How to E-File W2 Forms to the State

Make sure you have the correct Company open inside W2 Mate

Note: In order to use this feature you must purchase and enable W2 Mate Option #4 to electronically file

1. Click E-Filing

2. Select W2 Forms

😳 Example Company - W2 Mate (2017)					
Company Tools Import D	ata Export Data 🛛	-Filing US & SSA Instructions Quality Control 1099 Emailer	Help Order Supplies		
Shortcuts		W2 Forms			
	General In	1099-MISC Forms	Click E-Filing 1		
14	Employe	1099-INT Forms			
Company	Address	1099-DIV Forms	Select W2 Forms 2		
	Address	1099-R Forms	Sciect W2 Forms 2		
20	City:	1099-S Forms			
	State:	1098-T Forms			
Employees	Country	1098 Forms			
	Employe	1099-A Forms			
170	Employe	1099-B Forms			
1099 & 1098 Recipients	Notes (1099-C Forms			
		1099-PATR Forms	anges.		
W-2	Databa	1099-OID Forms			
	(read-or	1099-К Forms			
W2 Forms		Combine Multiple W2 Electronic Submission Files			
		Combine Multiple 1099 Electronic Submission Files			
W-3		Track Filing Status			
W3 Form	Current company	y name is : Example Company			
	You can create	a new company by selecting "Company > New" from the top menu.			
	You can open a	You can open a different company by selecting "Company > Open" from the top menu.			
1099					
1099 & 1098 Forms					
1096					
1036 Form					

This will open the Electronic Filing Submitter Setup

3. To see detailed help with the e-file process, click on the HELP button

💭 Example Company - W2 Mate (2017)					
Company Tools Import Data	Export Data E-Filir	ng IRS & SSA Instructions Quality Control	1099 Emailer Help	Or Detailed Help 3	
Shortcuts					
	W2 Electronic Filing Submitter Setup Please fill out the information in this dialog and click the OK button to create the W2 Electronic Submission File. Please click the HELP button to the right if you have any questions.				
Company	Submitter Information		Contact Information		
	Submitter Name:	Smiley Sam	Contact Name:	Smiley Sam	
200 C	Federal EIN:	998899663	Phone Number:	7085906376	
Employees	PIN (User ID):	00000000 Enter Zeros if E-Filing with State	Phone Extension:		
Linpioyees	Delivery Address:	120 Main	E-mail Address:	contact@contact.com	
	Location Address:	120 Main	Fax:		
uttu	City:	Chicago	Preparer Code:	Other	
1099 & 1098 Recipients	State:		Resubmission Informa	ation	
	Zip Code:	60605	Resubmitted Fi	ile WEID:	
W2 Forms	Federal or State	nerate a W-2 electronic submission file for the FED	ERAL Government (Social	Security Administration)	
W-3 W3 Form	STATE : Generate a W-2 electronic submission file for the STATE of Illinois Output File [Name and Path of the output W2 electronic submission file that W2 Mate will create]				
	File: C:\Users\RBS\Documents\Illinois-W2REPORT-EXAMPLE-COMPANY.txt Browse				
1099 & 1098 Forms	OK Cancel				
1065 Form					
1056 Form					

- 4. Complete Submitter and Contact Information fields (for the PIN you may use 00000000)
- 5. Select State to generate the W2 electronic submission file
- 6. Select correct State from drop down menu

Note: If your state is not listed please contact your state Department of Revenue and see if they accept the Federal EFW2 (Electronic filing format)

- 7. Click Browse to change the Output file location (where file is saved)
- 8. Click OK

Example Company - W2 Mate	te (2017)					
Company Tools Import Data	Export Data E-Filing Complete Submitter and Contact Information 4					
Shortcuts	W2 Electronic Filing Submitter Setup					
	Please fill out the information in this dialog and click the OK button to create the W2 Electronic Submission File. Please click the HELP button to the right if you have any query ons. HELP					
Company	Submitter Information Contact Information					
	Submitter Name: Smiley Sam Contact Name: Smiley Sam					
200 C	Federal EIN: 998899663 Phone Number: 7085906376					
Employees	PIN (User ID): 00000000 Enter Zeros if E-Filing with State Phone Extension:					
Linpioyees	Delivery Address: 120 Main E-mail Address: contact@contact.com					
	Location Address: 120 Main Fax:					
ut u	City: Chicago Preparer Code: Other					
1099 & 1098 Recipients	State: Resubmission Information					
11/2	Zip Code: 60605					
	Click Browse to change output					
Calact State	Federal or State file location 7					
Select State 5	○ FEDER Select correct State 6 the FEDER. THE TOCATION					
	STATE : Generate a W-2 electronic submission file for the STATE of Illinois					
<u>W-3</u>	Contract Elle Diseas and Daily of the state of WD electronic scheminica file that WD Mater will exacted					
W3 Form	Output File [Name and Path of the output W2 electronic submission file that W2 Mate will create]					
	File: C:\Users\RBS\Documents\Illinois-W2REPORT-EXAMPLE-COMPANY.txt Browse 7					
1099	Click OK 8					
1099 & 1098 Forms	OK Cancel					
1096						
1096 Eam						
1036 FORM						

Note: Please read this important information. If your submission file has errors you can view and correct them

9. If file creation is successful, you can copy the File Path to Clipboard so that you have the location of the file

10. Click Close

Example Company - W2 Mate (2017)							
Shortcuts	General Information W3 Information 1096 Information Employer's Name / Filer's Name: Example Company Address 1: 123 Main						
Company	State W2 Submission File Created Successfully Click Copy File Path to Clipboard 9						
Employees	State electronic transmittal file was created successfully and saved to: Open Containing Folder Open Containing Folder						
	C: Users (kBS: Documents Julinois-W2XEPORT-EXAMPLE-COMPANY.TXT PLEASE REMEMBER TO UPLOAD THE FILE TO THE STATE DEPARTMENT OF REVENUE Copy File Path to Clipboard						
1099 & 1098 Recipients W2 Forms	List of Employees Included in the Output File If an employee is missing from the list below then Box 15 on her/his W2 form does not match the state abbreviation for the state you are e-filing for, or Box 16 (State Wages) on the W2 Form equals zero. No employees found for this state. No records were added to the output file. Please remember that for an employee to be included in the output file then Box 15 on her/his W2 form MUST match the state abbreviation for the state you are e-filing and Box 16 (State Wages) on the W2 Form must be GREATER than zero.						
W3 Form	Click Close 10 17						
1096 Form							

Note: Once the W2 State E-file is created, log into your state's Department of Revenue website and follow the instructions for uploading your file