

# QuickBooks Online Payroll plans

Take advantage of exclusive savings with your ProAdvisor Preferred Pricing client discount\*

Features	Core	Premium	Elite
Retail price	\$45/mo + \$6/mo per employee or contractor	\$80/mo + \$8/mo per employee or contractor	\$125/mo + \$10/mo per employee or contractor
*ProAdvisor Preferred Pricing			
30% off base subscription	<del>\$45</del> \$31.50/mo	<del>\$80</del> \$52.50/mo	<del>\$125</del> \$87.50/mo
+15% off employee and contractor fees	+ <del>\$6</del> \$5.10/mo per employee or contractor	+ <b>\$8</b> \$6.80/mo per employee or contractor	+ <b>\$10 \$8.50/mo per employee or contractor</b>

Fast unlimited payroll runs			
Auto Payroll			
Direct deposit	Next day**	Same day**	Same day**
Automated tax payments and filings including federal forms 941, 944, 943, and 940	Federal, state, year-end filings	Federal, state, local, year-end filings	Federal, state, local, year-end filings
1099 E-file & pay			
Guarantees	Existing error-free filing guarantee <sup>+</sup>	Existing error-free filing guarantee <sup>†</sup>	Existing error-free filing guarantee + Tax penalty protection <sup>+</sup>
Time tracking (QuickBooks Time**)		QuickBooks Time Premium	QuickBooks Time Elite
Onboarding	Self-serve setup**	Self-serve set up + expert review**	Self-serve + expert review or expert setup**
Product support	Expert product support	24/7 expert product support**	24/7 expert product support**
Calculate paychecks & taxes			
Self-service employee portal and app (Workforce)			
Available in all 50 states			
Manage garnishments and deductions			
Payroll reports			
Health benefits (SimplyInsured)			
HR support (Mineral)		HR support center**	HR support center + Personal HR advisor**
Workers' comp administration (NEXT)	\$5 administration fee add on/mo	Administration fee included	Administration fee included
401(k) plans (Guideline)**			
State new-hire reporting			
Multi-state filing (single state filing included)**	\$12 fee add on per additional state	\$12 fee add on per additional state	Unlimited states included

QuickBooks Payroll & Contractor Payments: Money movement services are provided by Intuit Payments Inc., licensed as a Money Transmitter by the New York State Department of Financial Services. For more information about Intuit Payments' money transmission licenses, please visit https://www.intuit.com/legal/licenses/payment-licenses/.

# **†** Guarantees

### Guarantee offered with all SKUS

Accuracy Guaranteed available with QuickBooks Online Payroll Core, Premium, & Elite: We
assume responsibility for federal and state payroll filings and payments directly from your
account(s) based on the data you supply. As long as the information you provide us is correct
and on time, and you have sufficient funds in your account, we'll file your tax forms and
payments accurately and on time or we'll pay the resulting payroll tax penalties. Guarantee
terms and conditions are subject to change at any time without notice.

### For QuickBooks Online Payroll Elite Only:

• Tax penalty protection: Only QuickBooks Online Payroll Elite users are eligible to receive the tax penalty protection. If you receive a tax notice and send it to us within 15 days of the tax

notice, we will cover the payroll tax penalty, up to \$25,000. Intuit cannot help resolve notices for customers in Collections with the IRS because IRS Collections will only work with businesses directly. Additional conditions and restrictions apply. Learn more about tax penalty protection.

# **\*\* Features**

## Fast unlimited payroll runs

• QuickBooks Online Payroll lets you view and approve employee hours and run payroll in less than 5 minutes.

Run payroll in less than 5 minutes with QuickBooks payroll: Median time spent by QuickBooks Online Payroll users reviewing and approving payroll as of December 2022.

## Auto Payroll

- Run Auto Payroll for some or all of your eligible employees
- Preview or edit payroll before payday

Available if setup for the company is complete. At least one employee has completed setup and has consistent payroll that qualifies for automation (i.e. salaried or hourly with default). Company must complete bank verification if employee has direct deposit as the payment method, and the first payroll must run successfully. The account must not have a hold.

## Automated tax payments and filing

- Federal and state payroll taxes—including year-end filings—are calculated, filed, and paid, automatically
- Option to turn on or off
- Including forms 941, 944, 943, and 940. See here for more information on how we support these federal forms.

Automated tax payments and filing available for state and federal taxes. Enrollment in e-services is required for tax payments and filings only. Automated tax payments and filings for local taxes available in QuickBooks Online Payroll Premium and Elite only.

# Calculate paychecks & taxes

- Get automatic tax calculations on every paycheck.
- We'll monitor federal and state payroll tax rate and policy changes.

# Self-service employee portal (Workforce)

- Employees can access pay stubs and W-2s
- Employees can safely view PTO balances and withholding allowances online
- QuickBooks Workforce app lets teams view pay info and track time in one place. Available on Google Play and the <u>Apple app store</u>

QuickBooks Workforce: QuickBooks Payroll ("Payroll") and/or QuickBooks Time ("Time") subscription required. Feature availability may vary based on company subscription, settings, and employment type. Registration required. Certain features are available only through the Workforce web portal or through the Workforce mobile app.

QuickBooks Workforce mobile app: The QuickBooks Workforce mobile companion app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Not all features are available on the mobile app and mobile browser. QuickBooks Workforce mobile access is included with your QuickBooks Time subscription at no additional cost. Data access is subject to cellular/internet provider network availability and occasional downtime due to system and server maintenance and events beyond your control. Product registration required.

### Available in all 50 states

• Whether your business is a corner shop in a small town or spread throughout the country, we've got you covered

## Manage garnishments and deductions

- Set up and calculate garnishments and deductions from each paycheck
- Automatic employee benefit deductions

Available for employees. User is responsible for making the garnishment payment to the appropriate entity. Automatically calculate health benefits: Must sign-up for benefits through SimplyInsured and 401k through Guideline in order for QuickBooks Online Payroll to automatically calculate employee benefit deductions. Insurance coverage eligibility is not guaranteed, and depends solely on the rules of the insurance carrier. The insurance carrier has sole and final discretion as to the eligibility for health insurance products.

# Payroll Reports

• Create and download reports for payroll history, bank transactions, contractor payments, paid time off, tax payments, and more

# **1099 E-File & Pay**

- Easily e-file with the IRS. Create and e-file unlimited 1099-MISC and 1099-NEC forms
- We'll automatically send copies to your contractors

Prepare your 1099s in QuickBooks at no extra charge. If you choose the 1099 E-File Service, Intuit will e-file your Federal 1099 information with the IRS, and then print and mail a copy directly to your contractors; fees apply. As part of the paid 1099 E-File Service, we also give your contractors online access to their 1099s. State filing not included. You should check with your state agency on any state filing requirements.

# Health benefits (SimplyInsured)

- Compare plans for affordable coverage, powered by SimplyInsured
- Get instant quotes that fit your needs and budget. Save time with a quick 3-step application and manage your benefits all in one place.
- Automatic deductions

Powered by SimplyInsured and requires acceptance of SimplyInsured's Privacy Policy and Terms of Use. Additional fees will apply. SimplyInsured does not offer insurance in HI, VT, and DC. Insurance coverage eligibility is not guaranteed, and depends solely on the rules of the insurance carrier. The insurance carrier has sole and final discretion as to the eligibility for health insurance products.

#### State new hire-reporting

• Automatically file state new hire paperwork to stay compliant

#### Multi-state filing (single state filing included)

- For Core and Premium, the service includes 1 state filing, additional states are \$12 per state
- There is no additional charge for multi-state tax filings in Elite.

#### Workers' comp administration (NEXT Insurance)

- Get quotes inside QuickBooks—our broker NEXT Insurance will compare plans and pricing for you
- If you already have a policy, NEXT Insurance will connect it to QuickBooks
- Pay as you go and stop paying one lump sum
- Premiums are automatically calculated so you don't miss payments and reduce audit expenses.

Benefits are powered by NEXT Insurance and require acceptance of NEXT Insurance's Privacy Policy and Terms of Use. Additional fees will apply. There is a monthly fee (currently, \$5 per month) for QuickBooks Online Payroll Core users for the QuickBooks Workers' Comp Payment Service. This non-refundable fee will be automatically added to each monthly Intuit invoice at the then-current price until you cancel. The fee is separate from any workers' comp insurance policy premium by NEXT Insurance. Workers' Compensation Service requires an active and paid QuickBooks payroll subscription. Eligibility criteria applies to transfer active insurance policy broker of record, including insurance carrier, policy renewal date, and payment method. Workers compensation insurance is not available in OH, ND, WA and WY.

### **Product support**

- Prioritized help when you need it
- Get step-by-step help, troubleshooting assistance and resources
- Call back support means you'll get an answer on your time no waiting on hold
- QuickBooks Online Payroll Core offers phone and chat support from 6am 6pm M-F
- QuickBooks Online Payroll Premium and Elite offer phone and chat support 24/7

Expert product support: Included with your paid subscription to QuickBooks Online Payroll Core. Chat and phone support is available Monday through Friday 6 AM to 6 PM PST. Your subscription must be current. Get more information on how to <u>contact support</u>. Intuit reserves the right to limit the length of the call. Terms, conditions, features, pricing, service and support are subject to change without notice.

24/7 expert product support: 24/7 customer support by phone or chat is included with your paid subscription to QuickBooks Online Payroll Premium and Elite. Your subscription must be current. Intuit reserves the right to limit the length of the call. Terms, conditions, features, pricing, service, and support are subject to change without notice.

### Direct deposit

- Pay employees faster, easier, and without the hassle
- Depending on your plan, you'll get direct deposits for either the next day or same day. It's your choice.

Next day direct deposit: Available to QuickBooks Online Payroll Core users. Payroll processed before 5 PM PT the day before shall arrive the next business day (excluding weekends and holidays). Requires setup of direct deposit and bank verification. Next-Day direct deposit may be subject to eligibility criteria. Deposit delays may occur because of third party delays, risk reviews, or issues beyond Intuit's control. Next-Day Deposit available for contractors and employees. Direct deposit for contractors is \$6 per month. Each employee is \$6 per month with no additional fees for direct deposit.

Same day direct deposit Available to QuickBooks Online Payroll Premium and Elite users. Payroll processed before 7AM PST shall arrive the same business day (excluding weekends and holidays). Requires setup of direct deposit and bank verification. Same-Day direct deposit may be subject to eligibility criteria. Deposit delays may vary because of third party delays, risk reviews, or issues beyond Intuit's control. Same-Day Deposit available only for employees.

#### HR support (Mineral)

- Powered by Mineral, you'll receive professional guidance on HR issues
- With Elite, you'll get additional levels of compliance with state and federal laws

HR support is provided by experts at Mineral, Inc. Requires acceptance of Mineral's <u>Privacy Policy</u> and <u>Terms of Use</u>. HR Support Center available only to QuickBooks Online Premium and Elite subscriptions. HR Advisor support only available in QuickBooks Online Payroll Elite. HR support is not available to accountants who are calling on behalf of their clients.

### 401(k) plans (Guideline)

- An affordable way to save for the future
- Quick setup means employees can start saving for retirement right away
- Attract top talent and match contributions so employees can grow with you
- Guideline experts handle 401(k) administration, compliance, and record keeping, at no extra cost

401(k) offerings are provided and administered by Guideline, an independent third party and not provided by Intuit. Intuit is not a 401(k) plan administrator, fiduciary or other provider. Requires acceptance of <u>Guideline's Client Relationship Summary</u> and <u>Privacy Policy</u>. Additional 401(k) plan fees will apply. Employees may manage their contributions directly with Guideline. Admin and Payroll access required to sign up for a 401(k) plan with Guideline. Guideline experts: Guideline expert services are provided by and administered by Guideline, an independent third party and not provided by Intuit. Guideline live US-based support is available M-F, 6 AM-4 PM PT.

## Time tracking (QuickBooks Time)

- Workers can clock in or out anywhere, on any device
- GPS tracking makes it easy to see who's working where, at a glance
- Review, edit, and approve employee hours right inside QuickBooks
- Elite lets you track project hours and geofencing alerts

The QuickBooks Time mobile app works with iPhone, iPad, and Android phones and tablets. Devices sold separately; data plan required. Data access is subject to cellular/internet provider network availability. GPS tracking requires cell service and that users set their location settings to "Always" in order to click-in and track time using the mobile app. Not all features are available on the mobile apps and mobile browser. QuickBooks Time mobile access is included with your QuickBooks Online Payroll Premium and Elite subscription at no additional cost.

### **Expert Review**

- We'll review your payroll setup
- After you set up your payroll a QuickBooks expert will review your work to make sure everything is correct.
- Avoid common pitfalls that often cause tax notices.
- Switching from another provider? We'll make sure data is entered correctly.

Available upon request for QuickBooks Online Payroll Premium and Elite.

# **Expert Setup**

- Payroll setup done for you
- A QuickBooks payroll expert will complete your setup, once you provide necessary information.
- Your payroll setup will be reviewed to make sure everything is correct.

Available to QuickBooks Online Payroll Elite users only. A QuickBooks payroll expert will complete your setup, once you provide necessary information. Your payroll setup will be automatically reviewed to make sure everything is correct before Tax Penalty Protection is enabled.

\* Pricing

#### **ProAdvisor Preferred Pricing - ProAdvisor Discount**

#### **Terms and Conditions**

FOR QUICKBOOKS ONLINE ACCOUNTANT CUSTOMERS WHO TAKE ADVANTAGE OF THE 30% OFF QUICKBOOKS ONLINE SIMPLE START, ESSENTIALS, PLUS, OR ADVANCED SUBSCRIPTION WITH PROADVISOR PREFERRED PRICING - PROADVISOR DISCOUNT OFFER

**Eligibility:** This offer is eligible to accounting firms who register or have registered for QuickBooks Online Accountant ("QBOA") and use the ProAdvisor Discount option ("QBOA Customer") for the QuickBooks Online ("QBO"), QuickBooks Online Payroll ("QBOP"), and QuickBooks Time (formerly TSheets) (collectively, "QuickBooks") subscription fees. (The ProAdvisor Discount invoicing option means that the QBOA user agrees to pay for the QBO subscription fees ("ProAdvisor Discount"). Offer is available to new QuickBooks subscribers only.

**Pricing:** Eligible QBOA Customers will be entitled to the following discounts:

30% off the then-current list price of QuickBooks Online Simple Start, Essentials, Plus, or Advanced 30% off the then-current list price of QBOP and 15% off the then-current per employee list price 30% off the then-current list price of QuickBooks Time (Formerly TSheets) and 15% off the then-current per employee list price

Discount and list price subject to change at any time at Intuit's sole discretion. All prices are quoted without sales tax. If you add or remove services, your service fees will be adjusted accordingly.

**Offer Terms:** All QuickBooks subscriptions must be entered through ProAdvisor Discount and activated within 6 months of offer sign up. The discount will be terminated for any subscriptions which are not activated within the 6 month activation period. The discount is valid only for the named individual or company that registered for QuickBooks subscription and cannot be transferred to another client, individual, or company. Cannot be combined with any other Intuit offer. Offer valid for a limited time only, only in the U.S., and is non-transferable. Terms, conditions, pricing, special features, and service and support options subject to change without notice.

**Billing:** The QBOA Customer's account will automatically be charged on a monthly basis. The first bill date will be on the date of enrollment unless the QBOA Customer already has other QuickBooks subscriptions through the ProAdvisor Discount, in which case the charge will be deferred to the next existing bill date at a prorated rate for all active subscriptions at the ProAdvisor Discount until the billing for subscription is transferred or the subscription is terminated. Subscriptions will be charged to your credit card through your account. Payment is due, in full, immediately upon monthly invoicing. To remove the QuickBooks subscription from ProAdvisor Discount, please click here and follow the prompts. All future monthly subscription charges will be transferred to the QuickBooks company at the then-current list price. You may remove subscriptions from ProAdvisor Discount at any time. Transfer of the billing for the subscription will become effective at the end of the monthly billing period and then the QuickBooks company will be responsible for the then-current list price of the subscription fees. You will not receive a pro-rated refund. Transfer of the billing for the subscription will not terminate the QBOA Customer's user rights. For more information on

#### managing user rights or deleting clients, <u>please see here</u>.

QuickBooks requires a persistent internet connection (a high-speed connection is recommended) and a computer with a supported Internet browser or a mobile phone with a supported operating system (see System Requirements). Network fees may apply.

#### **ProAdvisor Preferred Pricing - Direct Discount**

#### **Terms and Conditions**

FOR QUICKBOOKS ONLINE ACCOUNTANT CUSTOMERS WHO TAKE ADVANTAGE OF THE 30% OFF FOR QUICKBOOKS ONLINE SIMPLE START, ESSENTIALS, PLUS, OR ADVANCED SUBSCRIPTION FOR THE FIRST 12 MONTHS OF THE SUBSCRIPTION WITH PROADVISOR PREFERRED PRICING CLIENT DISCOUNT OFFER

**Eligibility:** This offer is eligible to accounting firms who register or have registered for QuickBooks Online Accountant ("QBOA") and use the Client Discount option for the QuickBooks Online ("QBO"), QuickBooks Online Payroll ("QBOP"), and QuickBooks Time (formerly TSheets) (collectively, "QuickBooks") subscription fees ("QBOA Customers"). The Client Discount invoicing option means that the QBOA user enters in the client's information and the client is billed for the QuickBooks subscription fees directly ("Client Discount"). Offer is available to new QuickBooks subscribers only.

**Pricing:** Eligible QBOA Customers will be entitled to apply the following discounts for the first 12 months of the service for their client starting from the date of enrollment, followed by the then-current fee for the service.

30% off the then-current list price of QuickBooks Online Simple Start, Essentials, Plus, or Advanced 30% off the then-current list price of QBOP and 15% off the then-current per employee list price 30% off the then-current list price of QuickBooks Time (formerly TSheets) and 15% off the then-current per employee list price.

Discount and list price subject to change at any time at Intuit's sole discretion. All prices are quoted without sales tax. If you add or remove services, your service fees will be adjusted accordingly.

**Offer Terms:** All QuickBooks subscriptions must be entered through Client Discount. The discount is valid only for the named individual or company that registered for QuickBooks subscription and cannot be transferred to another client, individual, or company. Cannot be combined with any other Intuit offer. Offer valid in the US only and is non-transferable. Terms, conditions, pricing, special features, and service and support options subject to change without notice.

**Billing:** The QuickBooks customer's account will automatically be charged on a monthly basis. The first bill date will be on the date of enrollment. Subscriptions will be charged to the credit card through the QuickBooks account. Payment is due, in full, immediately upon monthly invoicing. To remove the QuickBooks subscription from your Client Discounts, please click here and follow the prompts. Removal of the billing for the subscription will become effective at the end of the monthly billing period. All future monthly subscription charges to the QuickBooks account will be at the then-current list price. You may remove subscriptions from your Client Discounts at any time. The QuickBooks customer may cancel their subscription at any time, by going to the Account & Settings in QBO and selecting "Cancel." The QuickBooks customer will not receive a pro-rated refund. Removal of the Client Discount for the subscription will not terminate the QBOA customer's user rights. For more information on managing user rights or deleting clients, please see here.

QuickBooks requires a persistent internet connection (a high-speed connection is recommended) and a computer with a supported Internet browser or a mobile phone with a supported operating system (see System Requirements). Network fees may apply.