Onboarding Checklist

==PLEASE HAVE ALL OF THE NECESSARY INFORMATION BELOW BEFORE STARTING==

We are excited that you chose GetPayroll to service your payroll and tax needs. Before you get start with the onboarding process, we want to make sure that you have all of the necessary information before you begin. Here is a listing of the items that you will need during the onboarding process:

- Federal Proof
  - IRS Form SS-4 or
  - IRS Letter 147C (The IRS can be contacted at 800-829-4933 to request a copy) or
  - A signed Form 8655 or Form 1120S or
  - IRS Form CP575
- Company Bank Information (Document must show your company name, address, routing number, and account number)
  - A copy of a voided check or
  - A copy of a signed bank letter
  - A copy of a bank statement
- Employee demographics
  - You can use the spreadsheet provided in the next step or
  - You can upload the information from your previous payroll provider
    - Note: Make sure the SSN's and account numbers are unmasked
- Payroll history (if applicable)
  - Prior quarter(s) payroll and tax history
    - A summary of gross pay, employee taxes, employer taxes, deductions, and net pay by employee for the previous quarters
    - A detailed breakdown of the taxes paid by check date
  - Current quarter payroll and tax history
    - A summary of gross pay, employee taxes, employer taxes, deductions, and net pay for the current quarter
    - A detailed breakdown of the taxes paid by check date