

Payroll Tax Support: Frequently Asked Questions

How do I enroll in e-file for federal Form 940 and 941/944?

Before you can e-file your federal Form 940 and Form 941/944 with the IRS, you first need to enroll in IRS e-*file*—the IRS agency's electronic filing program. You only need to enroll once in order to file both federal Form 940 and Form 941/944.

Step 1: Gather information and keep it handy

During enrollment, you'll be prompted to provide or verify the following information:

- Your 9-digit Employer Identification Number (EIN).
- Your company legal name and address, which needs to exactly match the company legal name and address on file with the IRS. You'll typically find this information on IRS correspondence sent to your company or on a preprinted IRS payment coupon, like the preprinted Form 8109 shown here.

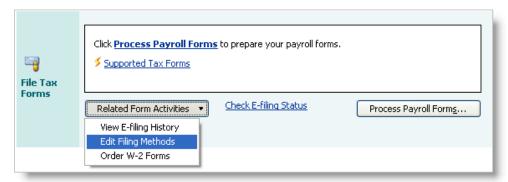


- The name, job title, email address, and phone number of **the person the IRS can contact about your enrollment and your payroll tax forms**. This person must be the same person that's on file with the IRS.
- An electronic signature. You'll need to provide the name and email address of the person who signs your payroll tax forms. This person must be the same person that's on file with the IRS.

Step 2: Submit an enrollment request through the QuickBooks Payroll Setup interview

You need to submit your enrollment request through the QuickBooks Payroll Setup interview. To do so:

- 1. In your QuickBooks company file, go to the **Employees** menu and click **Payroll Center**.
- 2. In the File Tax Forms section of the Payroll Center, click **Related Form Activities** and then **Edit Filing Methods**.



3. In the QuickBooks Payroll Setup interview, click **Continue**.



4. On the Filing methods panel, verify that your federal form is set up for e-file. If it isn't, select the form and click Edit; then follow the instructions for setting up the form's filing method. Click **Continue**.

QuickBooks Payroll Setup QuickBooks Payroll Setup I Taxes Filing methods Enrollments	Review your filing methods This list shows the forms you need to file and the method you've selected for filing each one. To change the filing method, click the form and then click the Edit button.		X
	Form Federal Form 940 Federal Form 941/Federal Form 944 Federal Form W-2/W-3 California Form DE 6 California Form DE 7	Description E-file 941/E-file E-file E-file Print	
Finish Later	UP52.2516	Edit Continu	e //

5. Review the instructions on the e-file enrollment panel and then click **Next**.

e-File Enrollment	×
Form 940 and 941 e-file enrollment	
In this section, we'll help you enroll in the IR<i>S e-file</i> program so you can file your federal Form 940 or Form 941 electronically with the IRS. Later, we'll help you enroll with the appropriate agencies to file your state payroll tax forms.	
To enroll in the IRS <i>e-file</i> program, you'll review or modify the company and contact information we collect from your QuickBooks company file and then submit the information for processing. You'll review:	
 Your EIN Your company legal name and address The name, title, phone number, and e-mail address of the person to contact about your payroll tax forms The name and e-mail address of the person who signs your payroll tax forms 	
You don't need to enroll to file W-2 and W-3 forms electronically with the Social Security Administration (SAA).	
E-file is available for employers who have an active subscription to Enhanced Payroll, and is a Beta feature in certain states. What does it mean when a feature has a "Beta" status?	
Do I have to enroll?	
<u>Cancel</u> <u>N</u> ext > UPS3.1.2359	

6. Verify your EIN and enter your company's legal name and address, and then click **Next**.

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✓ Filing metho → Enrollments		I us how you pay your employees and about their payroll additions and deductions. Gather the help you answer our questions. 99-1234567	Э
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	* City * State	Any Town CA - California	
	* Zip Code	90210	
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Finish	Cancel UP53.2.2562	< Previous Next >	

7. Enter the name, job title, email address, and phone number of the person the IRS can contact about your enrollment and your payroll tax forms. This person must be the same person that's on file with the IRS. Click Next.

QuickBooks Payroll Se	tup	E	×	
QuickBooks Payroll Setu ✓ 1 Taxes ✓ Filing metho → Enrollments	Form 940 and 941 e-file enrollment: Contact information P Review and complete the following contact information for the person to contact about your			
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Finish	What is this information of Will changes be saved to * required field Cancel UP53.3.2551	used for? o my QuickBooks company file? < Previous Next >		

8. Review the information in the summary window. (If you need to modify the information, click Previous and make any necessary changes.)

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QuickBooks Payroll Setu	e-File Enrollment		×	
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✓ Filing metho → Enrollments	Review the following company and contact information. To modify the information, click Previous and make any necessary corrections. After you verify the company and contact information:			
	 Click Send Information. Or, if you're not ready to submit your information, click Next. After your information processes successfully, click Next to either enroll with state agencies or exit. 			
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	Legal Address	123 Any Street	I I	
	City	Anytown	I I	
	State	CA	I I	
	Zip Code	90210	I I	
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	Job Title	Owner	I I	
	E-mail	Owner_Name@Company.com	- H	
	Phone	4085554321	- H	
		Send Information	- H	
		What happens after I subm the enrollment information?	t	
Finish	Cancel UPS3.4.2585	< Previous Next >		
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9. Click **Send Information**. After you send the information, click Next and then click Finish until you close the QuickBooks Payroll Setup interview.

Step 3: Complete the enrollment process

After you submit your enrollment information, the following occurs:

- 1. The enrollment information is sent to Intuit.
- 2. Intuit sends the enrollment information to the agency.
- 3. The agency receives the enrollment.
- Intuit sends you an e-mail that indicates whether your enrollment was received or rejected by the agency.
 IMPORTANT! The IRS can STILL reject your enrollment if they find an issue during the processing. If they do, you will receive a letter directly from the IRS.
- 5. Within 7 to 10 business days, the agency sends a unique 10-digit PIN through the mail to your company legal address.
- 6. Be sure to sign and return the PIN acknowledgement to the agency. (If the agency doesn't receive your acknowledgement, they may disable your PIN.)

Store the PIN in a secure place. You'll use the PIN each time you submit a payroll tax form (Form 940 or 941). Make sure that you enter the PIN exactly as provided to ensure that the form is accepted by the agency and processed in a timely manner.

NOTE: You must complete the entire enrollment process before you submit a form electronically through Intuit.

Other Resources

Ask the User Community

(http://community.intuit.com/) Connect with other users and experts to ask questions and find answers.

Find a Local Expert

(http://proadvisor.intuit.com/referral/) Local Certified QuickBooks ProAdvisors[™] can get you set up and provide accounting advice tailored to your business needs. (Fees may apply)

Contact Support

(http://payroll.intuit.com/support/contact/index.jsp) Get answers to common questions and personalized assistance from a support representative.