



# QuickBooks Series: How to Process Payroll in QuickBooks Online

A VIRTUAL WORKSHOP

4



## *Section 1* *Virginia Registration Requirements*

5

### Must Register for

- Virginia Withholding taxes
- And VEC for unemployment
- Go to [tax.virginia.gov](http://tax.virginia.gov)

6

## Virginia Tax Online Services for Businesses

### New Users

Enroll in Business iFile to establish your User ID and Password

Are you a new Business? Register Here

Register as a Household Employer

Register as a Tax Preparer

Register with VEC Only

### iFile Login

Account Type ☐ TAX ☐ VEC

Account #

User ID

Password

[Log In](#)

### Other Online Services

eForms

Web Upload

Pay a bill - QuickPay

Tax Preparer Login

Sign up for email updates

FIPS Code Lookup

Apply for a Nonprofit Exemption

7

## Business Registration

### SECTION 2 - Identify Tax Liabilities \* [?](#)

Select all taxes for which your business is liable. Please review the definition of each tax carefully to determine if it applies to your business.

- |   |  |   |
|---|--|---|
| <input checked="" type="checkbox"/> Retail Sales Tax (In-State dealers) <a href="#">?</a> | <input type="checkbox"/> Watercraft Sales Tax <a href="#">?</a>    | <input type="checkbox"/> Cattle Tax <a href="#">?</a>               |
| <input type="checkbox"/> Marketplace Facilitator  | <input type="checkbox"/> Tire Recycling Fee <a href="#">?</a>      | <input type="checkbox"/> Egg Assessment <a href="#">?</a>           |
| <input type="checkbox"/> Employer Withholding Tax <a href="#">?</a>                       | <input type="checkbox"/> Forest Products Tax <a href="#">?</a>     | <input type="checkbox"/> Peanut Tax <a href="#">?</a>               |
| <input type="checkbox"/> Pass-Thru-Entity <a href="#">?</a>                               | <input type="checkbox"/> Communications Tax <a href="#">?</a>      | <input type="checkbox"/> Corn Assessment <a href="#">?</a>          |
| <input type="checkbox"/> Litter Tax <a href="#">?</a>                                     | <input type="checkbox"/> Small Grains Assessment <a href="#">?</a> | <input type="checkbox"/> Soybean Tax <a href="#">?</a>              |
| <input type="checkbox"/> Vending Machine Tax <a href="#">?</a>                            | <input type="checkbox"/> Soft Drink Tax <a href="#">?</a>          | <input type="checkbox"/> Motor Vehicle Rental Tax <a href="#">?</a> |
| <input type="checkbox"/> Consumer Use Tax <a href="#">?</a>                               | <input type="checkbox"/> Sheep Assessment <a href="#">?</a>        | <input type="checkbox"/> Peer-to-Peer Tax <a href="#">?</a>         |
| <input type="checkbox"/> Digital Media Fee <a href="#">?</a>                              | <input type="checkbox"/> Cotton Assessment <a href="#">?</a>       | <input type="checkbox"/> Insurance Premiums Tax <a href="#">?</a>   |

Next



8

Access Code Issued (Virginia Employment Commission)

[Printer Friendly](#)

### Welcome to the Virginia Employment Commission

**Your online registration has not been completed.**

If you need to pause your registration or lose your connection, you may use the access code shown below to return to iReg and complete your registration. This is NOT your Virginia account number and cannot be used to file returns and make payments. We will assign a Virginia account number when you complete your registration.

Your access code is:  
The User ID you entered is:  
The Password you entered is:



Write this number down.

Please keep this access code, User ID, and Password you entered in a safe place. You will need to use the access code to log in at the Returning User Login and complete your registration if the registration is interrupted.

[Continue your registration now](#)

9



**File and/or Pay Tax Returns and Payments**

[Return to My TAX/VEC Linked Accounts page](#)  
[File/Pay Employer Withholding Tax](#)  
[Make a Pass-Through Entity/S Corp Withholding Payment 502W](#)  
[Make an Annual Pass-Through Entity/S Corp Return Payment 502V](#)  
[Submit W2s or 1099s using eForms](#)  
[Submit W2s or 1099s using Web Upload](#)  
[Make a Bill Payment and Review Bill History](#)  
[Create or Manage a Payment Plan](#)  
[Make a Return Payment using Web Payments](#)

**Update Your Business Profile**

[Register with VEC](#)  
[Update Addresses](#)  
[Update Contact Information](#)  
[Update Responsible Parties](#)  
[Close Your Business](#)  
[End Liability for a Tax Account](#)  
[Add a new Tax Type to Existing Account](#)

**Manage Your Account**

[User Maintenance](#)  
[Update Bank Account](#)  
[Assign a Tax Preparer](#)  
[Tax Preparer Maintenance](#)  
[Change My Password](#)  
[Update My Email Address](#)  
[Link My Tax Account to a VEC Account](#)  
[Send or Receive a Secure Email](#)





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[Continue your registration now](#)

11

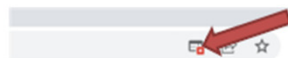


## NEW EMPLOYER REGISTRATION

### What is Needed to Register Successfully?

Business entities that have paid wages to employees working in Virginia and meet certain employer qualifications are required to register with the Virginia Employment Commission. By using the VEC on-line registration system, you can register your business and pay the appropriate tax rate immediately. The requirements to complete your registration are listed below:

1. Federal Identification Number (FEIN).
2. Name of legal entity.
3. DBA (Doing Business As) name, if it is different than the legal name.
4. Physical address of the business.
5. Mailing address (if different from the physical address).
6. Additional business location addresses.
7. Type of legal entity (corporation, sole proprietorship, LLC, etc.).
8. Primary business activity performed.
9. If a partnership or corporation, state and date of incorporation/formation.
10. Name, social security number, and telephone number for owner(s)/officers/partners of the business.
11. Date that first wages were paid to covered employees.
12. Payroll service/agent name (if applicable) and type of correspondence you want them to receive.



*In your browser bar, top right*

The registration process requires the use of pop-up windows. Please disable all pop-up blockers before continuing.

[Register Now!](#) [Cancel](#)

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## CONFIRMATION

### Confirmation Page

**Congratulations! You have successfully registered your business with the VEC.**  
Your confirmation number is 3961335 \*

Employer Name :	
Employer Account# :	0012189200
UI Tax Rate for 2022 :	2.73%
Date, Time :	04/03/2022 02:21:19 PM

You will be receiving additional information soon concerning your new account.

Press the Home button to view your homepage or file quarterly Tax and Payroll Reports.  
Please print this page and keep for your records.

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## Section 2

### QuickBooks Payroll Options



14

*QuickBooks and  
Payroll discount code*

<https://intuit.me/va-sbdc>



Accounting Payroll

**Core**

Our simplest solution for reliable, automated payroll.

\$45

**\$31<sup>50</sup>/mo**

Save 30% off for 12 months  
+\$4/employee per month\*

**Buy now**

Full-service payroll  
Includes automated tax and forms

- ✓ Auto Payroll
- ✓ Health benefits for your team
- ✓ Expert product support
- ✓ Next-day direct deposit

QuickBooks Accounting - 30% off for 12 months

**Most Popular**

**Premium**

Our automated payroll solution with integrated time tracking and tools that help you grow.

\$75

**\$52<sup>50</sup>/mo**

Save 30% off for 12 months  
+\$8/employee per month\*

**Buy now**

Full-service payroll  
Includes automated tax and forms

- ✓ Auto Payroll
- ✓ Health benefits for your team
- ✓ Expert product support
- ✓ Same-day direct deposit
- ✓ HR support center
- ✓ Expert setup review
- ✓ Track time on the go

QuickBooks Accounting - 30% off for 12 months

**Elite**

Automated payroll backed by our guarantee, with certified HR support to protect your business.

\$125

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- ✓ Same-day direct deposit
- ✓ Workers' comp administration
- ✓ HR support center
- ✓ Expert setup
- ✓ 24/7 expert product support
- ✓ Track time and projects on the go
- ✓ Tax penalty protection<sup>1</sup>
- ✓ Personal HR advisor

QuickBooks Accounting - 30% off for 12 months

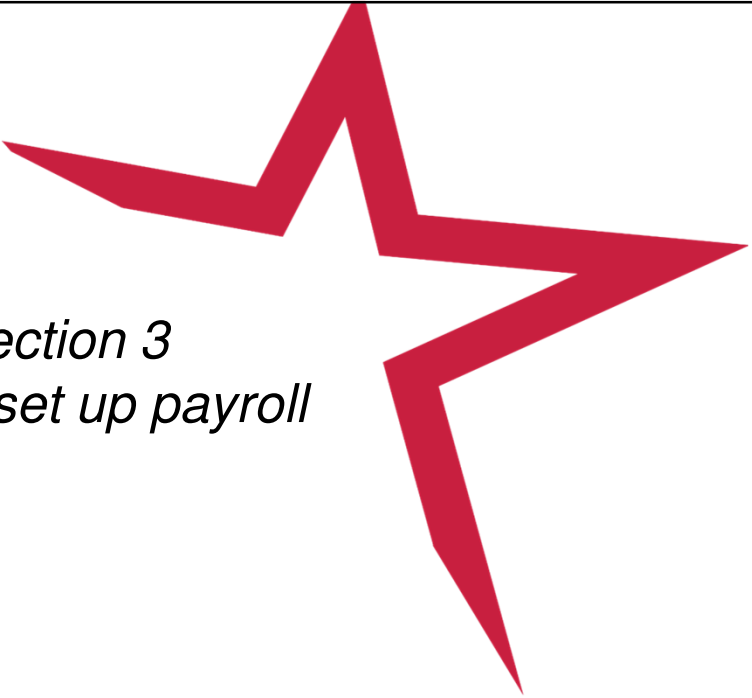
15

Choose a QuickBooks Payroll plan with the right benefits for your team

Buy now for 50% off\* ☒ Free trial for 30 days


Core	<b>MOST POPULAR</b> Premium	Elite
Cover the basics—easily pay your team and have your payroll taxes done for you.	Manage your team and perfect payday with HR support and employee services.	Access on-demand experts to simplify payday and protect what matters most.
\$45 <b>\$22<sup>50</sup></b> /mo Save 50% for 3 months* +\$4/employee per month	\$75 <b>\$37<sup>50</sup></b> /mo Save 50% for 3 months* +\$8/employee per month	\$125 <b>\$62<sup>50</sup></b> /mo Save 50% for 3 months* +\$10/employee per month
<a href="#">Select</a> <a href="#">Learn more</a>	<a href="#">Select</a> <a href="#">Learn more</a>	<a href="#">Select</a> <a href="#">Learn more</a>
<b>Take care of payday</b>	<b>Take care of payday</b>	<b>Take care of payday</b>
<b>Payroll features</b> <ul style="list-style-type: none"> <li>✓ <b>Full-service payroll</b> Includes automated taxes and forms</li> <li>✓ Auto Payroll</li> <li>✓ 1099 E-File &amp; Pay</li> <li>✓ Expert product support</li> <li>✓ Next-day direct deposit</li> </ul>	<b>Payroll features</b> <ul style="list-style-type: none"> <li>✓ <b>Full-service payroll</b> Includes automated taxes and forms</li> <li>✓ Auto Payroll</li> <li>✓ 1099 E-File &amp; Pay</li> <li>✓ Expert product support</li> <li>✓ Same-day direct deposit</li> <li>✓ Expert review</li> <li>✓ Track time on the go</li> </ul>	<b>Payroll features</b> <ul style="list-style-type: none"> <li>✓ <b>Full-service payroll</b> Includes automated taxes and forms</li> <li>✓ Auto Payroll</li> <li>✓ 1099 E-File &amp; Pay</li> <li>✓ Expert product support</li> <li>✓ Same-day direct deposit</li> <li>✓ Expert setup</li> <li>✓ Track time and projects on the go</li> <li>✓ 24/7 expert product support</li> <li>✓ Tax Penalty Protection</li> <li>✓ Personal HR advisor</li> </ul>

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## Section 3

### How to set up payroll



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Accounting Payroll

Core

Our simplest solution for reliable, automated payroll.

\$45

**\$31<sup>50</sup>** /mo

Save 30% off for 12 months +\$4/employee per month\*

Buy now

Full-service payroll

Includes automated tax and forms

- ✓ Auto Payroll
- ✓ Health benefits for your team
- ✓ Expert product support
- ✓ Next-day direct deposit

QuickBooks Accounting - 30% off for 12 months

MOST POPULAR

Premium

Our automated payroll solution with integrated time tracking and tools that help you grow.

\$75

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Automated payroll backed by our guarantee, with certified HR support to protect your business.

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- ✓ Personal HR advisor

QuickBooks Accounting - 30% off for 12 months

AMERICA'S SBDC VIRGINIA ROANOKE REGION

18

+ New

Overview

Books review

Dashboard

Banking

Sales

Cash flow

Expenses

Payroll

Reports

Taxes

Mileage

Accounting

My accountant

Payroll

Current QuickBooks Users

Employees Contractors Workers' comp

Conquer payroll. Empower your team.

- Run payroll automatically and let us handle your payroll taxes.
- Manage your time and money with same-day direct deposit.
- Access health benefits, workers' comp, and HR services.

Get started

Want to track employees but don't need payroll yet? [Add an employee](#)

Have questions? Call sales at 877-300-7345 or [chat](#)

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## Payroll

[Overview](#) [Employees](#) [Contractors](#) [Workers' comp](#) [Benefits](#) [HR Adviser](#) [Compliance](#)

# Welcome to QuickBooks Payroll

Let's get acquainted. Just a few quick questions and you'll be on your way.

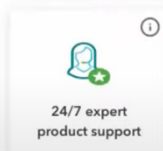
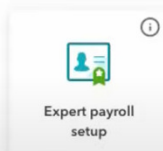
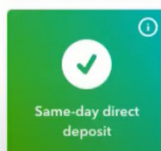
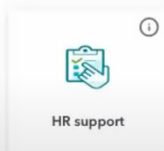
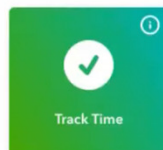
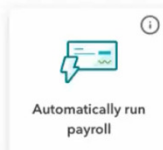
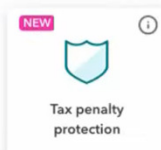
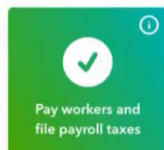
[Get started](#)



20

## Pay and manage your team—all inside QuickBooks

Select what you need. We'll recommend a plan that's right for you



Based on these selections, we recommend

**Premium**

[See details](#)

\$

[Sign up and save 50%](#)


Save 50% for lifetime of the subscription\*

21




## Pay and manage your team—all inside QuickBooks


Select what you need. We'll recommend a plan that's right for you




Pay workers and file payroll taxes




NEW  
Tax penalty protection




Automatically run payroll




Track Time




HR support



Same-day direct deposit



Expert payroll setup



24/7 expert product support

Based on these selections, we recommend

**Core**

[See details](#)

\$


**Sign up and save 50%**

Save 50% for lifetime of the subscription\*


22

## Have you paid employees in 2022?


Answer yes if you, your accountant, or maybe even a previous owner of your business has paid employees.



No



I'm not sure



Yes

Next

23

## How much have you already paid Mark in 2022?

Why do we ask?

Did you pay Mark on or after January 1?

☐ Yes

☐ No

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## How much have you already paid Mark in 2022?

Why do we ask?

Did you pay Mark on or after January 1?

☒ Yes

☐ No

Enter info from Mark's pay stub(s) below.

Why is this important?

What will I need?

Not seeing an item below?

	YEAR-TO-DATE TOTALS AS OF TODAY
Regular Wages	\$ <input type="text"/>
Federal Income Tax	\$ <input type="text"/>
Social Security	\$ <input type="text"/>
Medicare	\$ <input type="text"/>
VA Income Tax	\$ <input type="text"/>
Net pay (Optional)	\$ <input type="text"/>

We use net pay to double-check for accuracy

25

## When is your next payday?

Pick a date and we'll get things rolling on our end.

< April 2022 >

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Previous

Next

'e  
'BDC,

26

## What's the primary work location?

This is the address where most of your employees work. We'll use this as your primary work location.  
You can add additional work locations later.

Business name

Street address

City

State

ZIP code

Next

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## Who's your payroll contact?

This helps us make sure that reminders and other important payroll info get to the right person.

First name

Last name

none

Business phone

Email address

Next

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### Payroll

Overview Employees Contractors Workers' comp Benefits HR Adviser Compliance

#### Let's get you set up

Take a look and help us make sure we moved all your QuickBooks Desktop Payroll info to the right place.



##### SETUP TASKS

- ☒ **Your team's 2022 payments are ready**  
Review your employees and confirm if they were paid in 2022 to keep your tax payments on track.
- ☒ **Your business info is complete**  
We have everything we need to calculate your payroll taxes.
- ☒ **Tell us about your team**  
Enter each employee's info and pay details to get your employees ready for payday.
- ☒ **Connect your bank**  
This helps get you set up for electronic payments and same-day direct deposit.
- ☒ **Tell us which taxes you paid this year**  
This keeps us from paying them again. Then you can e-sign a few forms, allowing us to pay and file your taxes.  
Do this first: Tell us about your team, Connect your bank

Start

Start

##### SETUP RESOURCES



#### Get payroll up and running

Check out our setup guide and help videos.

##### Hide resources

- [View setup guide](#)
- [Set up your team \(3:47\)](#)
- [Add payroll history and tax info \(3:34\)](#)
- [Connect your bank account \(1:51\)](#)
- [Add tax payment history \(2:06\)](#)
- [Sign tax forms \(2:20\)](#)
- [Run payroll with direct deposit \(2:30\)](#)

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## Get started with payroll

1  
EMPLOYEES

2  
TAXES

### Tell us about your employees

Add each employee you've paid in 2022 (including terminated employees).

NAME	PAY RATE	PAY SCHEDULE	PAY METHOD	YTD NET PAY

[Add an employee](#)

30

### Add an employee

#### 1 Personal info

First name\*  M.I.  Last name\*

Email

We'll email an invite for this employee to view their pay stubs and W-2 with QuickBooks Workforce. [Learn about Workforce](#)

☒ Ask this employee to enter their personal, tax (2020 W-4), and banking info with QuickBooks Workforce.

#### 2 What are this employee's employment details?

Add employee's hire date and where they work.

Hire date

Work location

#### 3 What are this employee's withholdings?

We'll invite this employee to complete this part via Workforce, our free employee portal. If you want to enter it yourself, uncheck self-setup in step 1.

#### 4 How often do you pay this employee?

Enter a few details and we'll work out your company's payroll calendar. What is a pay schedule?

[+ Create pay schedule](#)

#### 5 How much do you pay this employee?

If your company offers additional pay types, add them here. These pay types show up when you run payroll.

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# You're invited to view your pay stubs online

QuickBooks Workforce is your personal tool for keeping track of your work info — including pay stubs, W-2, time off, and more.

Create account

32

## Payroll

Overview Employees Contractors Workers' comp Benefits HR Adviser Compliance

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Enter each employee's info and pay details to get your employees ready for payday.
- ☒ Connect your bank  
This helps get you set up for electronic payments and same-day direct deposit.
- ☒ Tell us which taxes you paid this year  
This keeps us from paying them again. Then you can e-sign a few forms, allowing us to pay and file your taxes.  
Do this first: Tell us about your team, Connect your bank

#### SETUP RESOURCES



#### Get payroll up and running

Check out our setup guide and help videos.

#### Hide resources

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- [Run payroll with direct deposit \(2:30\)](#)



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## Connect your bank to send money with QuickBooks

To use direct deposit to pay your workforce as well as e-file and e-pay for your taxes, you need to connect your bank account. For your security, we need information that your principal officer will have.

[Get started](#)

Connect your bank to



Send money with QuickBooks



Pay your workforce with direct deposit



E-file and e-pay your taxes

34

Linking your bank

## Let's get a picture of your profits

Connect your bank or credit card to bring in your transactions.

First Citizens

2,085 results for *First Citizens*



**First Citizens Bank (VA)**  
www.firstcitizens.com



**First Citizens Bank (NC) - Business**  
www.firstcitizens.com



**First Citizens Bank netAccess**  
www.firstcitizens.com




**First Citizens Bank & Trust Co. (NC)**  
www.firstcitizens.com

35

Linking your bank

## Sign in to account



**First Citizens Bank (VA)**  
<http://www.firstcitizens.com/>  
1-888-323-4732

Login ID

This field is required

Password

[SHOW](#)


This field is required

BackContinue

36


## Get set up to pay with direct deposit

You'll be moving money so let's double-check your info (this should take about 5 minutes)




**Business**  
Contact info, website, tax ID

[Review](#)



**About your principal officer**  
Contact info, date of birth, last 4 of Social Security number

[Review](#)



**Bank account**  
Either sign-in info, or routing and account numbers

[Review](#)

By selecting **Accept and Submit**, you agree that Intuit Payments Inc. will provide money movement services under the [Terms](#) subject to eligibility criteria, credit and application approval, and have read and acknowledge the [Privacy Statement](#). You provide written instructions authorizing us to periodically pull your credit report starting now, until you cancel your money movement services in your QuickBooks settings (web).

Accept and Submit

37

### About your principal officer

This is the main person listed on your business's bank account.

Owner's first name

Owner's last name

Business title

Choose

☐ Same as business address

Owner address

Apt/Ste/Unit

ZIP

City

State

Select

Owner's date of birth

Mobile phone number

Social Security number (last 4 digits)

Next

38

### Bank account

Let us know which bank account you'd like to use.

HOMETRUST BANK, NA
used for bank feeds

HOMETRUST BANK, NA
used for bank feeds

HOMETRUST BANK, NA
used for bank feeds

Add new bank account

Next

By selecting **Accept and Submit** you agree that **Intuit Payments Inc.** will provide money movement services under the [Terms](#) subject to eligibility criteria.

39

Get set up to pay with direct deposit

You'll be moving money so let's double-check your info (this should take about 5 minutes)

✓

Business

Contact info, website, tax ID

Edit

✓

About your principal officer

Contact info, date of birth, last 4 of Social Security number

Edit

✓

Bank account

Either sign-in info, or routing and account numbers

Edit

By selecting **Accept and Submit**, you agree that Intuit Payments Inc. will provide money movement services under the [Terms](#) subject to eligibility criteria, credit and application approval, and have read and acknowledge the [Privacy Statement](#). You provide written instructions authorizing us to periodically pull your credit report starting now, until you cancel your money movement services in your QuickBooks settings (web).

Accept and Submit

40

✓

Your bank account is connected!

You've successfully set up your bank account. It's ready to use for direct deposit and tax e-payments.

OK

41

19



SETUP TASKS

✓

**Your team's 2022 payments are ready**  
Review your employees and confirm if they were paid in 2022 to keep your tax payments on track.

✎

✓

**Your business info is complete**  
We have everything we need to calculate your payroll taxes.

✎

✓

**You're ready to pay your team**  
To add more employees or change their info, select edit.

✎

ⓘ

**Add a workers' comp policy**  
Comply with state law and protect your business. Due as soon as you hire your first employee.

Start

ⓘ

**Fill in your tax info**  
Gather your state and federal tax ID numbers so we can file your taxes for you.

Start

✓

**We've connected your bank.**  
You're all set for direct deposits and electronic payments.

✎

ⓘ

**Sign your tax forms**  
One quick signature and we'll be ready to pay and file your taxes for you.  
Do this first: Fill in your tax info

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## Do you have workers' comp?

Virginia requires workers' comp for most businesses that have one or more employees.

✓

Yes, I'm covered

✗

No, I don't have it

Next

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20

SETUP TASKS

✓

Your team's 2022 payments are ready

Review your employees and confirm if they were paid in 2022 to keep your tax payments on track.

✓

Your business info is complete

We have everything we need to calculate your payroll taxes.

✓

You're ready to pay your team

To add more employees or change their info, select edit.

✓

Add a workers' comp policy

Comply with state law and protect your business. Due as soon as you hire your first employee.

Start

✓

Fill in your tax info

Gather your state and federal tax ID numbers so we can file your taxes for you.

Start

✓

We've connected your bank.

You're all set for direct deposits and electronic payments.

✓

Sign your tax forms

One quick signature and we'll be ready to pay and file your taxes for you.

Do this first: Fill in your tax info

44

1 General

2 Federal

3 State

Tell us your general business info

Let's make dealing with your payroll taxes a snap. Tell us about your business so we can report your payroll wages and taxes. This is the info you used when you applied for a Federal EIN.

Company legal name

This may be different than a trade or doing business as (DBA) name.

Company legal address

Street address

City

Roanoke

State

VA

ZIP code

24019

Company type

Other

Cancel

Next

45

21

✓ General

2 Federal

3 State

Give us your federal tax info

Once we have your tax info, we can correctly pay and file your federal taxes. You can find what you need in letters and tax notices you've received from the IRS.

Employer Identification Number (EIN) (optional) ⓘ

12-3456789

Don't have one? [Apply for an EIN](#)

Which payroll tax form do you file with the IRS? ⓘ

Form 941 (quarter)

Form 944 (annual)

How often do you pay your taxes? ⓘ

Monthly – (less than \$50,000 of tax deposits during previous 12-month lookback period or just hired employees for 1<sup>st</sup> time)

Semiweekly – (more than \$50,000 of tax deposits during the previous 12-month lookback period)

Previous

Next

46

✓ General

✓ Federal

3 State

Let's add your Virginia tax info

We'll need the following info to correctly pay and file your state payroll taxes based on where your employees live and work. You can find what you need in emails or letters you've received from the state.

Withholding

Account Number (optional)

0-123456789F-123

[Learn about state tax IDs](#)

How often do you pay your taxes?

Monthly

Quarterly – (estimated payments per quarter will be less than \$300)

Monthly – (estimated payments per quarter will be between \$300-\$2999)

Semiweekly – (estimated payments per quarter will be \$3000 or more)

Unemployment Insurance (UI)

VEC Account Number (optional)

1234567890

[Learn about state tax IDs](#)

Do you know your Unemployment Insurance (UI) rate? ⓘ

Yes, it's .

No, use 6.2% for now.

Should be 2.73%, see the exact rate after registering.

Previous

Done

47

CONFIRMATION

Confirmation Page

**Congratulations! You have successfully registered your business with the VEC.**  
**Your confirmation number is 3961335 \***

Employer Name :	
Employer Account# :	0012189200
UI Tax Rate for 2022 :	2.73%
Date, Time :	04/03/2022 02:21:19 PM

You will be receiving additional information soon concerning your new account.

Press the Home button to view your homepage or file quarterly Tax and Payroll Reports.  
Please print this page and keep for your records.



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SETUP TASKS

✓	<b>Your team's 2022 payments are ready</b> Review your employees and confirm if they were paid in 2022 to keep your tax payments on track.	
✓	<b>Your business info is complete</b> We have everything we need to calculate your payroll taxes.	
✓	<b>You're ready to pay your team</b> To add more employees or change their info, select edit.	
✓	<b>Add a workers' comp policy</b> Comply with state law and protect your business. Due as soon as you hire your first employee.	
⊖	<b>Your tax setup is almost ready</b> We need some additional info to handle your taxes.	<div>Finish up</div>
✓	<b>We've connected your bank.</b> You're all set for direct deposits and electronic payments.	
⊖	<b>Sign your tax forms</b> One quick signature and we'll be ready to pay and file your taxes for you.	<div>Start</div>

49

1 Preferences

2 Review

3 Authorization

## Let's get you ready to pay and file your federal and state taxes

Payment and filing preference

I want QuickBooks to automatically pay and file my taxes [Change payment and filing preference](#)

Bank account

HOMETRUST BANK, NA,...

Cancel

Next

50

×

## Verify your information

Mobile phone number (must be registered to you)

By clicking Continue, you authorize us to send a security code to this number.

Don't have your phone? [Verify another way](#)

Continue

51



✓ Preferences

✓ Review

3 Authorization

Next we'll review and sign a few forms

We need your company's principal officer to review and sign a few important authorization forms. This lets us report payroll taxes on behalf of your business.

Confirm officer's first and last name

Previous

Confirm

52

✓ Preferences

2 Review

3 Authorization

Let's confirm your tax info

We'll use this info to set up online tax payments. If any numbers are missing or incorrect, it can result in late payments or notices.

Federal tax

Employer Identification Number (EIN)

Virginia tax

VEC Account Number

Account Number

Previous

Next

53

*Processing time to setup for E-File & E-Pay is 1-2 weeks*

✓ Preferences

✓ Review

3 Authorization

## We've got your forms

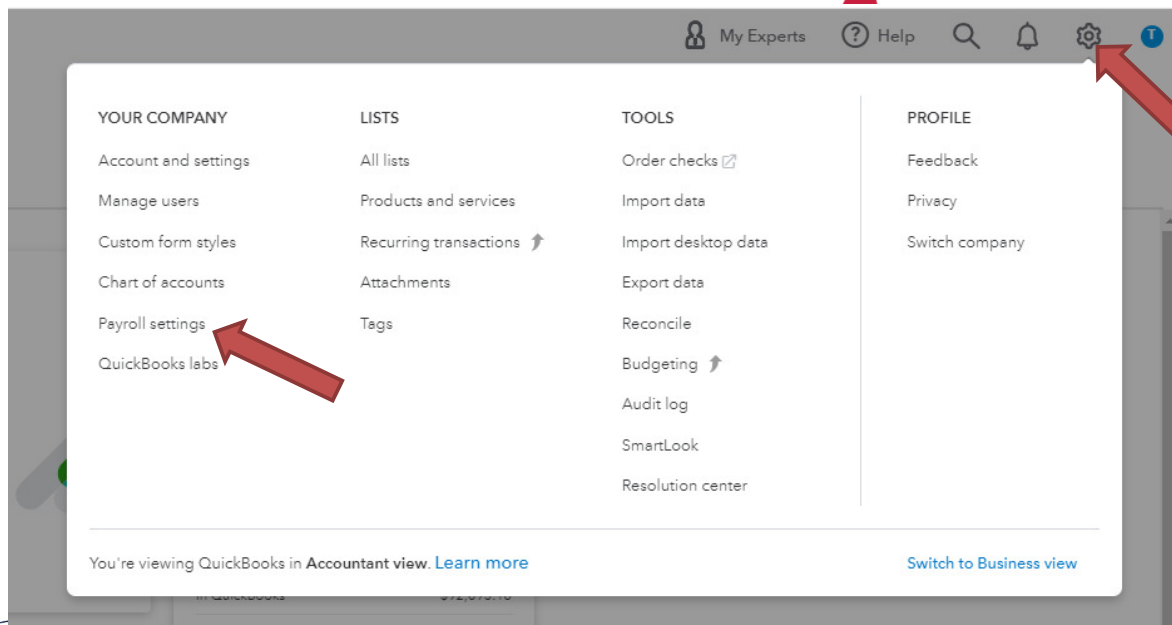
If any final paperwork is needed, we'll let you know in setup tasks. You'll hear from us once you're all ready for online tax payments and filings. Until then you're responsible for making on-time payments and filings.

Previous

Done



54



55

Payroll Settings

General tax	Company type, filing name, and filing address		
Federal tax	Federal EIN, deposit schedule, and filing requirement		
Virginia tax	State EIN, deposit schedule, and state unemployment insurance rate		
Auto Payroll	Automatically pay your employees. (Currently ineligible.) <a href="#">Why am I ineligible?</a>	No employees enrolled	
Taxes and forms	Payment and filing preference	Automated taxes and forms	
Federal form preferences	Third party designee and paid preparer info		
Email notifications	Send to	onefocusmedia@me.com	
	Setup notifications	Send to you	
	Form filing notifications	Send to you	
	Payday notifications	Send to you	
	Tax notifications	Send to you	
	Payday reminders	Send to you	
	Tax payment reminders	Send to you	
Early pay	Give eligible employees access to money between paydays at no cost to you. <a href="#">Learn more</a>	On	
Shared data	Allow employees to import W-2 data into TurboTax	On	
	Include automated income and employment verification service powered by The Work Number® from Equifax	On	

Done

56

Company State Tax Information

\* = Required

VA Withholding Setup

VA Account Number
30-
Example: 30-123456789F-123

VA Income Tax\*

Deposit Schedule
Effective Date

Monthly (current schedule)
01/01/2021

[Change or add new schedule.](#)

VA State Unemployment Insurance (SUI) Setup

VA VEC Account Number
00118
Example: 1234567890

VA SUI

Rate
Effective Date

New
2.73% (current rate)
01/01/2021
Delete

OK
Cancel

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Payroll Settings

General tax

Company type, filing name, and filing address

Federal tax

Federal EIN, deposit schedule, and filing requirement

Virginia tax

State EIN, deposit schedule, and state unemployment insurance rate

Auto Payroll

Automatically pay your employees. (Currently ineligible.)

No employees enrolled

[Why am I ineligible?](#)

Taxes and forms

Payment and filing preference

Automated taxes and forms

Federal form preferences

Third party designee and paid preparer info

Email notifications

Send to

onefocusmedia@me.com

Setup notifications

Send to you

Form filing notifications

Send to you

Payday notifications

Send to you

Tax notifications

Send to you

Payday reminders

Send to you

Tax payment reminders

Send to you

Early pay

Give eligible employees access to money between paydays at no cost to you.

On

[Learn more](#)

Shared data

Allow employees to import W-2 data into TurboTax

On

Include automated income and employment verification service powered by The Work Number® from Equifax

On

Done

58

Taxes and forms

Check out your setup tasks if you make changes to your settings

If you've changed your settings we may need more info from you before we're ready to automate your taxes and forms. Make sure to double-check your setup tasks.

☒ Automate taxes and forms
 

On

We'll automatically pay and file your federal and state payroll taxes (including year-end filings) beginning with tax periods ending on or after Friday, April 01, 2022.

[Learn More](#)

Cancel

Save

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Payroll Settings

Taxes and forms

Payment and filing preference

Automated taxes and forms

Federal form preferences

Third party designee and paid preparer info

Email notifications

Send to

onefocusmedia@me.com

Setup notifications

Send to you

Form filing notifications

Send to you

Payday notifications

Send to you

Tax notifications

Send to you

Payday reminders

Send to you

Tax payment reminders

Send to you

Early pay

Give eligible employees access to money between paydays at no cost to you.

On

Learn more

Shared data

Allow employees to import W-2 data into TurboTax

On

Include automated income and employment verification service powered by The Work Number® from Equifax

On

Learn more

Bank accounts

Account number

....0915

Routing number

....0279

Direct deposit

Payroll timing

Next-day

Funding limit

\$40K per payroll (6-day period)

Printing

Paystubs

Pay stub on plain paper

Accounting

Choose how payroll transactions are exported

Not exporting

Done

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Accounting preferences

Accounting preferences - Review

FROM PAYROLL

TO CHART OF ACCOUNTS

Paycheck and payroll tax payments

Bank Account

Member One

Wage expenses

Wage Account

Payroll Expenses:Wages

Employer tax expenses

Tax Account

Payroll Expenses:Taxes

Tax liabilities

Federal Taxes (941/944)

Payroll Liabilities:Federal Taxes (941/944)

Federal Unemployment (940)

Payroll Liabilities:Federal Unemployment (940)

VA Income Tax

Payroll Liabilities:VA Income Tax

VA SUI Employer

Payroll Liabilities:VA SUI Employer

Other liabilities and assets

child support / taxes

Payroll Liabilities:child support / taxes

Want to update existing transactions

Update accounting preferences for past transactions according to current preference settings (we'll change all accounts except the one in the Bank Account section).

Back

Done

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## Payroll

Overview

Employees

Contractors

Workers' comp

Benefits

HR Adviser

Compliance

### 4 days until payday

Have a minute? Check your to do list to stay on top of important action items.

[View paycheck list](#)



#### SHORTCUTS



Run payroll



Add employee



Pay contractor



Add contractor

#### TO DO LIST

Looks like you're all caught up.

#### STATUS



Auto Payroll

Off

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## Paycheck list [Feedback](#)

Need to print a check? [Go to settings](#)

Share

Filter

<input type="checkbox"/>	Pay date	Name	Total pay	Net pay	Pay method	Check number	Status	Action
<input type="checkbox"/>	04/01/2022		\$692.75	\$560.56	Check	1100	-	<a href="#">Print</a>
<input type="checkbox"/>	04/01/2022		\$550.13	\$434.85	Check	1223	-	<a href="#">Print</a>



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## Section 4

### Payroll Taxes and Reports



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Overview

Books review

Dashboard

Transactions

Sales

Cash flow

Expenses

Payroll

Reports

Taxes

Mileage

Accounting

My accountant

Sales tax

Payroll tax

1099 filings

Payroll Tax Center

Payments

Filings

Upcoming tax payments

Tax type	Payment status	Amount	Due date	Payment method	Actions
> Federal Taxes (941/944) 03/01/2022 – 03/31/2022	SCHEDULED	\$740.68	04/15/2022	Electronic Withdrawal on 04/08/2022	
> VA Income Tax 03/01/2022 – 03/31/2022	AUTOMATIC	\$127.66	04/25/2022	Electronic Paying automatically	
> VA SUI Employer 01/01/2022 – 03/31/2022	AUTOMATIC	\$183.83	05/02/2022	Electronic Paying automatically	
> Federal Taxes (941/944) 04/01/2022 – 04/30/2022	ACCRUING	\$290.94	05/16/2022	Electronic Paying automatically	
> VA Income Tax 04/01/2022 – 04/30/2022	ACCRUING	\$51.61	05/25/2022	Electronic Paying automatically	
> VA SUI Employer 04/01/2022 – 06/30/2022	ACCRUING	\$33.93	08/01/2022	Electronic Paying automatically	
> Federal Unemployment (940) 01/01/2022 – 12/31/2022	ACCRUING	\$47.85	01/31/2023	Electronic Paying automatically	

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## Payroll Tax Center

Payments

Filings

### Upcoming tax payments

Tax type	Payment status	Amount	Due date	Payment method
Federal Taxes (941/944) 03/01/2022 – 03/31/2022	<b>SCHEDULED</b>	\$740.68	04/15/2022	Electronic Withdrawal on 04/08/2022
Federal Income Tax		\$249.14		
Social Security		\$199.19		
Social Security Employer		\$199.19		
Medicare		\$46.58		
Medicare Employer		\$46.58		

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> Federal Unemployment (940)

01/01/2022 – 12/31/2022

**ACCRUING**

\$47.8:

### Payment resources

[Tax payment history](#)

Run reports to view your tax payments history.

[Tax setup](#)

Edit your federal and state tax info in Payroll Settings.

[Tax liability report](#)

Run reports to view your tax liabilities.

[Prior tax history](#)

Add payments to your prior tax history.

[Compliance resources](#)

Year-end info and resources to help stay in compliance.



The Roanoke Regional Small Business Development Center is funded in part through a cooperative agreement with the U.S. Small Business Administration and supported by America's SBDC, Virginia SBDC, and George Mason University

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## Payroll tax payments [Feedback](#)

This year ▼ 01/01/2022 📅 12/31/2022 📅

Payment date	Tax type	Amount	Payment method	Notes
04/08/2022	Federal Taxes (941/944) 03/01/2022 - 03/31/2022	\$740.68	Electronic	
03/15/2022	VA Income Tax 02/01/2022 - 02/28/2022	\$69.48	Electronic	
03/08/2022	Federal Taxes (941/944) 02/01/2022 - 02/28/2022	\$417.69	Electronic	
02/14/2022	VA Income Tax 01/01/2022 - 01/31/2022	\$48.39	Electronic	
02/08/2022	Federal Taxes (941/944) 01/01/2022 - 01/31/2022	\$325.78	Electronic	



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> Federal Unemployment (940)  
01/01/2022 – 12/31/2022

ACCRUING

\$47.8:

### Payment resources

#### [Tax payment history](#)

Run reports to view your tax payments history.

#### [Tax setup](#)

Edit your federal and state tax info in Payroll Settings.

#### [Tax liability report](#)

Run reports to view your tax liabilities.

#### [Prior tax history](#)

Add payments to your prior tax history.

#### [Compliance resources](#)

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Tax Liability Report			
<a href="#">Back to report list</a> <div> Date Range <div>This year</div> <div>Run Report</div> </div>			
	TAX AMOUNT	TAX PAID	TAX OWED
<b>Federal Taxes (941/944)</b>	<b>\$1,775.09</b>	<b>\$1,484.15</b>	<b>\$290.94</b>
Federal Income Tax:	\$554.67	\$453.89	\$100.78
Social Security	\$494.55	\$417.49	\$77.06
Social Security Employer	\$494.55	\$417.49	\$77.06
Medicare	\$115.66	\$97.64	\$18.02
Medicare Employer	\$115.66	\$97.64	\$18.02
<b>Federal Unemployment (940)</b>	<b>\$47.85</b>	<b>\$0.00</b>	<b>\$47.85</b>
FUTA Employer	\$47.85	\$0.00	\$47.85
<b>VA Income Tax</b>	<b>\$297.14</b>	<b>\$117.87</b>	<b>\$179.27</b>
VA Income Tax:	\$297.14	\$117.87	\$179.27
<b>VA SUI Employer</b>	<b>\$217.76</b>	<b>\$0.00</b>	<b>\$217.76</b>
VA SUI Employer	\$217.76	\$0.00	\$217.76

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Taxes

Sales tax

Payroll tax

1099 filings

Payroll Tax Center

Payments

Filings

Upcoming filings

Form type	Filing status	Period	Due	Actions
941	AUTOMATIC	Quarterly (Q1) Jan - Mar 2022	05/02/2022 Filing automatically	<button>Preview</button>
VA VEC FC-20-21	AUTOMATIC	Quarterly (Q1) Jan - Mar 2022	05/02/2022 Filing automatically	<button>Preview</button>

Filing resources

Archived forms and filings

Completed tax filings and forms ready to view and print.

Compliance resources

Year-end info and resources to help stay in compliance.

Employee setup

Forms for you and your employee to complete.

Employer setup

Applications for employer identification numbers.

QuickBooks compatible tax forms

Federal tax forms designated to work with QuickBooks.

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Back

Archived Forms

--All--

--All--

12 archived forms found

Employer's summary of W-2's transmitted

Employer's summary of W-2's transmitted

Year 2021, Intuit Generated

Date archived: 01/22/2022 E-Filed: Yes

W-3

Employer Copies: Form W-2

Employer Copies: Form W-2

Year 2021, Intuit Generated

Date archived: 01/22/2022 E-Filed: Yes

W-2 Copies A & D (employer)

Printable Employee Copies: Form W-2

Printable Employee Copies: Form W-2

Year 2021, Intuit Generated

Date archived: 01/22/2022 E-Filed: Yes

W-2 Copies B, C, & 2 (employee)

VA UI Quarterly Tax Return

VA UI Quarterly Tax Return

4th quarter, 2021, Intuit Generated

Date archived: 01/20/2022 E-Filed: Yes

VA VEC-FC-20

VA WH Annual Tax Return

VA WH Annual Tax Return

Year 2021, Intuit Generated

Date archived: 01/29/2022 E-Filed: Yes

VA VA6

VA WH Employer Copy Of W-2

VA WH Employer Copy Of W-2

Year 2021, Intuit Generated

Date archived: 01/30/2022 E-Filed: Yes

VA Employer W-2

FD WH Quarterly Tax Return

FD WH Quarterly Tax Return

4th quarter, 2021, Intuit Generated

Date archived: 02/01/2022 E-Filed: Yes

FD 941

FD UI Annual Tax Return

FD UI Annual Tax Return

Year 2021, Intuit Generated

Date archived: 02/01/2022 E-Filed: Yes

FD 940

FD WH Quarterly Tax Return

FD WH Quarterly Tax Return

3rd quarter, 2021, Intuit Generated

Date archived: 10/26/2021 E-Filed: Yes

FD 941

VA UI Quarterly Tax Return

VA UI Quarterly Tax Return

AMERIC

SBD

VIRGIN

ROANOKE REG

72

Taxes

Sales tax

Payroll tax

1099 filings

Payroll Tax Center

Payments

Filings

Upcoming filings

Form type	Filing status	Period	Due	Actions
941	AUTOMATIC	Quarterly (Q1) Jan - Mar 2022	05/02/2022 Filing automatically	Preview
VA VEC-FC-20-21	AUTOMATIC	Quarterly (Q1) Jan - Mar 2022	05/02/2022 Filing automatically	Preview

Filing resources

Archived forms and filings

Completed tax filings and forms ready to view and print.

Compliance resources

Year-end info and resources to help you stay in compliance.

Employee setup

Forms for you and your employee to complete.

Employer setup

Applications for employer identification numbers.

QuickBooks compatible tax forms

Federal tax forms designated to work with QuickBooks.

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## Employee Setup Forms

The following forms are filed for each employee. To view a form, select the employee, then click the name of the form you want to view. You or your employee may need to complete information on some forms.

Tanner, Tom ▾

### Authorization for Direct Deposit

Employees or contractors who will be paid by direct deposit should complete this form and provide a voided check. Keep this form for your records.  
You have no new contractor hires to report at this time.

[Bank Verification >](#)

### Employment Eligibility Verification

Use this form to determine an employee's eligibility to work in the US.  
You have no new contractor hires to report at this time.

[I-9 >](#)

### Hiring Incentives to Restore Employment (HIRE) Act Employee Affidavit

Qualified employees should complete a W-11 form to affirm that they meet the requirements of the 2010 HIRE Act.  
You have no new contractor hires to report at this time.

[W-11 >](#)

### Employee's Withholding Allowance Certificate

Employees should complete Form W-4 to determine filing status and allowances for income tax withholding. Record in the employee's tax information.  
You have no new contractor hires to report at this time.

[W-4 >](#)

### VA Withholding Allowance Certificate

Employees must complete Form VA-4 to determine Virginia withholding allowances. Otherwise, the employer must withhold as if the employee had no allowances. Employees who live in DC, KY, MD, PA or WV should check Box 3.  
You have no new contractor hires to report at this time.

[VA-4 >](#)

Want to view or print a form you already saved or e-filed? [View and print archived forms](#)

[Print a blank employee packet](#)



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## Intuit QuickBooks Payroll



### Employee Direct Deposit Authorization

#### Instructions

Employee: Fill out and return to your employer.

Employer: Save for your files only.

This document must be signed by employees requesting automatic deposit of paychecks and retained on file by the employer. Do not send this form to Intuit. Employees must attach a voided check for each of their accounts to help verify their account numbers and bank routing numbers.

#### Account 1

Account 1 type: ☐ Checking ☐ Savings

Bank routing number (ABA number): \_\_\_\_\_

Account number: \_\_\_\_\_

Percentage or dollar amount to be deposited to this account: \_\_\_\_\_

#### Account 2 (remainder to be deposited to this account)

Account 2 type: ☐ Checking ☐ Savings

Bank routing number (ABA number): \_\_\_\_\_

Account number: \_\_\_\_\_

attach a voided check for each account here

Authorization (enter your company name in the blank space below) \_\_\_\_\_

This authorizes \_\_\_\_\_ (the "Company") to send credit entries (and appropriate debit and adjustment entries), electronically or by any other commercially accepted method, to my (our) account(s) indicated below and to other accounts I (we) identify in the future (the "Account"). This authorizes the financial institution holding the Account to post all such entries. I agree that the ACH transactions authorized herein shall comply with all applicable U.S. Law. This authorization will be in effect until the Company receives a written termination notice from myself and has a reasonable opportunity to act on it.

Authorized signature: \_\_\_\_\_ Employee ID #: \_\_\_\_\_

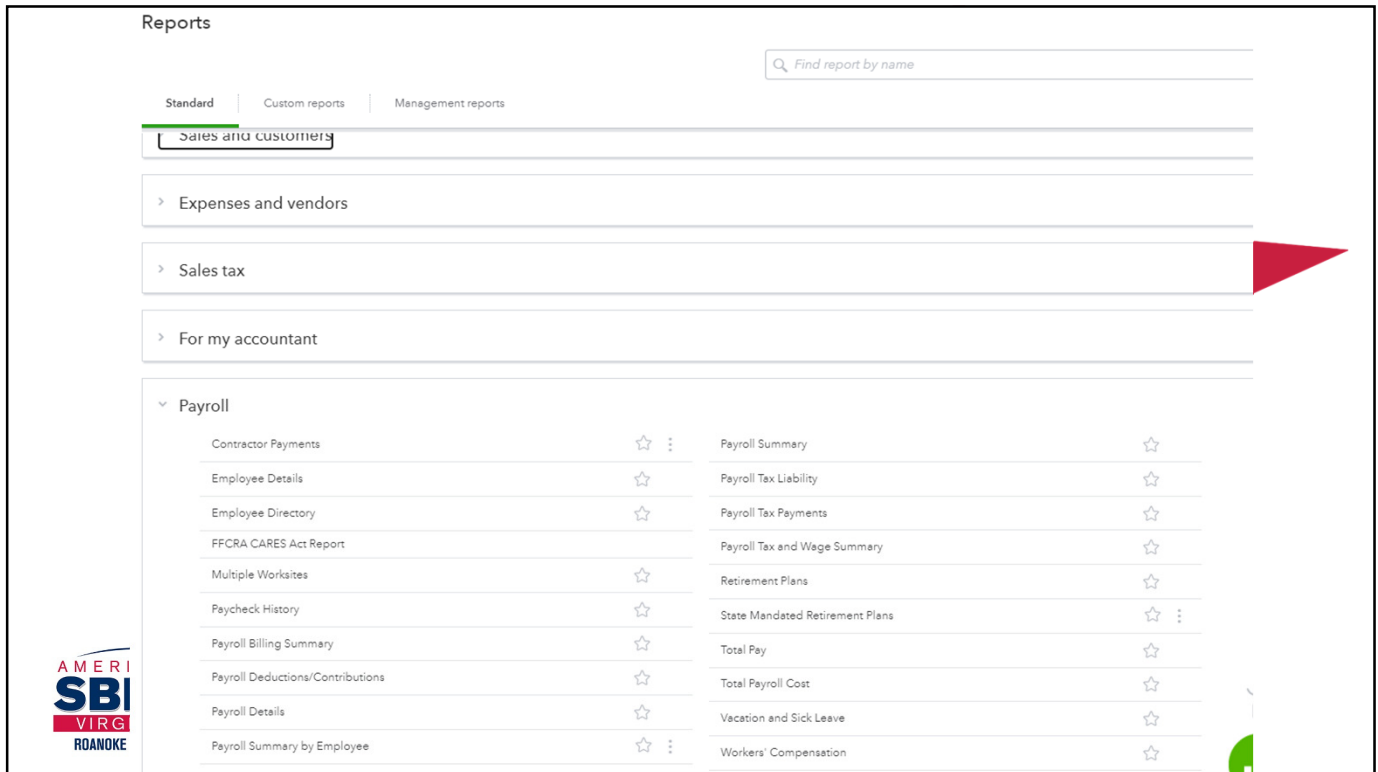
Print name: \_\_\_\_\_ Date: \_\_\_\_\_

Employee Direct Deposit Authorization Form

See Authorization\_Rpt\_201606\_091010



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LET'S DO THIS!

WE HELP YOU WITH BUSINESS SO YOU CAN GET ON WITH YOUR BIG IDEAS.


[RoanokeSmallBusiness.org](https://RoanokeSmallBusiness.org)


[hello@roanokesmallbusiness.org](mailto:hello@roanokesmallbusiness.org)


[540-632-1174](tel:540-632-1174)




[@RRSBDC](https://www.instagram.com/RRSBDC)

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