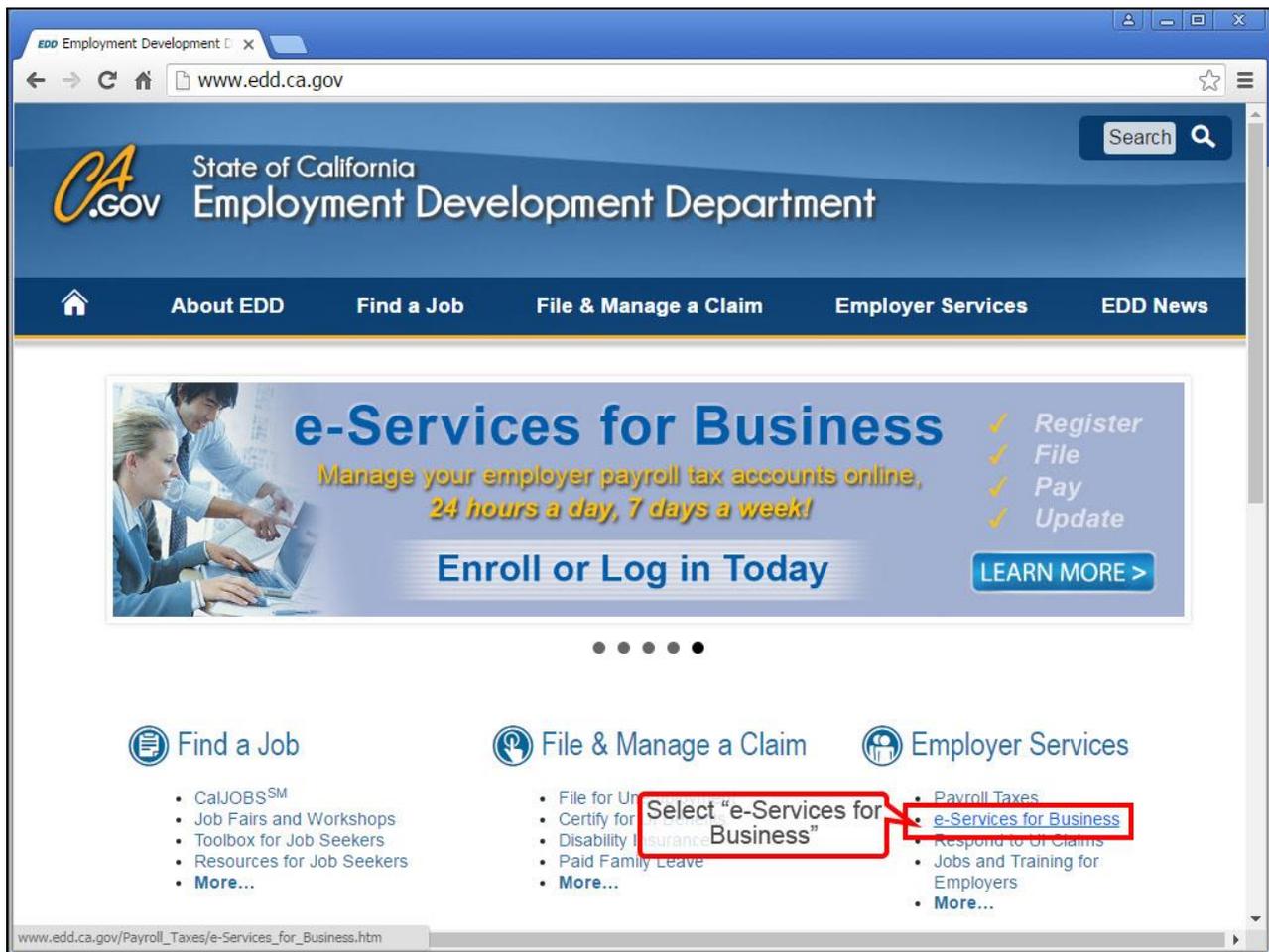


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# I Want to Enroll as an Agent and Add Access to Accounts in e-Services for Business

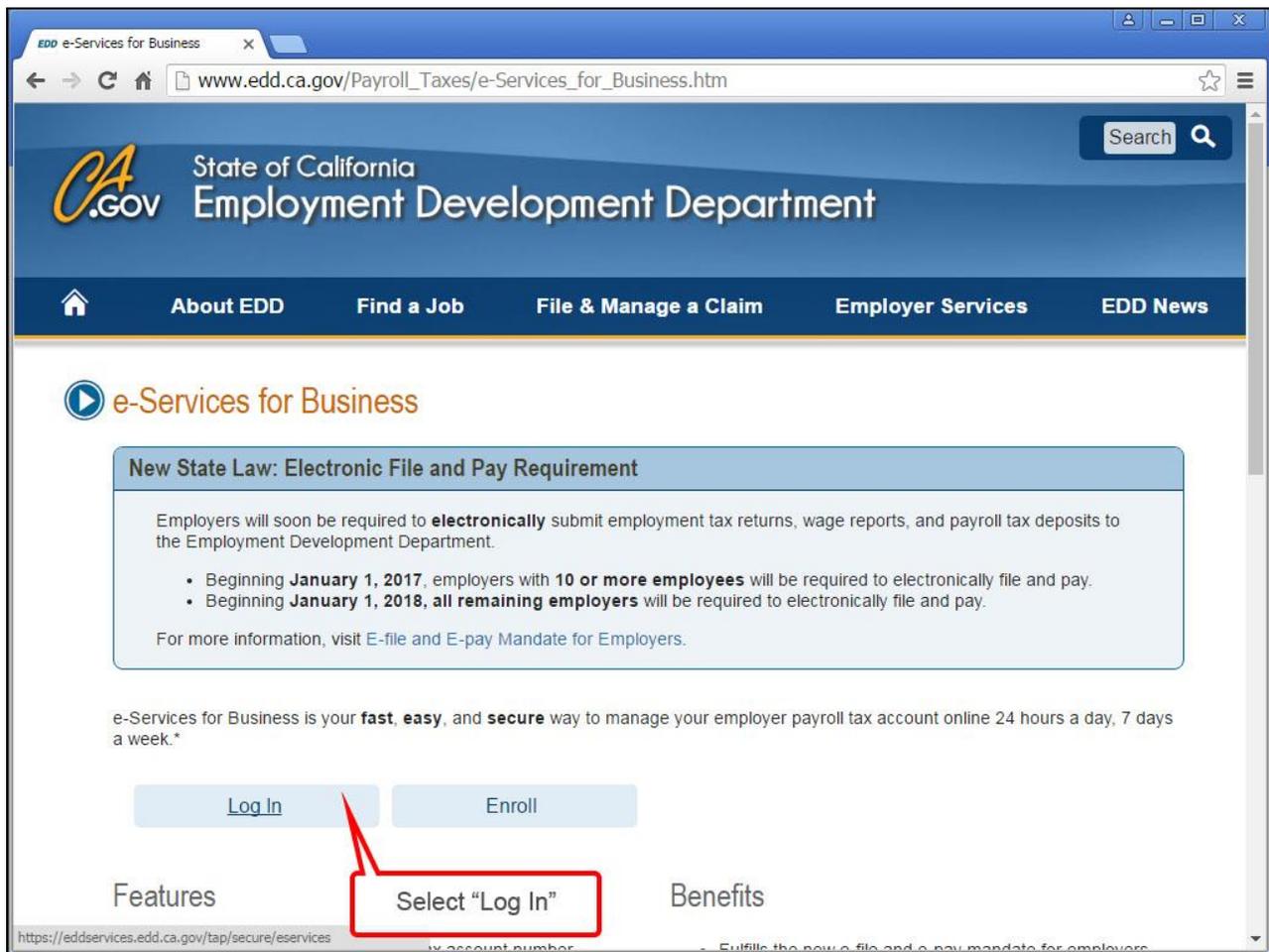
## **Slide notes**

The California Employment Development Department (EDD) developed this tutorial to assist you with navigating through e-Services for Business. This tutorial will show you how to complete this enrollment process as an employer representative/payroll agent and how to access a client's account in e-Services for Business.



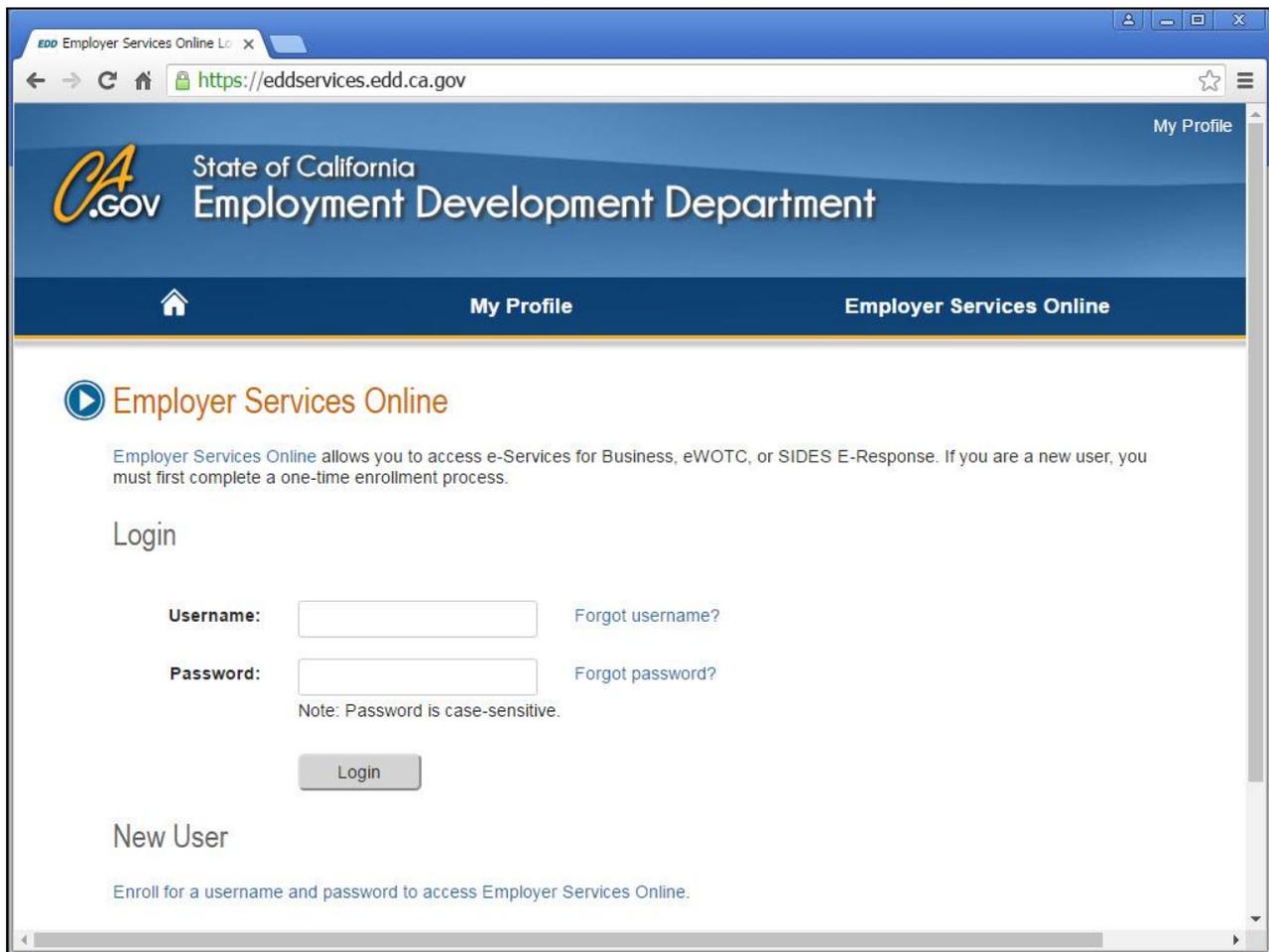
## Slide notes

Welcome to the Employment Development Department home page. Notice the "e-Services for Business" link in the Employer Services column. Select the "e-Services for Business" link.



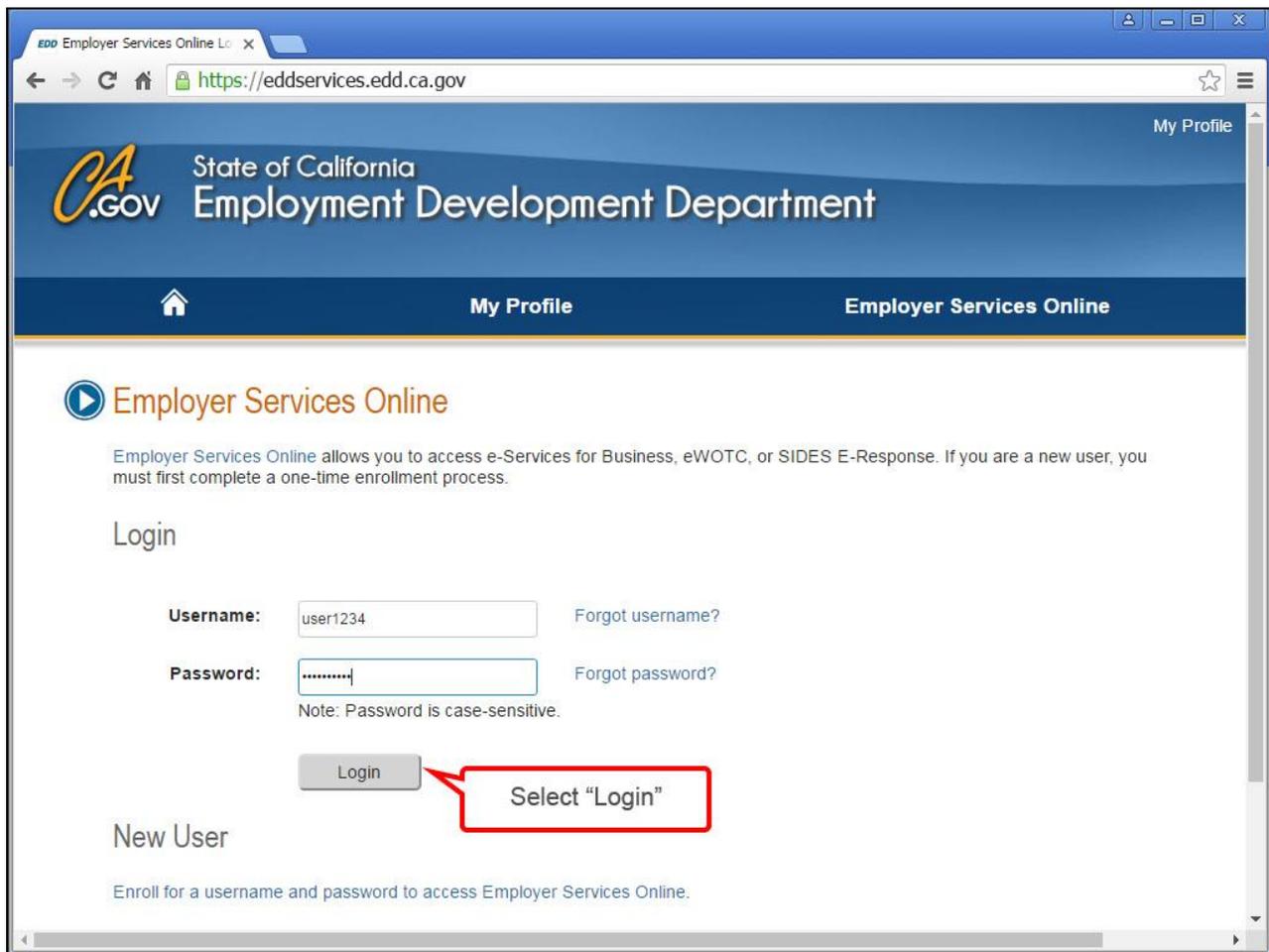
## Slide notes

Select the e-Services for Business “Log In” button.



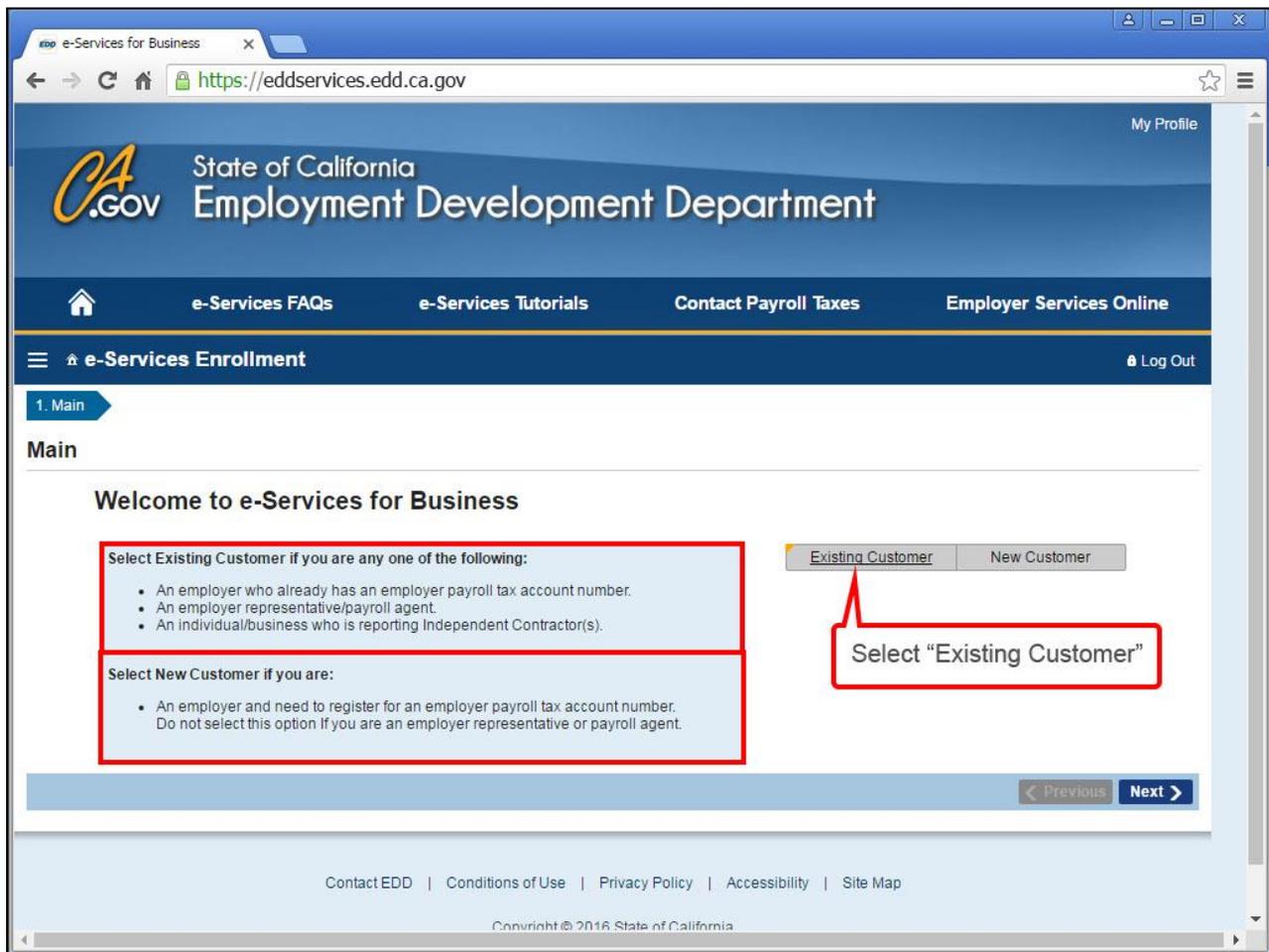
### Slide notes

You should already have a username and password established. Enter your username and password. If you would like to learn how to enroll for a username and password refer to the tutorial "I Want to Enroll for a Username and Password to Use e-Services for Business."



### Slide notes

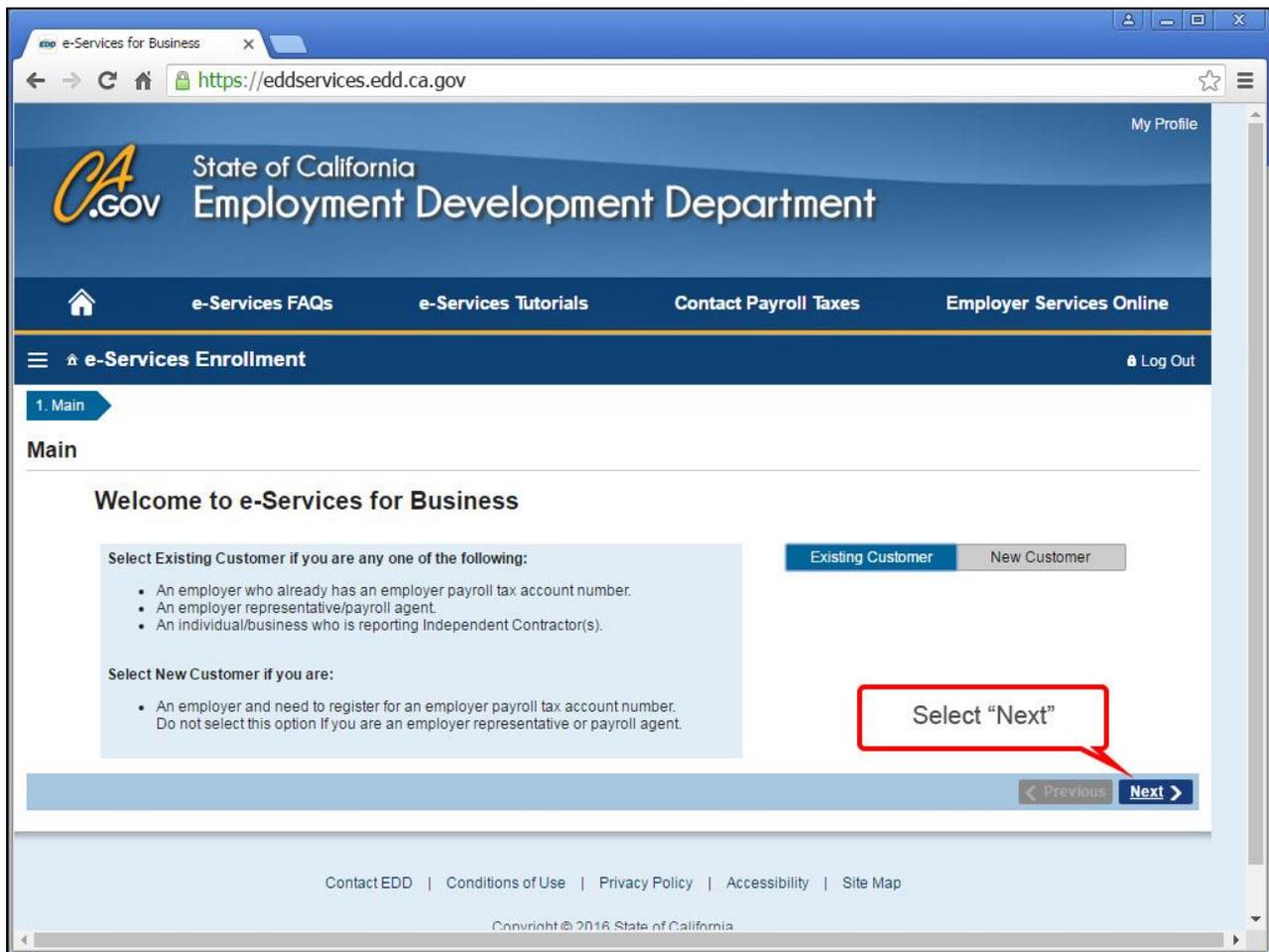
Select "Login" to begin using e-Services for Business.



## Slide notes

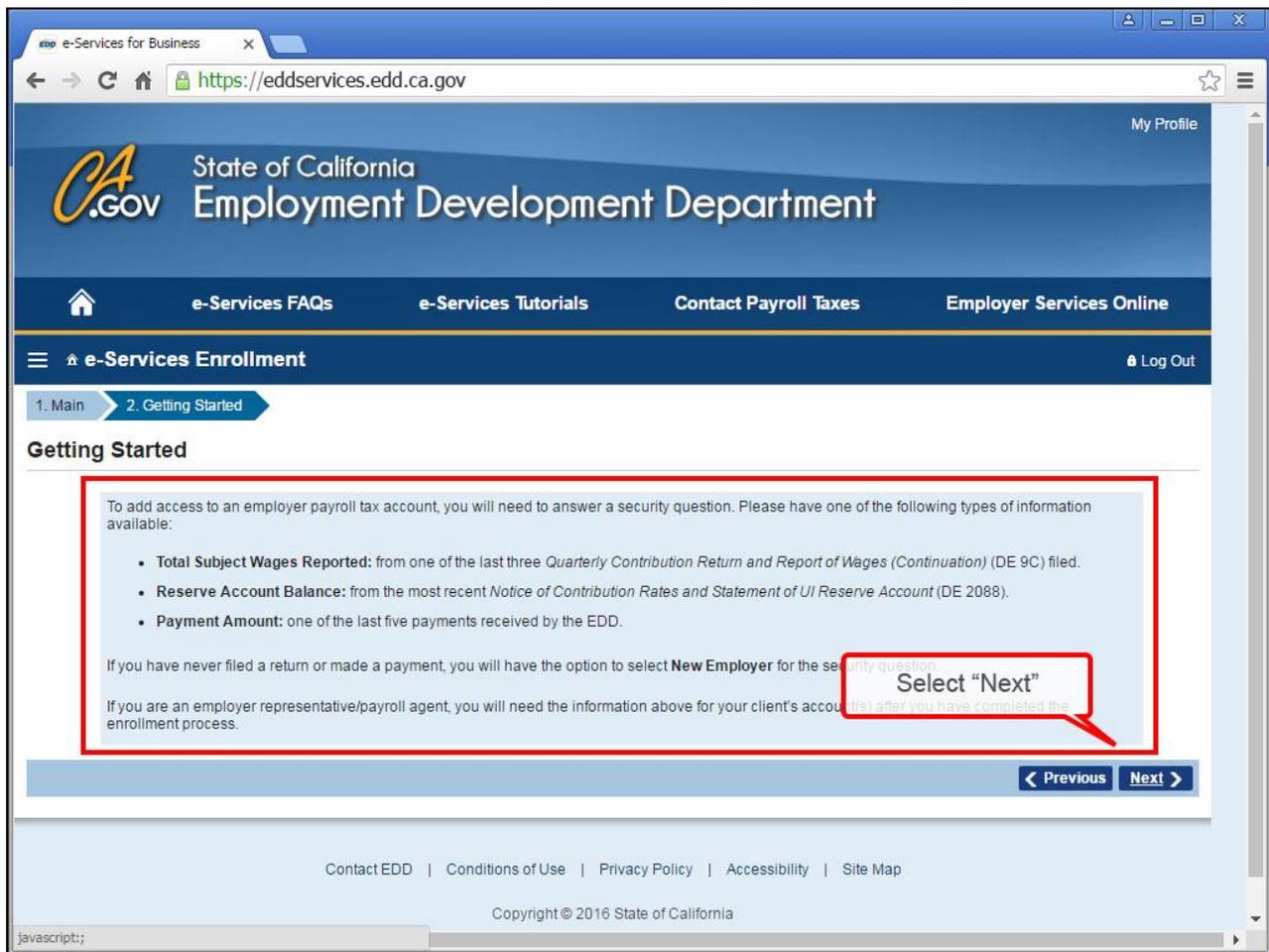
To begin this enrollment, select whether you are an Existing Customer or New Customer. An Existing Customer is an employer who already has an Employer Payroll Tax Account Number or is an employer representative/payroll agent.

Select "New Customer" if you are an employer and would like to apply for an Employer Payroll Tax Account Number. If you are an employer representative/payroll agent do not select this option. For this tutorial, we are going to select "Existing Customer".



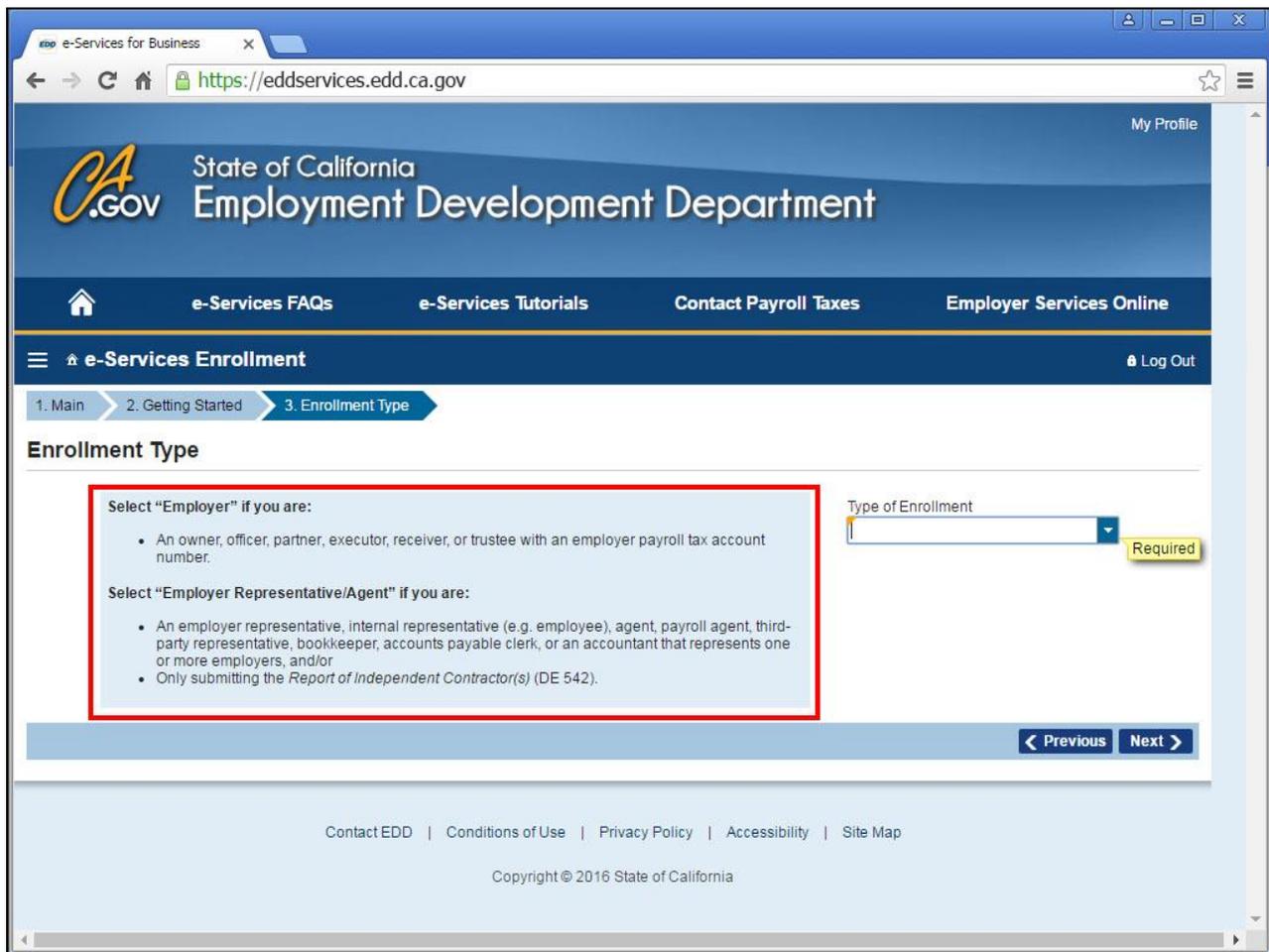
**Slide notes**

Select "Next" to continue.



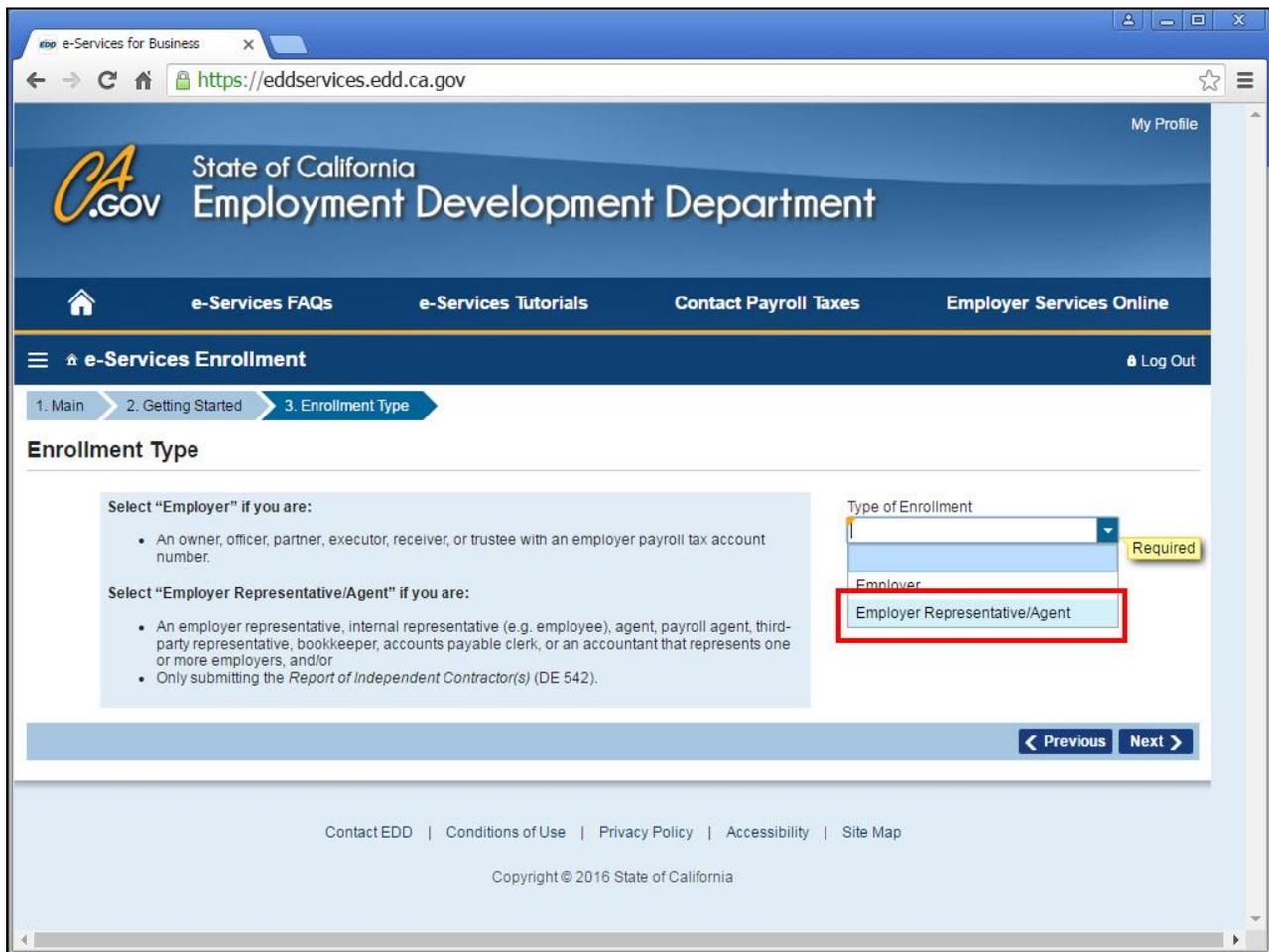
## Slide notes

To add access to an employer payroll tax account, you will need to answer a security question. Be prepared to answer one of the questions listed here. Select "Next" to continue.



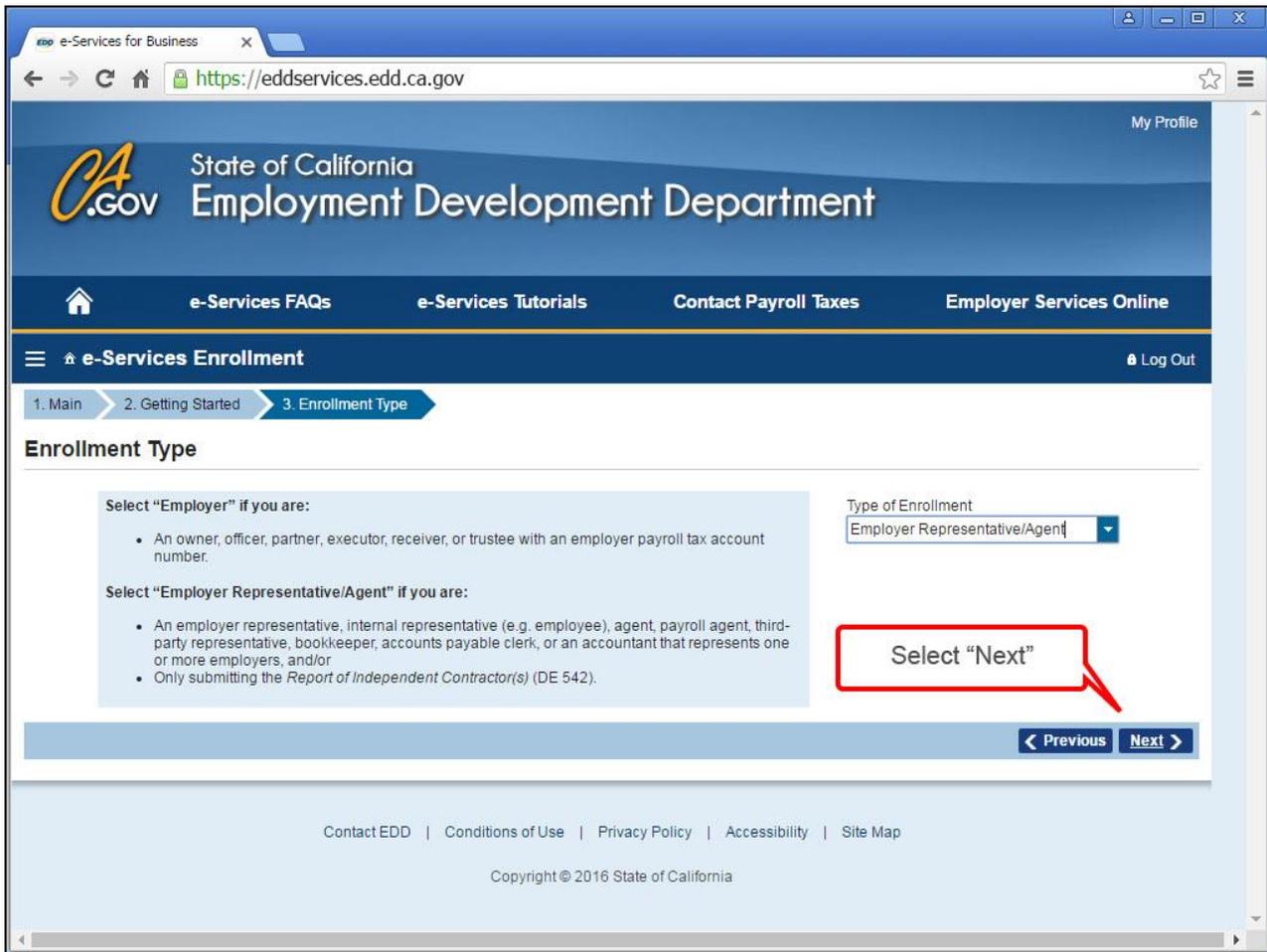
## Slide notes

The two types of enrollment are either an "Employer Representative/Payroll Agent" or "Employer." Please take a moment and read this important message. Take time to find out what type of enrollment you want to utilize. This is a detailed explanation of the two choices.



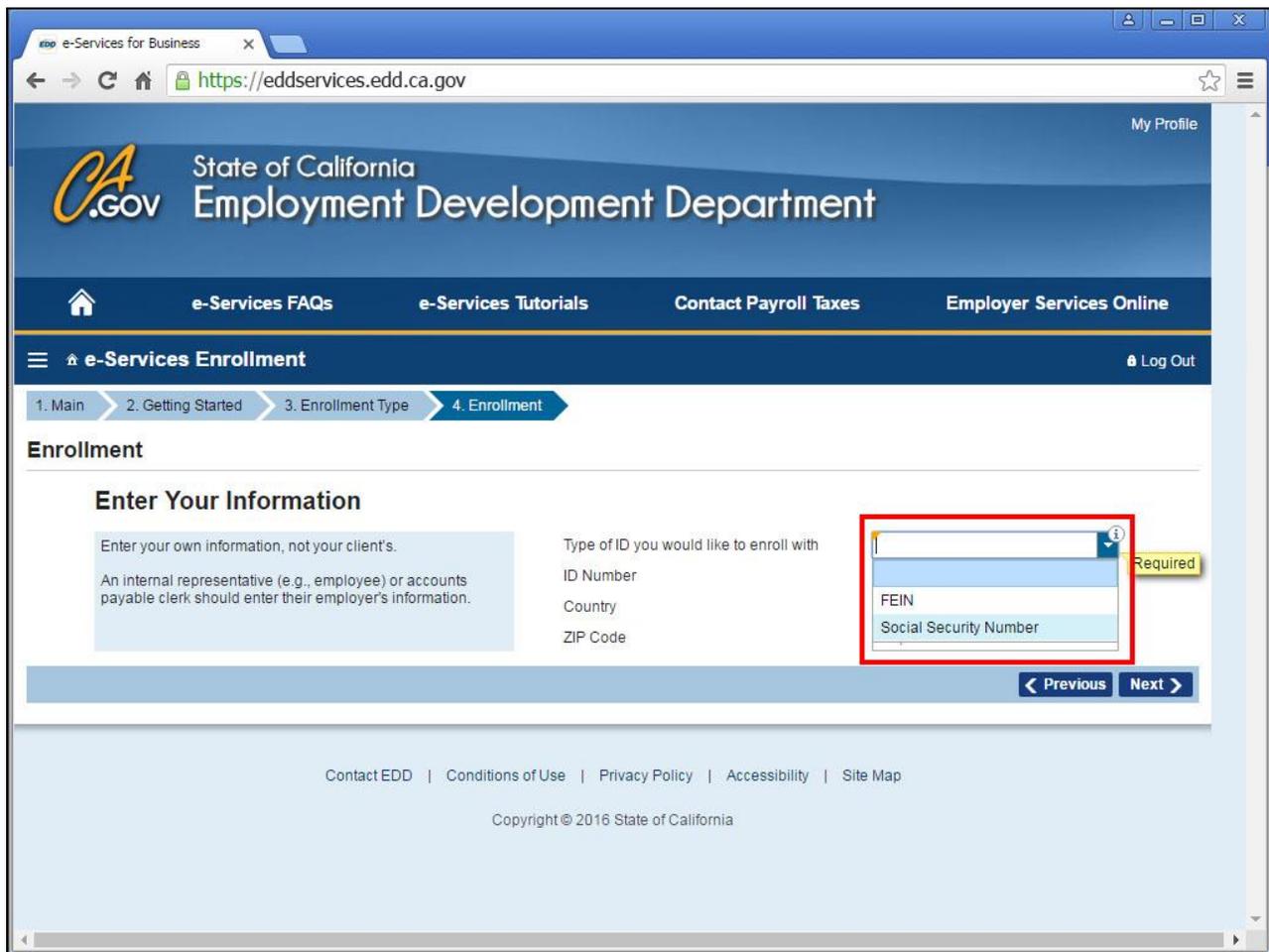
## Slide notes

In this example, we are going to choose "Employer Representative/Agent."



## Slide notes

Select "Next" to continue.



## Slide notes

You have a choice of Social Security number (SSN) or federal employer identification number (FEIN). If you are currently a business with a FEIN, you may select it.

If you are an individual, you may select Social Security number. For this example, we select "Social Security number."

e-Enrollment

1. Main > 2. Getting Started > 3. Enrollment Type > 4. Enrollment

### Enrollment

#### Enter Your Information

Enter your own information, not your client's.  
An internal representative (e.g., employee) or accounts payable clerk should enter their employer's information.

Type of ID you would like to enroll with: Social Security Number

ID Number: XXX-XX-XXXX

Country: USA

ZIP Code: 95814

< Previous Next >

Select "Next"

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### Slide notes

Enter the ZIP Code related to the FEIN or SSN that you entered. When all fields are completed, select "Next" to continue.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the CA.GOV logo and the text "State of California Employment Development Department". Navigation links include "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". A breadcrumb trail shows the current step: "1. Main > 2. Getting Started > 3. Enrollment Type > 4. Enrollment > 5. Agent Information".

### Agent Information

#### Enter Your Information

Enter your own information, not your client's.

Organization Type	Individual / Sole Proprietor
First Name	<input type="text"/>
Last Name	<input type="text"/> Required
Location Address	<input type="text"/> Required
City	<input type="text"/> Required
State	<input type="text"/> Required
ZIP Code	95814
Country	USA

Navigation: < Previous Next >

Footer: [Contact EDD](#) | [Conditions of Use](#) | [Privacy Policy](#) | [Accessibility](#) | [Site Map](#)

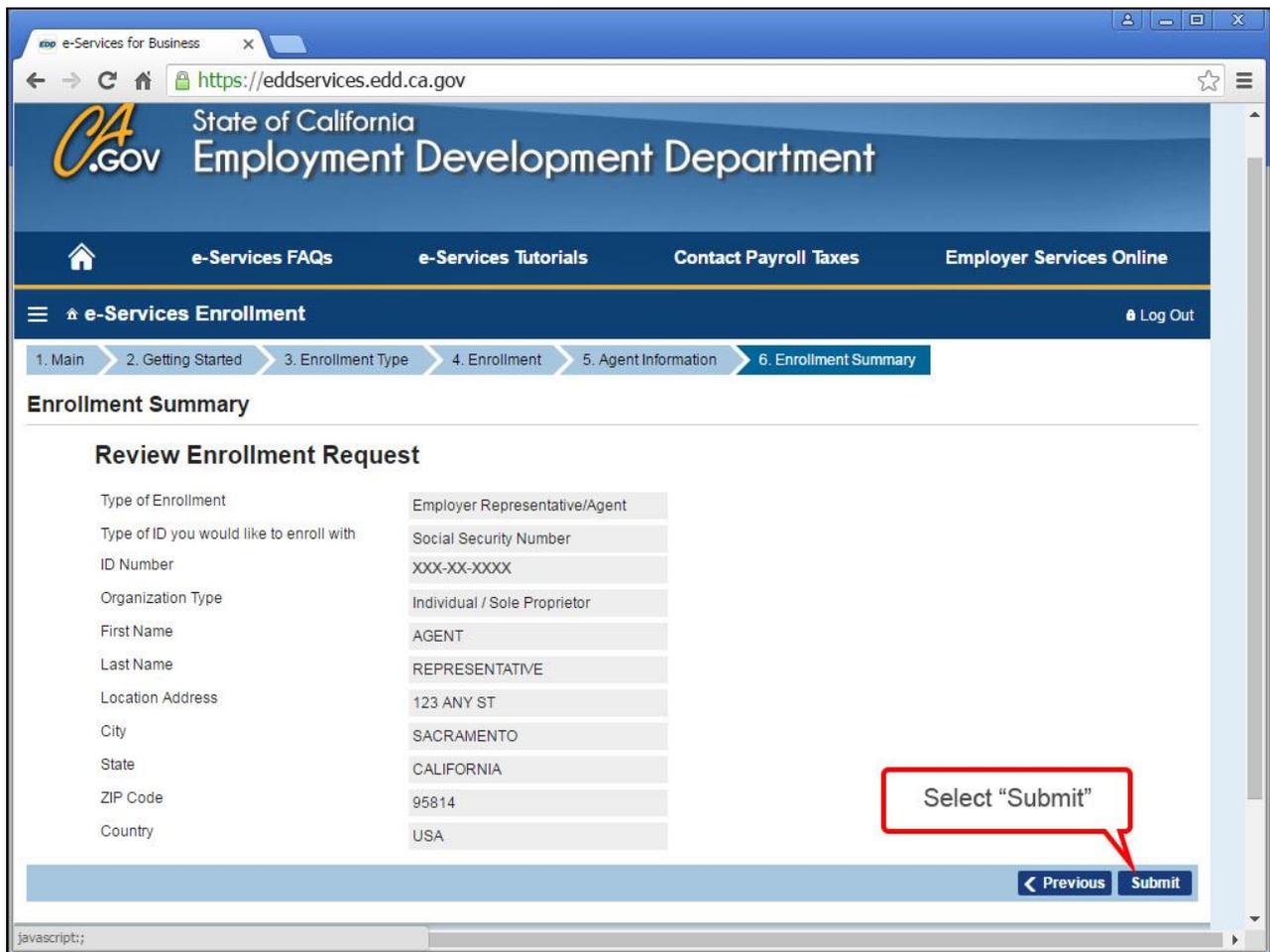
### Slide notes

Complete this page with your own information, not your clients.

The screenshot shows a web browser window with the URL <https://eddservices.edd.ca.gov>. The page header includes the State of California logo and the text "State of California Employment Development Department". A navigation bar contains links for "e-Services FAQs", "e-Services Tutorials", "Contact Payroll Taxes", and "Employer Services Online". Below this is a dark blue bar with "e-Services Enrollment" and a "Log Out" link. A progress indicator shows five steps: 1. Main, 2. Getting Started, 3. Enrollment Type, 4. Enrollment, and 5. Agent Information (highlighted). The main content area is titled "Agent Information" and "Enter Your Information". It contains a large text input field with the placeholder "Enter your own information, not your client's." and a form with the following fields: Organization Type (Individual / Sole Proprietor), First Name (AGENT), Last Name (REPRESENTATIVE), Location Address (123 ANY ST), City (SACRAMENTO), State (CALIFORNIA), ZIP Code (95814), and Country (USA). At the bottom right of the form is a "Next" button with a right-pointing arrow. A red box highlights the text "Select 'Next'" with a red arrow pointing to the "Next" button. The footer contains links for "Contact EDD", "Conditions of Use", "Privacy Policy", "Accessibility", and "Site Map".

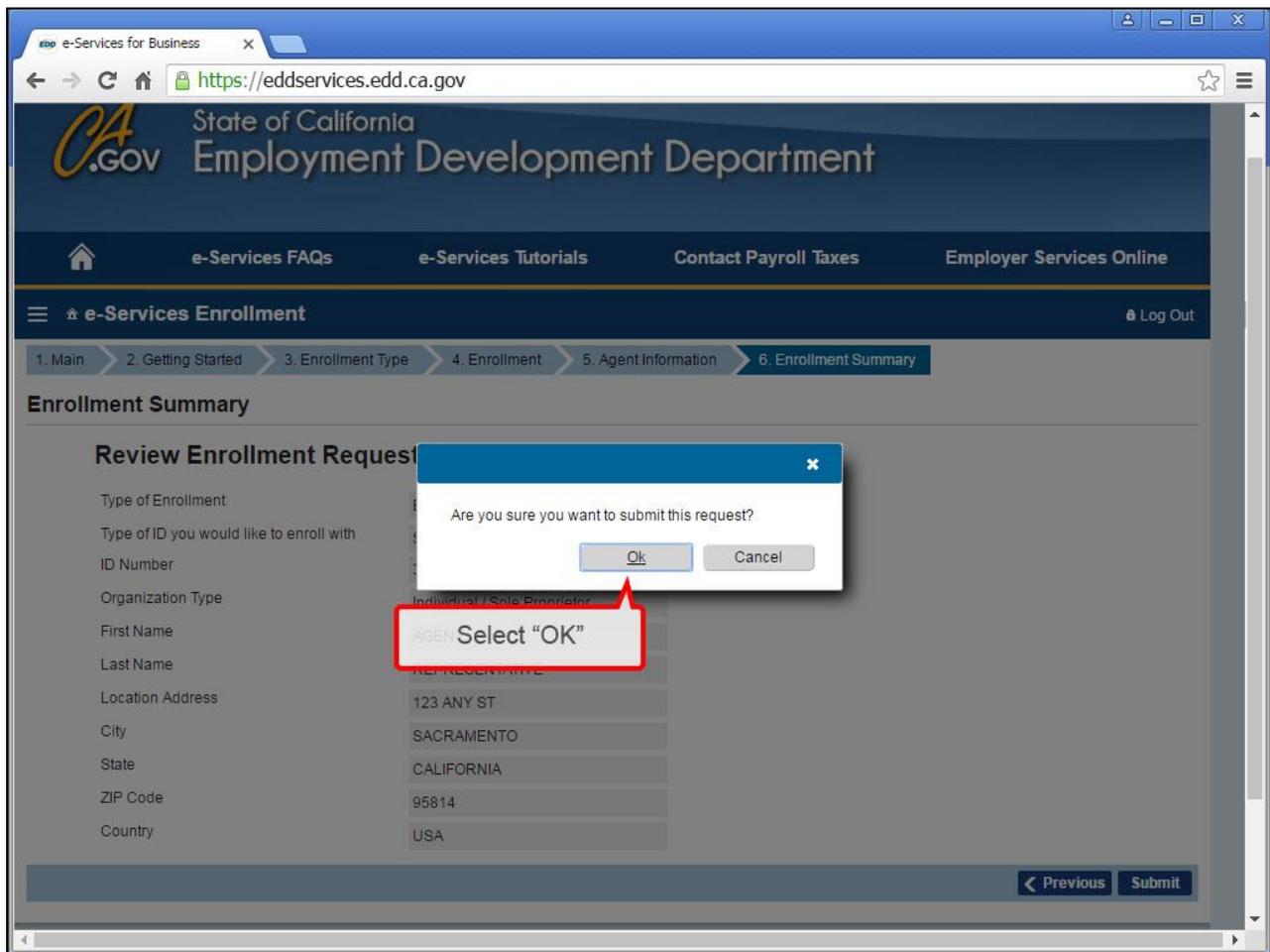
**Slide notes**

When the information is completed, select "Next" to continue.



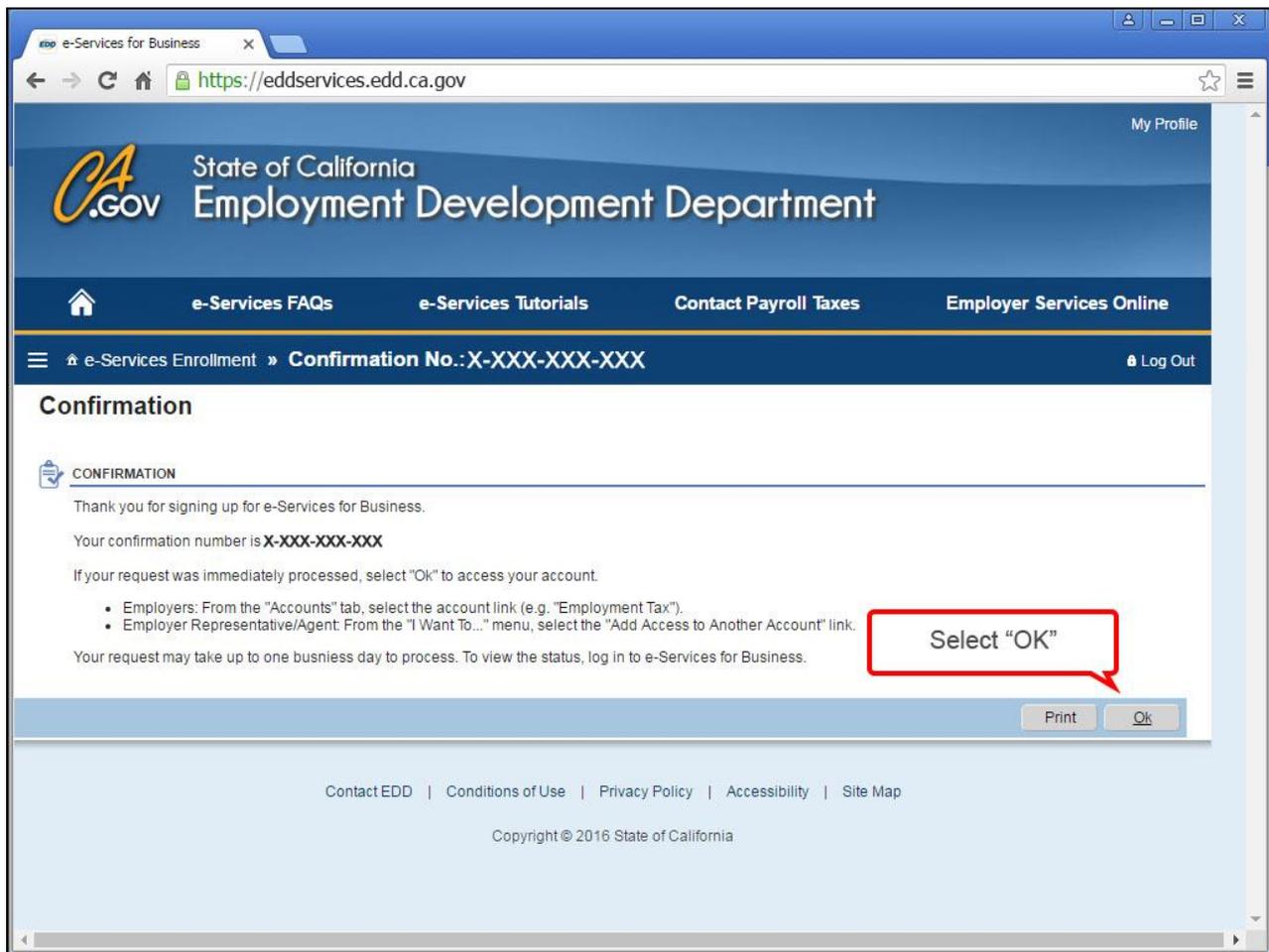
### Slide notes

Now you are ready to submit this request. Select "Submit."



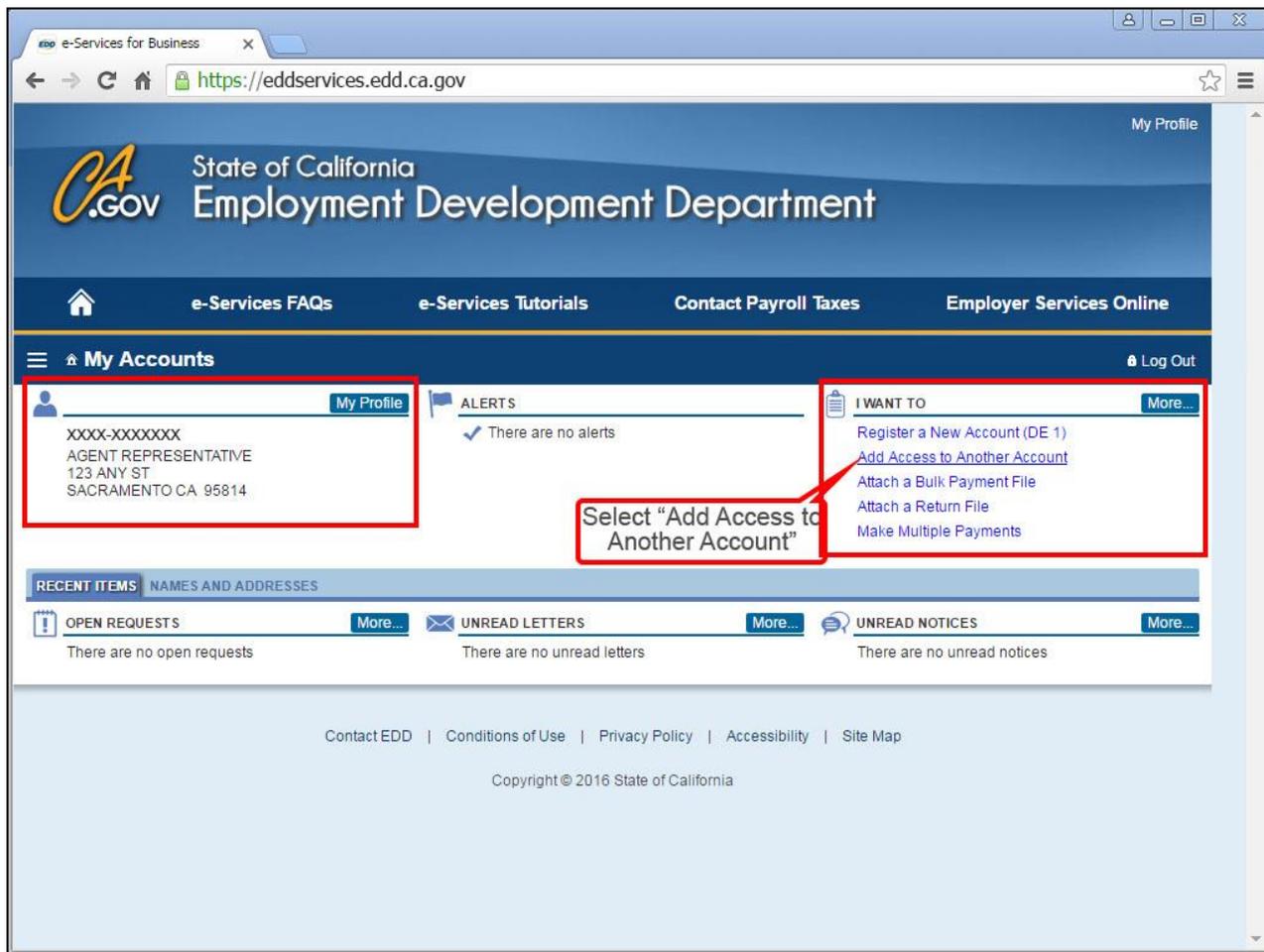
**Slide notes**

Are you sure you want to submit this request? Select "OK."



## Slide notes

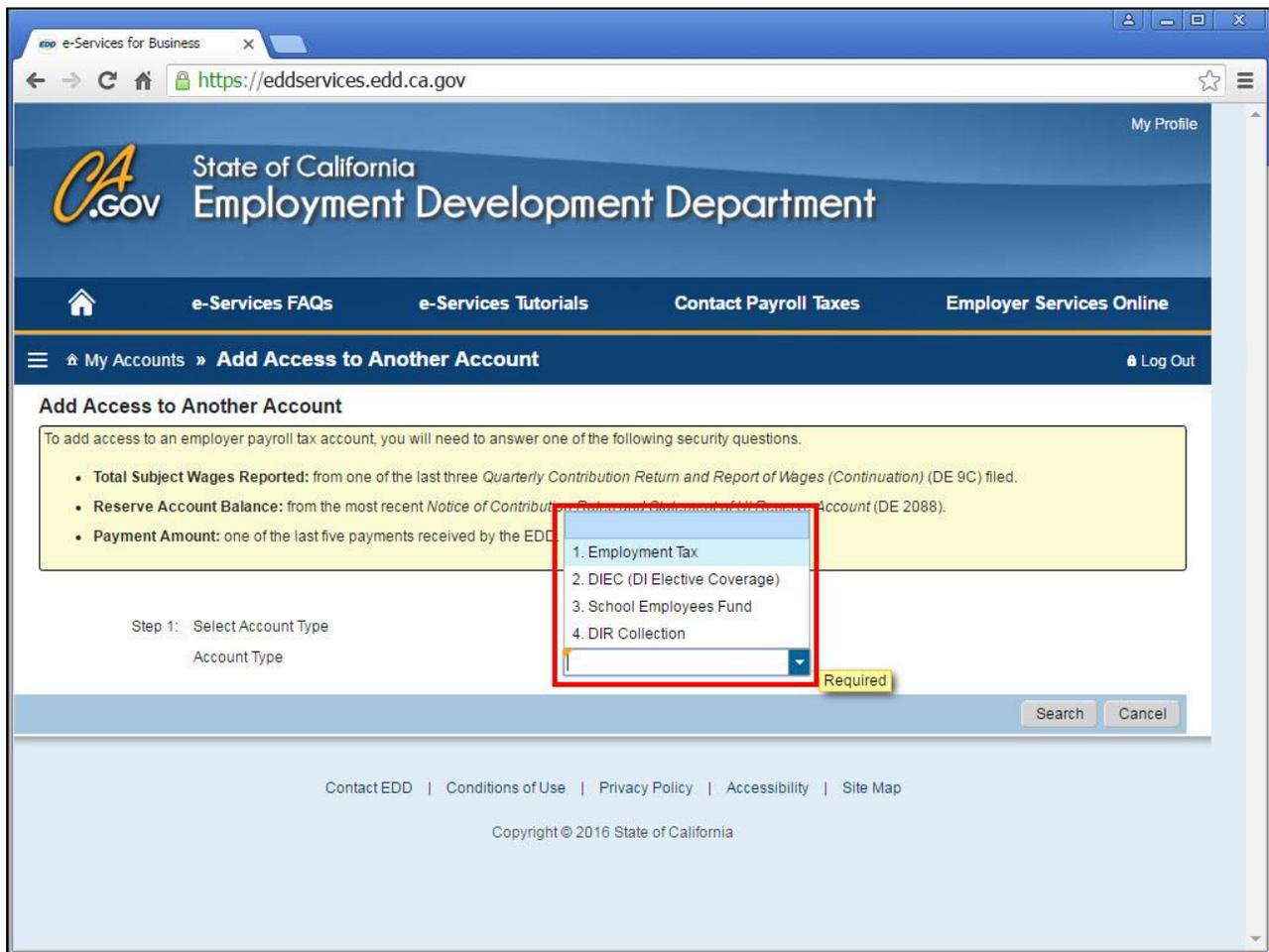
Here is your confirmation number. Your enrollment request is being processed. Select "OK to continue.



## Slide notes

The e-Services for Business home page screen shows a summary of your enrollment information as the agent. The summary section displays your profile details including taxpayer names and addresses.

From the "I WANT TO" menu, select the links in this section to perform the stated action. Select "Add Access to Another Account" to gain access to your client's account. Repeat these steps for each client account number.



**Slide notes**

Select "Account Type." For this example we select "Employment Tax."

**Add Access to Another Account**

To add access to an employer payroll tax account, you will need to answer one of the following security questions.

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **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.

Step 1: Select Account Type  
Account Type: 1. Employment Tax

Step 2: Authorization Questions  
Account Number: XXX-XXXX-X  
Country: USA  
ZIP Code: 95814  
Choose a security question to answer: 1. Total Subject Wages Reported  
Enter the total Subject Wages from one of the last three Wage Reports: 1000.00

Enter your authorization information. When you are done, select Search.

**Select "Search"**

Search Cancel

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### Slide notes

Choose an additional question to answer. We chose "Total Subject Wages Reported." Select "Search" to continue.

**Add Access to Another Account**

To add access to an employer payroll tax account, you will need to answer one of the following security questions.

- **Total Subject Wages Reported:** from one of the last three *Quarterly Contribution Return and Report of Wages (Continuation)* (DE 9C) filed.
- **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.

Step 1: Select Account Type  
Account Type: 1. Employment Tax

Step 2: Authorization Questions  
Account Number: XXX-XXXX-X  
Country: USA  
ZIP Code: 95814  
Choose a security question to answer: 1. Total Subject Wages Reported  
Enter the Total Subject Wages from one of the last three Wage Reports: 1000.00

If you have no payroll, then enter 0.00 for your total wages.

The account number you are trying to gain access to is xxx-xxxx-x. Click Submit to add access to this account.

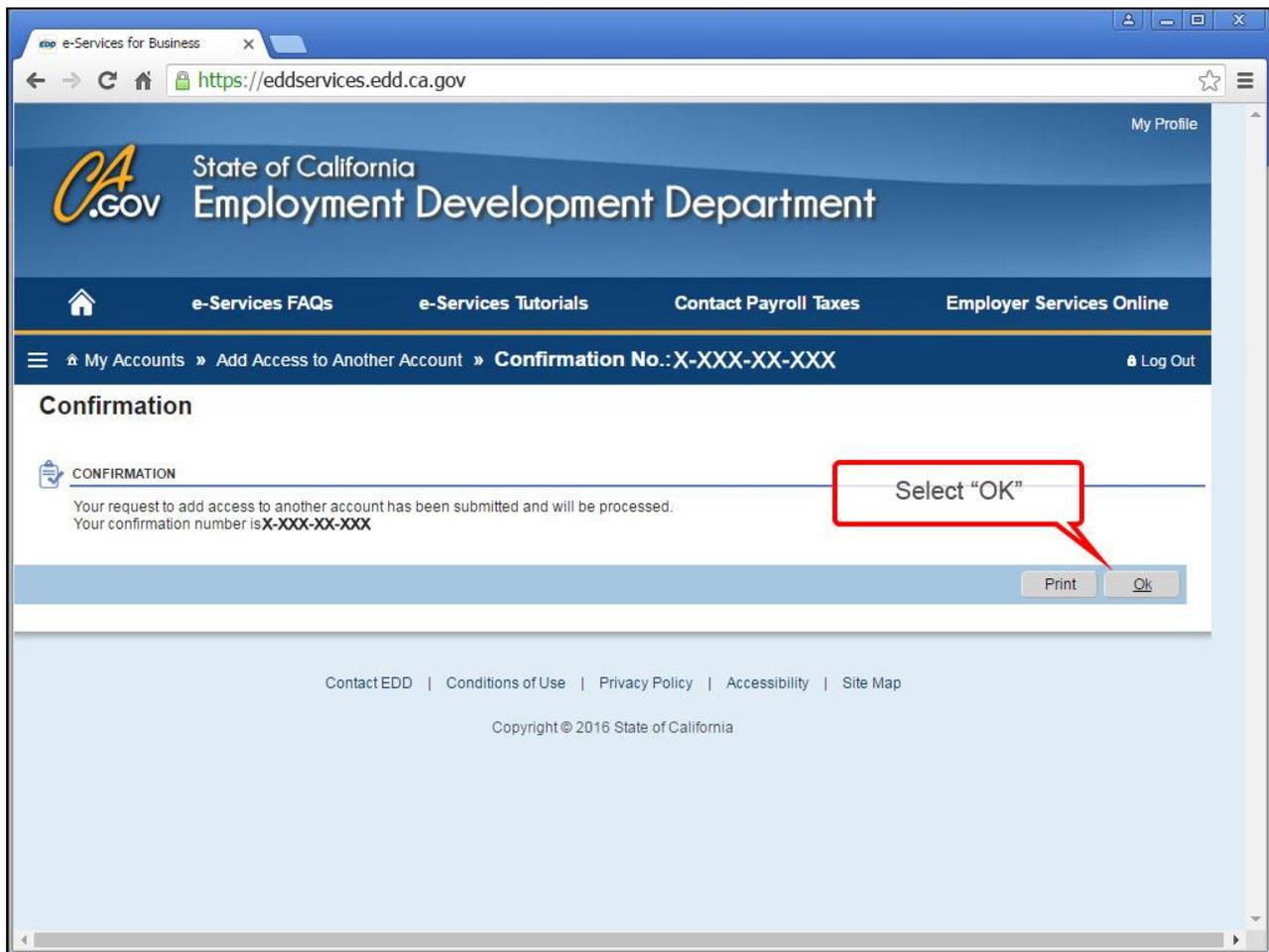
Select "Submit"

Submit Cancel

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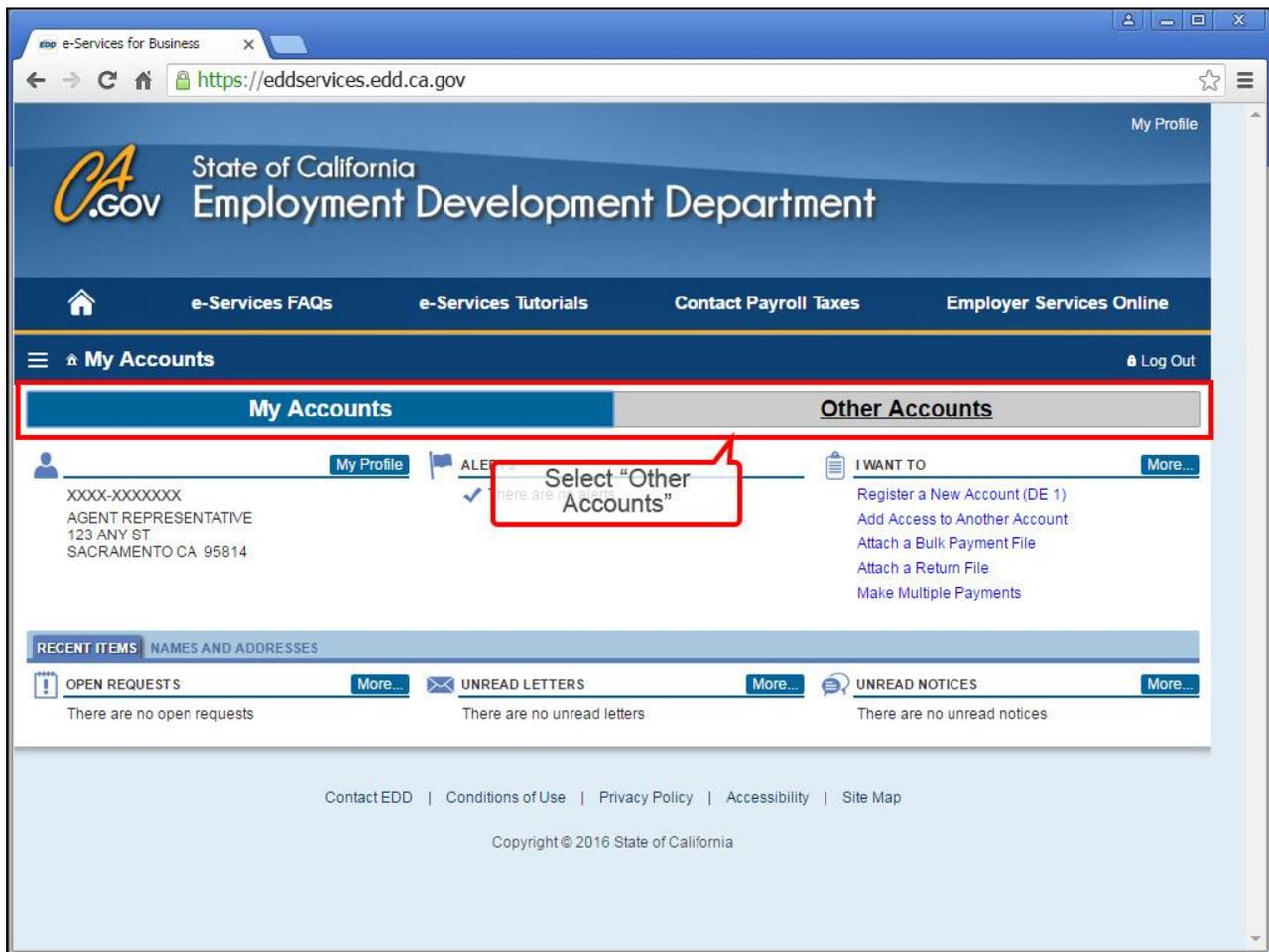
### Slide notes

The message at the bottom informs you that you are trying to add access to the specified account. Select "Submit" to add access to this account.



### Slide notes

The request to add access to another account has been submitted and will be processed. Select "OK" to continue.



## Slide notes

There are now two new tabs at the top of the screen. Select the "Other Accounts" tab to see the account you added access to.

The screenshot displays the EDD website interface. At the top, the navigation bar includes 'e-Services FAQs', 'e-Services Tutorials', 'Contact Payroll Taxes', and 'Employer Services Online'. The main content area is divided into 'My Accounts' and 'Other Accounts' tabs. Under 'My Accounts', there is a user profile section with a 'My Profile' link and an 'ALERTS' section showing 'There are no alerts'. To the right, the 'I WANT TO' menu lists actions like 'Register a New Account (DE 1)', 'Add Access to Another Account', 'Attach a Bulk Payment File', 'Attach a Return File', and 'Make Multiple Payments'. A red box highlights the 'More...' link in this menu. Below this, the 'OTHER ACCOUNTS' section is visible, featuring a table with columns for Account Type, Account ID, Name, and Balance. A red box highlights the 'Employment Tax' row in this table.

Account Type	Account ID	Name	Balance
Employment Tax	XXX-XXXX-X	SMALL BUSINESS	0.00

## Slide notes

When you select the “Other Accounts” tab, you can see the newly added account located under the “Summary” subtab on the home page.

There are many other actions on the home page that an employer representative or payroll agent may find helpful for managing multiple accounts. Most of these actions can be accessed by selecting the “More” link in the “I WANT TO...” menu.

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Other Resources  
[www.edd.ca.gov](http://www.edd.ca.gov)

Taxpayer Assistance Center  
1-888-745-3886

**Slide notes**

Thank you for taking the time to watch this tutorial on how to enroll and navigate through e-Services for Business as an employer representative or payroll agent.

Be sure to view our other tutorials demonstrating how to file bulk returns, make bulk payments, and the many other actions available in e-Services for Business.

Other resources are available at [www.edd.ca.gov](http://www.edd.ca.gov) or by calling the Taxpayer Assistance Center at 1-888-745-3886.