

Payroll Setup Checklist

Depending on your business, you'll need most of the information listed below, and you should be able to find it using your own records, previous payroll providers (if applicable), or from federal and state agencies.

Start with your company

- ☐ Business name, address, and phone number
- ☐ Tax filing name and address (if you use a different name and address for filing with the IRS)

Add your employees

- ☐ Basic info: legal name, birthday, hire date, home address, email address, and tax withholding (you can find this on their I-9 and W-4 forms)
- ☐ Earnings: Pay rate (hourly, salary, etc.) and pay schedule (weekly, biweekly, etc.)
- ☐ Benefits & deductions: Any health insurance, retirement and bonuses
- ☐ Direct deposit: Add bank account and routing number for free 24-hour Direct Deposit (optional)

Enter prior payrolls

If you've already paid employees this calendar year, we need to know the amounts to accurately calculate new paychecks and complete your tax forms.

- ☐ Total payment amounts for each employee you've paid this year (including quarterly and year-to-date totals)
- ☐ Copies or summary of all payroll tax payments you've made this year

Enter tax information

- ☐ [Federal Employer Identification Number \(FEIN\)](#) and [deposit schedule](#)
- ☐ State tax account numbers and withholding deposit schedule, and state unemployment insurance rate (Tip: This isn't required for setup, but you'll need it before you file taxes. If you don't know this info, see how to contact your state [here](#))

Optional: Bank account setup

- ☐ Company bank account for direct deposit or electronic tax payments
- ☐ [Principal Officer](#) legal name, social security number, birthday, and home address

Get more information about pricing, options, and how-to's at payroll.intuit.com.