How to **Upload Documents** to the
IRS Online Registration System (CPEO)

Are you having trouble uploading documents to support your CPEO or Controlled Group? This document provides additional details to help you upload documents successfully (and in the correct place) in the IRS Online Registration System. There are **two main ways** to upload documents. Click on the link for details about each of these options.

I need to upload a document to an application **I haven't submitted yet.**

If you haven't yet submitted your information for IRS review, and are filling out one of the applications listed below, you should follow the steps in this section.

1. PEO Certification
2. Form 14751, CPEO Surety Bond
3. Quarterly Submissions
4. Annual Audited Financial Statements
5. e-File Waiver Request
6. Update CPEO Account Information
7. Update RI Account Information

▪**Click here to jump to your instructions**.

I need to upload a document to an application **I've already submitted.**

If an IRS representative has contacted you to request that you upload documents to an application that you've already filled out and submitted (or you need to attach quarterly submissions to a PEO Certification that you've already submitted), follow the steps in this section. It will be helpful to have the "Application Number" of your submitted application nearby, which your IRS representative may have provided you.

▪**Click here to jump to your instructions**.

How to upload a document to an application you haven't submitted yet.

1. **Log in to your online account.**

2. **Are you submitting a PEO Certification? If not, skip to step 3.**

    a. Under the "Start or Resume an Application" section of your main menu, select "CPEO" from the "Choose Organization Type" dropdown, and select "PEO Certification" from the "Choose Application" dropdown. Click "Select."

Start or Resume an Application

Which application would you like to complete?

CPEO	▼

PEO Certification	▼	**Select**

    b. Skip to step 5.

3. **Are you submitting documents for any other application?**

    a. Under the "Manage your license information" section of your main menu, find the CPEO/INDV for which you'd like to submit a new application or document.

    b. Use the "Choose Application" dropdown in that row to select the application you'd like to create to submit documents. Click "Select."

Manage your license information

CPEO #CPEO-100108

<Choose Application>	▼	**Select**

4. **Are you submitting an "Update" application? If not, skip to step 5.**

    a. After following step 3, be sure to select the "Update" button next to "Upload Attachments" on the "Identify Changes" screen before navigating to the "Document Upload" screen.

   *   Upload Attachments   ◉ Update   ○ No Update Needed

(Steps continued on the next page)

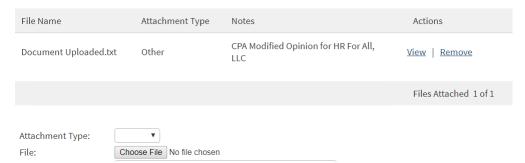How to Upload Documents to the IRS Online Registration System (CPEO)

5. Follow instructions and IRS guidance to complete the application and submit necessary documents. Each application will require different documents. When you get to the "Document Upload" screen, follow these instructions:

    a. Select an option from the "Attachment Type" dropdown. Make sure to choose the correct option for your document.

       TIP: Documents in this list with an asterisk are required.

    b. Click "Browse" or "Choose File". Locate your document on your computer.

    c. Enter any comments about the document in the "Notes" field. (These are viewable by the IRS.)

    d. Click "Attach".

* Attachment Type:	* Other ▾
* File:	Choose File No file chosen
Notes:	

[Attach] [Previous] [Next] [Return to Main Menu]

    e. Once successfully attached, your document will display above the "Attachment Type" dropdown. If your document does not display here, it has not been attached to the application.

File Name	Attachment Type	Notes	Actions
Document Uploaded.txt	Other	CPA Modified Opinion for HR For All, LLC	View	Remove
			Files Attached 1 of 1

Attachment Type:	▾
File:	Choose File No file chosen

6. Continue to upload all documents as needed.

Follow the on-screen steps to complete your application and click "Submit". Once you see a screen titled "Download Your Summary Report", your application and documents have been successfully submitted to the IRS.

Download Your Summary Report

Your CPEO Update application has been successfully submitted. You must click "View PDF Summary Report" to print or save a copy of this report for your records. You will not be able to print or save a copy of this submission at a later date.

This is your only opportunity to save a copy of this form.

How to Upload Documents to the IRS Online Registration System (CPEO)

How to upload a document to an application you've already submitted

1. Log in to your online account.

2. Under "View Application Status", click "Details" next to the application with the matching application name (example: PEO Certification).

If you have more than five open applications, click "Select" to access your list of open applications. At that point, you will be able to view "Details "for the desired application.

View Application Status

CPEO - PEO Certification	Status: Open	**Details**

Click "Submit Document(s)". The "Application Number" in this pop-up should match the Application Number that was provided to you by your IRS representative.

Submission Date	01/06/2017
Application Name	PEO Certification
Application Number	10553
Status	Open
Deficiencies	
Notes	

Submit Document(s) **Done**

TIP: If you see a "Fix" button on this screen, you should click that button and follow the instructions in the first section for unsubmitted applications.

3. The "Subsequent Attachments" screen appears, which is where you will upload your documents.

Follow the steps in this exact order to successfully attach your documents.
   a. Click "Browse" or "Choose File". Locate your document on your computer.
   b. Enter any comments about the document in the "Notes" field. (These are viewable by the IRS.)
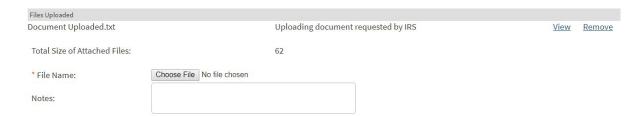   c. Click "Attach".

(Steps continued on the next page)

PEO Certification - Subsequent Attachments - 10553

Follow the steps below to upload a file. Files must be less than 2 MB in size. The following document extensions are acceptable: .pdf, .doc, .docx, .rtf, .txt, .gif, .jpeg, .jpg, and .png.

1. Click **Browse** and locate your file.
2. Add notes (if desired) then click **Attach**. Your document will display under the 'Files Uploaded' gray bar. If your document does not display here, it has not been attached.
3. Repeat steps 1 and 2 for each supporting document.
4. Once all documents are attached, click **Submit**.

You will see a 'Subsequent Attachments Success' screen. If you do not see this screen, your documents have not been submitted to the IRS.

* File Name: **A** [Choose File] No file chosen

Notes: **B** [   ]

[Cancel]   [Submit]   [Attach] **C**

4. Your document will display under the "Files Uploaded" gray header.
If your document does not display here, it has not been attached.

Files Uploaded			
Document Uploaded.txt	Uploading document requested by IRS	View	Remove
Total Size of Attached Files:	62		

* File Name: [Choose File] No file chosen

Notes: [   ]

5. [OPTIONAL] Repeat step 4-5 for any additional documents.

6. Click "Submit".

7. You will see the "Subsequent Attachments Success" screen.
If you do not see this screen, you have not submitted your documents to the IRS.

Subsequent Attachments Success

Thank you for submitting the additional documents to support application # 10553 of application type PEO Certification.
Click on "Done" to return to the Main Menu.

[Done]

Still having trouble? Contact the CPEO team at sbse.able.cpeo.info@irs.gov.