

HOW TO E-FILE W2 FORMS TO THE SSA USING PAYROLL MATE

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

To E-file W2's in Payroll Mate requires the purchase of: Payroll Mate SSA Wage File Export Optional Feature

Before you can upload the electronic wage files to the SSA you are required to obtain a SSA User ID (PIN) and have a SSA Business Services Online account.

The Payroll Mate SSA Wage File Export Optional Feature generates wage files for users to electronically upload W2 forms to the SSA only and is priced by the number of companies you can generate wage files for.

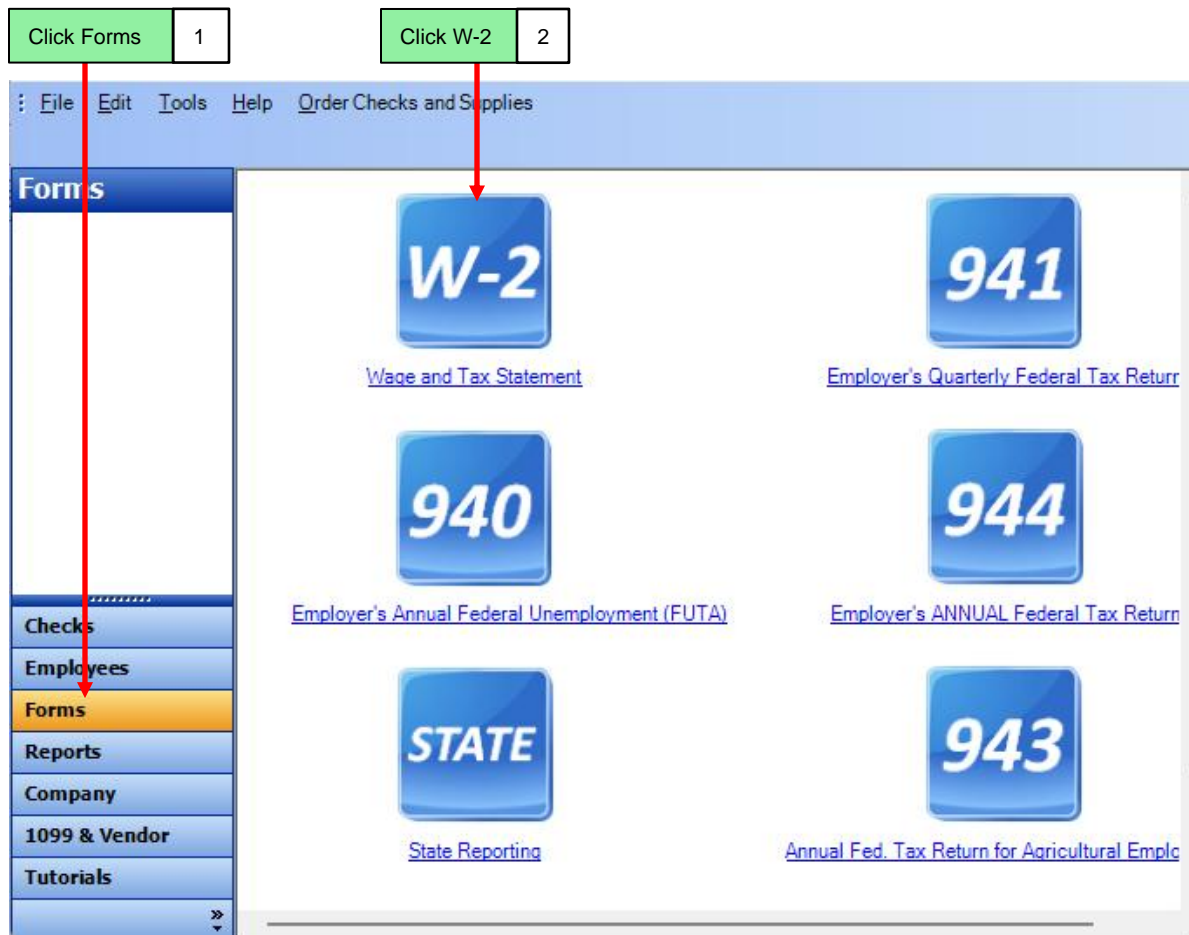
For pricing and to purchase this feature you can visit: <https://www.realtaxtools.com/Buy-Credit.html>

**PLEASE NOTE THE SOFTWARE DOES NOT FILE ON YOUR BEHALF
THE SOFTWARE WILL CREATE AN ELECTRONIC FILE
THAT YOU WILL HAVE TO UPLOAD TO THE SSA**

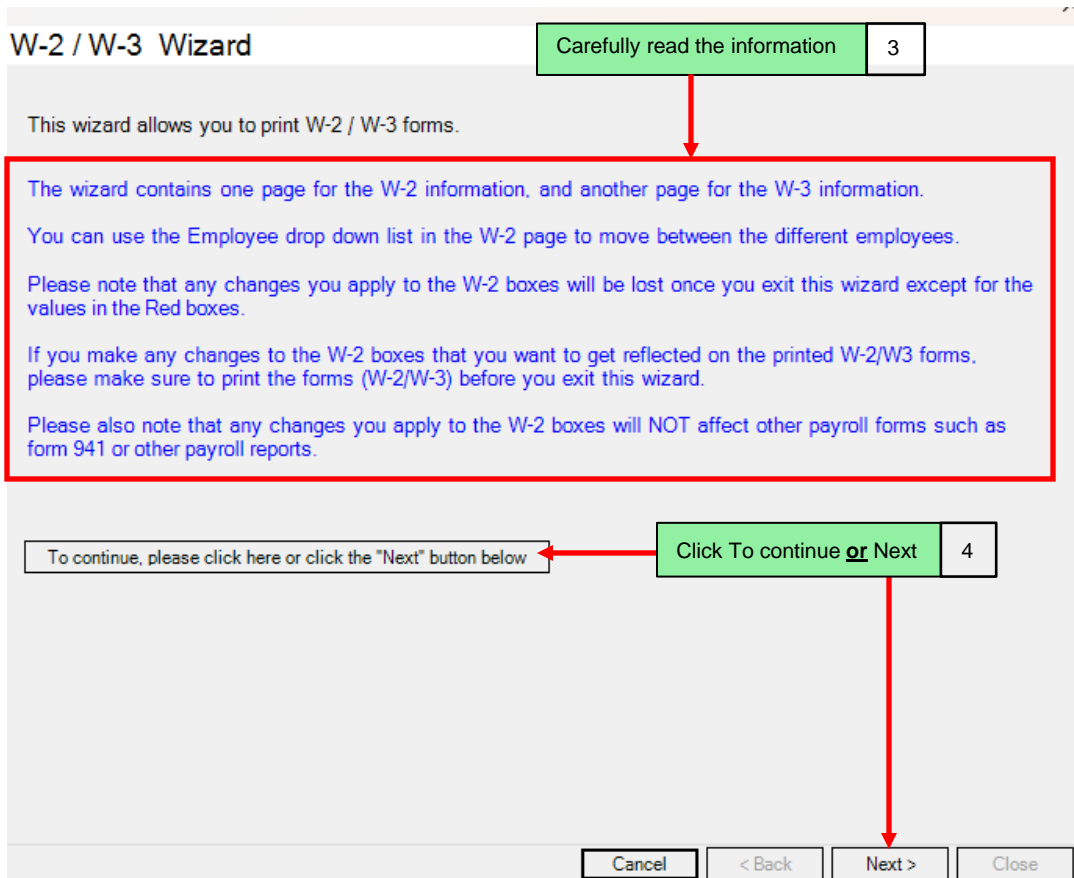
After you make the purchase of Payroll Mate SSA Wage File Export Optional Feature proceed to the next page for instructions to create an electronic file.

Create an electronic file

1. Click **Forms**
2. Click **W-2** (Wage and Tax Statement)



3. The W-2 / W-3 Wizard will open, this wizard allows you to print W-2 / W-3 forms. **Carefully read the information** in blue font regarding functionality of the wizard.
4. Click **To continue**, please click here or click the **“Next”** button below or click **Next**



The screenshot shows the 'W-2 / W-3 Wizard' window. At the top, a green callout box labeled '3' contains the text 'Carefully read the information'. A red arrow points from this box to a paragraph of blue text within a red-bordered box. The blue text provides instructions on how to use the wizard, including details about the W-2 and W-3 pages, the Employee drop-down list, and the importance of printing forms before exiting. Below this, another green callout box labeled '4' contains the text 'Click To continue or Next'. A red arrow points from this box to a text box that says 'To continue, please click here or click the "Next" button below'. At the bottom of the wizard, there are four buttons: 'Cancel', '< Back', 'Next >', and 'Close'.

5. The wizard will open with the first employee and their W-2 data will be populated in the form.
Carefully review the 1st W2
6. Once you have completed your review for the first employee, you can **go to the next employee** by **clicking on the Employee drop down box** located at the top of the wizard.
7. Once you have gone through all the employees click **Next**

Carefully review 1st W2 5

Go to next employee - Click dropdown 6

W-2 Page

Employee [Use this drop-down list to move between different employees]

Smith, Wilson [SSN: 546-84-1351]

Click Here to Continue to the W-3 form

W2

Preview Print Override Calculations

1 Wages, tips, other compensation

3542.31

3 Social security wages

3807.70

5 Medicare wages and tips

3807.70

7 Social security tips

0.00

Box 9 is no longer in use

11 Nonqualified plans

0.00

13 Statutory Retirement Third-party
employee plan sick pay

See instructions for box 12

	Code	Amount
12 a	D	265.39
12 b		
12 c		
12 d		

12 a

D

265.39

12 b

12 c

12 d

14 Other

SDI

0.00

15 State

IL

Employer's state
ID number

XXXXXXXX

16 State wages,
tips, etc.

3542.31

17 State income
tax

180.35

18 Local wages,
tips, etc.

3807.70

19 Local income
tax

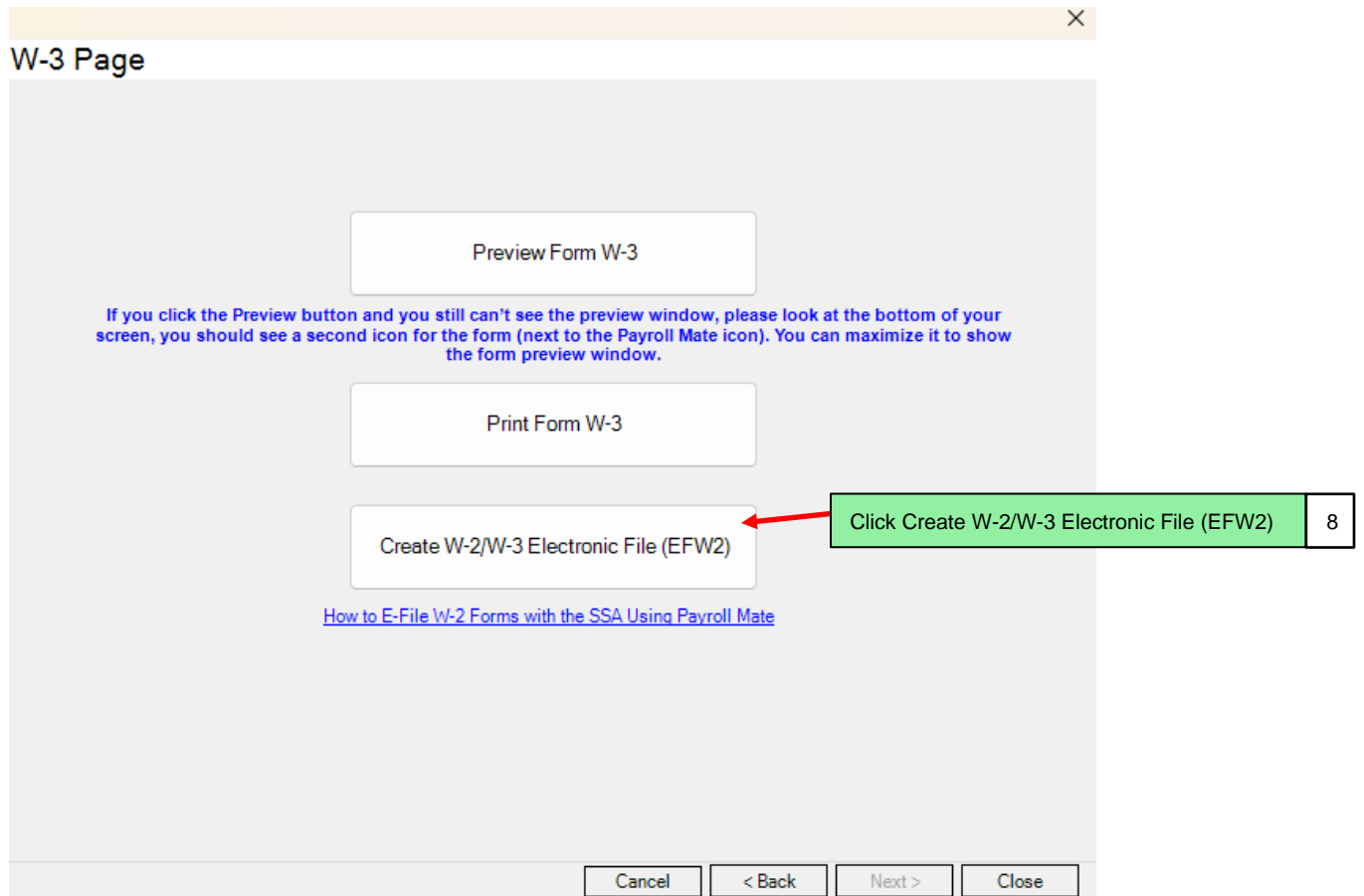
200.00

20 Locality
name

Cancel < Back Next > Close

Click Next 7

8. The W-3 Page dialog box will appear. **Click Create W-2/W-3 Electronic File (EFW2)**



9. The W-2 Electronic Filing Setup dialog box will appear. **Complete the information in the dialog box.**
10. In the Output File section, click **Browse**

Complete your information 9

W-2 Electronic Filing Setup X

Please fill out the information in this dialog and click the OK button to create the W-2 Electronic Submission File.
Please click the HELP button to the right if you have any questions.

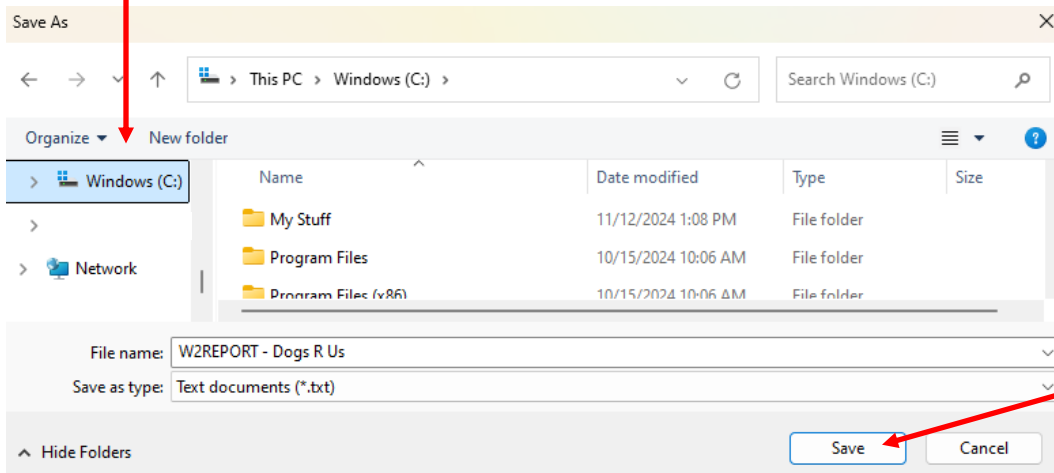
HELP

<p>Submitter Information</p> <p>Submitter Name: <input type="text"/> ?</p> <p>Federal EIN: <input type="text"/> ?</p> <p>PIN (User ID): <input type="text"/> ?</p> <p>Delivery Address: <input type="text"/> ?</p> <p>Location Address: <input type="text"/> ?</p> <p>City: <input type="text"/> ?</p> <p>State: <input type="text" value="AK"/> ?</p> <p>Zip Code: <input type="text"/> ? Zip Code Extension: <input type="text"/> ?</p>	<p>Contact Information</p> <p>Contact Name: <input type="text"/> ?</p> <p>Phone Number: <input type="text"/> ?</p> <p>Phone Extension: <input type="text"/> ?</p> <p>E-mail Address: <input type="text"/> ?</p> <p>Fax: <input type="text"/> ?</p> <p>Preparer Code: <input type="text" value="Accounting Firm"/> ?</p>
<p>Kind Of Employer</p> <p> <input checked="" type="radio"/> None apply <input type="radio"/> 501c non-govt. <input type="radio"/> State/local non-501c <input type="radio"/> State/local 501c <input type="radio"/> Federal govt. </p>	
<p>Output File [Name and Path of the output W-2 electronic submission file that Payroll Mate will create]</p> <p>File: <input type="text" value='Please click the "Browse..." button to set the output file name and path'/> ? <input type="button" value="Browse..."/></p>	

Click Browse 10

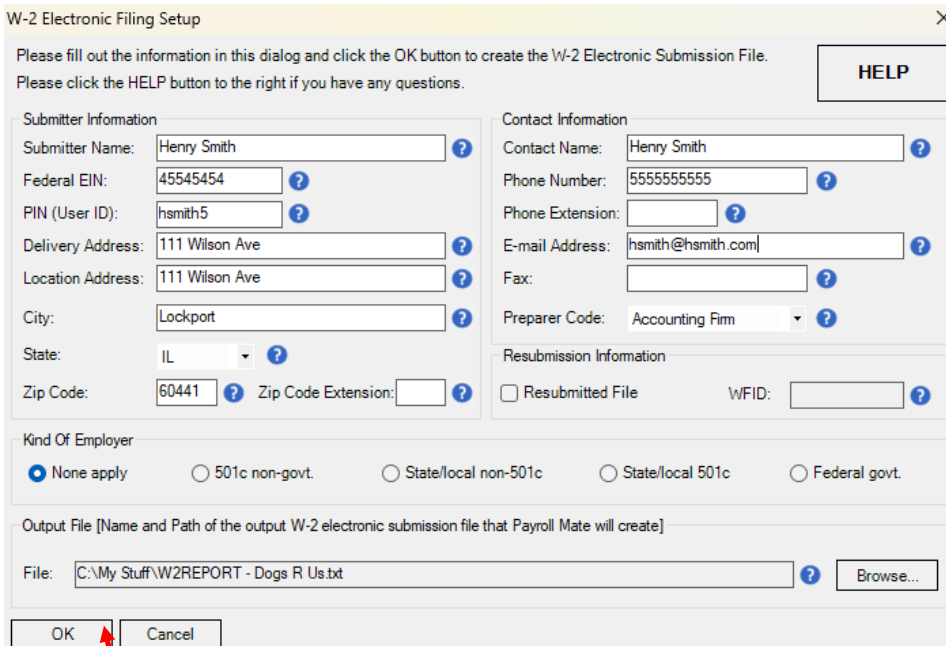
11. **Browse to the location/path** in which you are going to save your electronic file.
12. Click **Save**

Browse to the location/path to save your file 11



Click Save 12

13. The W-2 Electronic Filing Setup dialog box will appear again and will not contain your information, the file name and path of your electronic file. Click **OK**



The screenshot shows the 'W-2 Electronic Filing Setup' dialog box. It contains fields for Submitter Information (Name: Henry Smith, EIN: 45545454, PIN: hsmith5, Address: 111 Wilson Ave, City: Lockport, State: IL, Zip: 60441), Contact Information (Name: Henry Smith, Phone: 5555555555, E-mail: hsmith@hsmith.com), and Resubmission Information (Resubmitted File: [unchecked], WFID: [empty]). The 'OK' button is highlighted with a red arrow pointing from a callout box that says 'Click OK'.

Click OK 13

You are now done completing your electronic file.

14. The next page is labeled as **Next Steps**

This page shows you:

- **The file path to your electronic file**
- **A link to a free service by the SSA that enables you to check W-2 Wage reports for correctness before uploading them to SSA.**
- **The link to the BSO to upload the formatted wage file.**
- **How to check the Submission Status.**

You have now created your electronic file and you're ready to log into the BSO and upload your file.

After you log into the BSO website you need to upload the file generated by Payroll Mate, into the BSO's website. If you need help with the BSO website you need to contact the BSO directly:

<https://www.ssa.gov/employer/>

Please note: We are unable to provide any assistance regarding the BSO.