

Uploading W-2/W-3 Information

Before you can upload to the SSA, you must first register to use their Business Services Online (BSO) website.

Registering to Use the Social Security Administration's Website

Registering on the BSO website gives you a login ID and password. You will also establish which of the SSA's services you will be using.

- 1) Point your browser to <http://www.ssa.gov/bsowelcome.htm>
- 2) Click **Register**. Enter your registration information. Once you've entered your information, you will be prompted to select the services you will be using.
- 3) From the **Main Menu** on the left side of the screen, go to **Manage Services**.
- 4) Select **Request New Services**
- 5) Select **SSA Services Suite for Employers**

Uploading W-2 Information

There are 3 steps to uploading W-2 information to the Social Security Administration:

1. Create the upload file
2. Test the upload file with AccuWage
3. Transmit the file to the SSA.

Step 1: Create the Upload File (E-Filing > W2 E-Filing (EFW2) > Create File)

The screenshot shows the 'Federal EFW2/W3 Submission' form with the following fields and callouts:

- 1**: User Identification Number (User ID)
- 2**: Preferred Method of Problem Notification (Contact E-Mail Address Required)
- 3**: Preparer Code (A (Accounting Firm), L (Self-Prepared), S (Service Bureau), P (Parent Company), D (Other))
- 4**: Employer Record Information (Agent Indicator Code: 1 2678 Agent (Approved by IRS), 2 Common Paymaster, 3 3504 Agent, 4 Other; Terminating Business checkbox)
- 5**: Employer EIN
- 6**: Regular W2's (selected) / W2's On The Fly
- 7**: Save Screen, Create File, Exit buttons

Additional fields include: Resubmit (File is being resubmitted checkbox, Resubmit Wage File Identifier), and File Name and Path.

1. The **User ID** is the 8-character user ID assigned by the SSA when you registered on the SSA's website.
2. **Preferred Method of Problem Notification** — Default is the e-mail address entered for you, the preparer, in **Firm > Firm Info/Global Settings**. If the **Use Client Contact Information for paper W2s and e-Filing W2/W3s** option is selected on the **Setup > Client Information > W2/W3-1099/1098 Setup** tab is used for problem notification.
3. Select the appropriate **Preparer Code**.
4. Select the correct Agent Indicator Code. If you don't know if you are one of the first three options, select **Other**.

NOTE: An "agent" is someone other than the employer used to pay the employer's taxes.

5. Enter the **Employer or Agent EIN** for tax payments that were submitted to the IRS for their 94X series tax returns (based on the table below).

Which EIN to Enter?

If the Agent Indicator Code is:	Enter the EIN for the:
2678 Agent (Approved by IRS)	Agent and Employer EIN
Common Paymaster	Agent EIN
3504 Agent	Agent EIN
Other	Employer EIN

6. Select whether you are creating this upload file for **Regular W-2s** or **W-2s created On the Fly**.
7. Click **Save Screen**, then **Create File**

Write down the path and filename of the upload file created.

It is important to note the name and location of the upload file displayed at the bottom of the **E-Filing > W2 E-Filing (EFW2) > Create File** screen in CWU. You will need this information in step 2 below.

Step 2: Test the Upload File with AccuWage

To test an upload file:

- 1) Point your browser to <http://www.ssa.gov/bsowelcome.htm>
- 2) Click **Log In**. If you've not created your Business Services Online account, click **Register**. If you have an account, enter your **User ID** and **Password**, select "I have read & agree to these terms", then click **Log In**.
- 3) Click the **Report Wages to Social Security** link.
- 4) Click **I Accept**
- 5) On the *Electronic Wage Reporting (EWR)* page, click the **AccuWage Online** tab
- 6) Click the **AccuWage Online** link in the first box

- 7) Click the appropriate Submission Type (**W-2 Regulars** or **W-2c (Corrections)**)
- 8) Click **Start Testing**
- 9) Browse to the file created in **E-Filing > W2 E-Filing (EFW2) > Create File** and click **Open**. Pay special attention to the bottom half of the screen labeled "Issue(s) for Selected Record".
- 10) Make the necessary corrections. Once corrections have been made, reprocess W-2s, recreate the upload file (**E-Filing > W2 E-Filing (EFW2) > Create File**), and test again with AccuWage until it reports no errors.

Step 3: Transmit the file to the SSA

- 1) In DrakeCWU 2017, go to **E-Filing > W2 E-Filing (EFW2) > Transmit File**.
- 2) Select **W2 files have been tested using AccuWage**
- 3) Click **Open Web Site**.
- 4) Click **Log In**.
- 5) Enter your **User ID** and **Password**, select "I have read & agree to these terms", then click **Log In**.
- 6) Click the "Report Wages to Social Security" link.
- 7) Click **I Accept**
- 8) On the *Electronic Wage Reporting (EWR)* page, click the **Upload Formatted Wage File** tab
- 9) Click the **Submit/Resubmit a Formatted Wage File** link. This page also has the link to check previous submissions ("View Submission Status")
- 10) Click **Continue** at the bottom right of the screen.
- 11) Make sure **New W-2s/W-3s for Tax Year 2017 or previous tax year (EFW2)** is selected and click **Continue** at the bottom right of the screen.
- 12) Click **Choose File** and browse to the file created in **E-Filing > W2 E-Filing (EFW2) > Create File** and click **Open** to specify the file in DrakeCWU to upload to the SSA.
- 13) Click **Submit**.