e-Services FOR BUSINESS

- ✓ REGISTER
- ✓ FILE
- ✓ PAY
- ✓ UPDATE

User Guide

e-Services Business
Employment Development Department

EDD Employment Development Department
State of California

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e-Services for Business **Online. Anytime.**

What is e-Services for Business?

e-Services for Business is a fast, easy, and secure way for employers, employer representatives, and payroll agents to manage an employer payroll tax account online 24 hours a day, 7 days a week, at no cost.

Employers are encouraged to use e-Services for Business to monitor and manage their employer payroll tax account online, even if they use an employer representative or payroll agent to submit their returns, reports, and payments.

Fast, easy, and secure!

Features:

- Register, close, or re-open an employer payroll tax account.
- File, adjust, and print returns and reports.
- Make payments.
- Protest Unemployment Insurance (UI) benefit charges or UI rates.
- Report changes to your business.
- Authorize a power of attorney.
- Report new employees or independent contractors.
- View notices and letters.
- Request a transfer of a reserve account.
- View information on your issued payroll tax refund.

Benefits:

- 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 submitted.
- Saves time by saving basic account information for future transactions.

[e-Services for Business](#)

Log In   Enroll

Create a Username and Password

1. Visit e-Services for Business.

2. Select **Enroll**.

3. Complete required fields.
   - Username
     Username cannot be the same as your password and must include at least:
       - *8 characters (no more than 15)*
       - *One letter (no accents)*
       - *One number*
   - Password
     Password cannot be the same as your username and must include at least:
       - *8 characters (no more than 12)*
       - *One uppercase letter*
       - *One lowercase letter*
       - *One number*
       - *One special character: ! @ # $ % ^ & * ( )*
   - Re-enter password
   - First Name
   - Last Name
   - Create a 4-digit PIN
     Your Username and the 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 to complete the enrollment process.
   - Re-Enter Email
   - Phone Number (XXX-XXX-XXXX) (optional), then select **Continue**.

4. 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. Print or make a note of the answers for your records.

5. Review enrollment summary then select **Submit**.
   You may use the card on page 15 of this guide to write down your enrollment information. Keep this information secure.

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. View the displayed enrollment verification on the EDD website.

Enroll as an Employer

Enroll as an employer if you are the owner, officer, partner, executor, receiver, or trustee of a business, to manage your employer payroll tax account.

1. After creating a username and password, select **Log In** from 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; such as Employment Tax.
7. Enter your eight-digit employer payroll tax account number.
8. Select the country from the drop-down menu if other than the 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 your 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.

Log In   Enroll

Enroll as a Representative

Enroll as Representative if one of the following applies to you:
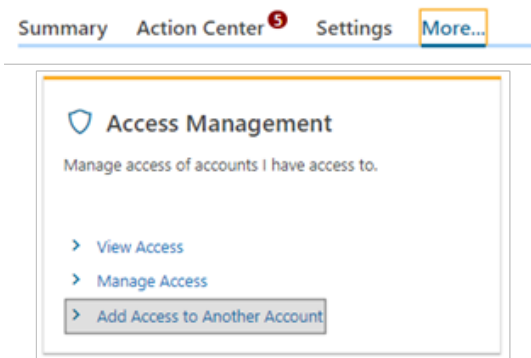
- You are a third-party representative enrolling to manage your client's employer payroll tax account, such as a tax preparer, bookkeeper, agent, or accountant.
- You are an employee enrolling to manage your employer's payroll tax account.
- You are only submitting the *Report of Independent Contractor(s)* (DE 542).

1. After creating a username and password, select **Log In** from 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:
   Enter the information for your business unless you are an internal representative (for example: employee) or an accounts payable clerk, then 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 if other than the USA.
   - Enter five-digit ZIP Code associated with the FEIN or SSN that you entered.
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 the 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.

1. Select **More**.

2. Select **Add Access to Another Account** from the **Access Management** panel.

3. Select the Account Type; such as Employment Tax.

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

5. Select the Country from the drop-down menu, if other than the USA.

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

7. Security Questions.

   • 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.

8. 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.

9. Select **Submit**.

10. 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.

The periods requiring your attention are displayed on the home page.

1. Select **File Return** for the period you want to file.

2. Select **File Now** from the **Action** column next to **Tax Return**.

3. Answer the question, "Do you have payroll to report?" by selecting **Yes** or **No**.

    • If you answered **Yes**, select **Next** then enter the return information:

        • Total Subject Wages Paid this Quarter.

        • UI Wages.

        • SDI Wages.

        • SDI Tax Withheld.

        • Personal Income Tax Withheld.

        • Contributions and Withholdings Paid for the Quarter.

        • Select **Next.**

    • If you answered **No**, select Next.

4. 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**. To access a saved return or report, go to the **Action Center**.

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.

The periods requiring your attention are displayed on the home page.

1. Select **File Return** for the period you want to file.

2. Select **File Now** under the **Action** column next to **Wage Report**.

3. Answer the question, "Do you have payroll to report?" by selecting **Yes** or **No**.
    *   If you answered **Yes**, select **Next** then go to step 4.
    *   If you answered **No**, select **Next** then go to Step 7.

4. Answer the question, "Do you want to import a file?"
    *   If you answered **Yes**, select **Upload CSV File** to import your file. Review the wage detail and make any corrections if needed, then select **Next**.
    *   If you answered **No**, select **Next** to manually enter the wage information for each employee, then select **Next**.

Wage Information

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

Instructions

Wage Detail

	SSN	First Name	M.I.	Last Name	Subject Wages	PIT Wages	PIT Withheld	Wage Plan Code

Complete Wage Information *

5. Enter the Number of Employees for the 1st, 2nd, and 3rd months in the quarter.

6. Verify the **Wage Detail Totals** are correct. Select **Previous** to go back and make correction or select **Next** to continue.

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**. To access a saved return or report, go to the **Action Center**.

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)
Voluntary Plan for Disability Insurance Quarterly Adjustment Form (DE 938)

Log in to e-Services for Business.

1. Select **Manage Periods and Returns** from the **Account** panel.

2. Select the filing period for the period you want to adjust.

3. Select **File or Adjust a Return or Wage Report**.

4. Select **View or Adjust Return** under the **Action** column next to **Tax Return**.

5. Select **Adjust Return**

6. If needed, update your answer to the question, "Do you have payroll to report?" by selecting **Yes** or **No**.

   • If you answered **Yes**, select **Next** then enter the corrected return information:

     • Total Subject Wages Paid this Quarter.

     • UI Wages.

     • SDI Wages.

     • SDI Tax Withheld.

     • Personal Income Tax Withheld.

     • Contributions and Withholdings Paid for the Quarter.

     • Select **Next**.

   • If you answered **No**, select **Next**.

7. Enter the **Reason for Adjustment**, then select **Next**.

   • If no adjustments were made to SDI and PIT, go to step 9.

8. If you made adjustments reducing the SDI or PIT, you will need to review and answer the questions regarding SDI and PIT overpayment, then select **Next**.

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**.

Adjustments to tax returns can be saved and completed later by selecting **Save Draft**. To access a saved return or report, go to the **Action Center**.

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.

> Make a Payment
> Manage Periods and Returns
> View My Payments

1. Select **Manage Periods and Returns** from the **Account** panel.

2. Select the filing period for the period you want to adjust.

3. Select **File or Adjust a Return or Wage Report**.

4. Select **View or Adjust Return** under the **Action** column next to **Wage Report**.

5. Select **Adjust Return**.

6. If needed, update your answer to the question, "Do you have payroll to report?" by selecting **Yes** or **No**.

    • If you answered **Yes**, select **Next** then go to step 7.

    • If you answered **No** but previously reported wages, select **Clear All Fields**, check **Confirm** in the confirmation box, then select **OK**. Select **Next** then go to step 10.

7. Answer the question, "Do you want to import a file?"

    • If you answered **Yes**, select **Upload CSV File** to import your file. Review the wage detail and make any corrections if needed, then select **Next**.

    • If you answered **No**, select **Next** to manually enter the wage information for each employee, then select **Next**.

8. Enter corrected Number of Employees for the 1st, 2nd, and 3rd months in the quarter, if applicable.

9. Complete the **Amended Wage Totals** section.
    Report the corrected grand totals for all employees, not just the amended employees.

10. Enter the **Reason for Adjustment**, then select **Next**.

11. Complete the **Declaration**, then select **Submit**.

12. Select **Ok** to submit the request.

13. Review the information on the **Confirmation** screen, then select **OK**.

Adjustments to wage reports can be saved and completed later by selecting **Save Draft**. To access a saved return or report, go to the **Action Center**.

Payroll Tax Deposit (DE 88)

Log in to .

1. Select **Make a Payment** from the **Account** panel.

2. Select **Make a Payroll Tax Deposit (DE 88)**.
   If you select **Credit Card Payment**, you will be directed to the ACI Payments Inc., website to complete your payment.

3. Select the **Payment Period** for your DE 88 payment.

4. Complete the following **Payment Source** information:

   - Bank Account Type
     S*elect **Business Checking**, **Business Savings**, **Personal Checking**, or **Personal Savings**.*

   - 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.

   - Confirm Amount

   - Deposit Schedule
     *Select **Monthly**, **Next-Day**, **Quarterly**, or **Semiweekly***

   - Pay Date (Date Wages Were Paid)
     This is the date you paid your employees. Select the calendar icon to choose a date.

   - Payment Amounts
     Enter the amount(s) of your contributions and withholdings

     - Unemployment Insurance

     - Employment Training Tax

     - State Disability Insurance

     - Personal Income Tax

     - Penalty and Interest, if applicable

5. Verify **Payment Total** matches the payment amount you entered above, then select **Next**.

6. Review your payment Information, then select **Submit.**

7. Select **Ok** to authorize your payment.

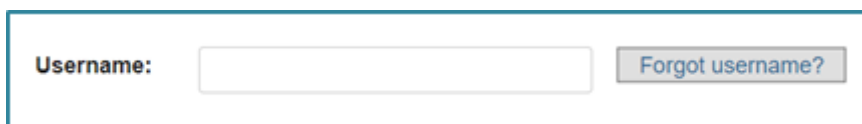8. Review the information on the **Confirmation** screen, then select **OK**.

> Make a Payment

> Manage Periods and Returns

> View My Payments

Username Recovery

Visit e-Services for Business.

1. Select **Log In**.
2. Select **Forgot username?**

Username:		Forgot username?

3. Enter:
   - First name
   - Last name
   - Email
   - 4-digit PIN
4. Answer your security questions, then select **Submit**.
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 username recovery process will need to be repeated.*
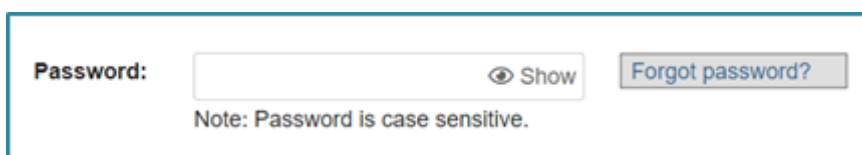6. Your username will be provided on the screen.

Password Reset

Visit e-Services for Business.

1. Select **Log In**.
2. Select **Forgot password?**

Password:	👁 Show	Forgot password?
	Note: Password is case sensitive.	

3. Enter:
   - Username
   - First name
   - Last name
   - Email
   - 4-digit PIN
4. 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 password reset 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
    - Select a category: **Payroll Tax**.
    - Select a sub-category: **e-Services for Business**.
    - Select **Learn More** for the **Account Lockouts** topic.
    - 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 your account 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: _____

4-digit PIN: _____

Email: _____

Enrollment Security Questions

	Security Questions	Your Answers
1.		
2.		
3.		
4.		

Resources

Resources

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

- [EDD 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 on features and benefits, access to tutorials, FAQs, the *[e-Services for Business Brochure (DE 159) (PDF)](#)*, and more!

- [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:

    - Create a Username and Password to Enroll in Employer Services Online

    - Enroll as an Employer in e-Services for Business

    - Enroll as a Representative and Add Access to Accounts

    - File a Tax Return or Wage Report

    - Make a Payroll Tax Deposit (DE 88) Payment

    - Make a Payment Using Express Pay

    - Register for a California Employer Payroll Tax Account Number

- [FAQs - e-Services for Business](#)

    Review the frequently asked questions (FAQs) for answers to specific information about e-Services for Business.

- *[Electronic Filing Guide for Quarterly Wage and Withholding Program (DE 8300) (PDF)](#)*

    Review the DE 8300 for guidance on creating a Comma Separated Value (CSV) file for importing your DE 9C wage information to your wage report. The DE 8300 also provides guidance on creating an eXtensible Markup Language (XML) file which is primarily used by representatives to **Upload a Bulk Return File** to report DE 9C information for multiple businesses.