e-Services
FOR BUSINESS

User Guide
TABLE OF CONTENTS

About e-Services for Business
Features and Advantages ..................................................................................................3

Account Setup
Create a Username and Password ....................................................................................4
Enroll as an Employer .........................................................................................................5
Enroll as a Representative .................................................................................................6
Add Account Access ..........................................................................................................7

Filing Returns and Reports
File a Tax Return ................................................................................................................8
File a Wage Report ............................................................................................................9

Adjusting Previously Filed Returns and Reports
Adjust a Tax Return ..........................................................................................................10
Adjust a Wage Report ......................................................................................................11

Making Payments
Payroll Tax Deposit (DE 88) .............................................................................................12

Self Help
Username Recovery......................................................................................................... 13
Password Reset ...............................................................................................................13
Lockouts ...........................................................................................................................14
For Your Records .............................................................................................................15

Resources
Resources ........................................................................................................................16
Fast, easy, and secure!

Features:
- Register, close, or re-open an employer payroll tax account.
- File, adjust, and print returns and reports.
- Make payments.
- View and update business name, address, and more.
- Protest Unemployment Insurance (UI) benefit charges or UI rates.
- Authorize a power of attorney.
- Report new employees or independent contractors.
- Request a transfer of a reserve account.

Advantages:
- Simple one-time enrollment.
- No cost to enroll and use.
- Fast, easy, and secure way to manage your payroll taxes.
- Available 24 hours a day, 7 days a week.
- Provides confirmation when a return, report, or payment is received.
- Saves time by saving basic account information for future transactions.
Account Setup

Create a Username and Password

1. Visit e-Services for Business (edd.ca.gov/e-Services_for_Business).
2. Select Enroll.
3. Complete required fields.
   - Username
     *Username cannot be the same as your password and must include:*
     - 8-15 characters
     - At least one letter
     - At least one number
   - Password
     *Password cannot be the same as your username and must include:*
     - 8-12 characters
     - At least one uppercase letter
     - At least one lowercase letter
     - At least one number
     - At least one special character: ! @ # $ % ^ & * ( )
   - Re-enter password
   - First Name
   - Last Name
   - Last 4 of SSN or create a 4-digit PIN
     *Your Username and last four digits of your Social Security number or a four-digit PIN that you create are required to reset your password.*
   - Email
     *An email address may only be used once. A message will be sent to this email address to complete the enrollment process.*
   - Re-Enter Email
   - Phone Number (XXX-XXX-XXXX) (optional)
   - Complete security check box, then select Continue.
   - Complete all security questions then select Continue.
     *These security questions are a part of your account recovery options should you forget your username and/or password. Please print or make a note of the answers for your records.*
4. Review enrollment summary then select Submit.
   *You may use the card on page 15 of this guide to write down your enrollment information. Please keep this information secure.*
5. Check your email inbox for a message from the EDD and select the hyperlink to confirm your email address. *You must respond within 24 hours or the enrollment process will need to be repeated.*
6. View the displayed enrollment verification on the EDD website.
Enroll as an Employer

1. After creating a username and password, select Log In from e-Services for Business (edd.ca.gov/e-Services_for_Business).

2. Enter username and password.

3. Select Existing Employer, then select Next.

4. Review the information on the Getting Started screen, then select Next.

5. Select Yes on the Enrollment Type – Employer screen, then select Next.

6. Select your account type from the drop-down menu (e.g., Employment Tax).

7. Enter your eight-digit employer payroll tax account number.

8. Select the country from the drop-down menu (e.g., USA).

9. Enter the five-digit ZIP Code associated with your employer payroll tax account.

10. Security Questions:
    - Select a security question to answer:
      - Total Subject Wages Reported
        The total subject wages from one of the last three Quarterly Contribution Return and Report of Wages (Continuation) (DE 9C) filed.
      - Reserve Account Balance
        The Unemployment Insurance (UI) reserve account balance from the most recent Notice of Contribution Rates and Statement of UI Reserve Account (DE 2088).
      - Payment Amount
        One of the last five payments received by the EDD.
      - New Employer
        If you have never filed a return or made a payment, select New Employer.
    - Enter the answer to the security question you selected.

11. Select Next.

12. Review Enrollment Request, then select Submit.

13. Select Ok to submit your request.

14. Review the information on the Confirmation screen, then select Ok.

You now have access to your account!

To add access to an additional employer payroll tax account, refer to Add Account Access on page 7 of this guide.
Enroll as a Representative

1. After creating a username and password, Select Log In from e-Services for Business (edd.ca.gov/e-Services_for_Business).

2. Enter username and password.

3. Select Existing Employer, then select Next.

4. Review the information on the screen then select Next.

5. Select No on the Enrollment Type – Employer screen, then select Next.

6. Select Yes on the Enrollment Type – Representative screen, then select Next.

7. Enter your information:
   - If you are an internal representative (e.g., employee) or an accounts payable clerk, enter your employer’s information.
     • Select the type of ID from the drop-down menu (Federal Employer Identification Number [FEIN] or Social Security Number [SSN]).
     • Enter your ID number based on the type of ID you selected.
     • Select the country from the drop-down menu (e.g., USA).
     • Enter five-digit ZIP Code associated with the FEIN or SSN that was entered above.

8. Select Next.

9. Enter Information:
   • Select your organization type from the drop-down menu (if you enrolled using your FEIN).
   • Enter the Business Name if you enrolled using your FEIN, or
   • Enter your First Name and Last Name if you enrolled with your SSN.
   • Enter your Location Address.
   • Enter your City.
   • Select your State from the drop-down menu.
   • Select Next.

10. Review Enrollment Request then select Submit.

11. Select Ok to submit request.

12. Review the information on the Confirmation screen, then select Ok.

You are now enrolled in e-Services for Business. You will need to add access to the employer payroll tax account. Refer to Add Account Access on page 7 of this guide.
Add Account Access

Log in to e-Services for Business (edd.ca.gov/e-Services_for_Business).

1. Select **Add Access to Another Account** from the I Want To menu.

2. Select the Account Type (e.g., Employment Tax) from the drop-down menu.

3. Enter the eight-digit employer payroll tax account number.

4. Select the Country from the drop-down menu.

5. Enter the five-digit ZIP Code associated with the employer payroll tax account.

   - Choose a security question to answer:
     - Total Subject Wages Reported
       The total subject wages from one of the last three Quarterly Contribution Return and Report of Wages (Continuation) (DE 9C) filed.
     - Reserve Account Balance
       The Unemployment Insurance (UI) reserve account balance from the most recent Notice of Contribution Rates and Statement of UI Reserve Account (DE 2088).
     - Payment Amount
       One of the last five payments received by the EDD.
     - New Employer
       If you have never filed a return or made a payment, select **New Employer**.
   - Enter the answer to the security question you selected.

7. Select **Next**.
   A message will appear at the bottom of the page informing you that you are trying to gain access to the specified account.

8. Select **Submit**.

9. Review the information on the Confirmation screen, then select **Ok**.

You now have account access!
File a Tax Return

Quarterly Contribution Return and Report of Wages (DE 9)
Employer of Household Worker(s) Annual Payroll Tax Return (DE 3HW)
Quarterly Contribution Return (DE 3D)

Log in to e-Services for Business (edd.ca.gov/e-Services_for_Business).
Select the account type hyperlink (e.g., Employment Tax).

1. Select the filing period for the period you want to file.
2. Select File or Adjust a Return or Wage Report from the I Want To menu.
3. Select File Now next to Tax Return.
4. Answer the question, “Do you have payroll to report?” by selecting Yes or No, then select Next.
   • If you answered No, complete the Declaration, then select Submit.
   • If you answered Yes, enter the return information:
     • Total Subject Wages Paid this Quarter.
     • UI Wages.
     • SDI Wages.
     • SDI Contribution.
     • Personal Income Tax Withheld.
     • Contributions and Withholdings Paid for the Quarter.
     • Select Next.
     • Complete the Declaration, then select Submit.
5. Select Ok to submit request.
6. Review the information on the Confirmation screen, then select Ok.

You may view, print, or edit your tax return after you submit your request.

Tax returns can be saved and completed later by selecting Save Draft on the bottom left of the return. To access a saved return or report, go to Submissions.
File a Wage Report

Quarterly Contribution Return and Report of Wages (Continuation) (DE 9C)
Employer of Household Worker(s) Quarterly Report of Wages and Withholdings (DE 3BHW)

Log in to e-Services for Business (edd.ca.gov/e-Services_for_Business).
Select the account type hyperlink (e.g., Employment Tax).

1. Select the filing period for the period you want to file.

2. Select File or Adjust a Return or Wage Report from the I Want To menu.


4. Answer the question, “Do you have payroll to report?” by selecting Yes or No, then select Next.
   - If you answered No, complete the Declaration, then select Submit.
   - If you answered Yes, go to step 5.

5. Answer the question, “Do you want to import a file?”
   - If you answered Yes, select the Import a Wage File button to import your file, then select Next.
   - If you answered No, select Next to directly enter the employee(s) wage information, then select Next.

You may report multiple Wage Plan Codes on the same return if your account is subject to both Unemployment Insurance and Disability Insurance.

Instructions

<table>
<thead>
<tr>
<th>Wage Details</th>
<th>Filter</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
<td>First Name</td>
</tr>
</tbody>
</table>

Complete Wage Information

6. Enter the number of employees for the 1st, 2nd, and 3rd months in the quarter, then select Next.

7. Complete the Declaration, then select Submit.

8. Select OK to submit the request.

9. Review the information on the Confirmation screen, then select OK.

Wage reports can be saved and completed later by selecting Save Draft on the bottom left of the report. To access a saved return or report go to Submissions.
Adjusting Previously Filed Returns and Reports

Adjust a Tax Return

Adjust a previously filed Tax Return.

Quarterly Contribution and Wage Adjustment Form (DE 9ADJ)
Tax and Wage Adjustment Form (DE 678)
Quarterly Adjustment Form for Voluntary Plan Disability Insurance Employers (DE 938)

Log in to e-Services for Business (edd.ca.gov/e-Services_for_Business).
Select the account type hyperlink (e.g., Employment Tax).

1. Select the filing period for the period you want to adjust.
2. Select File or Adjust a Return or Wage Report from the I Want To menu.
3. Select View or Adjust Return next to Tax Return.
4. Select Adjust Return from the I Want To menu.
5. Complete the required fields with your corrected wage and contribution information, then select Next.
6. Enter the Reason for Adjustment, then select Next.
   • If no adjustments were made to SDI and PIT, go to step 8.

Amendment Information

Reason for Adjustment

7. If you made adjustments to SDI and/or PIT, you will need to review and answer the questions regarding SDI and PIT overpayment on the Additional Information screen, then select Next.
8. Complete the Declaration, then select Submit.
9. Select Ok to submit the request.
10. Review the information on the Confirmation screen, then select Ok.
Adjust a Wage Report

Adjust a previously filed Wage Report.

Quarterly Contribution and Wage Adjustment Form (DE 9ADJ)
Tax and Wage Adjustment Form (DE 678)

Log in to e-Services for Business (edd.ca.gov/e-Services_for_Business).
Select the account type hyperlink (e.g., Employment Tax).

1. Select the filing period for the period you want to adjust.
2. Select File or Adjust a Return or Wage Report from the I Want To menu.
3. Select View or Adjust Return next to Wage Report.
4. Select Adjust Return from the I Want To menu.
5. Complete the required fields with your corrected wage information, then select Next.
6. Enter corrected number of employees for the 1st, 2nd, and 3rd months in the quarter if applicable.
7. Complete the Amended Wage Totals section. Report the corrected grand totals for all employees, not just the amended employees.
8. Enter the Reason for Adjustment, then select Next.

Amendment Information

<table>
<thead>
<tr>
<th>Reason for Adjustment</th>
<th>Required</th>
</tr>
</thead>
</table>

9. Complete the Declaration, then select Submit.
10. Select Ok to submit the request.
11. Review the information on the Confirmation screen, then select Ok.
Making Payments

Payroll Tax Deposit (DE 88)

Log in to e-Services for Business (edd.ca.gov/e-Services_for_Business). Select the account type hyperlink (e.g., Employment Tax).

1. Select the filing period for the period you would like to make a payment.
2. Select Make a Payment from the I Want To menu.
3. Select ACH Debit. If you choose to pay by credit card, you will be directed to the Official Payments Corporation website to complete your payment.
4. Select DE 88 Payment.
5. Complete the following information:
   - Bank Account Type
     Select Checking or Savings from the drop-down menu.
   - Routing Number
   - Account Number
     The bank account number.
   - Confirm Account Number
     Select Yes if you want to save this payment source as the default for this account.
   - Bank Debit Date
     This is the date the funds will be debited from your bank account.
   - Amount
     Enter the amount of your total payment. This amount should match the Payment Total at the bottom of the screen.
   - Confirm Amount
   - Deposit Schedule
     Select Monthly, Next-Day, Quarterly, or Semiweekly from the drop-down menu.
   - Pay Date
     This is the date you paid your employees. Select the calendar icon to select a date.
   - Deposit Amounts
     Enter the amount(s) of your contribution(s) and/or withholding(s)
     • Unemployment Insurance
     • Employment Training Tax
     • State Disability Insurance
     • Personal Income Tax
     • Penalty and Interest (if applicable)
6. Verify Payment Total, then select Submit.
7. Select Ok to authorize your payment.
8. Review the information on the Confirmation screen, then select Ok.
Username Recovery
Visit e-Services for Business (edd.ca.gov/e-Services_for_Business).

1. Select Log In.
2. Select Forgot username?
3. Enter:
   • First name
   • Last name
   • Email
   • Last 4 of SSN or 4-digit PIN
4. Complete security check box, then select Submit.
5. Answer your security questions, then select Submit.
6. Check your email inbox for a message from the EDD and select the hyperlink to confirm your email address. You must respond within 24 hours or the enrollment process will need to be repeated.
7. Your username will be provided on the screen.

Password Reset
Visit e-Services for Business (edd.ca.gov/e-Services_for_Business).

1. Select Log In.
2. Select Forgot password?
3. Enter:
   • Username
   • First name
   • Last name
   • Email
   • Last 4 of SSN or 4-digit PIN
4. Complete security check box, then select Submit.
5. Answer your security questions, then select Submit.
6. Check your email inbox for a message from the EDD and select the hyperlink to confirm your email address. You must respond within 24 hours or the enrollment process will need to be repeated.
7. Enter your new password, then select Update.
Lockouts

Temporary Lockout
After three failed log in attempts, your account will be temporarily locked. You must close your browser and wait 30 minutes before attempting to log in again.

Adding Account Access Lockout
After three failed attempts to add access to an employer payroll tax account in e-Services for Business, you will be locked-out. You will not be able to add access to that employer payroll tax account in e-Services for Business until the account is unlocked.

To unlock the account you will need to:

• Call the Taxpayer Assistance Center at 1-888-745-3886, or
• Visit Ask EDD (askedd.edd.ca.gov).
  • Select a category: Payroll Tax from the drop-down menu.
  • Select a sub-category: e-Services for Business from the drop-down menu.
  • Select a topic: Account Lockouts from the drop-down menu.
  • Select Continue.
  • Enter your contact information and preferred contact method.
  • Provide additional information including your eight-digit employer payroll tax account number and the answer to one of the security questions.
• Select Submit.
  A representative will contact you when your account has been unlocked using the preferred contact method you selected.
For Your Records

e-Services for Business Enrollment Information

| Username: | 
| Password: | 
| Last 4 of SSN or 4-digit PIN: | 
| Email: | 

Enrollment Security Questions

<table>
<thead>
<tr>
<th>Security Questions</th>
<th>Your Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
</tbody>
</table>
Resources

The EDD has many resources to help you with using e-Services for Business.

• **EDD e-Services for Business** (edd.ca.gov/e-Services_for_Business)
  e-Services for Business is your fast, easy, and secure way to file, pay, and manage your employer payroll tax account online. Visit e-Services for Business for more information, direct links to tutorials, FAQs, the *e-Services for Business Brochure (DE 159) (PDF)* (edd.ca.gov/pdf_pubCtr/de159), and more!

• **Tutorials** (edd.ca.gov/Payroll_Taxes/e-Services_for_Business_Tutorials)
  The EDD has developed tutorials to help guide you through e-Services for Business. The tutorials are available 24 hours a day, 7 days a week.
  Some of the tutorials available are:
  • I Want to Enroll for a Username and Password to Use Employer Services Online
  • I Want to Enroll as an Employer in e-Services for Business
  • Enroll as a Representative and Add Access to Accounts
  • I Want to File a Tax Return or Wage Report
  • I Want to Make a Payroll Tax Deposit (DE 88) Payment
  • I Want to Adjust a Tax Return or Wage Report
  • I Want to Get my UI Rate or Update My Account Information

• **FAQs - e-Services for Business** (edd.ca.gov/Payroll_Taxes/FAQ_-_e-Services_for_Business)
  If you are looking for specific information about e-Services for Business, review the frequently asked questions (FAQs).