

TaxTime USA, Inc.



Dear TaxTime USA Customer,

This update is for the e-filing of Form 941. To download the update, please follow the instructions in the body of the e-mail sent to you, including Registration information.

PREPARING to E-File IRS Form 941

- To E-File Form 941 the user must have an EFIN (Electronic Filer Identification Number) number assigned by the IRS.
 - Enter the Firm's EFIN number on the "Firm Name" Tab in the Setup -> Configuration Screen (See below):

Configuration Setup

Firm Address | Defaults | Printing | Program & Database Location | 1099 & W2

Company Name: TAXTIME USA, INC.

Address: 30800 TELEGRAPH RD
SUITE 1775

City: BINGHAM FARMS State: MI Zip: 48025

Telephone: (248) 642-7070

Federal ID: 123456781

W-2/1099 Required E-file Info

Preparer Code:

SSA Business online UserId:

IRS Fire System TCC:

941/940 Required E-file Info

EFIN: 123456

Originator Type Code: ERO

Name Control: TAXT

EFIN: Enter EFIN assigned by the IRS

Originator Type Code: Select either ERO or Reporting Agent (most firms are an ERO)

Name Control – this used during E-Filing when Reporting Agent is selected. It is generally the first four characters of the firms name and is auto filled by this program.

- The IRS MEF system requires User ID's and Passwords in order to E-File Form 941. The first time a user attempts to E-File a return the system will prompt the user to enter a User name and Password and select an Administrator. The system will open up the preparers screen to allow the setup of your user names and passwords. Additionally you are required to designate one of the preparers as an administrator. The administrator will have the ability to add users and reset passwords. You can designate more than one user as an administrator. The following screen will open:

Preparer

Preparer & Emails

First Name	Last Name	Preparer Name	Preparer Email	PTIN/SSN	User Name	Admin	
George	Jones	George Jones		P02121212	George	<input checked="" type="checkbox"/>	Login Info.
Henry	Heat	Henry Heat		P01111111	Henry	<input type="checkbox"/>	Login Info.
Mary	Smith	Mary Smith		P13131313	Mary	<input type="checkbox"/>	Login Info.
						<input type="checkbox"/>	Login Info.

Delete Save

Ok Cancel

Click the Login Info button to add a User Name and Password to a Preparer. You can also designate the user as an Administrator by clicking the Administrator check box. See below:

To save your changes you Must click "Save" and then "Ok"

Login Credentials

User Name:

Password:

Renter Password:

Is Administrator?

Ok Cancel

Once the user's credentials have been added the maintenance screen has been closed following Login window will open: Enter the user name and password and click "Ok".

Login

User Name:

Password:

Ok Cancel

This Login window will open the first time the E-File button is clicked or if the system is IDLE for 30 minutes after logging in.

In the event the Administrator forgets their password, you can gain access to the preparer/credentials setup screen by re-registering the software and then clicking the E-File button on the 941 worksheet screen. This will open up the above setup window and allow the password to be recreated.

- The 941/940 E-File requires two additional Configuration Setups:
 - Click on Setup, then Configuration
 - Click on Firm Address and enter in your Federal ID; no dashes should be used.

- Then click on the Preparer & Emails tab and enter in each Preparer's PTIN. If you previously did not have any Preparers listed here please enter each Preparer name, e-mail and PTIN.
- Click Save and then Ok.
- The federal ID and preparer information, including PTIN is required for each Form 941 return.

E-FILING RETURNS

941/MI Unemployment Express - 2019 - [Marigold Corporation, File name: MarigoldTTTest1]

File Setup Reports Window Help

Select Screen ▶ 941-Quarterly Federal Tax Re for I Quarter

Part 1: Answer these questions for this quarter. Disable auto update from Wage Detail Entry E-file 941/940

1. Number of employees who received wages, tips, or other: Override 1,000

2. Wages, tips, and other compensation: 34,415,600.00

3. Total income tax withheld from wages, tips, and other compensation: 9,640,866.35

4. If no wages, tips, and other compensation are subject to social security or Medicare tax:

	Column 1	Column 2
5a. Taxable social security wages:	34,415,600.00 x .124 =	4,267,534.40
5b. Taxable social security tips:	.00 x .124 =	
5c. Taxable Medicare wages & tips:	34,415,600.00 x .029 =	998,052.40
5d. Taxable wages & tips subject to additional Medicare Tax withholding:	5,000.00 x .009 =	45.00

5e. Add Column 2 from lines 5a, 5b, 5c, and 5d:

5f. Section 3121(q) Notice and Demand—Tax due on unreported tips:

6. Total taxes before adjustments (add lines 3, 5e, and 5f)

7. Current quarter's fractions of cents:

8. Current quarter's sick pay:

9. Current quarter's adjustments for tips and group-term life insurance:

10. Total taxes after adjustments. Combine lines 6 through 9.

11. Qualified small business payroll tax credit for research activities. Attach Form 8974 .00

12. Total taxes after adjustments and credits. Subtract line 11 from line 10 14,906,498.15

13. Total deposits for this qtr, inclu. overpayment applied frm prior qtr: Override 14,907,118.00

14. Balance due (If line 12 is more than line 13, enter the difference): 0

15. Overpayment (If line 13 is more than line 12, enter the difference): 610.85

E-File button

E-file 941/940 check box

E-File button – clicking this button opens the E-File control browse window.

E-file 941/940 check box – by checking this box it allows the E-file instruction letter along with the 8879-EMP form to be print pre-viewed and printed

After you have completed the Form 941 return and are ready to e-file, Locate the E-File button on the worksheet screen.

- Make sure the E-File 941/940 check box is checked
 - Checking this box changes the instruction letter to the E-File instruction letter
 - Checking this box will also allow the user to print preview and print the 8879-EMP form.
- Always click on the Save button near the bottom right of the screen.
- Click on E-file button on the worksheet screen will open the below E-File control window.

Efile - 941

Submission Id	Recvd. at Provider	Sent to State	Recvd. From State	Status	State Submission Id

E-File

Refresh

H. Refresh

Print

Close

- To E-File a return click the E-File Button again on this window.
- A validation screen then displays. Click on Accept. E-file info will be displayed. If there are any validation issues, they will display. If there are validation issues, close the screen

and fix the problems. It is recommended to always click on Save before clicking on the e-file button.

- Although the returns are due on the last of the month following the quarter end we highly recommend filing at least a few days prior to the due date to allow the IRS time to process the return.
- Refresh Button – by clicking this button the user refreshes the E-File Status window with any updates/acknowledgements from the IRS.
- H. Refresh Button – (typically this button is not used) this button is used if no information is displayed in the E-File status window after a return has been e-filed and the refresh has been clicked a couple of times. Or if the users are using multiple 941/940 software databases instead of a central database in a multi-user environment and Acknowledgement information is not being retrieved by clicking the Refresh Button.
- Print Button – Click this button to print the contents of the E-File Status window.
- By Clicking on an entry in the E-File status window the system will open a window that contains the E-File status information including any error message of a rejected return. In addition it displays the actual contents of the 941/940 file being sent to the IRS. This information can also be printed by clicking the Print button on the opened window.

PRINT PREVIEW

To print preview the 941/940 return, e-file authorization form and Instruction Letter, click on the print preview icon or click on File then Print Preview option. The default print preview form is page one of the form being worked on. Use the Select dropdown to view the second page of the return, instruction letter or other schedules including the 8879-EMP authorization form.

PRINT

DO NOT PAPER FILE FORM 941/940 IF IT HAS BEEN E-FILED.

To print a copy for your files and/or for your client, click on the print icon or click on File then Print. A print screen then displays. Enter the number of copies and check the 941/940 and/or letter boxes and then click Print.

E-FILE AUTHORIZATION FORM 8879-EMP

Each return must be signed by an authorized person and the Electronic Return Originator (ERO) by using the e-file authorization Form 8879-EMP, which is included in our software. A taxpayer PIN will need to be entered which will be part of the authorization process and will be included in the e-filed return; the printed and signed Form 8879-EMP should be retained as part of the tax preparer's records. To enter the PIN, preparer name, date, etc. enter this in Part 5 of the 941 quarterly Federal Tax Return Screen. If you are a reporting agent then only your PIN will be needed to file the return.

E-FILE STATUS REPORT

From the top task bar select Report, then select E-file Status. The report displays the latest status information for all e-filed 941/940 returns. This report can be printed by clicking on the Printer icon.

PDF PRINTING

941/940 returns can be saved as a pdf. From the print screen click on the Print to pdf file.

Please feel free to contact us if you have any questions or comments regarding our software.

Best regards,

TaxTime USA, Inc.

248-642-7070

salesupport@taxtimeusa.com