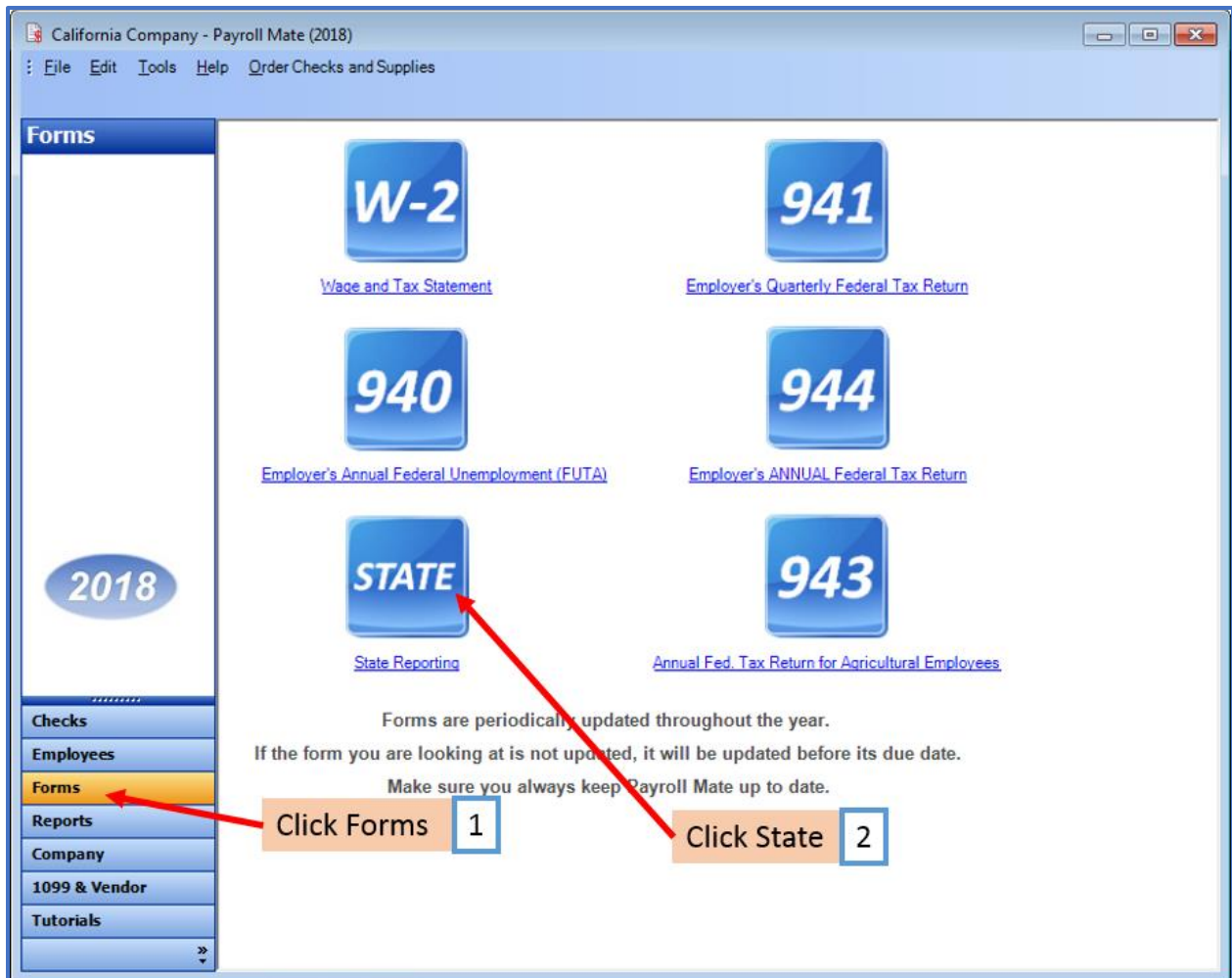


How to Use California State Reporting in Payroll Mate

Note: In order to use this feature you must purchase and enable Payroll Mate Option #5 (State Reporting)

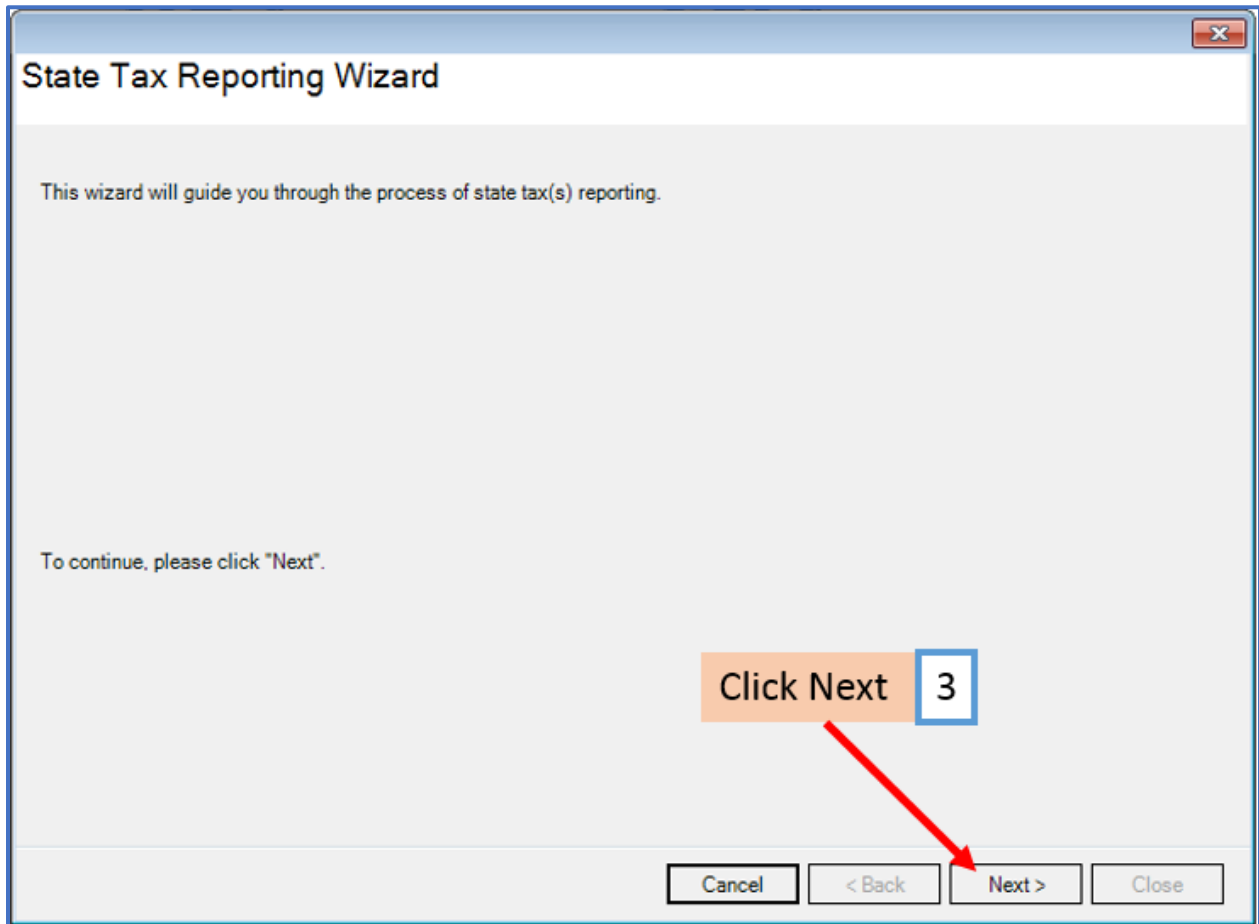
Make sure you have the correct Company open inside Payroll Mate

1. Inside Payroll Mate Software, Click Forms from Shortcuts
2. Click State Reporting



State Tax Reporting Wizard will open

3. Click Next



4. Select California as the Reporting State

State Tax Reporting Wizard

Reporting State: California
(Select the state for which you are reporting. If your state isn't listed, it's not currently supported by Payroll Mate)

Reporting Period: Second Quarter

Reported Tax: CA DE 9C (Withholding Income Tax & Unemployment Insurance)
(Specify the type of tax you want to report)

Buttons: Cancel, < Back, Next >, Close

5. Select the correct Reporting Period Quarter

State Tax Reporting Wizard

Reporting State: California
(Select the state for which you are reporting Income Tax Withholding, Unemployment, or Disability Insurance)
[If your state isn't listed in the "Reporting State" list above, then it's not currently supported by Payroll Mate]

Reporting Period: Second Quarter
First Quarter
Second Quarter
Third Quarter
Fourth Quarter

Reported Tax: Income Tax & Unemployment Insurance
(Specify the type of tax you want to report)

Cancel < Back Next > Close

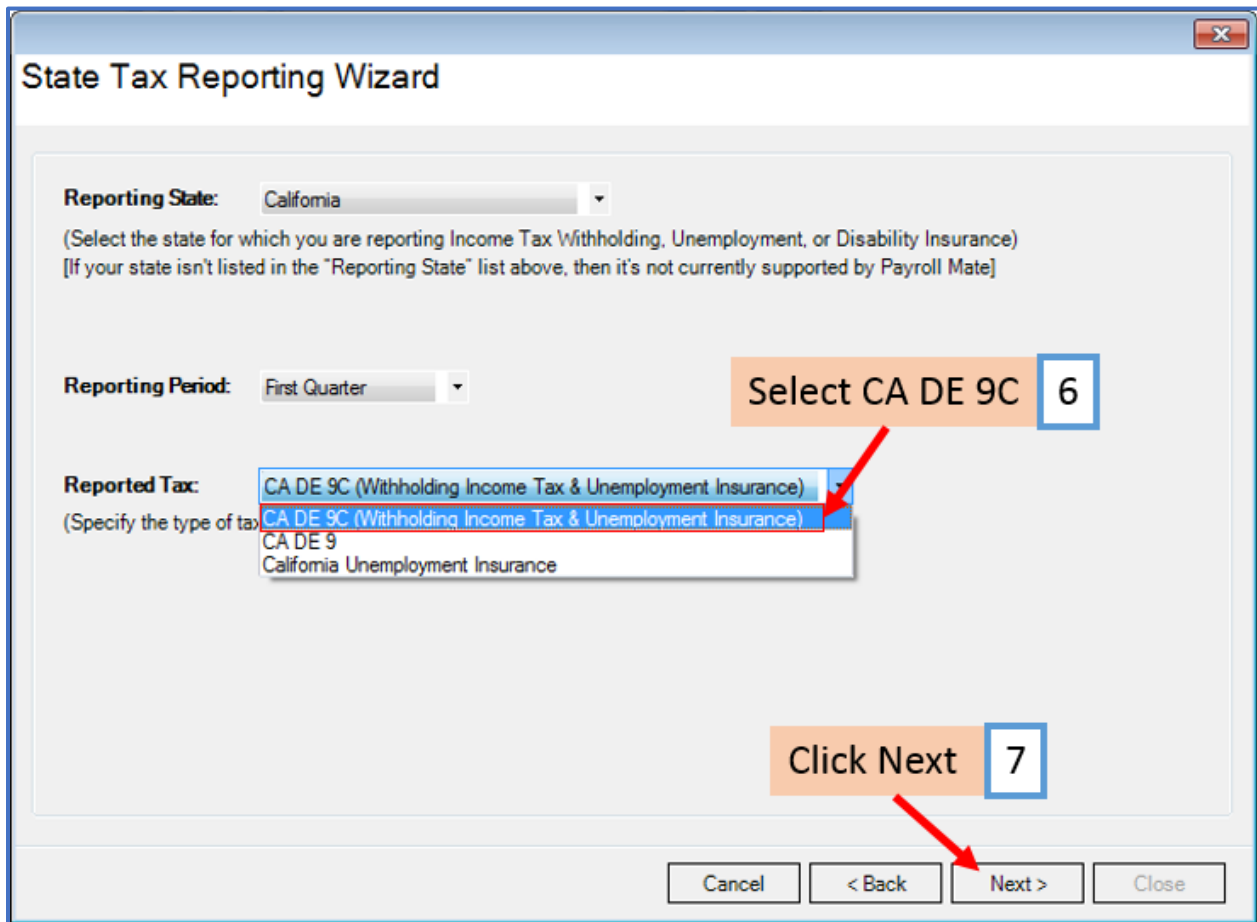
Payroll Mate offers 3 types of California reports

[*CA DE 9C \(Withholding Income Tax & Unemployment Insurance\)](#) , [*CA DE 9](#) and [*California Unemployment Insurance](#)

*** CA DE 9C (Withholding Income Tax & Unemployment Insurance)**

6. Select CA DE 9C (Withholding Income Tax & Unemployment Insurance)

7. Click Next



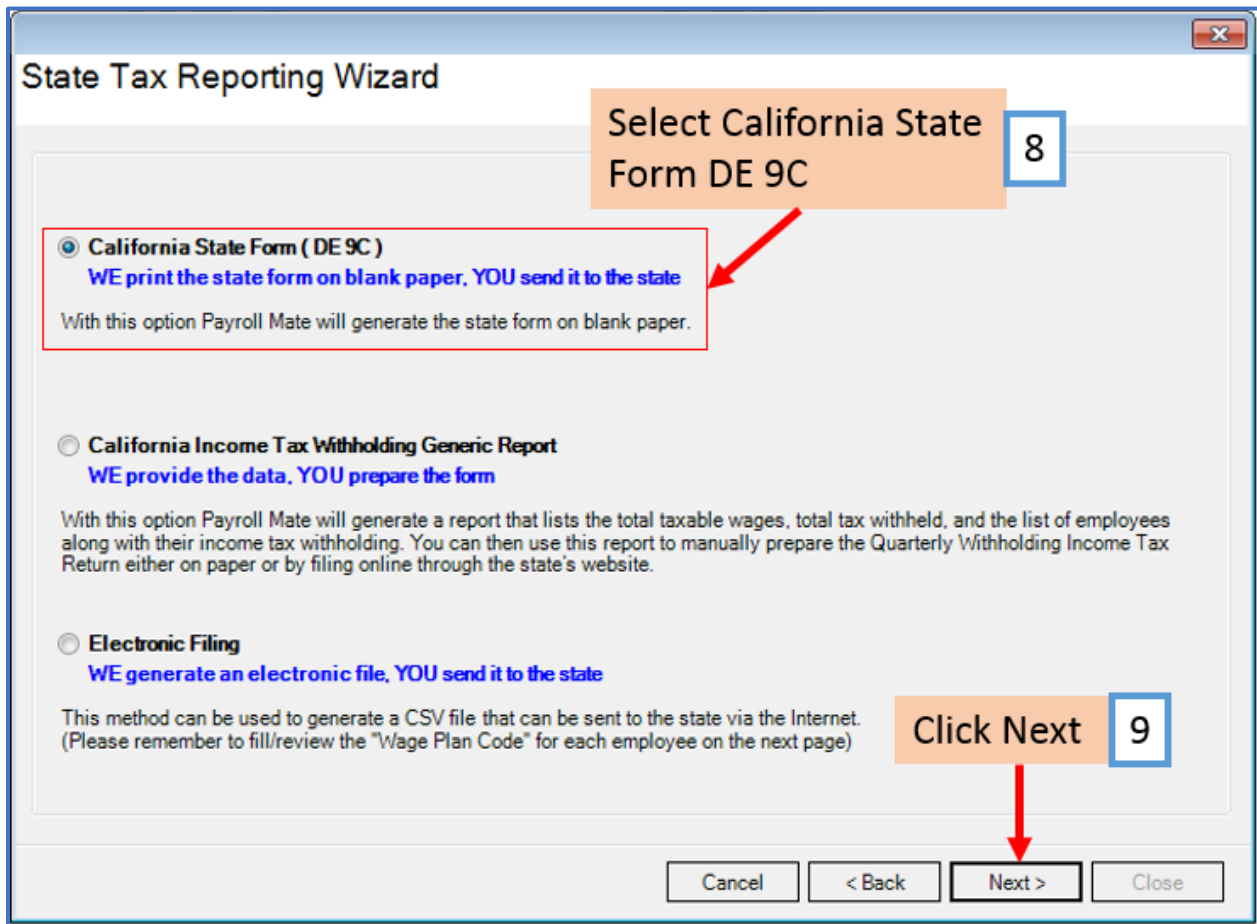
Payroll Mate offers 3 options for reporting California DE 9C information

[*California State Form \(DE 9C\)](#) - printed on blank paper, [*California Income Tax Withholding Generic Report](#), or [*Electronic Filing](#)

***California State Form (DE 9C) - printed on blank paper**

8. Select California State Form (DE 9C)

9. Click Next



10. Select the employees to include in the report

11. Click Next

State Tax Reporting Wizard Select Employees **10**

From the list below please select the employee(s) you would like to include in this report.
You can edit the information being reported for a certain employee by first selecting that employee and then clicking the "Edit Employee" button.

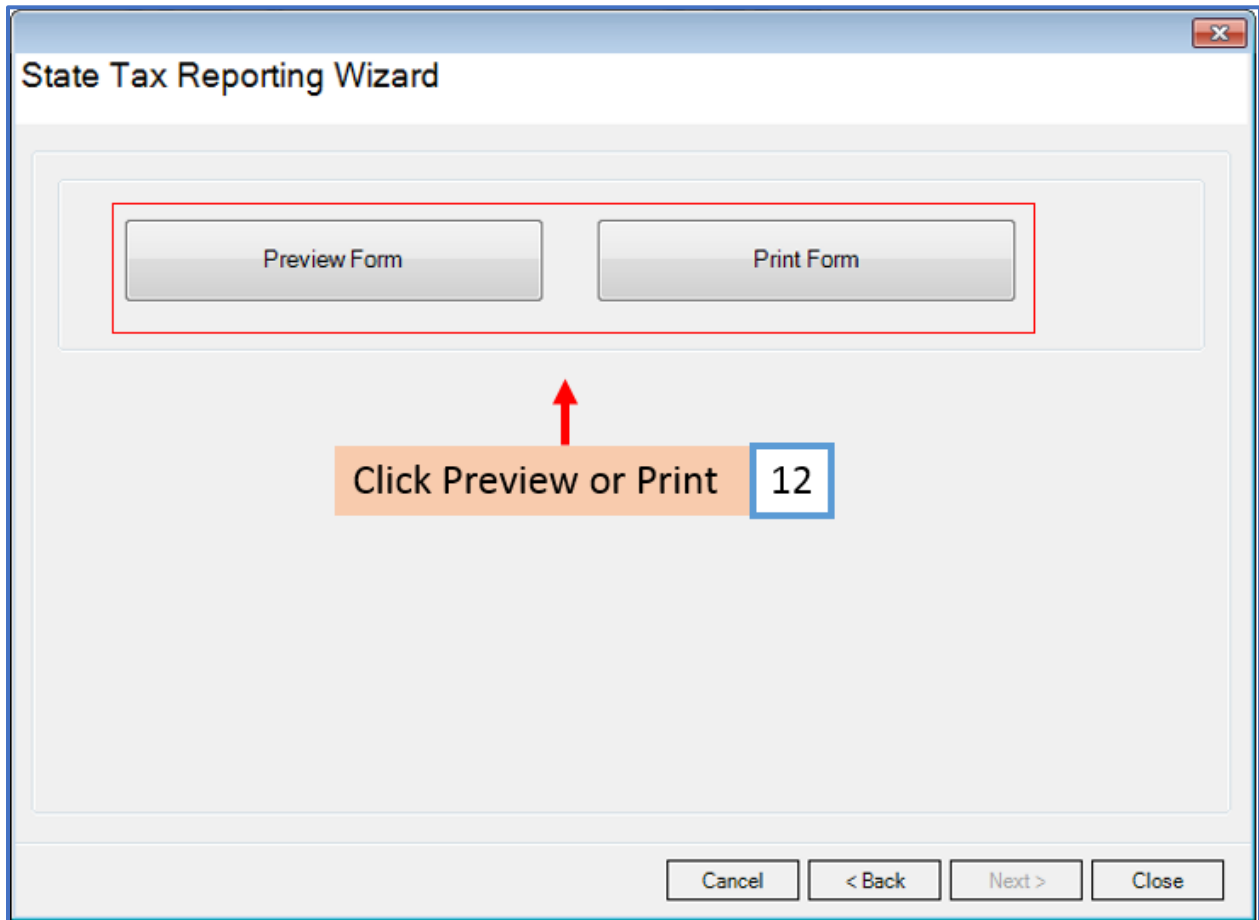
	Full Name	SSNumber	UI Total Wages	WH Taxable Wages	WH Tax	
<input checked="" type="checkbox"/>	Jason Smith	565-65-6556	1060.00	1060.00	43.34	Edit Employee

Check All
 Uncheck All

Amounts are for:
1st Quarter
2018

Click Next **11** Cancel < Back **Next >** Close

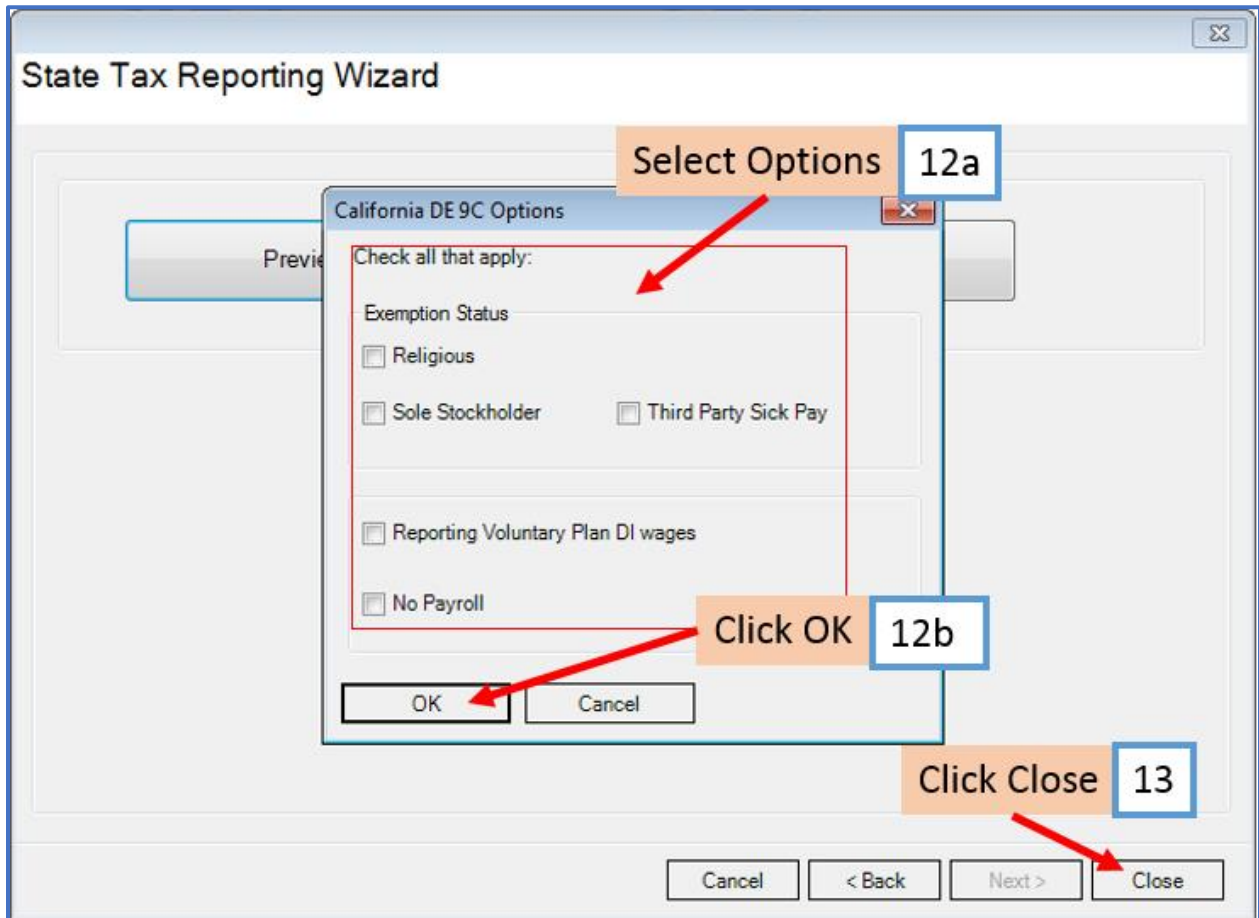
12. Click to Preview or Print the California State Form (DE 9C) form



12a. Select DE 9C options as applicable

12b. Click OK

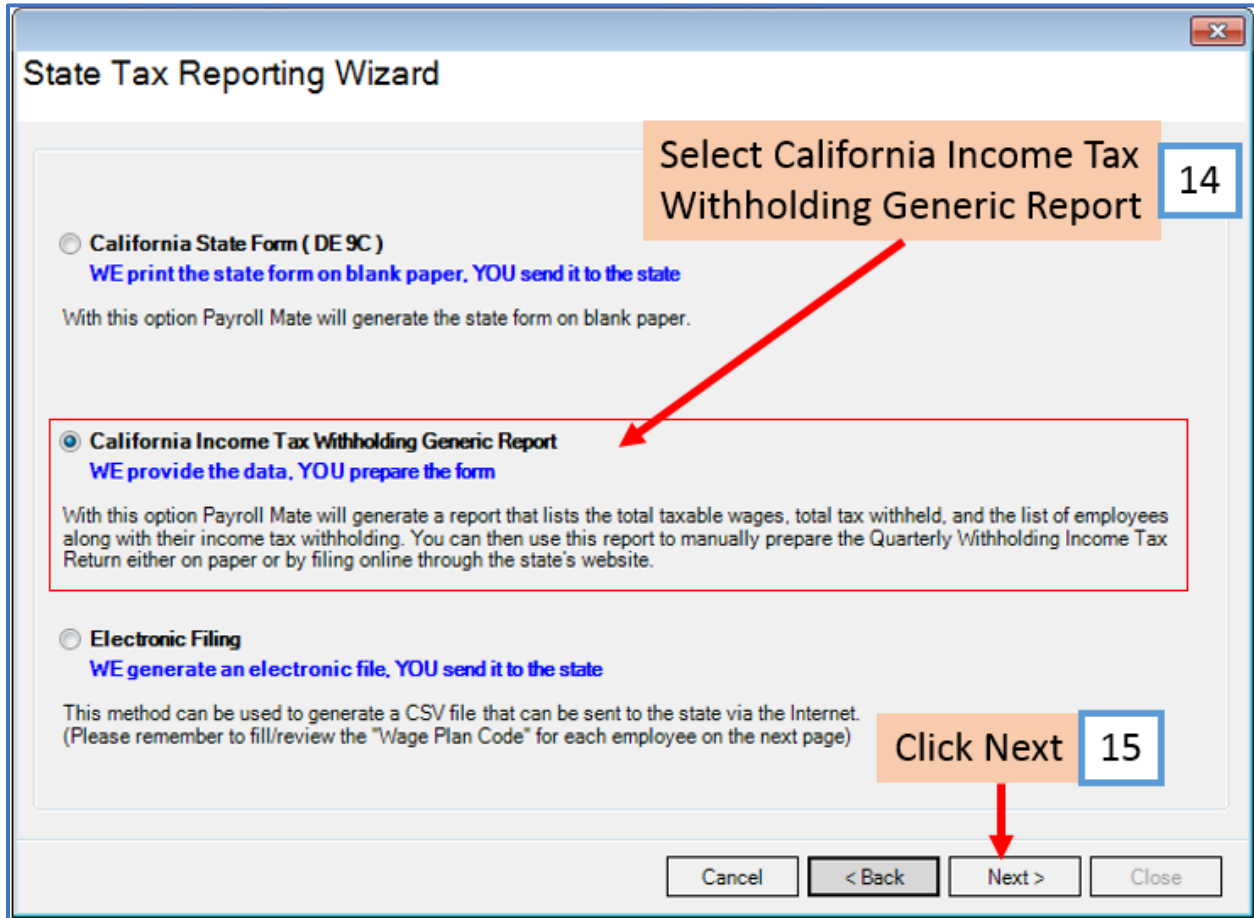
13. Click Close



***California Income Tax Withholding Generic Report**

14. Select California Income Tax Withholding Generic Report

15. Click Next



16. Select employees to include in this report

17. Click Next

State Tax Reporting Wizard

Select Employees 16

From the list below please select the employee(s) you would like to include in this report.
You can edit the information being reported for a certain employee by first selecting that employee and then clicking the "Edit Employee" button.

	Full Name	SSNumber	UI Total Wages	WH Taxable Wages	WH Tax	
<input checked="" type="checkbox"/>	Jason Smith	565-65-6556	1060.00	1060.00	43.34	Edit Employee

Check All

Uncheck All

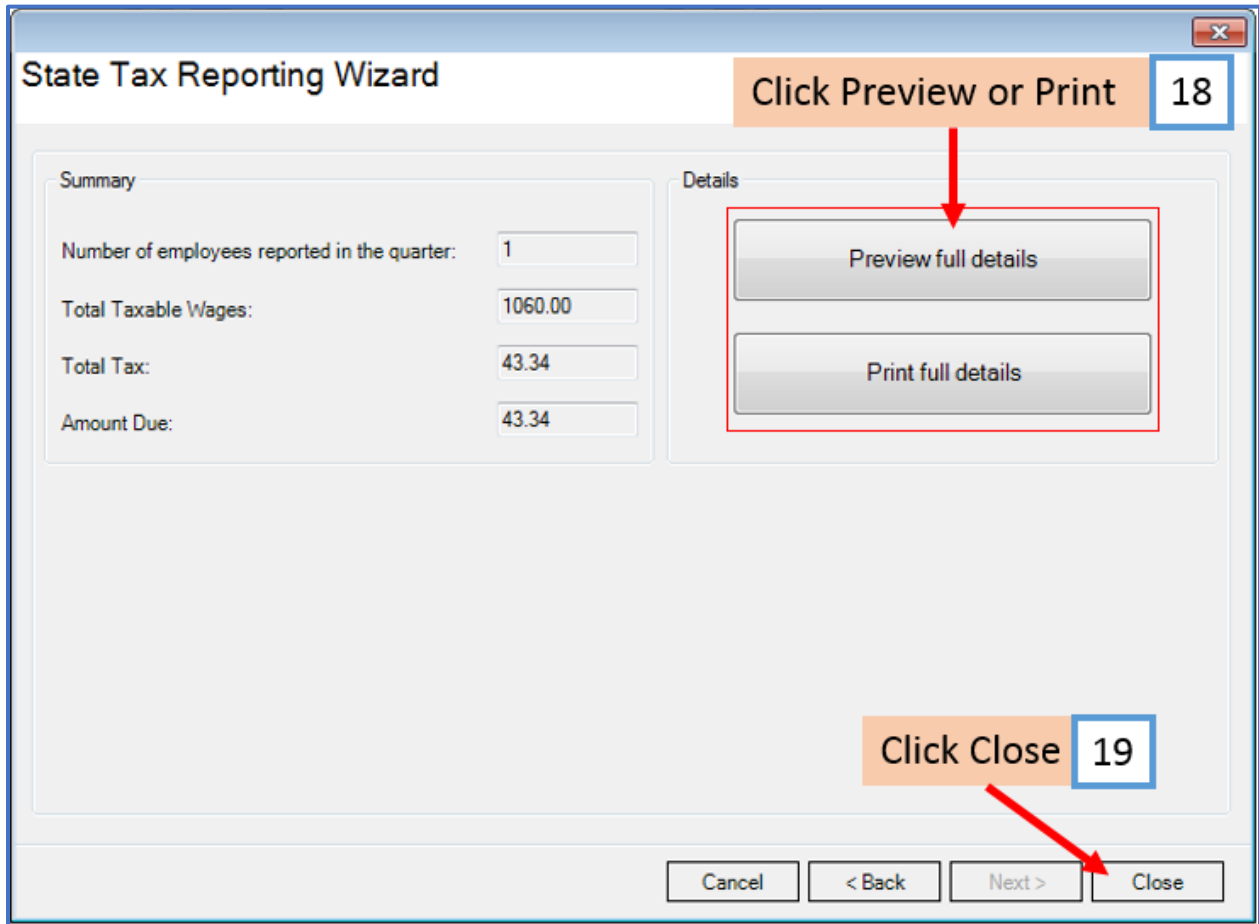
Amounts are for:
1st Quarter
2018

Click Next 17

Cancel < Back Next > Close

18. Click to Preview or Print the California Income Tax Withholding Generic Report

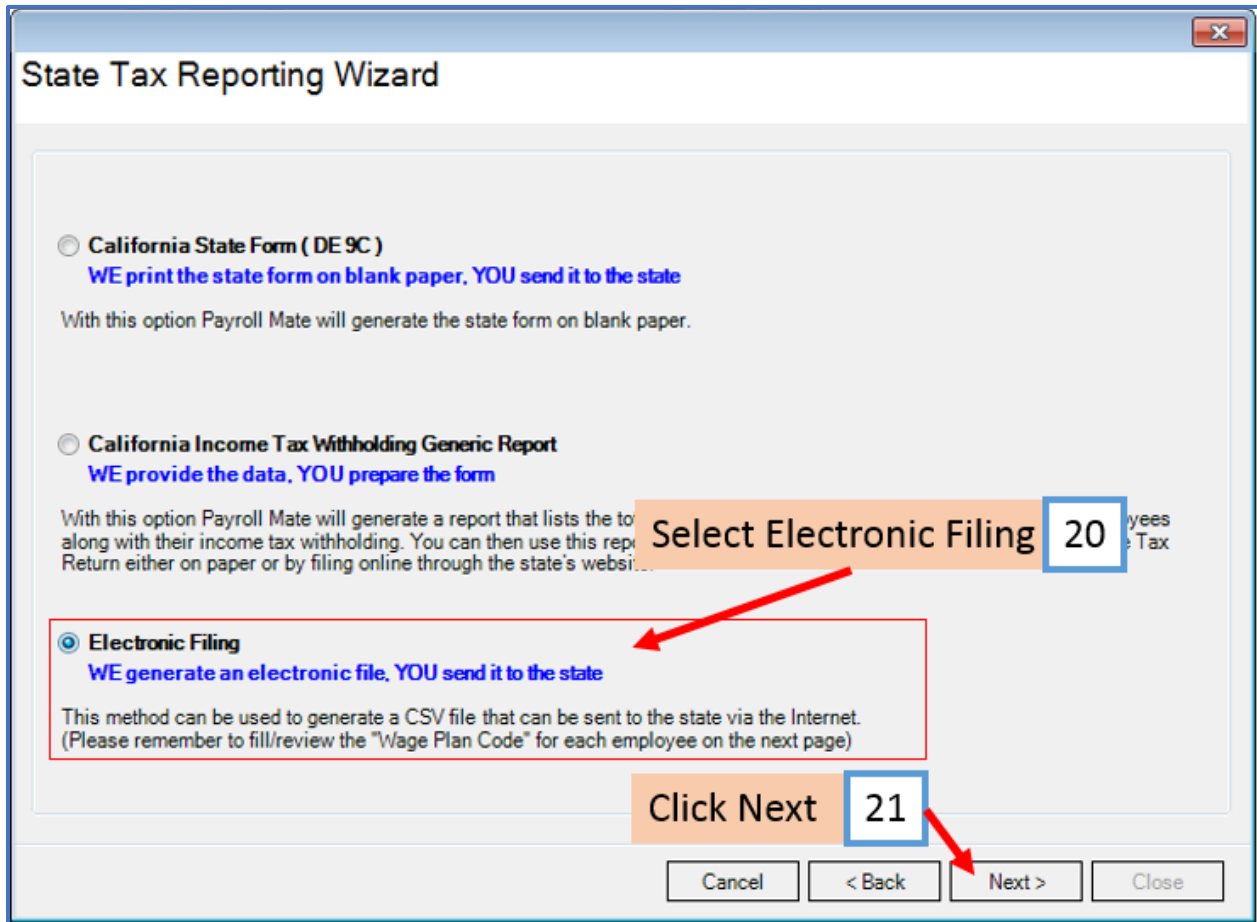
19. Click Close



***Electronic Filing**

20. Select Electronic Filing

21. Click Next



22. Select employees to include in the report

State Tax Reporting Wizard

Select Employees 22

From the list below please select the employee(s) you would like to include in this report. You can edit the information being reported for a certain employee by first selecting that employee and then clicking the "Edit Employee" button.

	Full Name	SSNumber	UI Total Wages	WH Taxable Wages	WH Tax	
<input checked="" type="checkbox"/>	Jason Smith	565-65-6556	1060.00	1060.00	43.34	Edit Employee

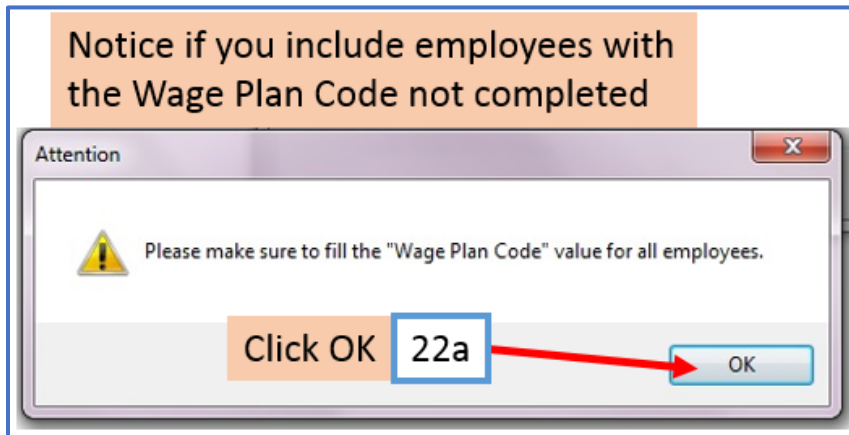
Check All

Uncheck All

Amounts are for:
1st Quarter
2018

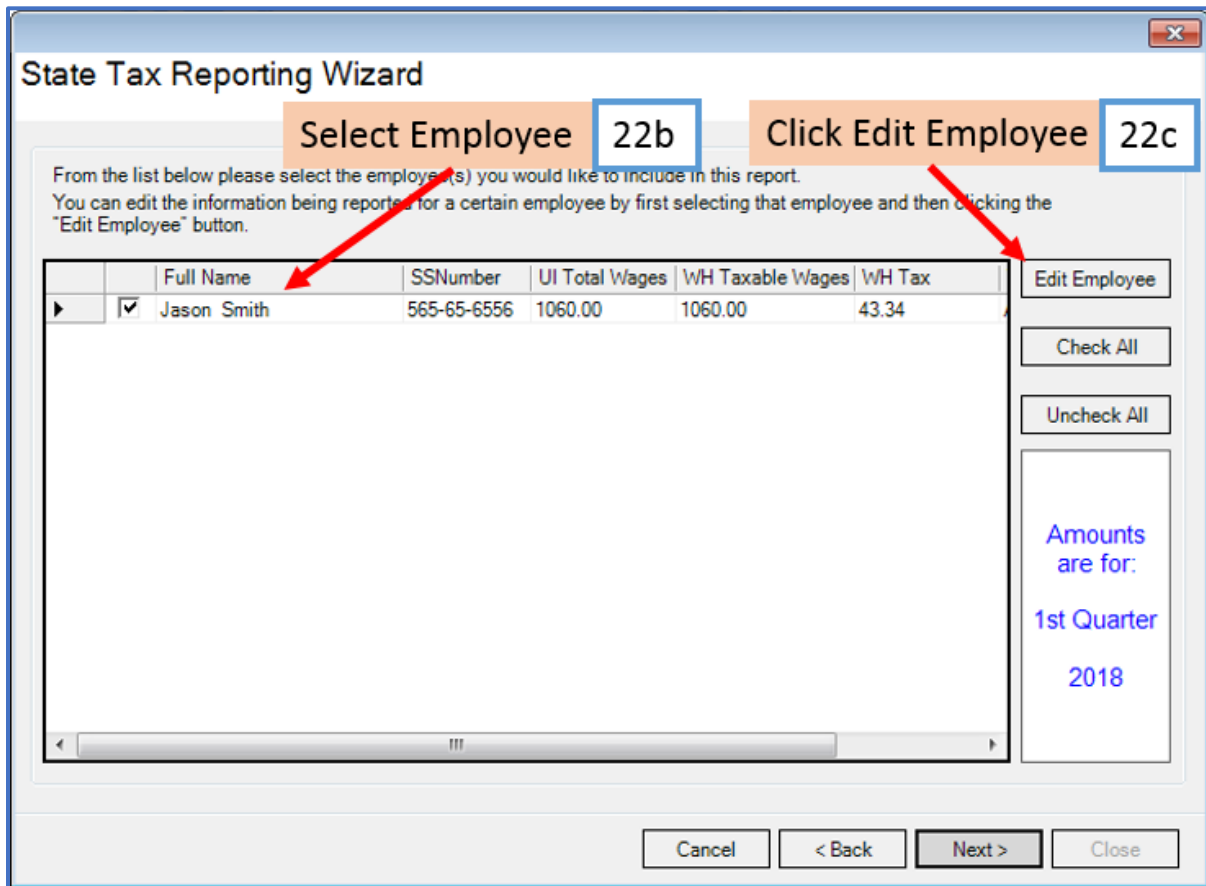
Cancel < Back Next > Close

If any selected employees do not have the Wage Plan Code completed you will receive a notice 22a. Click OK



22b. Select Employee

22c. Click Edit Employee



22d. Checkmark box to Include Employee in Current State Reporting

22e. Enter Wage Plan Code

For assistance with the Wage Plan Code refer to the EDD State of CA
http://www.edd.ca.gov/pdf_pub_ctr/de231wpc.pdf

22f. Click OK

The screenshot shows the 'Edit Employee' dialog box with the following fields and values:

First Name	Jason
Middle Initial	
Last Name	Smith
Social security number:	565-65-6556
Quarterly Unemployment Insurance Total Wages	1060.00
Quarterly Withholding Taxable Wages	1060.00
Quarterly Withholding Tax	43.34

Annotations and actions:

- 22d:** A red arrow points to the checked checkbox labeled 'Include Employee in Current State Reporting'.
- 22e:** A red arrow points to the 'Wage Plan Code' field, which contains the letter 'A'. A red box highlights the field with the text 'Wage Plan Code Must be A, J, L, P, R, S, or U'.
- 22f:** A red arrow points to the 'OK' button.

23. Click Next

From the list below please select the employee(s) you would like to include in this report.
You can edit the information being reported for a certain employee by first selecting that employee and then clicking the "Edit Employee" button.

	Full Name	SSNumber	UI Total Wages	WH Taxable Wages	WH Tax	
<input checked="" type="checkbox"/>	Jason Smith	565-65-6556	1060.00	1060.00	43.34	Edit Employee

Check All

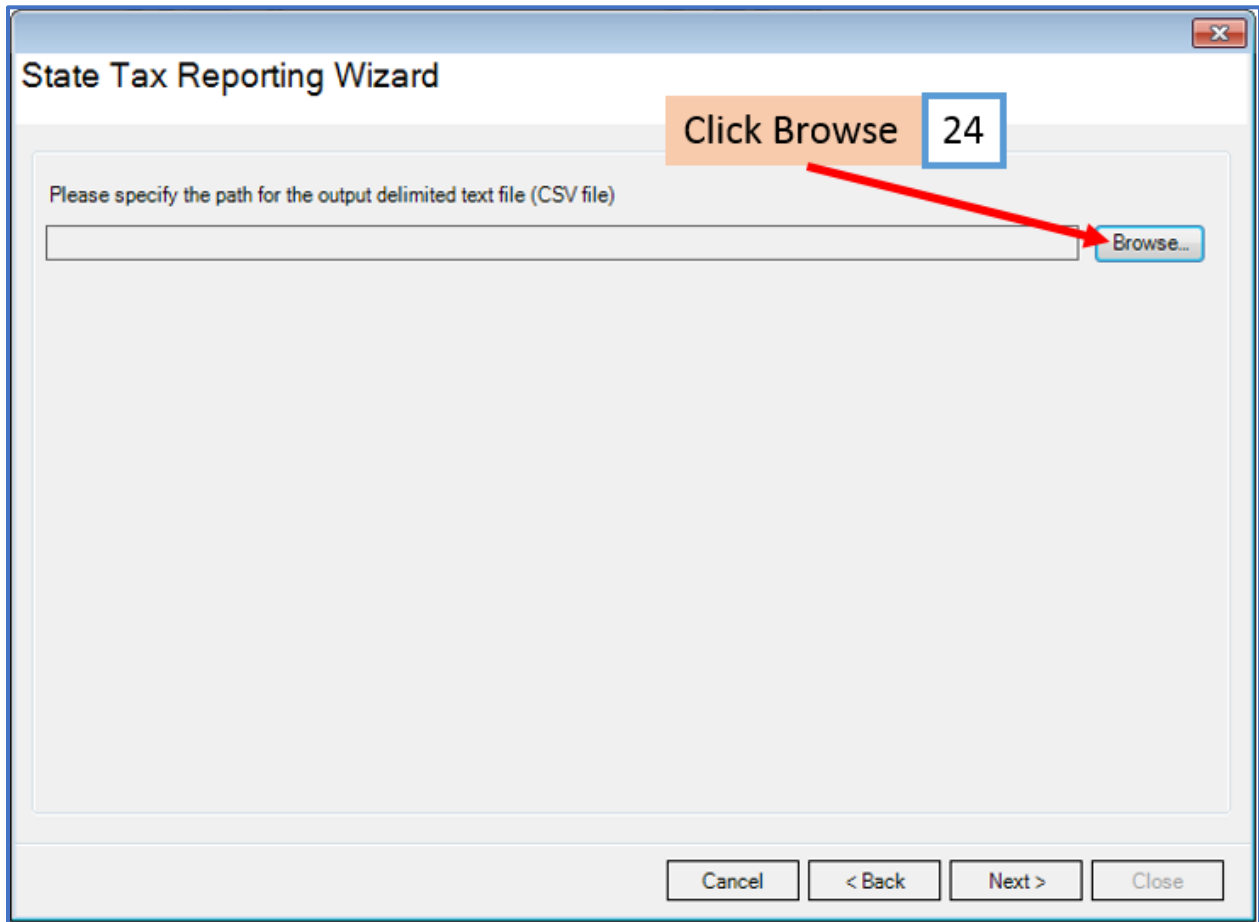
Uncheck All

Amounts are for:
1st Quarter
2018

Click Next 23

Cancel < Back Next > Close

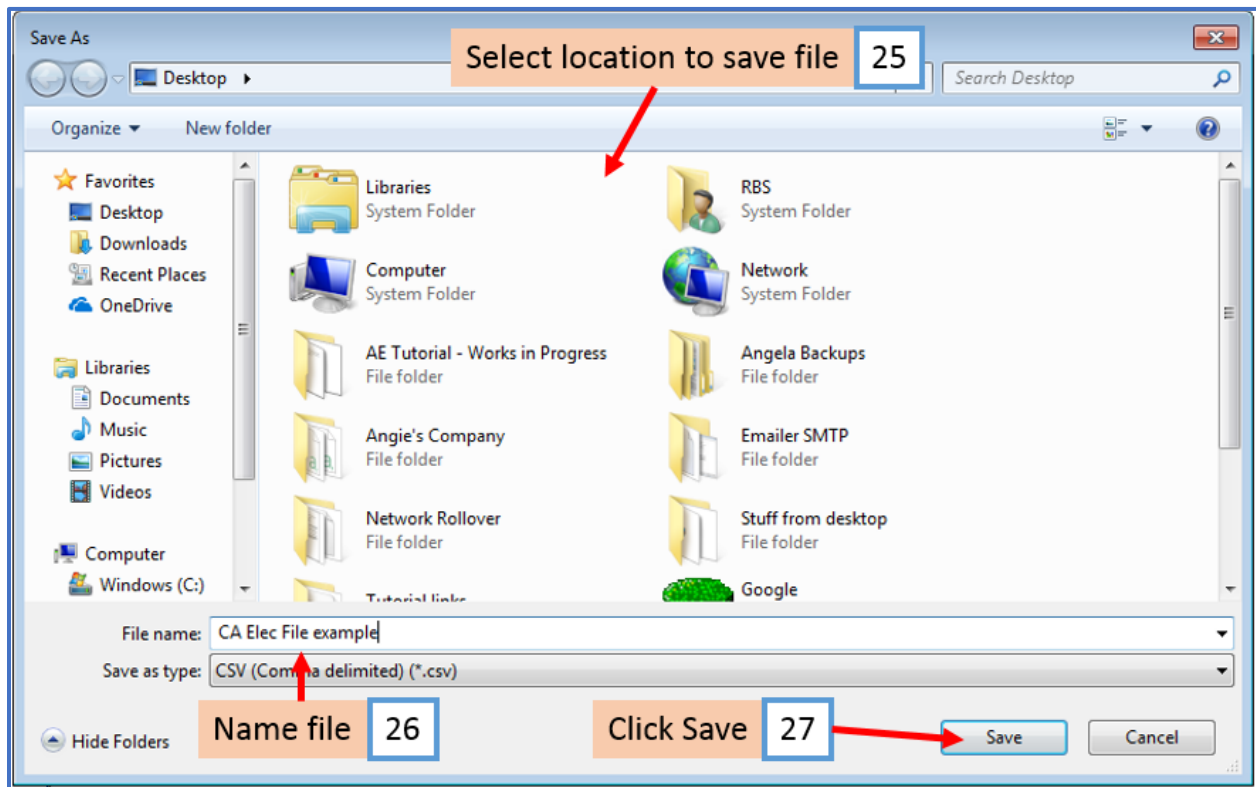
24. Click Browse



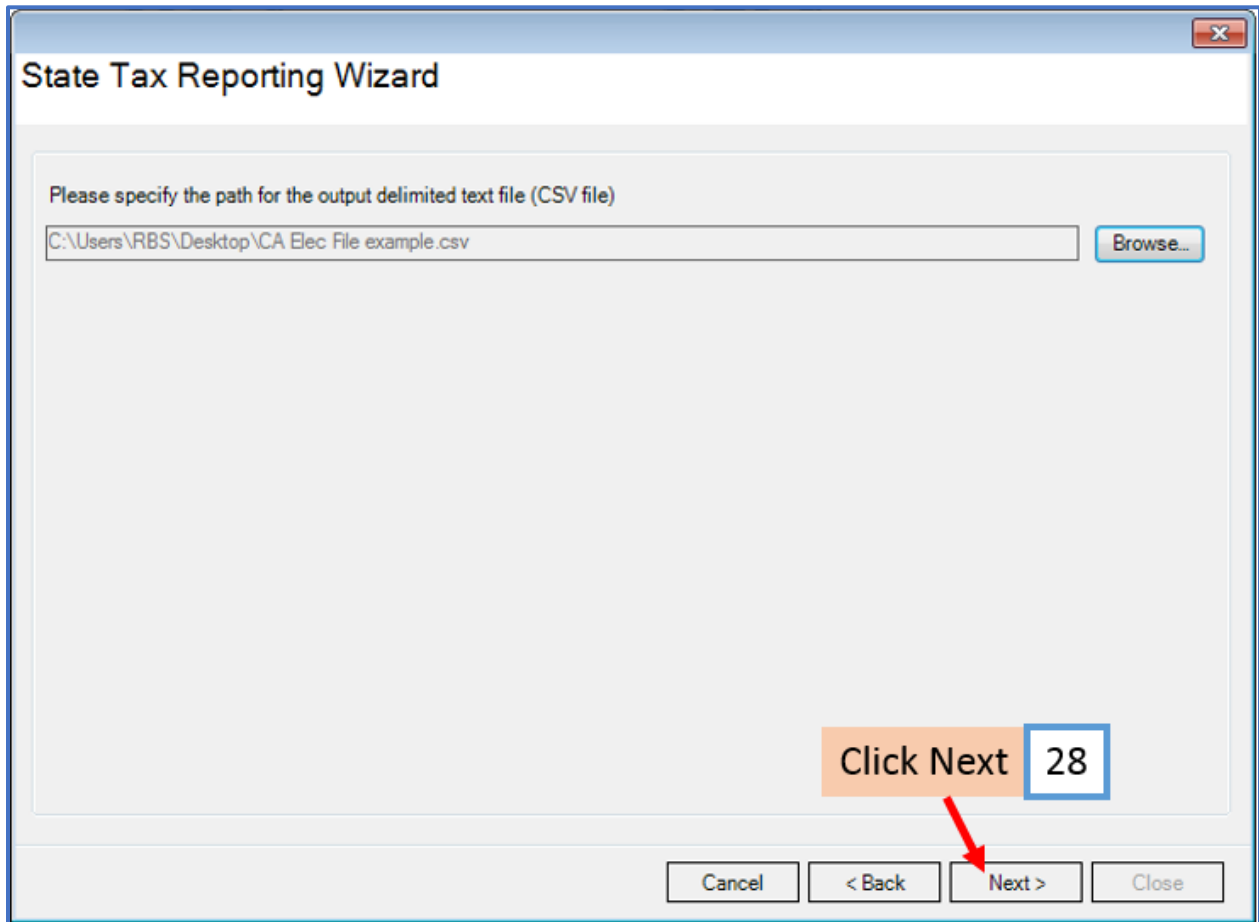
25. Select location to save file

26. Enter File Name for the electronic file

27. Click Save

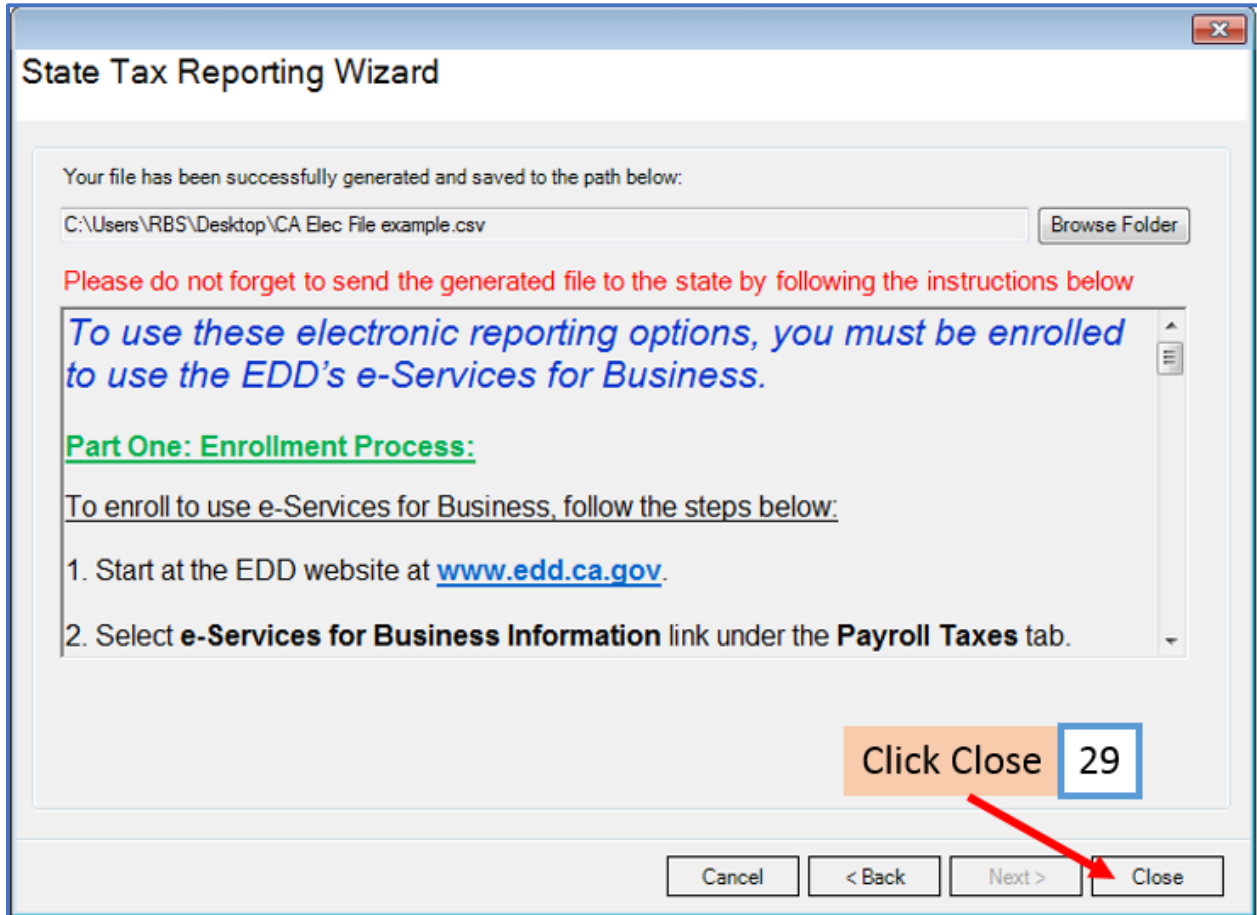


28. Click Next



The electronic file has now been created and saved

29. Click Close



To use the electronic reporting option you must be enrolled to use the California Employment Development Department (EDD) e-Services for Business.

Part One: Enrollment Process:

To enroll to use e-Services for Business, follow the steps below:

1. Start at the EDD website at www.edd.ca.gov
2. Select **e-Services for Business Information** link under the **Payroll Taxes** tab.
3. Select **e-Services for Business Login** link under **Getting Started** section.
4. Select **Enroll for a username and password** link and follow the prompts.

After you have established a username and password, you will need to complete a one-time authorization process to use e-Services for Business.

To register as an Employer or an Agent, follow the steps below:

1. After logging into **e-Services for Business**, select **Registration Type** link.
2. From a drop-down menu, select the **Type of Enrollment** (Employer or Agent/Employer Representative) and follow the prompts.
3. Complete **Account Information** and select the **Submit** button.

In order to add access to an account(s), follow the steps below:

1. After logging into **e-Services for Business**, select **Add Access to Another Account** link under **I Want To** menu on left-hand side.
2. From a drop-down menu, select **Account Type** and select the **Search** button.
3. Complete **Authorization Questions** and select the **Search** button.
4. Select the **Submit** button to add access to account.
5. **Print** or select the **OK** button.

If you have any difficulty with any portion of the enrollment process, you may contact the CA Taxpayer Assistance Center at 855-866-2657. Once the username and password have been established, you can use the e-Services for Business applications to manage your account, file reports/returns, and pay taxes.

Part Two: Uploading the Electronic File:

File a Return (Import a CSV File)

To use the **File a Return** option:

1. Start at the e-Services for Business Web page.
2. Select the **e-Services for Business Login** link.
3. Enter your username and password and select the **Login** button.
4. Under **My Accounts** or **Other Accounts**, select the **Account ID** link that you are reporting for.
5. Select the **File a Return** option under “I Want To...” menu on the left-hand side.
6. Select **Period**.
7. Select **Wage Report** for your return type.
 - Step 1: Select **I Have Payroll to Report** or **No Payroll to Report**.
 - If you selected **I Have Payroll to Report** continue with **Step 2**.
 - If you selected **No Payroll to Report** continue to **Step 9**.
 - Step 2: Select **Import File** link to import information from a CSV to populate the fields.
8. Enter **Number of Employees** for each month.
9. Select the **Submit** button to file the completed DE 9C.
10. Select **OK** on the dialogue box.
11. Print or make a note of confirmation number.

***CA DE 9**

30. Select CA DE 9

31. Click Next

State Tax Reporting Wizard

Reporting State: California
(Select the state for which you are reporting Income Tax Withholding, Unemployment, or Disability Insurance)
[If your state isn't listed in the "Reporting State" list above, then it's not currently supported by Payroll Mate]

Reporting Period: First Quarter

Reported Tax: CA DE 9
(Specify the type of tax)
CA DE 9C (Withholding Income Tax & Unemployment Insurance)
CA DE 9
California Unemployment Insurance

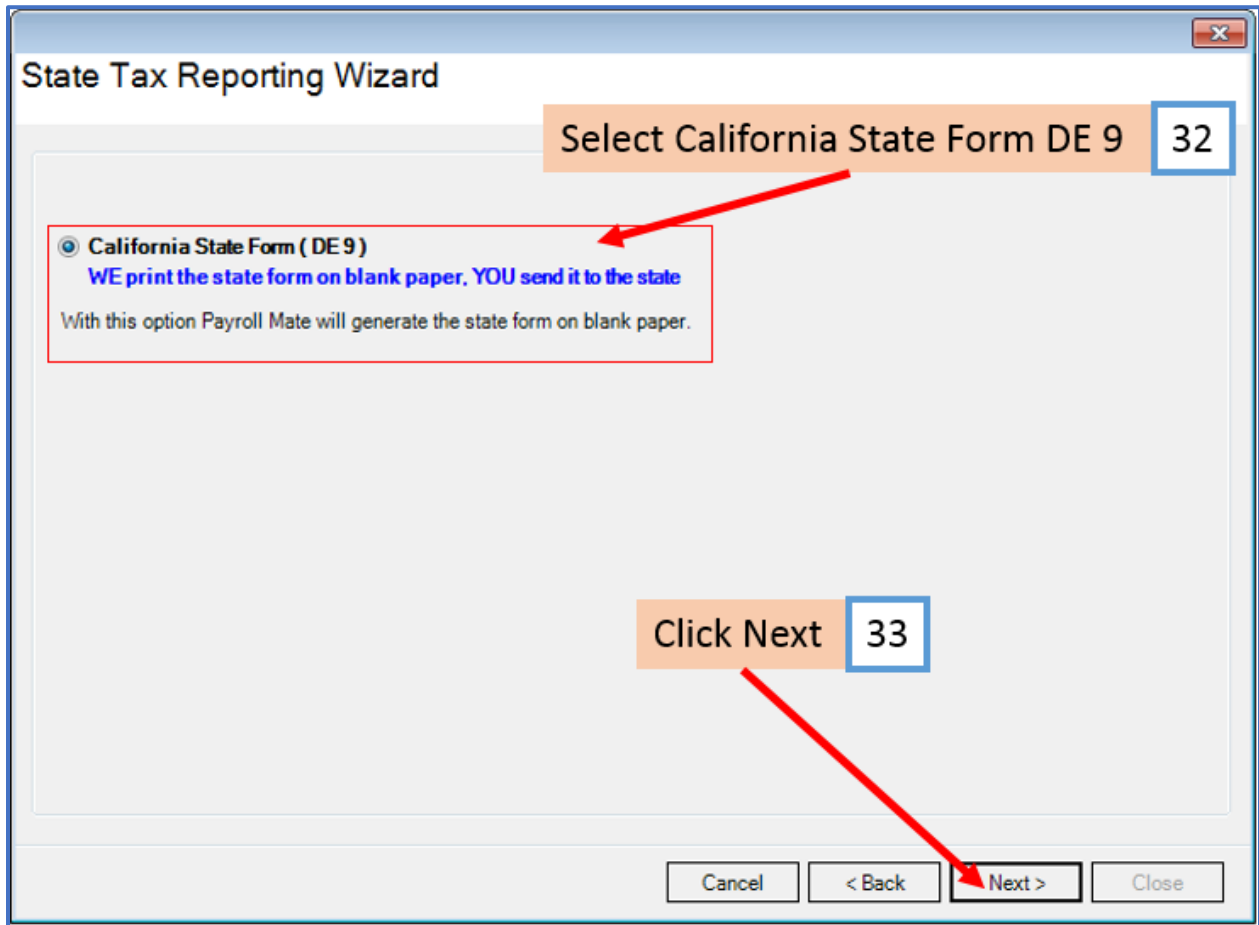
Select CA DE 9 30

Click Next 31

Cancel < Back Next > Close

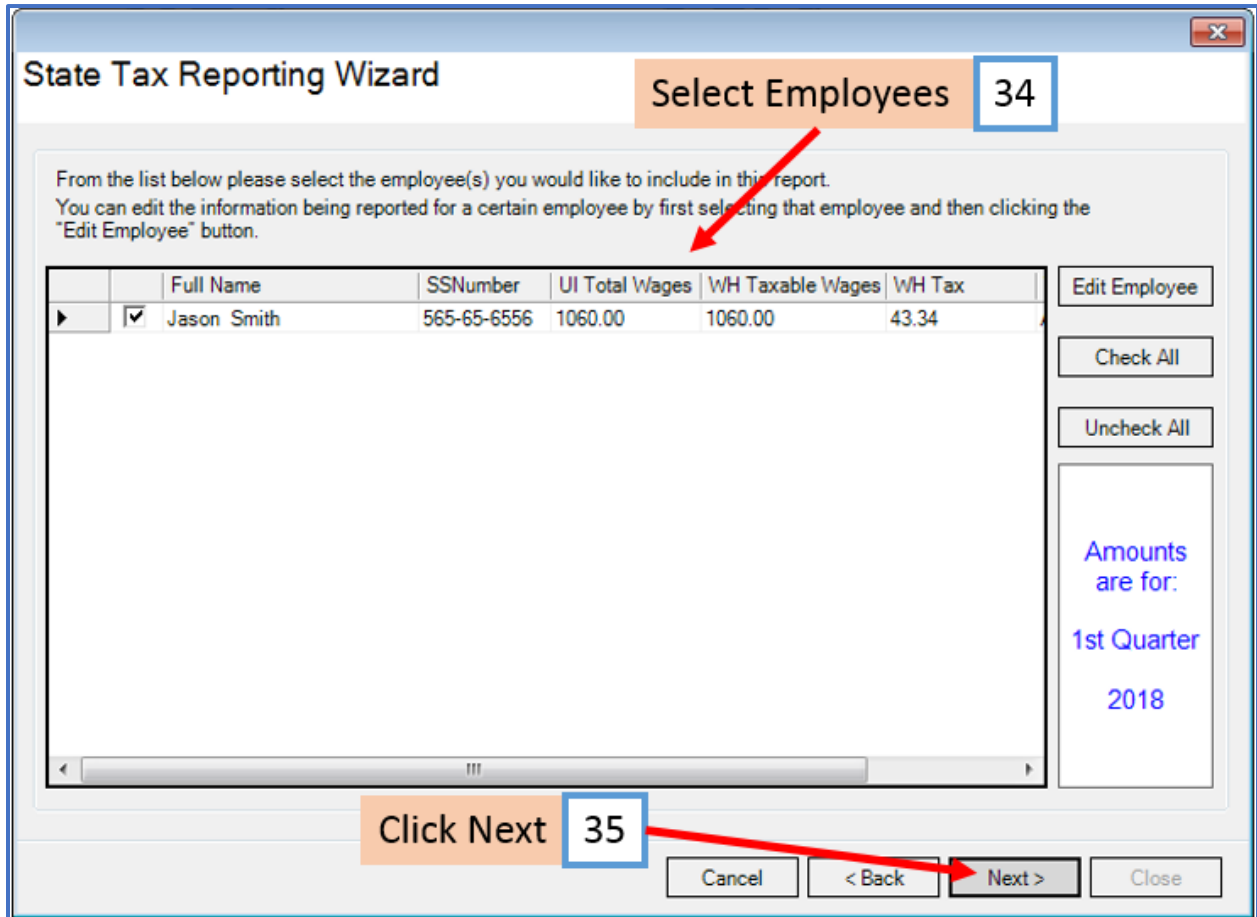
32. Select California State Form (DE 9) - printed on blank paper

33. Click Next

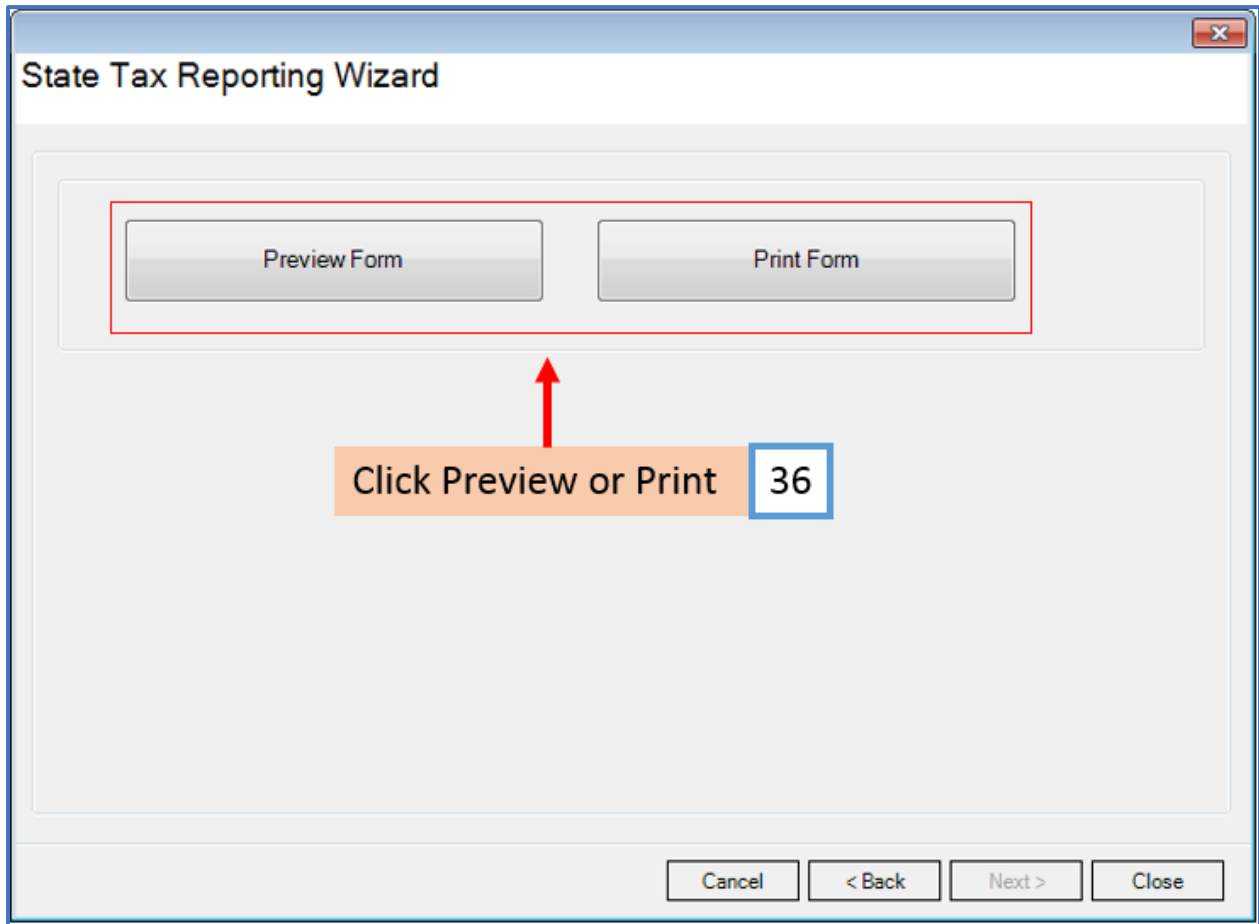


34. Select employees to include in this report

35. Click Next



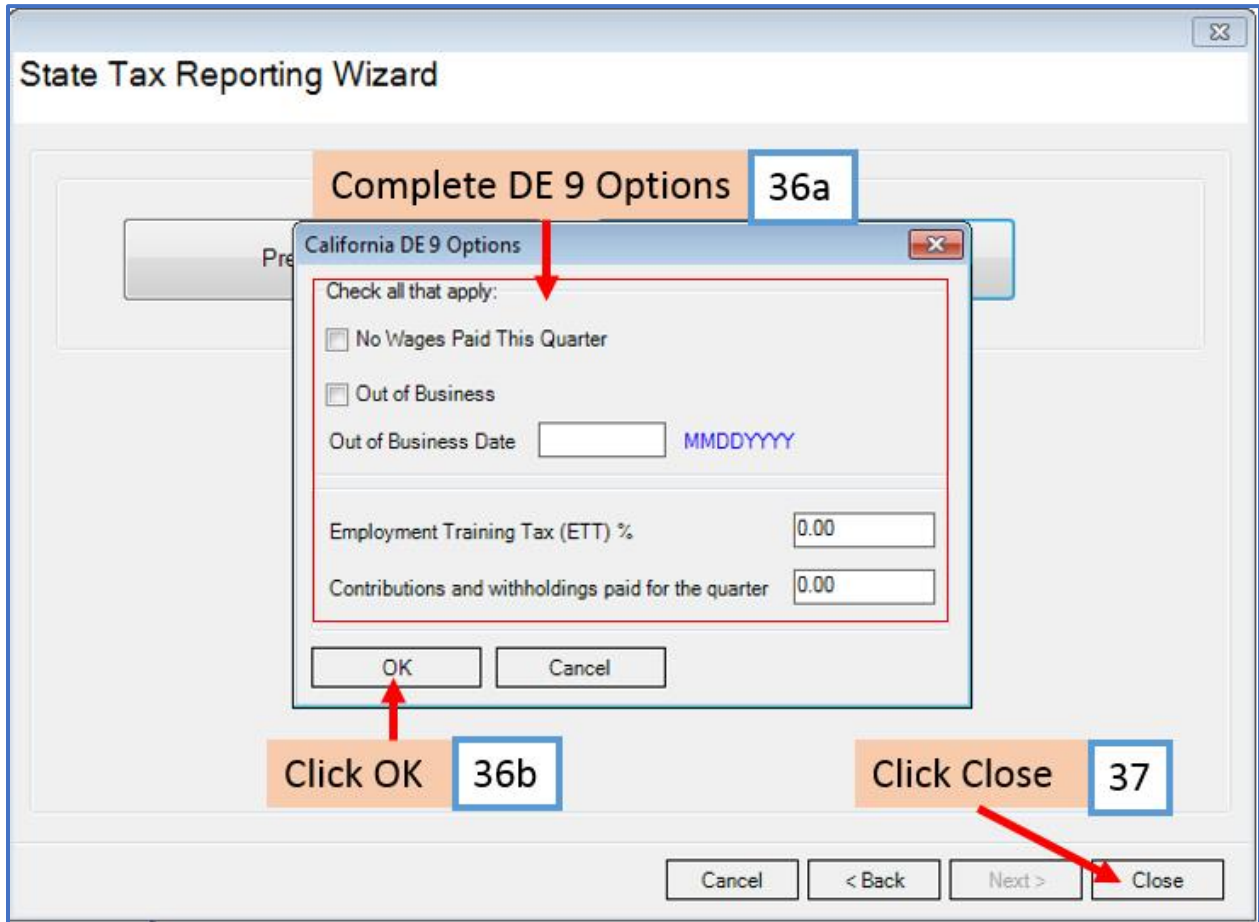
36. Click to Preview or Print the CA DE 9 form



36a. Complete DE9 Options as applicable

36b. Click OK

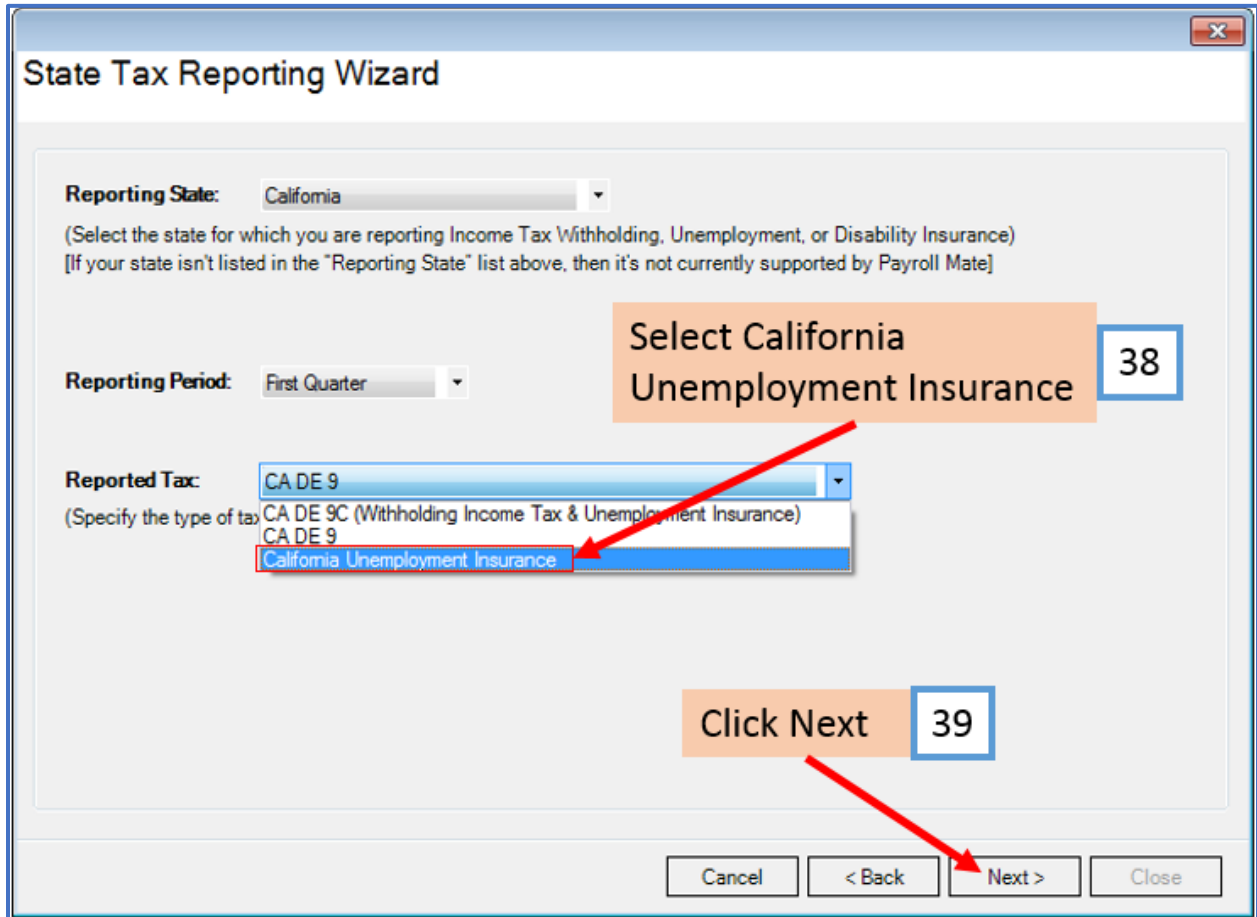
37. Click Close



***California Unemployment Insurance**

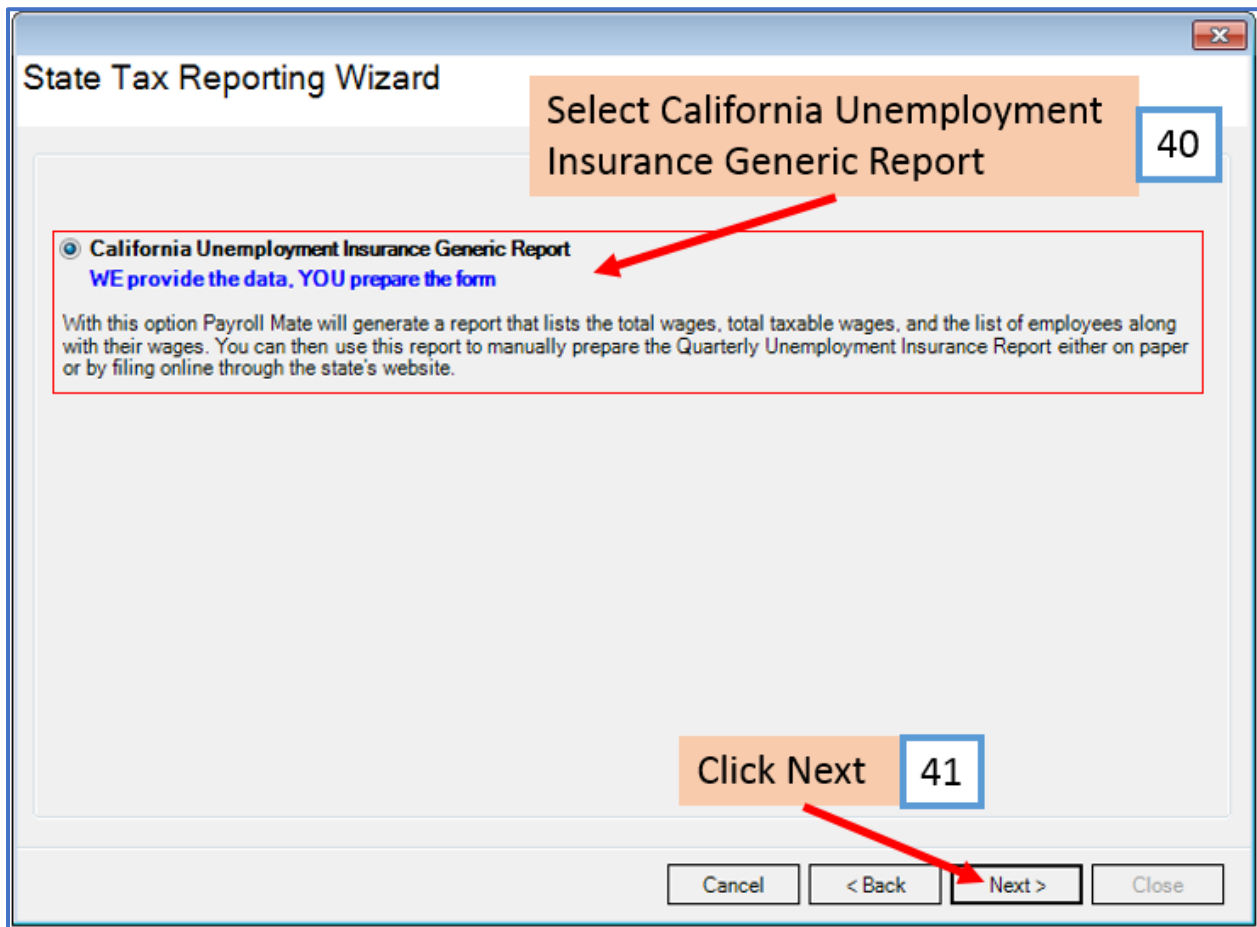
38. Select California Unemployment Insurance

39. Click Next



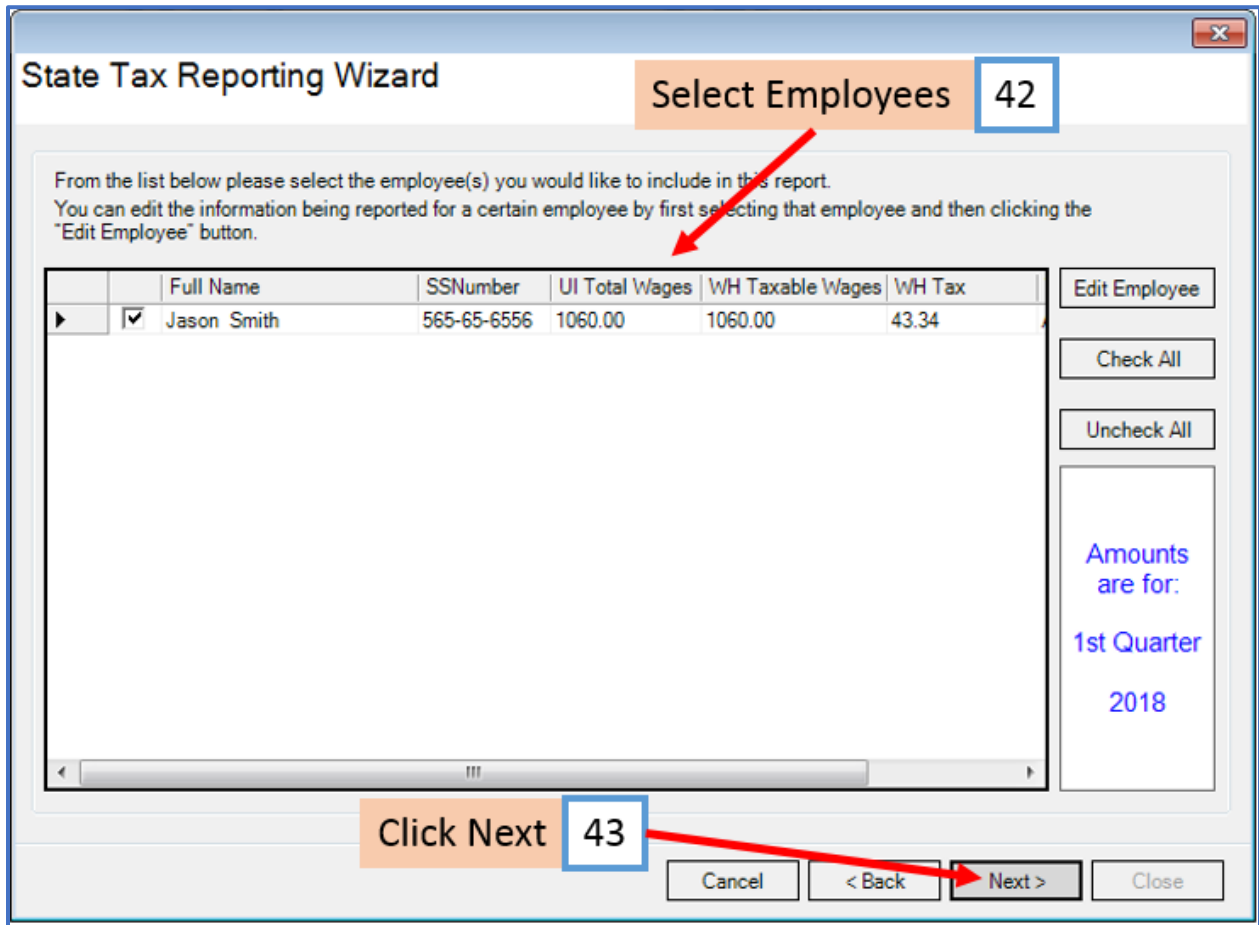
40. Select California Unemployment Insurance Generic Report

41. Click Next



42. Select employees to include in this report

43. Click Next



44. Click to Preview or Print the California Unemployment Insurance form

45. Click Close

