Quarterly Tax Processing Hold Form

Holding quarterly filings:

Please use this form to request that a hold be placed on your quarterly tax filing so you may add additional payroll data or make changes to payroll data prior to submission. SDP begins quarterly preparation after your final payroll of each quarter. **This form must be returned to SDP by the following dates to ensure the proper holds can be placed on your account:**

Quarter 1: March 24th   **Quarter 2:** June 23th   **Quarter 3:** September 22rd

Releasing quarterly holds:

Please be sure to submit all required data and notify SDP in writing to release your hold as soon as possible. To ensure federal and state returns can be filed on time, SDP automatically releases all holds on the 15th of each filing month. If changes have not been submitted by the following dates your tax returns will be filed as is and a tax amendment will be necessary (amendment fees will apply).

Quarter 1: April 15th   **Quarter 2:** July 15th   **Quarter 3:** October 15th

Company Code & Name	Quarter and Year
	Quarter _____ Year _____
Hold/Adjustment Reason	**Notes -Additional Details**
☐ Bonus ☐ Off-cycle payroll run/Additional payroll ☐ Third-party sick pay ☐ Fringe benefits ☐ Payroll correction ☐ Employee Retention Credit Wages* ☐ Form 7200 Tax Credits* ☐ Other (please describe in notes)	

Absolution Agreement: Acknowledgment of Responsibility for Penalty and Interest.

Client will provide Southland Data Processing with per employee amounts needed to perform adjustments. I confirm that I have calculated and verified any adjustments, to ensure they meet all eligibilities and qualifications needed.

Due to the timing of my adjustments, I understand that any adjustments processed may result in taxes being deposited after due date and may incur penalties and interest. These penalties and interest, if any, are the responsibility of my company. Additionally, I understand that we may be charged a fee because of delaying the processing of our tax processing and filing, which can include W-2s.

Signature: _____   Title: _____   Date: _____