Intuit Historical Data Extraction

Employee information

Employee Demographic & Tax Info
- Reports Tab
- Employee Reports
  - Employee Details
- Bottom of window click on Show Inactive Employees
- Top of window click View in Excel

Employee Bank Info
Unavailable, need to send bank forms to employees.

Employer Information

Tax Returns
- Taxes & Forms
- Forms
- Quarterly Forms
- View Archived Forms
  - 941 Per quarter needed
  - State forms Per quarter needed

Payroll Registers

Payroll Register (OPEN QUARTER)
- Reports
- Employee Reports
  - Payroll Details
  - Can run in 2 ways
    - Per Check date
    - For the Quarter (it'll separate by check date)
  - Update Report
  - View in Excel

Payroll Register (CLOSED QUARTER)
- Reports
- Employee Reports
  - Payroll Details
  - Range = First Quarter/Second Quarter/Third Quarter
  - Instead of All Checks, run for Summary by Employee
  - Update Report
  - View in Excel