GetPayroll
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Onboarding Checklist

We're pleased that you've chosen **GetPayroll** to manage your payroll and tax needs.

To ensure a smooth and efficient onboarding process, it is important that you gather all required documents and information BEFORE you begin. Having everything ready in advance will help prevent delays, minimize follow-up requests, and allow us to get your payroll set up accurately and on time.

Please review the checklist below and make sure you have all required information available before starting the onboarding process.

1) FEDERAL PROOF

Federal proof shows that you have registered your business with the IRS. We can accept **any one** of the following documents as proof of your Federal Employer Identification Number (EIN):

1. **Form SS-4** – Application for Employer Identification Number View Example

2. **IRS Letter 147C** – Verification letter (available by calling the IRS Business & Specialty Tax Line at 800-829-4933) View Example

3. **Completed and signed Form 941** – Employer's Quarterly Federal Tax Return from a previously filed quarter

4. **Completed and signed Form 940** – Employer's Annual Federal Unemployment (FUTA) Tax Return from a previously filed year

5. **Signed Form 8655** – Reporting Agent Authorization View Example

6. **Signed Form 1120S** – U.S. Income Tax Return for an S Corporation View Example

7. **IRS Form CP575** – EIN Confirmation Letter View Example

Note: The document must clearly display your EIN and business name exactly as registered with the IRS.

2) COMPANY BANK INFORMATION

We can accept **any one** of the following documents as proof of your company banking information:

1. **Voided check –** Must be preprinted with the company's name. View Example

2. **Signed bank letter –** Issued on the bank's letterhead and signed by a bank representative. View Example

3. **Bank statement –** Must be from the most recent statement period. View Example

Requirements:

Regardless of which document you provide, it must clearly display:

- Company name
- Company address
- Bank routing number
- Bank account number

3) EMPLOYEE DEMOGRAPHICS

- You can complete this spreadsheet

OR

You can provide a report from your previous payroll provider with all relevant information. Please make sure the SSN's and account numbers are unmasked

While each payroll system is different, this data can typically be found on an employee profile report or an employee summary report or an employee demographic report.

Payroll history (if applicable) For each prior quarter, provide:

- **Employee-level summary**: hours and earnings by earning code.
- **Employee taxes**: withheld amounts by tax category and jurisdiction.
- **Employer taxes**: liability by tax category and jurisdiction.
- **Compliance documents**: federal and state tax filing packages.

For the current quarter, provide (by pay period, per employee):

- Pay date
- Hours and earnings by earning code
- Employee taxes withheld (by tax category and jurisdiction)
- Employer tax liability (by tax category and jurisdiction)
- Proof of tax deposits

*While each payroll system is different, this data can typically be found on the payroll journal/register report, a tax report for each period, and the quarter-end tax returns

You will need all of these documents before starting the process. The system requires all documents to be submitted at the same time.

Schedule Your Free Zoom Onboarding Call

If you have any questions, feel free to email us at info@getpayroll.com or call 972-353-0000 Ext. 1