

Items needed for Payroll Only

1. W-4 for all employees that will be current in that calendar year.
2. Any employee that has a courtesy city withholding or school district must report that to us. We do not know what city or school district would apply just by address.
3. Pay Rate for each employee.
4. If not a new start up company the most recent quarterly reports stating account numbers with state, state unemployment, federal ID # and localities currently being withheld.
5. Copy of company voided check that payroll and taxes are to be drawn from.
6. Direct Deposit information for any employee who desires direct deposit.
7. E-mail address for Administrator of company portal and all employees that will access employee portals.

If Switching from another provider not at beginning of year we also need

1. All Payroll reports generated year to date.
2. Listing of impounded taxes and refund of unpaid taxes from former provider.
3. Copies of any quarterly filings prepared by former provider.