

Business Payroll Services

Employee information setup

Company name

_____ New Change

Complete for each employee or provide a report with the following information. * Indicates required field.

† Date of birth and date of hire required for any retirement plan or if using New Hire Reporting. Date of hire required for Time Off Accruals.

1. Employee information

Social security number *	Employee ID	Company ID
_____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____	_____	_____
Last name *	First name *	MI
_____	_____	_____
Address 1 *	Address 2	
_____	_____	
City *	State *	Zip code *
_____	_____	_____

Date of birth†	Gender	Department	Current hire date†	Termination date
_____ _____ _____ _____ _____	_____	_____	_____ _____ _____ _____	_____ _____ _____ _____
Current status code	Position status (for timeclock import)	Salary amount	Hourly rate 1	Hourly rate 2
<input type="radio"/> Active <input type="radio"/> Terminated <input type="radio"/> Inactive	<input type="radio"/> Full Time <input type="radio"/> Part Time	_____	_____	_____
Pay frequency			Workers' comp code	
<input type="radio"/> Weekly <input type="radio"/> Bi-Weekly <input type="radio"/> Semi-Monthly <input type="radio"/> Monthly <input type="radio"/> Other			_____	

2. Tax withholding status

Federal marital status *	Federal exemptions *				
<input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Married, but withholding at Single rate	Number: _____				
Federal withholdings	Amount	Percentage	State withholdings	Amount	Percentage
<input type="radio"/> Flat rate <input type="radio"/> Additional	<input type="radio"/> \$	<input type="radio"/>	<input type="radio"/> Flat rate <input type="radio"/> Additional	<input type="radio"/> \$	<input type="radio"/>
		%			%
State marital status	State exemptions				
<input type="radio"/> Single <input type="radio"/> Married <input type="radio"/> Married, but withholding at Single rate	Number: _____				
SIT/SDI state	SUI state	Local tax / county			
_____	_____	_____			

3. Recurring earnings/deductions (Per pay period, in addition to standard tax deductions)

Description	Select one:	Amount	Percentage
_____	<input type="radio"/> Pre-tax <input type="radio"/> Post-tax	<input type="radio"/> \$	<input type="radio"/>
			%
Description	Select one:	Amount	Percentage
_____	<input type="radio"/> Pre-tax <input type="radio"/> Post-tax	<input type="radio"/> \$	<input type="radio"/>
			%

4. Time off balance

Description	Balance
_____	_____
Description	Balance
_____	_____

5. Direct deposit information (It can take one to two payroll periods for you to begin receiving direct deposits.)

Bank name	Account type	Amount to be deposited (select dollar or percentage)
_____	<input type="radio"/> Checking <input type="radio"/> Savings	<input type="radio"/> \$ <input type="radio"/>
		%
Routing/transit number (must start with 0, 1, 2 or 3)	Account number	
_____ _____ _____ _____ _____ _____ _____ _____ _____ _____	_____ _____ _____ _____ _____ _____ _____ _____ _____ _____	