

Request for Copies of Filed Payroll Tax Forms (2002 and later)

If you are requesting copies because you received a tax notice, fax the notice to our Notice Resolution Group at 866.293.1994. You do NOT have to submit a request for copies of your tax forms.

Explanation of fees

Type of Fee	Amount	Explanation
Document fee	\$25.00 each	Fee for each document and filing period you request.
Historical research fee	\$100.00 for each year	This fee applies to each year prior to 2002 from which you request documents, and is in addition to the per-document fee listed above.
Overnight shipping Email or fax U.S. Postal Service	subject to charge no charge no charge	To request overnight shipping, check the option in the Shipping section of the form, and a rep will call you to discuss the fee.
Sales tax	your state's sales tax rate	Sales tax applies to all fees and shipping charges. Some states do not have sales tax.
W-2 Reprint Fee	\$2.50 each W-2 \$11.50 delivery fee <= 50 \$30.00 delivery > 50	Fee for each W-2 printed, then add delivery fee. (e.g. 10 W-2s: $[10 * 2.50] + 11.50 = \$36.50$)

FAQs

- Customer tax return copies are delivered to Assisted Payroll customers via QuickBooks Payroll Tax Center. It is the customer's responsibility to log in and download all available copies every quarter. We no longer mail form packets.
- PTC can be accessed from any computer using this external link. Payroll PIN is required to log in. QuickBooks software is not required. <https://payrolltaxcenter.intuit.com/ptc-termed/>
- The turnaround time for copies is 24-48 business hours.
- Filed forms are available in the PTC 45 days after the quarter closes with exception to Annual Withholding, which is available March 5th of the following year.
- Form 941SA (Wage List) is no longer on a separate form. It is now included on the Quarterly Unemployment Return for all states.
- Most state withholding deposits are electronically paid. Intuit doesn't provide PDF copies of payments made on your behalf.
- If the Company had an Entity Change, you will not be able to see copies of filed tax forms for the old EIN in PTC.
- If you recently canceled your payroll service, use the URL provided in the cancellation email and your payroll service PIN to access your filed tax copies.
- Copies of amended returns can't be provided until the amendment case has been completed.
- Annual reconciliation not available for CA and NY.

Intuit Assisted/Complete Payroll



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Section 1 - Company information

Company name: _____ Federal EIN: _____

Contact name (must match contact person on record): _____

Date of request: _____ Phone number: _____ Ext. _____

Section 2 - Special information

Did you have an entity change? Yes No If yes, list old Federal EIN _____

Is this for amended returns? Yes No

Section 3 - Federal forms (check all that apply)

940 Annual 20__	20__	20__
941 Quarter 20__ 1 2 3 4	20__ 1 2 3 4	20__ 1 2 3 4
W3 Annual 20__ 20__ 20__	W2 Employer's Copy All employees 20__ 20__ 20__	
W2 Social Security # Year(s)	Social Security # Year(s)	Social Security # Year(s)
_____ 20__ 20__ 20__	_____ 20__ 20__ 20__	_____ 20__ 20__ 20__
_____ 20__ 20__ 20__	_____ 20__ 20__ 20__	_____ 20__ 20__ 20__

Section 4 - State forms (fill in year and state abbreviation in top row)

Year/State	20__ / __	20__ / __	20__ / __	20__ / __	20__ / __	20__ / __														
Quarter	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4														
Quarterly unemployment																				
Quarterly withholding																				

Note: Quarterly withholding returns are not required for the following states: AR, CO, DE, DC, ID, KS, LA (prior to Q1 2012), MO, MI, MS, MD, MT, NM, OH, OK, OR, RI, and WI. VA, VT and NC withholding returns are only available for semi-weekly depositors.

Annual reconciliation	year/state 20__ / __	year/state 20__ / __	year/state 20__ / __	year/state 20__ / __	year/state 20__ / __	year/state 20__ / __
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Section 5 - Shipping information I prefer you send my copies to (select one):

US address: _____

Email: _____ Overnight shipping (call me to discuss additional fee)

Fax: _____ Do we need to call you before faxing? Yes No

Section 6 - Fee and payment information (Complete Payroll requests: payments are to be made by check only)

VISA Master Card American Express Discover Number of forms requested _____ (\$25 ea., \$100 will be added for all years prior to 2002 requested)

credit card # _____ exp date _____ CVV ID _____

Section 7 - Authorization (signature of a principal or duly authorized officer of the company is required)

I authorize the information listed above be delivered to me via the method I have checked above. I accept responsibility for the confidentiality of this information and agree to pay the fee listed above. Overnight shipping fee (if requested) to be paid separately.

Authorized signature: _____ Title: _____

Print name: _____ Date: _____

Sign and fax this request to 866.293.2069