



This SOP will outline the steps to enable your company to electronically file (e-file) your W2 and W3 payroll reports:

Note: For TY 2025 there is a new employee reporting requirement related to the premium portion of overtime payments. Please see the SOP: Qualified Overtime Compensation reporting.

Steps for E-Filing

1. Set up a BSO (Business Services Online) account with the SSA
2. Install the Gemini 2026 update
3. Complete all payroll for 2025
4. Close the month (December) or financial year for 2025
5. Generate the W2 e-files
6. Upload the e-files to Accuwage to test
7. Upload the e-files to your BSO account
8. Print the W2-State form (for states that require wage reporting) and W2-Employee form and distribute to each employee
9. Print the Employee W-2 Information Report and distribute to each employee

Step 1: Set up a BSO (Business Services Online) account with the SSA

This can be done here <https://secure.ssa.gov/RIL/SiView.action?LVL=7&URL=/RIL/bsa>

Step 2: Install the Gemini 2026 update

This step can be done before or after closing your month (December) of financial year for 2025

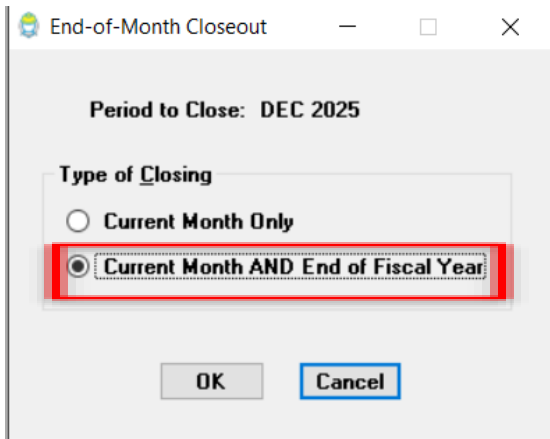
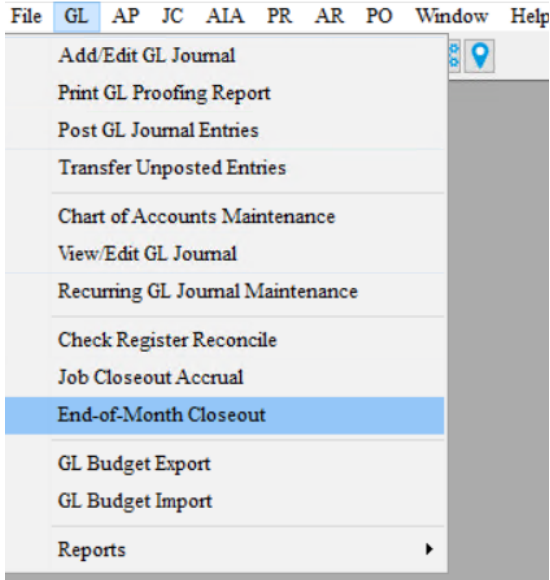
Step 3: Complete all payroll for 2025

Be sure to complete all payroll for the year 2025 – BEFORE closing December 2025



Step 4: Close the month (December) or financial year for 2025

When closing DECEMBER to calculate the full year of payroll for W2 reporting you can close the MONTH ONLY or close the MONTH AND END OF FISCAL YEAR. If you choose to close MONTH ONLY at a later time of your choosing you can close the YEAR under the SUPERVISOR menu.





Step 5: Generate the W2 e-files

File	GL	AP	JC	AIA	PR	AR	PC
Add/Edit PR Entries							
Calculate/Proofing Report							
Print/Post PR Checks							
Void Payroll Check							
Direct Deposit Utilities ▶							
Time Cards ▶							
Employee List Maintenance							
W-2 Operations							
Payroll Setup ▶							
Reports ▶							

Always check the W2 Form Tax Year and Magnetic Tax Year to verify the Gemini program version will properly create the e-files for the specific tax year. If these do not represent the correct tax filing year you will need to update the Gemini program to the latest program version.

The screenshot shows the 'Payroll W-2 Operations' window. At the top, there is a 'Tax Year' dropdown menu set to '2025'. To the right, a red box highlights the 'W2 Form Tax Year: 2025' and 'Magnetic Tax Year: 2025' fields. Below this is a table with three columns: 'Employee', 'SSN', and 'Gross Wages'. The table contains two rows of data:

Employee	SSN	Gross Wages
Doe, John	123-33-4545	1,743.00
Smith, Dave	123-12-1212	7,875.00

At the bottom of the window, there is a 'Last Name:' input field and buttons for 'Insert', 'Change', 'Delete', and 'Close'. On the right side, there are several buttons: 'Print Proofing', 'Print W-2's', 'W-2 Magnetic', 'Export W-2', 'Remove History', and 'Recreate Prior Year'.



Select the W2-Magnetic

Employee	SSN	Gross Wages
Doe, John	123-33-4545	1,743.00
Smith, Dave	123-12-1212	7,875.00

Review the important information screen and then select OK

Important Information

Please read the following important information!

This magnetic option is designed for use by the construction industry in the United States of America and thus has the following limitations:

1. You must have registered with the SSA and have received a personal PIN number before you can submit W-2 information via magnetic filing.
2. The employer and each employee must have an address in one of the 50 states. Foreign and United State possession addresses are not supported.
3. This handles single employers only.
4. This is only for "Self-Prepared" employers. It does not handle "Agents", or transmitting for other employers.
5. If you filed 941, 943 or W2 with the IRS using a different EIN, please contact Prosoft as this does not currently support this.
6. This only handles "Employment Code" of "R" (Regular).
7. This does not support Third-Party Sick Pay.
8. Section 457 Plans are not supported.

OK



Fill in the contact details

Payroll W-2 Magnetic Tax Year: 2023

User ID:

Contact Name:

Contact Phone: (Numbers only)

Phone Extension:

Contact FAX: (Numbers only)

Contact EMail:

File Location: ...

Resubmission WFID:

Terminating Business

Create File Print Proofing Cancel

Resubmission WFID – is only used to file correcting files if the initial upload needs to be modified

Terminating Business check box is only used if this is your last year to file W2 information

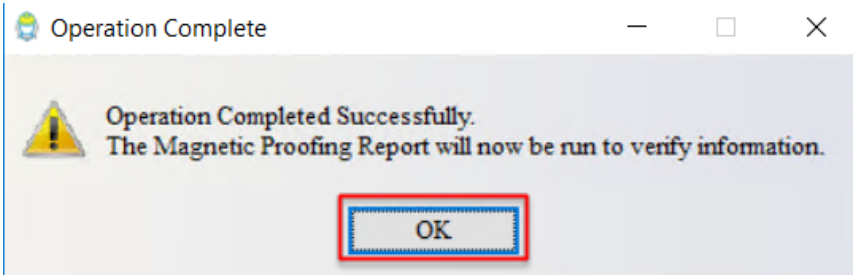
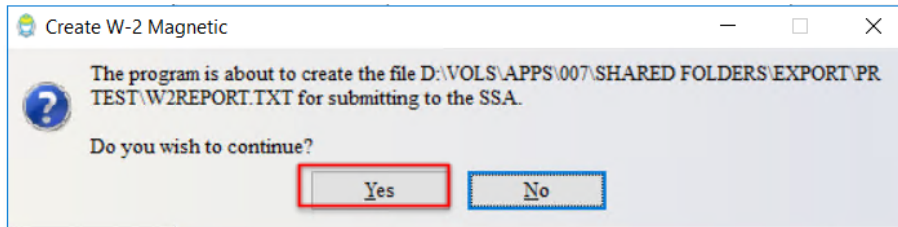
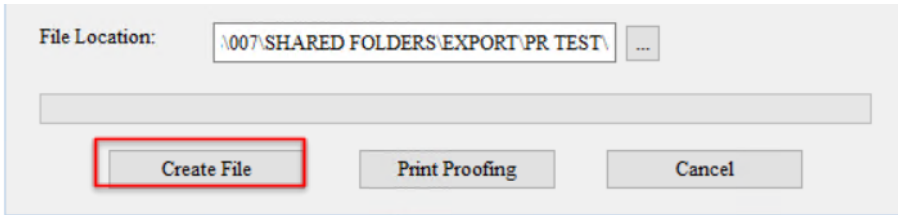
User ID: This is the 8 digit alphanumeric PIN number provided by the BSO (Business Services Online)

Contact Name: The contact name and the remaining contact fields are for the person submitting the e-file.

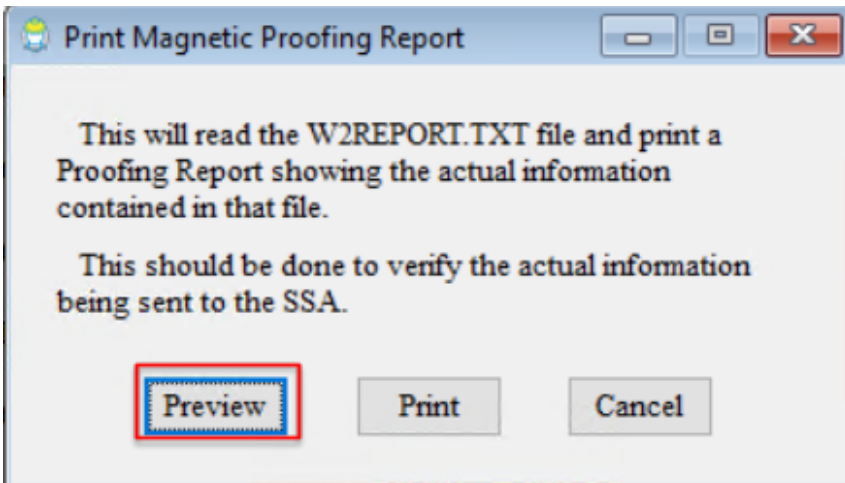
File Location: Save this to your local computer drive, so you can access and upload the file when you log into the BSO site to test the file in ACCUWAGE during the next step.



Select CREATE FILE and then YES



Select PREVIEW and review the proofing report before proceeding to the next step.





Step 6: Upload the e-files to Accuwave to test

Once the W2 e-file has been generated from Gemini you can test the e-file format using the Accuwave test site located here: <https://www.ssa.gov/employer/accuwave/index.html>

Follow the online instructions provided by the SSA.

Here is a link to the SSA Frequently Asked Questions

<https://www.ssa.gov/employer/accuwave/faqAccuWageOnline.pdf>

Here is a link to the SSA Accuwave Help Guide

<https://www.ssa.gov/employer/accuwave/helpGuideAccuWageOnline.pdf>

Some basic screenshots are provided below.

Log into the SSA

Select REPORT WAGES TO SOCIAL SECURITY



Select the ACCUWAGE ONLINE tab





Select ACCUWAGE ONLINE

Social Security Online Business Services Online

www.socialsecurity.gov BSO Main Menu | BSO Information | Logout

Electronic Wage Reporting (EWR)

Reporting Wages to Social Security

Forms W-2W-3 Online | Forms W-2cW-3c Online | Upload Formatted Wage File | **AccuWage Online**

AccuWage Online

AccuWage Online is a free internet application offered by the Social Security Administration that enables you to check EFW2 (W-2 Wage and Tax Statement) and EFW2C (W-2C Corrected Wage and Tax Statement) formatted wage files for format correctness before submitting them to SSA.

- [EFW2-EFW2C Specifications](#)
- [AccuWage Online Help Guide](#)
- [AccuWage Online FAQ](#)

Warning You still need to upload and submit your Formatted Wage File after testing it through AccuWage Online.

Select the W2 Regulars and then START TESTING

Social Security
The Official Website of the U.S. Social Security Administration

AccuWage Online
For Testing Tax Year 2023 EFW2/EFW2C Submissions

DISCLAIMER STATEMENT

AccuWage Online identifies most of the common format errors in wage submissions. Using this application greatly reduces submission rejections. Please be aware that even if no errors are identified by AccuWage Online, your submission could be returned because of other errors.

Important: You still need to upload and submit your Formatted Wage File after testing it through AccuWage Online.

Information:

We suggest you always zip your file before running it through AccuWage Online.

Submission Type

Select Submission Type

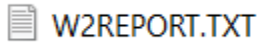
W-2(Regulars)

W-2c(Corrections)

Start Testing | Return to EWR Home



The W2 file Gemini created will look like the example below



The ACCUWAGE site will present testing results quickly, depending on the file size.



Social Security

The Official Website of the U.S. Social Security Administration

AccuWage Online

Important: You still need to upload and submit your Formatted Wage File after testing it through AccuWage Online.

Test Results

File name: W2REPORT.TXT

File has run 100% Complete

7 Record(s) Tested, 1 Records(s) with Issue(s)

Records

Filter record(s) by level: Issue Level Descriptions Critical (0) Error (0) Alert (1) Info (0)

AccuWage Online

Issue Level Descriptions

Critical:	AccuWage will stop processing the file when a Critical error is found. This would be a record sequencing error, record length error or over the error limit. It is mandatory to fix these issues before proceeding to the Business Services Online (BSO) webpage to upload the file.
Error:	AccuWage will not stop processing the file for an error, however, it is mandatory to fix this issue before proceeding to the Business Services Online (BSO) webpage to upload the file.
Alert:	AccuWage will not stop processing the file for an Alert. It is highly recommended you fix each Alert received on your file.
Info:	AccuWage will not stop processing the file for an Informational. It is highly recommended you fix each Informational received on your file.



Step 7: Upload the e-files to your BSO account

Select the UPLOAD FORMATTED WAGE FILE tab
Next select the SUBMIT A FORMATTED WAGE FILE

Since this is the initial file submission (and NOT a correcting return) select the 1st radio button below

Next use the BROWSE button to navigate to your W2 file.



Step 8: Print the W2-State form (for states that require wage reporting) and W2-Employee form and distribute to each employee

Use the Print W2's to print the Employee copy and the State copy of the W2 form
This requires using the pre-printed W2 forms

Note: Always test print on blank paper and then determine if the printed data lines up properly in the boxes on the W2 form. There are alignment options in Gemini to move the entire page UP/DOWN or LEFT/RIGHT. If you find the data does not line up after attempting alignment - check your PRINTER DRIVER. Using an outdated printer driver, or a printer driver not specifically for your printer will sometimes result in misalignment.

The screenshot shows a software window titled "Payroll W-2 Operations". At the top left, there is a "Tax Year" dropdown menu set to "2025". At the top right, it displays "W2 Form Tax Year: 2025" and "Magnetic Tax Year: 2025". Below this is a table with three columns: "Employee", "SSN", and "Gross Wages". The table contains two rows of data:

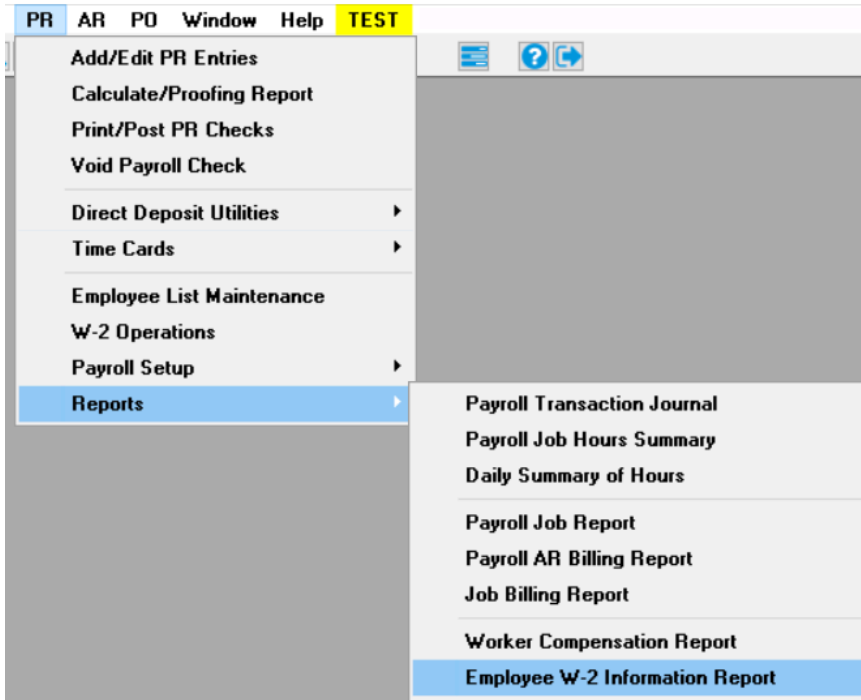
Employee	SSN	Gross Wages
Doe, John	123-33-4545	1,743.00
Smith, Dave	123-12-1212	7,875.00

To the right of the table is a vertical stack of buttons: "Print Proofing", "Print W-2's" (highlighted with a red box), "W-2 Magnetic", "Export W-2", "Remove History", "Recreate Prior Year", and "Close". At the bottom left, there is a "Last Name:" label followed by an empty text input field, and three buttons: "Insert", "Change", and "Delete".



Step 9: Print the Employee W-2 Information Report and distribute to each employee

See the SOP: Qualified Overtime Compensation reporting for more information regarding this requirement.



Print the Employee W2 report for the entire TY year

