



## 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.

006824 BOD CD-SB  
\*\* IF YOU HAVE ANY QUESTIONS, \*\*  
\*\* REFER TO THIS INFORMATION: \*\*  
NUMBER OF THIS NOTICE: CP-515  
DATE OF THIS NOTICE: 06-11-2008  
TAXPAYER IDENT. NUM: 94-1234567  
TAX FORM: 941 200828  
TAX PERIOD: 07/03/2008

OGDEN UT 84201-0030

ANNA LANSKI DDS PC  
123 MAIN ST.  
ANYTOWN, CA 95123

17726

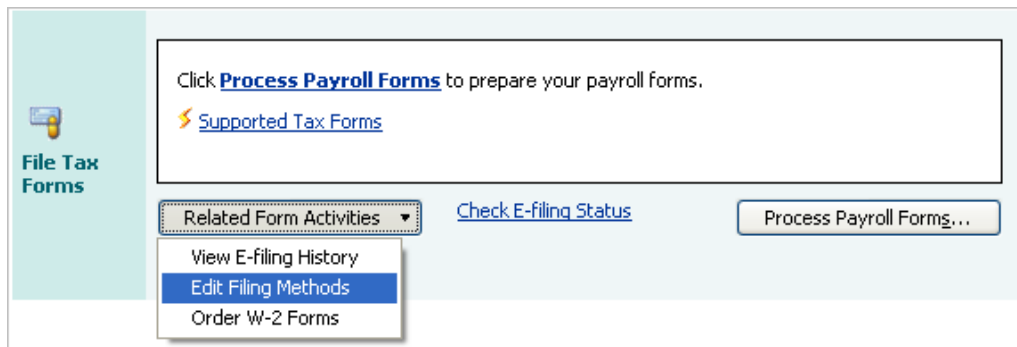
\*201685318222\*

- 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.

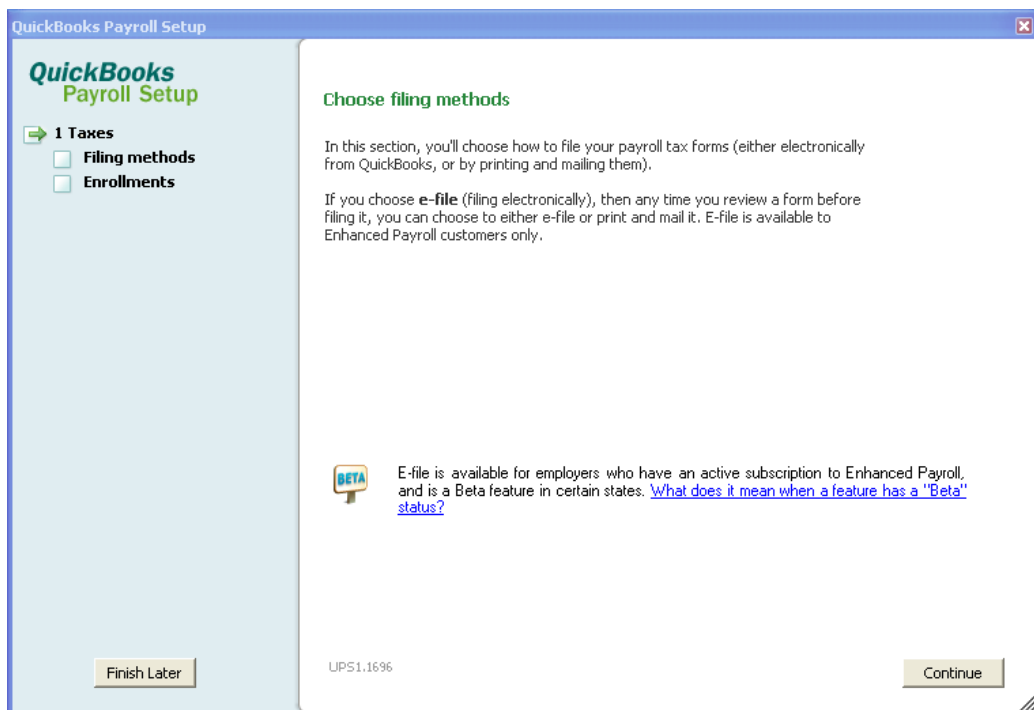
## Step 2: Submit an enrollment request through the QuickBooks Payroll Setup interview

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

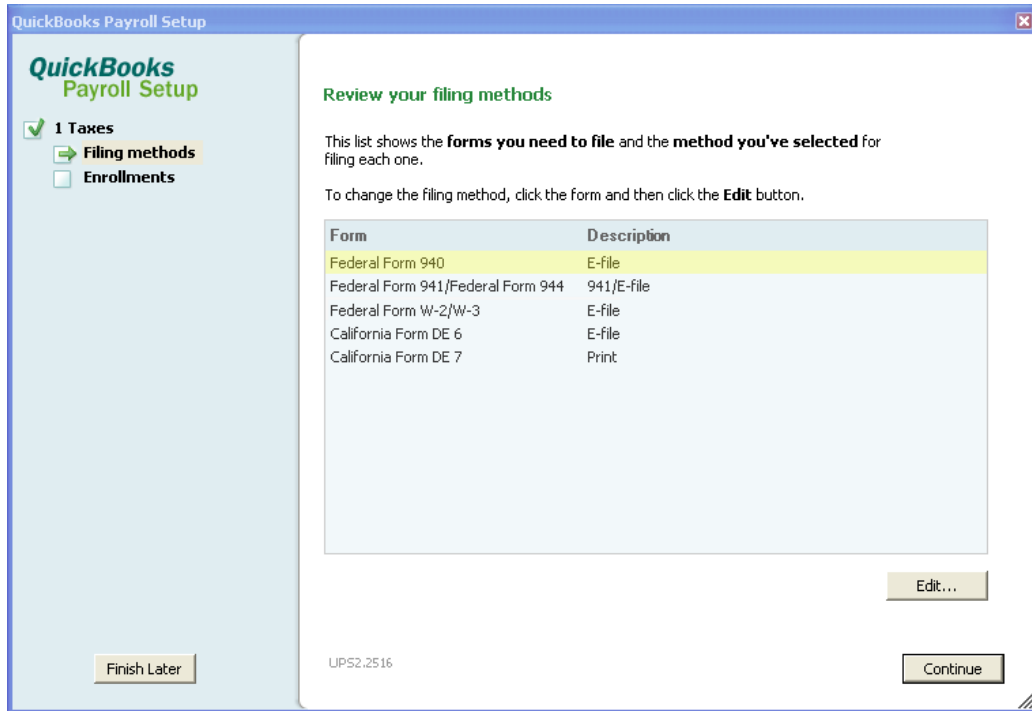
1. In your QuickBooks company file, go to the **Employees** menu and click **Payroll Center**.
2. In the File Tax Forms section of the Payroll Center, click **Related Form Activities** and then **Edit Filing Methods**.



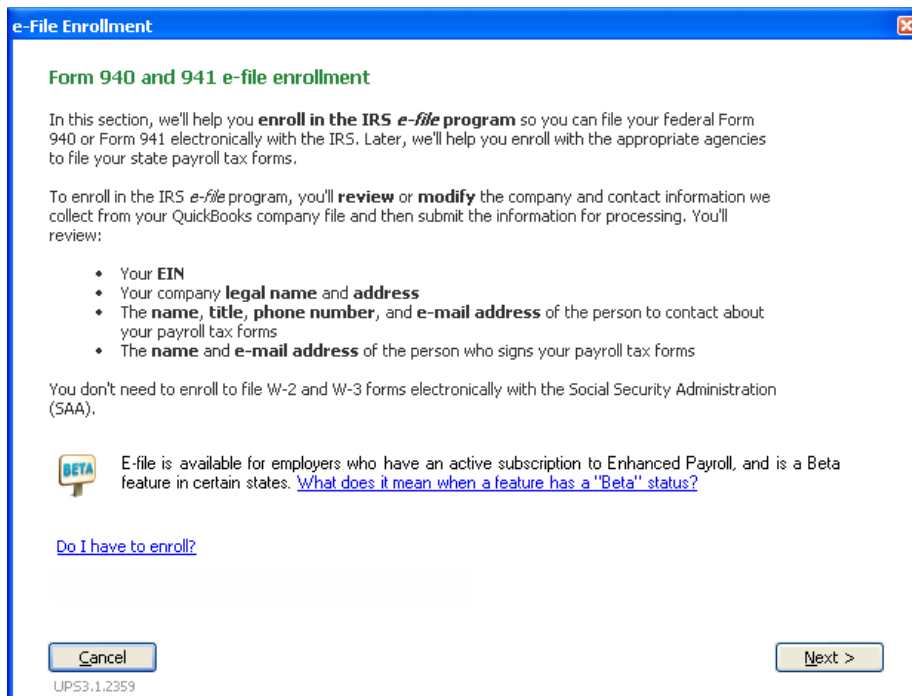
3. In the QuickBooks Payroll Setup interview, click **Continue**.



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**.



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



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

QuickBooks Payroll Setup

**QuickBooks Payroll Setup**

1 Taxes  
 ✓ Filing method  
 → Enrollments

**e-File Enrollment**

**Form 940 and 941 e-file enrollment: Company information**

In this section, you'll tell us how you pay your employees and about their payroll additions and deductions. Gather the following information to help you answer our questions.

\* EIN: 99-1234567

\* Legal Name: Rock Castle Construction

\* Legal Address: 123 Any Street

\* City: Any Town

\* State: CA - California

\* Zip Code: 90210

[Will changes be saved to my QuickBooks company file?](#)

\* required field

Cancel < Previous Next >

Finish

LPS3.2.2562

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 Setup

**QuickBooks Payroll Setup**

1 Taxes  
 ✓ Filing method  
 → Enrollments

**e-File Enrollment**

**Form 940 and 941 e-file enrollment: Contact information**

Review and complete the following **contact information** for the person to contact about your company payroll tax forms.

\* Contact Name: Owner Name

\* Job Title: Owner

\* Phone: 4085554321

\* E-mail: Owner\_Name@Company.com

\* Confirm E-mail: Owner\_Name@Company.com

[What is this information used for?](#)

[Will changes be saved to my QuickBooks company file?](#)

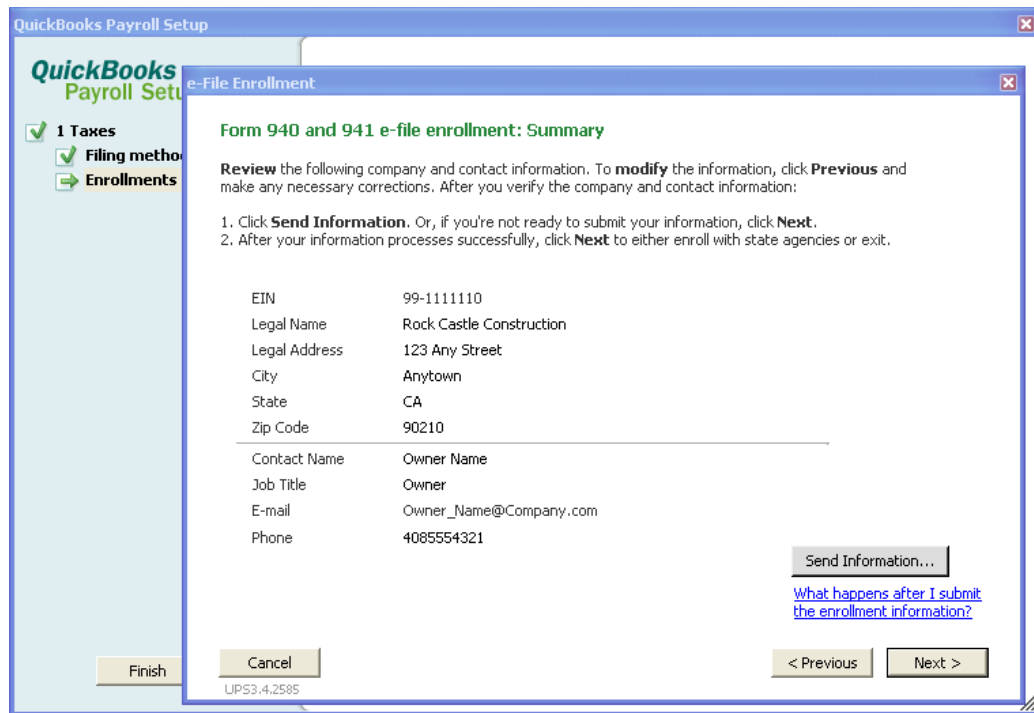
\* required field

Cancel < Previous Next >

Finish

LPS3.3.2551

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



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.
4. 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:** Be sure that you complete the entire enrollment process before you submit a form electronically through Intuit.

## Other Resources

### [Ask the User Community](http://community.intuit.com/)

(<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/)

(<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/)

(<http://payroll.intuit.com/support/>)

Get answers to common questions and personalized assistance from a support representative. Learn about free and paid support options.