

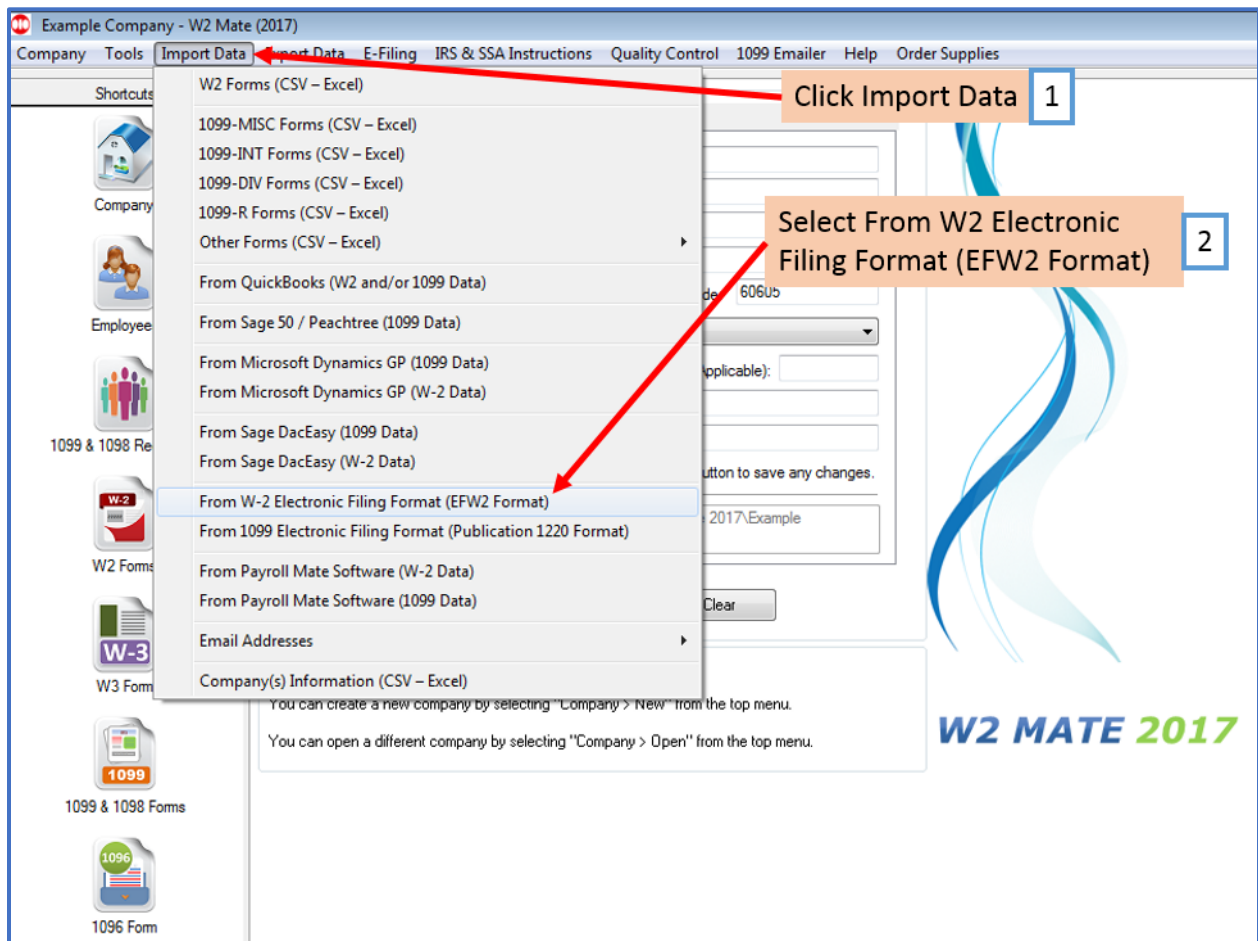
How to Import W2 Data Using Electronic Filing Format (EFW2 Format)

Note: In order to use this feature you must purchase and enable W2 Mate Option #3 to import

Make sure you have the correct Company open inside W2 Mate

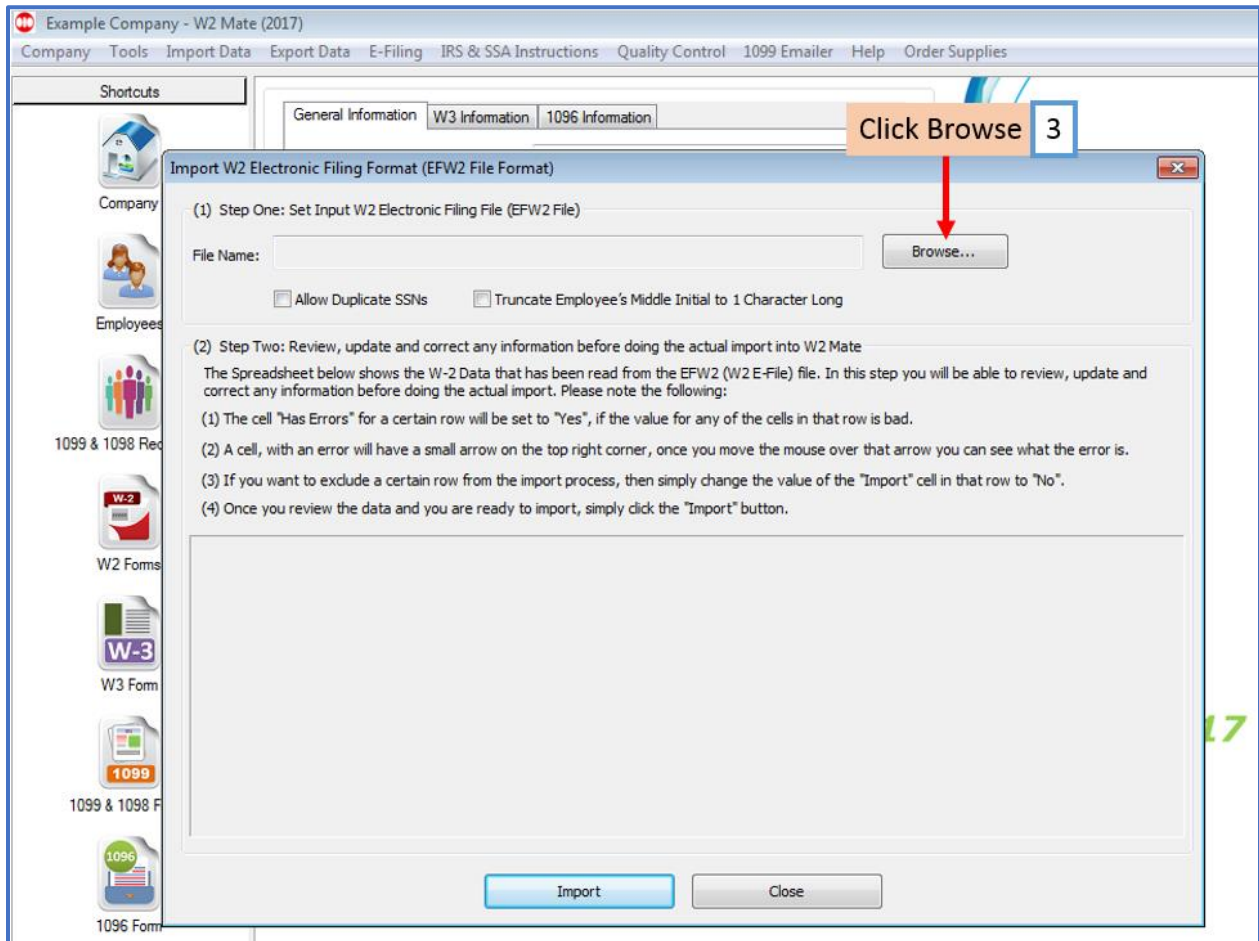
Note: If you do not currently have this company created inside of W2 Mate you will need to create the company prior to importing the W2 data. See How to Create a New Company tutorial.

1. Click Import Data
2. Select From W2 Electronic Filing Format (EFW2 Format)



3. Click Browse to select the EFW2 file

Note: Checkmark to Allow Duplicate SSNs or Truncate Employee's Middle Initial to 1 Character long as needed



4. Review Data

5. Click Import

Example Company - W2 Mate (2017)

Company Tools Import Data Export Data E-Filing IRS & SSA Instructions Quality Control 1099 Emailer Help Order Supplies

Shortcuts

- Company
- Employees
- 1099 & 1098 Recipients
- W2 Forms
- W3 Form
- 1099 & 1098 Forms
- 1096 Form

General Information W3 Information 1096 Information

Employer's Name / Filer's Name: Example Company

Import W2 Electronic Filing Format (EFW2 File Format)

(1) Step One: Set Input W2 Electronic Filing File (EFW2 File)

File Name: Y:\Angela\W2 MATE\IMPORT examples\W2REPORT-EXAMPLE-COMPANY.txt **Browse**

Allow Duplicate SSNs Truncate Employee's Middle Initial to 1 Character Long

Review Data 4

(2) Step Two: Review, update and correct any information before doing the actual import into W2 Mate

The Spreadsheet below shows the W-2 Data that has been read from the EFW2 (W2 E-File) file. In this step you will be able to review, update and correct any information before doing the actual import. Please note the following:

- (1) The cell "Has Errors" for a certain row will be set to "Yes", if the value for any of the cells in that row is bad.
- (2) A cell, with an error will have a small arrow on the top right corner, once you move the mouse over that arrow you can see what the error is.
- (3) If you want to exclude a certain row from the import process, then simply change the value of the "Import" cell in that row to "No".
- (4) Once you review the data and you are ready to import, simply click the "Import" button.

	Has Errors	Import	SSN #	First Name	Middle Name	Last Name	Suff.	Address
1	No	Yes	111-22-3333	SAMUEL	S	SAMPLE		456 TEST
2	No	Yes	999-99-9999	SALLY		TESTER		101 MAIN

Click Import 5

Import Close

6. Click OK

The screenshot shows the W2 Mate (2017) software interface. The main window has a menu bar with options: Company, Tools, Import Data, Export Data, E-Filing, IRS & SSA Instructions, Quality Control, 1099 E-mailer, Help, and Order Supplies. On the left is a 'Shortcuts' sidebar with icons for Company, Employees, 1099 & 1098 Recipients, W2 Forms, W3 Form, 1099 & 1098 Forms, and 1096 Form. The main area contains buttons for 'New Employee', 'Modify Employee', and 'Delete Employee', along with a 'Sort Employees By:' dropdown menu set to 'Last Name'. Below these is a table with the following data:

	Social Security Number	First Name	Middle Name	Last Name
1	123-22-3333	Stuart	S	Sample
2	111-22-3333	SAMUEL	S	SAMPLE
3	998-99-9999	Tommy		Tester
4	999-99-9999	SALLY		TESTER

An 'Import Process Completed Successfully' dialog box is overlaid on the table. The dialog box contains a warning icon and the text: 'Import Process Completed Successfully. You will now be directed to the Employees screen'. An 'OK' button is at the bottom right of the dialog box. A red arrow points from the 'Click OK' text to the 'OK' button. A blue box with the number '6' is next to the 'Click OK' text.