



330 Lynnway #340, Lynn, MA 01901

## **Payroll Set-up Checklist**

### **General Business Information**

- Company Legal Name
- DBA if applicable
- Business Address
- Business Classification I.E. LLC, S-Corp, C-Corp etc.
- Desired Payroll Frequency: Weekly, Bi-weekly Semi-monthly or Monthly
- Contact information

### **Tax and Banking Information**

- Proof of a federal ID Number (FEIN) Ideally any correspondence from the IRS will show proof
- Proof of set-up of State and unemployment tax accounts
- Signatures on Federal 8655, state power of attorney forms, and assigning TPA privileges
- If taking over payroll responsibilities during a current active tax year, we would need prior payroll reports to account for the current year to dates for all employees. Not applicable for new businesses with no prior payroll history or if we take over on for a brand-new tax year
- Attaching an active bank account to the payroll account
- A voided check or note from your bank that shows the routing/ABA # and account #

### **Employee Set-up**

- Legal Name
- Social Security Number
- Mailing Address
- State and Federal withholding status (recommend using form W4 to gather information)
- Pay Rate
- Direct Deposit info, individual bank account# and routing #
- Email Address if using virtual mail room for stubs
- List of any benefits, time off accrual programs, or any other deductions

***\* Forms will be provided to help gather all needed information \****