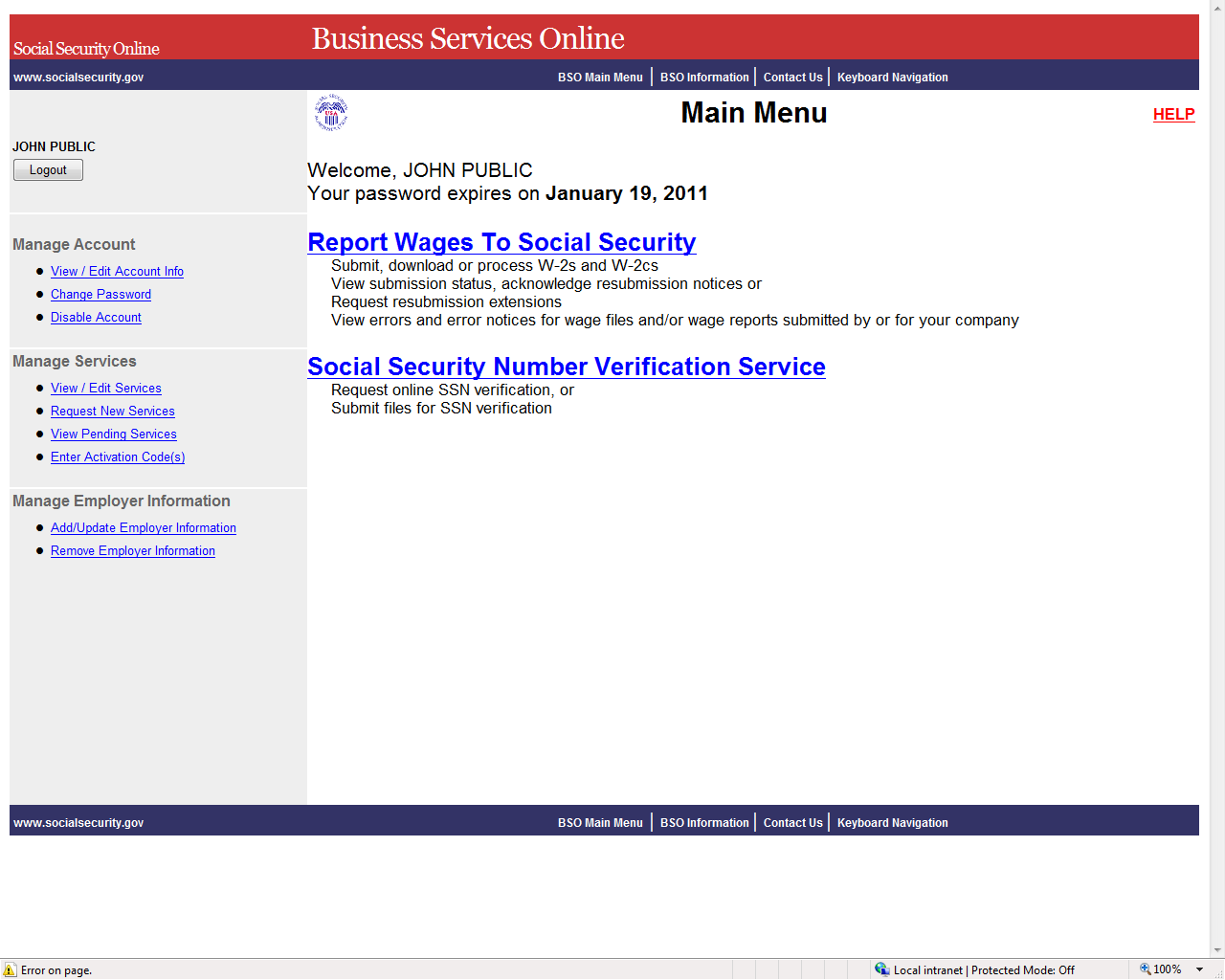
**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** button on the Business Services Online Welcome page.

**NOTE**

*The menu selection on your BSO Main Menu is unique to you and presents only the*

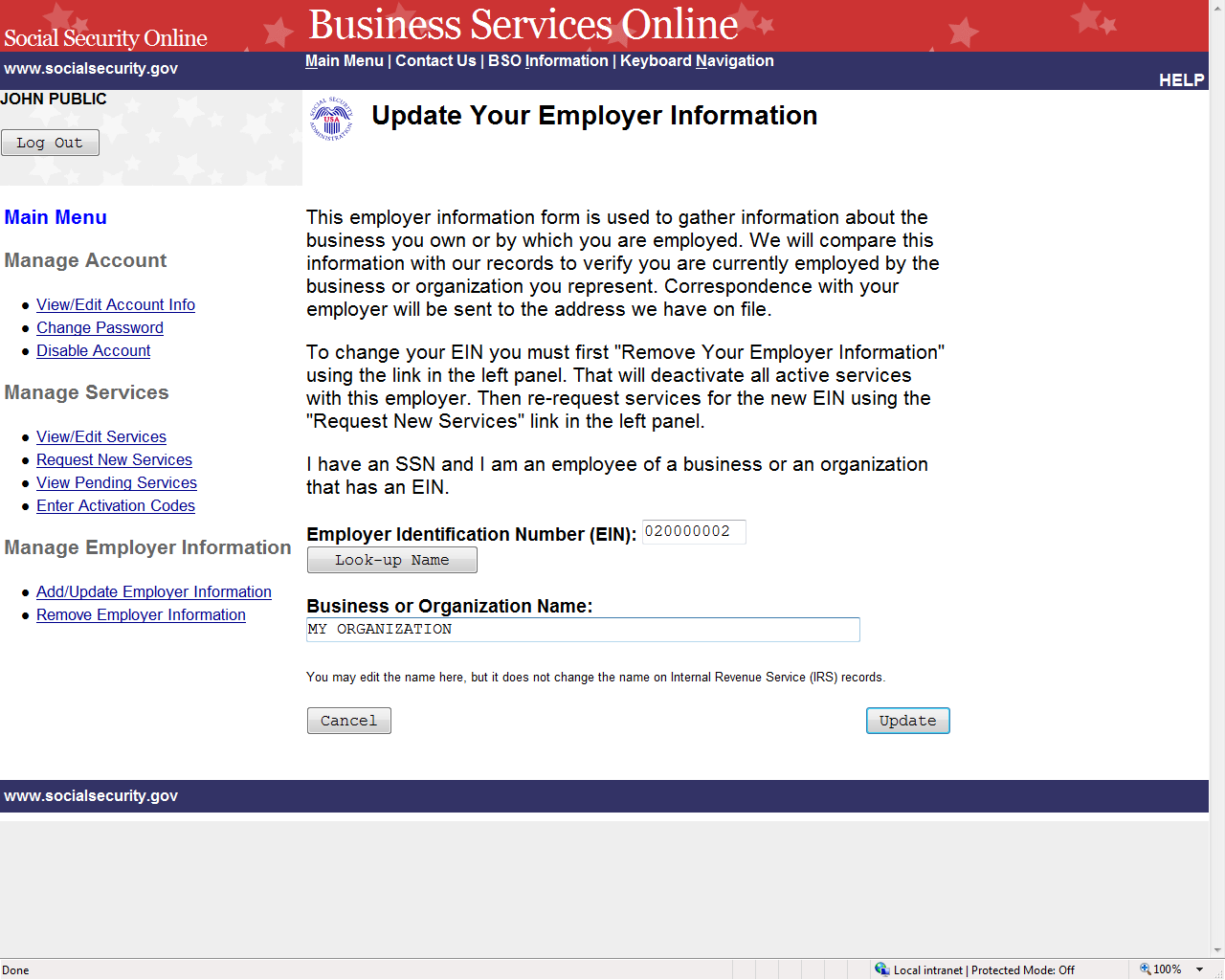
*applications and services to which you have access.*



**STEP 3:** Select the Add/Update Employer Information link from the left navigation panel. The

system displays the Update Your Employer Information page. (Select the Logout button to return

to the Business Services Online Welcome page.)



**STEP 4:** Change any information and select the **Update** to submit the changes. The system

displays the Update Your Employer Information Successful page. (Select the **Cancel**

button to return to the Business Services Online Main Menu page without submitting

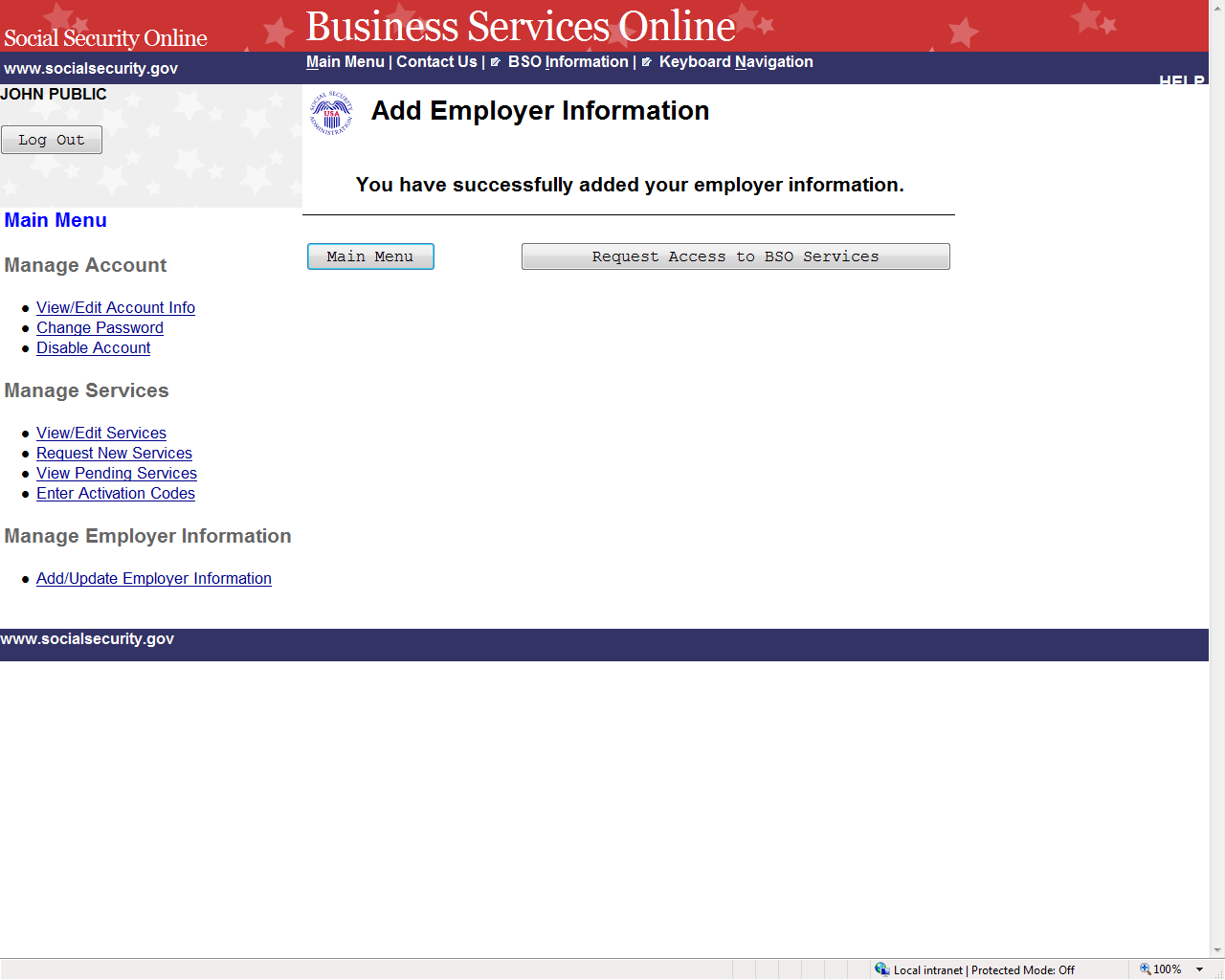
any changes).

**NOTE**

*Changing the EIN will deactivate all active services with this employer. To request*

*services for this different employer, select the Request New Services link under the*

*Manage Services section on the left navigation panel.*

****

**STEP 5:** Select the **Main Menu** button to return to the Business Services Online Main Menu.

## LESSON 16: REMOVE EMPLOYER INFORMATION

Follow the instructions below to remove employer information. Removing this employer

information will cause the services for this employer to be deactivated.

**STEP 1:** Point your browser to the Business Services Online Welcome page: [www.socialsecurity.gov/bso/bsowelcome.htm](http://www.socialsecurity.gov/bso/bsowelcome.htm).

**STEP 2:** Select the **Log In** button on the Business Services Online Welcome page.

**NOTE**

*The menu selection on your BSO Main Menu is unique to you and presents only the*

*applications and services to which you have access.*

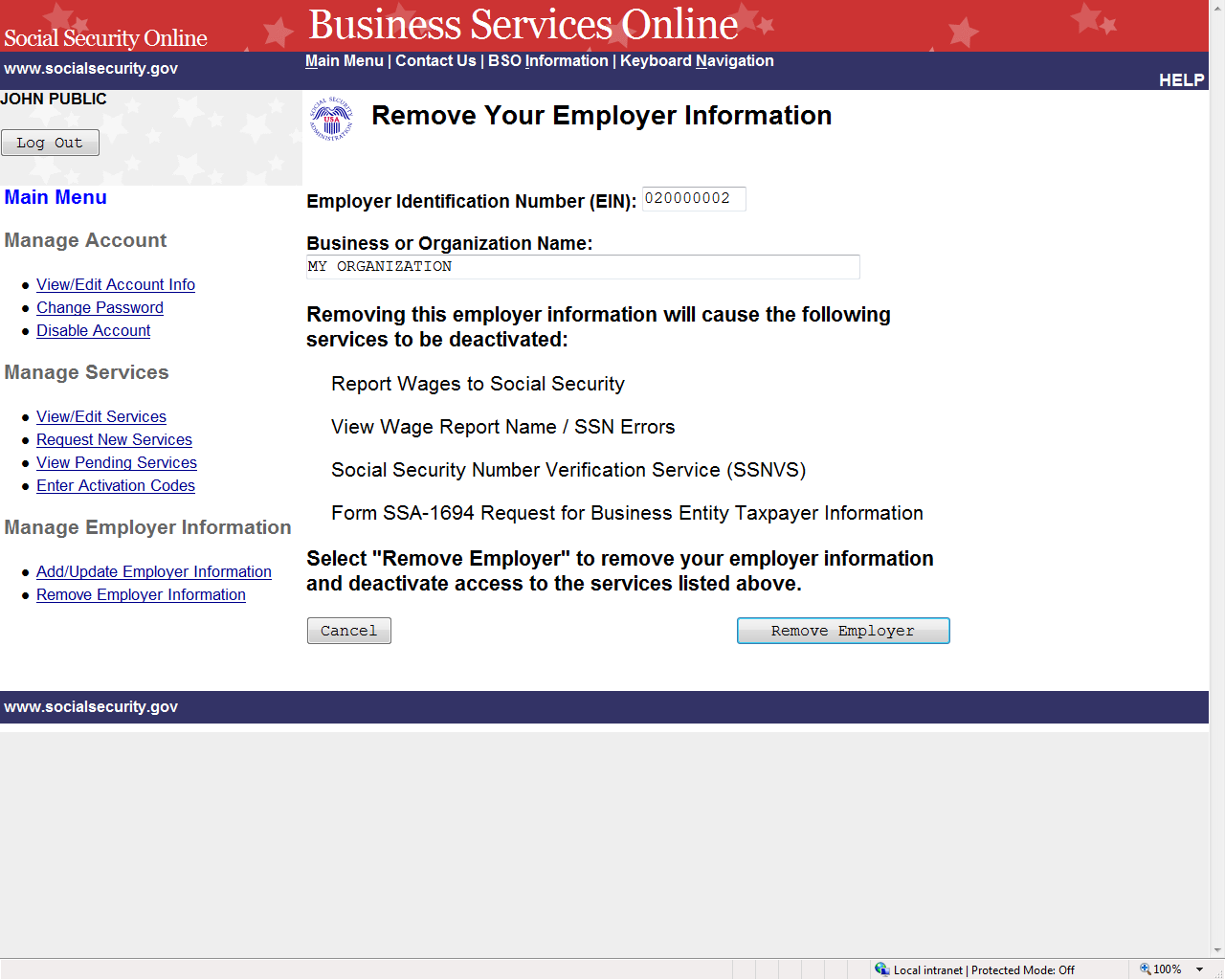


**STEP 3:** Under the Manage Employer Information section of the left navigation panel, select

the Remove Employer Information link. The system displays the Remove Your Employer

Information page. (Select the Logout button to return to the Business Services Online Welcome

page.)



**STEP 4:** Select the **Remove Employer** button to submit the changes. The system displays the

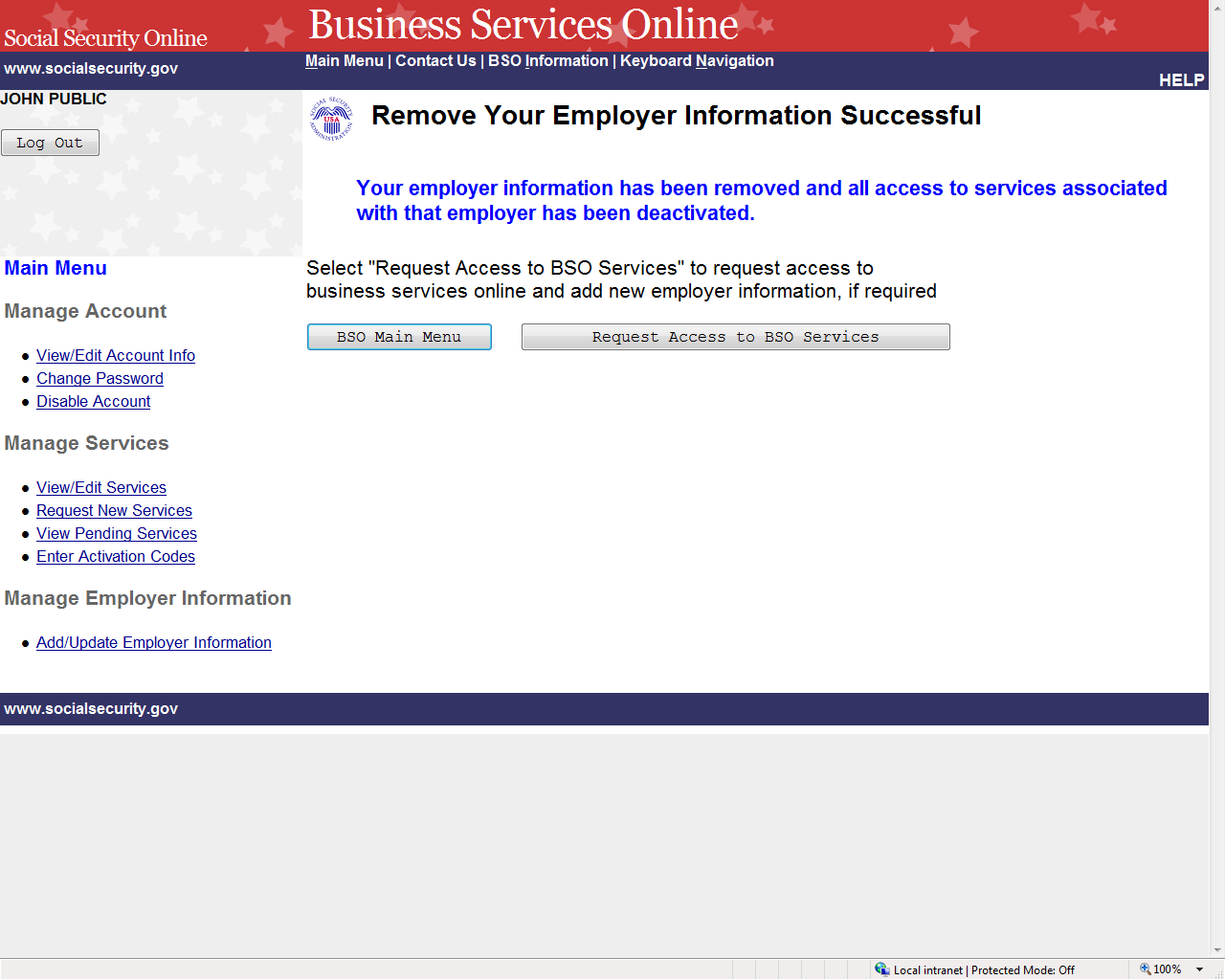
Remove Your Employer Information Successful page. (Select the **Cancel** button to

return to the Business Services Online Main Menu page without removing the

employer.)

**NOTE**

*Removing this employer information will cause the listed services to be deactivated.*

****

**STEP 5:** Select the **Request Access to BSO Services** button to request new services for a

different employer. To return to the Business Services Online Main Menu, select the **BSO Main**

**Menu** button.