# How to Track Filing Status Using W2 Mate

### 1. Click E-Filing

#### 2. Select Track Filing Status

Example Compared	any - W2 Mate	(2017)				
Company Tools	Import Data	Export Data	E-Filing USS & SSA Instructions Quality Cont	ol 1099 Emailer	Help Order Supplies	
Shortcuts	s		W2 Forms	E		
		General In	1099-MISC Forms		🛛 🚺 /	_
		Employe	1099-INT Forms		Click E-Filing	1
Company	,	Address	1099-DIV Forms			
		Address	1099-R Forms			
		City:	1099-S Forms		Select Track F	iling Status 2
		State:	1098-T Forms			
Employee	is i	Country	1098 Forms		•	
		Employe	1099-A Forms			
1111		Employe	1099-B Forms			
1099 & 1098 Re	cipients	Notes (	1099-C Forms			
			1099-PATR Forms	ал	nges.	
W-2			1099-OID Forms			
		(read-or	1099-K Forms			
W2 Forms	s		Combine Multiple W2 Electronic Submissio	n Files		
	.		Combine Multiple 1099 electronic Submiss	ion Files		
W-3			Track Filing Status		/ //	
W/2 Form		Current compa	ny name is : Example Company			
1101	'	You can creat	a new company by selecting "Company > New" from	the top menu.		
		You can open	a different company by selecting "Company > Open" f	om the top menu.	W2 I	MATE 2017
1099						
1099 & 1098	Forms					
1096 Form	n					

# 3. Select Company

Example Company - W2 M Company Tools Import D Shortcuts Company Company C	Mate (2017) Data Export Data E-Filing General Information ompany Filing Status Manag Use this window to track the fil	IRS & SSA Instructions Quality Contro W3 Information 1096 Information ement Select Comparing status of your companies. 8 member to compare to compare the second se	1 1099 Emailer Help	Order Supplies	
Employees	W2 Mate does not auto update Step 1: Select a Company Company Name: Exam Step 2: Track Filing Informatic Company Filing Status: U	e any information shown in this window. You r nple Company on ndefined Vote:	need to manually edit / upda	te these fields based on your r	equirements.
1099 & 1098 Recipients W2 Forms W3 Form W3 Form	W2 E-File Status: 1099-MISC E-File Status: 1099-INT E-File Status: 1099-DIV E-File Status: 1099-R E-File Status: 1099-S E-File Status: 1098 E-File Status:	Undefined     •	1098-T E-File Status: 1099-A E-File Status: 1099-B E-File Status: 1099-C E-File Status: 1099-PATR E-File Status: 1099-OID E-File Status: 1099-K E-File Status:	Undefined Undefined Undefined Undefined Undefined Undefined Undefined	
1099 & 1098 Forms		a	ose		

Shortcuts	General Information	W3 Information 1096 Informa	tion			
Company	ompany Filing Status Mana Use this window to track the W2 Mate does not auto upda	gement filing status of your companies. I te any information shown in this	Remember to a window. You	dick the "Save Changes" butt	on to save your update	s. your requirements.
2	Step 1: Select a Company	Update Com	npany F	iling Status 4		[
Employees	Company Name: Exa	ample Company		•	Save Changes	Export
	Step 2: Track Filing Informat	tion Undefined	Note:			
99 & 1098 Recipients	W2 E-File Status:	Undefined Info Pending / Proforma Sent Prepared Peviewad		1098-T E-File Status:	Undefined	•
W-2	1099-MISC E-File Status:	Filed - Electronic Filed - Paper Corrections Filed - Electronic Corrections Filed - Paper	•	1099-A E-File Status:	Undefined	•
W2 Forms	1099-INT E-File Status:		-	1099-B E-File Status:	Undefined	•
	1099-DIV E-File Status:	Undefined	•]	1099-C E-File Status:	Undefined	•]
	1099-R E-File Status:	Undefined	•]	1099-PATR E-File Status:	Undefined	•
W3 Form	1099-S E-File Status:	Undefined	•	1099-OID E-File Status:	Undefined	•
	1098 E-File Status:	Undefined	•]	1099-K E-File Status:	Undefined	•
1099						
1099 & 1098 Forms			C	ose		
1096						

4. Update Company Filing Status from drop down menu

Example Company - W2 N	Mate (2017)			
Company Tools Import D	ata Export Data E-Filing	IRS & SSA Instructions Quality Control	ol 1099 Emailer Help	Order Supplies
Shortcuts	General Information	W3 Information 1096 Information		
C	ompany Filing Status Manag	ement		
Company	Use this window to track the fi	ling status of your companies. Remember to	click the "Save Changes" but	ton to save your updates.
<b>A</b>	W2 Mate does not auto update	Update Each Form St	tatus as neede	d 5 ds based on your requirements.
	Step 1. Select a Company	^		
Employees	Company Name: Exar	nple Company		Save Changes Export
	Step 2: Track Filing Informati	on Nature		
	Company Filing Status:	Note:		
1099 & 1098 Recipients	W2 E-File Status:	Undefined 🗸	1098-T E-File Status:	Undefined 🗸
W.2	1099-MISC E-File Status:	Undefined E-File Created E-File Unloaded to SSA	1099-A E-File Status:	E-File Created
W2 Forms	1099-INT E-File Status:	E-File Accepted E-File Rejected	1099-B E-File Status:	E-File Accepted E-File Rejected
	1099-DIV E-File Status:	Paper Filed Undefined	1099-C E-File Status:	Paper Filed Undefined
W-3	1099-R E-File Status:	Undefined 🔻	1099-PATR E-File Status:	Undefined -
W3 Form	1099-S E-File Status:	Undefined 🔻	1099-OID E-File Status:	Undefined 🔻
	1098 E-File Status:	Undefined 🔻	1099-K E-File Status:	Undefined 🔹
1099 & 1098 Forme		c	Close	
1055 & 1056 Forms				
<b>1991</b>				
1096 Form				

5. Update each form type status as needed from drop down menu

# 6. Once all form types are updated, Click Save Changes

Note: If needed you can export the data to a spreadsheet by clicking Export and selecting a location to save the file

## 7. Click Close

1096 Form

Shortcuts	General Information	W3 Information 1096 Inform	k Save C	hanges 6	Click Exp if neede	port d
Company	Use this window to track the f W2 Mate does not auto updat	iling status of your companies te any information shown in th	. Remember to a is window. You r	dick the "Cave Changes" butt need to manually edit / updat	ton to save your updates. te these fields based on your	equirements.
Employees	Step 1: Select a Company Company Name: Exa	mple Company		•	Save Changes	Export
	Step 2: Track Filing Informat	ion Jndefined	Note:			
1099 & 1098 Recipients	W2 E-File Status:	Undefined	•	1098-T E-File Status:	Undefined	-
W-2	1099-MISC E-File Status:	Undefined	•	1099-A E-File Status:	Undefined	•
W2 Forms	1099-INT E-File Status:	Undefined	•	1099-B E-File Status:	Undefined	-
W2 Points	1099-DIV E-File Status:	Undefined	•	1099-C E-File Status:	Undefined	•
	1099-R E-File Status:	Undefined	•	1099-PATR E-File Status:	Undefined	•
W-3 W3 Form	1099-S E-File Status:	Undefined	•	1099-OID E-File Status:	Undefined	•
W3T0III	1098 E-File Status:	Undefined	•	1099-K E-File Status:	Undefined	•
1099 & 1098 Forms			d	lose	Click Close	7