

Client Start-up Checklist

Adding clients to Intuit Online Payroll for Accounting Professionals is easy! Just gather some basic client information listed in step 1, set up your client's payroll account as explained in steps 2 and 3, and then go back to your client (step 4) to secure their signature on the necessary enrollment forms that you send back to us.

1. Gather the general client information found on the forms that follow:

- ☐ Employer Information
- ☐ Employee Information
- ☐ Contractor Information
- ☐ Direct Deposit Authorization form (if applicable)

2. Enter your client's payroll information to set up their payroll account. To start the process, simply go to your **Client List** and click the **Add Client** link.

3. Enroll in electronic services if you want to provide electronic filing and payment or direct deposit for your clients. We'll create customized electronic services enrollment forms (such as Form 8655) after you've entered the general client data above.

To enroll your client in electronic services:

1. Log into the client's account.
2. Click **Setup > Electronic Services**.
3. Select the electronic services you want for this client.
4. Print the customized authorization form for client to sign.

4. Print the electronic services enrollment forms and have your client's primary principal sign them. Send these forms back to us and we'll get to work on the enrollment process.

IMPORTANT: If your client hasn't registered for their federal or state employer identification numbers or if your client's employees haven't filled out W-4s, you can easily find these forms within Intuit Online Payroll for Accounting Professionals. These forms are only available after you have completed the steps above.

To access these forms:

1. Log into the client's account
2. Click **Taxes & Forms > Employer Setup** or click **Employee & Contractor Setup Forms**

TIP: To save time, you can provide the federal and state forms to your client before starting the setup and enrollment process using the links below.

Application for Employer Identification Number (SS4)	http://www.irs.gov/pub/irs-pdf/fss4.pdf
Employee's Withholding Allowance Certificate (Form W-4)	http://www.irs.gov/pub/irs-pdf/fw4.pdf
Employment Eligibility Verification (I-9)	http://uscis.gov/graphics/formsfee/forms/files/i-9.pdf
State Specific Forms	https://onlinepayroll.intuit.com/sp/support/resources.jsp

EMPLOYER INFORMATION SHEET

General

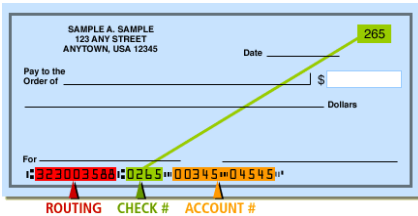
Business Name: _____
Business Address: _____
City, State, Zip: _____
Filing Name (if different): _____
Filing Address (if different): _____
City, State, Zip: _____

Contact Name: _____
Phone: _____
Fax: _____
Email: _____

Company Type: ☐ S-Corp ☐ C-Corp ☐ LLC ☐ LLP ☐ Partnership
☐ Sole Proprietor ☐ 501c3 ☐ Other _____

Direct Deposit

Employer Bank Routing Number: _____
Employer Bank Account Number: _____



Principal Officer's Name: _____
Principal's Social Security Number: _____
Principal's Date Of Birth: _____

Federal law requires that we store and verify information about the principal officer to help prevent money laundering and the funding of terrorist activity. The principal officer is the person who is the main contact for the bank account from which electronic payments (including direct deposit) are made.

Payroll

No. of W-2 employees _____
No. of 1099 contractors to be paid through payroll _____
First Date To Run Payroll MM____/ DD____/ YY____
Federal EIN _____ ☐ Applied For
State Employer Account No. _____ ☐ Applied For
State Unemployment No. _____ ☐ Applied For
State Unemployment Insurance Rate _____% (if known)
Other state tax rates, if applicable:

Federal Deposit Schedule

- ☐ Monthly
☐ Semi-Weekly
☐ Other _____

State Deposit Schedule

Only applicable to states with income tax

- ☐ Same as federal
☐ Other _____

Payroll History

Attach any historical payroll information from this calendar year for all active and terminated employees

- ☐ Have not run any payroll yet this year

Beginning of Calendar Quarter Start. If you will begin using our service at the start of the 2nd, 3rd or 4th calendar quarter (April 1, July 1, or October 1), please include the following items.

- ☐ Year-to-date wages, taxes, and deductions for each employee
- ☐ Dates and amounts of all payroll tax payments made to date for current year tax liabilities

Middle of Calendar Quarter Start. If you will begin using our service in the middle of a calendar quarter, please include the following items.

- ☐ Year-to-date wages, taxes, and deductions for each employee as of the most recent payroll
- ☐ Year-to-date wages, taxes, and deductions for each employee as of the end of the most recent calendar quarter (*not applicable if you're starting in the middle of the first calendar quarter*)
- ☐ Payroll register or other summary for each payroll date in the current quarter, including total amounts for each wage item, tax, and voluntary deduction on that date.
- ☐ Dates and amounts of all payroll tax payments made to date for current year tax liabilities

Notes

EMPLOYEE INFORMATION SHEET

Complete this form for each employee.

General Information

Employee Name _____
Address _____
City, State, Zip _____
Email Address _____

Birth Date MM____/DD____/YY____
Hire Date MM____/DD____/YY____
Social Security No. _____
Gender ☐ Female ☐ Male

Direct Deposit Information

Will this employee be paid by direct deposit?

- ☐ Yes. If so, please complete the Authorization of Direct Deposit form
☐ No

Tax Information

Please attach or specify the following information for this employee:

- ☐ Attach completed federal Form W-4
☐ Attach completed state withholding form. *Only applicable if state income tax and filing status/allowances are different from federal*
☐ Specify any payroll taxes that this employee is exempt from, such as state unemployment, social security, or Medicare:

- ☐ Specify any local taxes that need to be withheld from this employee's paycheck:

Notes:

Pay Information

Which types of pay does this employee receive?

- | | | |
|---|--|--|
| <input type="checkbox"/> Salary \$_____ per _____ | <input type="checkbox"/> Overtime Pay | <input type="checkbox"/> Clergy Housing (Cash) |
| | <input type="checkbox"/> Double Overtime | <input type="checkbox"/> Clergy Housing (In-Kind) |
| Hourly Rates (up to 8 different) | <input type="checkbox"/> Sick Pay | <input type="checkbox"/> Bereavement Pay |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Holiday Pay | <input type="checkbox"/> Group Term Life Insurance |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Vacation Pay | <input type="checkbox"/> S-Corp Owners Health Ins. |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Bonus | <input type="checkbox"/> Personal Use of Company Car |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Commission | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Allowance | |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Reimbursement | |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Cash Tips | |
| <input type="checkbox"/> \$_____ / hour | <input type="checkbox"/> Paycheck Tips | |

Pay Frequency	Payday details
<input type="checkbox"/> Every Week <input type="checkbox"/> Every Other Week <input type="checkbox"/> Twice a Month <input type="checkbox"/> Every Month <input type="checkbox"/> Other _____	Date(s) or day(s) employees paid _____ <i>(for example, the 1st and 15th of the month)</i> Period Covered _____ <i>(for example, Paycheck on the 1st covers the 16th to the end of the prior month)</i>

Payroll Deductions

Select the voluntary deductions that apply and enter the \$ or % amount to be deducted from each paycheck.

Deduction	\$ Amount or % of Gross	Deduction	\$ Amount or % of Gross
<input type="checkbox"/> Pre-tax medical <input type="checkbox"/> Pre-tax vision <input type="checkbox"/> Pre-tax dental <input type="checkbox"/> Taxable medical <input type="checkbox"/> Taxable vision <input type="checkbox"/> Taxable dental <input type="checkbox"/> 401(k) <input type="checkbox"/> Simple 401(k)		<input type="checkbox"/> 403(b) <input type="checkbox"/> Simple IRA <input type="checkbox"/> SARSEP <input type="checkbox"/> Medical expense FSA <input type="checkbox"/> Dependent care FSA <input type="checkbox"/> Loan Repayment <input type="checkbox"/> Cash Advance <input type="checkbox"/> Repayment <input type="checkbox"/> Other _____	

Is this employee subject to wage garnishments, such as a federal tax or child support garnishment?

- ☐ Yes If so, attach copies of all garnishment orders
☐ No

Sick and Vacation

If this employee earns paid time off, complete the section below; otherwise, leave blank.

Sick Pay	Vacation Pay
No. of Hours Earned Per Year _____ Max. hours accrued per year (if any) _____ Current Balance _____ Hours are accrued: <input type="checkbox"/> As a lump sum at the beginning of year <input type="checkbox"/> Each pay period <input type="checkbox"/> Each hour worked	No. of Hours Earned Per Year _____ Max. hours accrued per year (if any) _____ Current Balance _____ Hours are accrued: <input type="checkbox"/> As a lump sum at the beginning of year <input type="checkbox"/> Each pay period <input type="checkbox"/> Each hour worked

Notes

CONTRACTOR INFORMATION SHEET

Complete this form for each 1099 contractor.

General Information

Contractor Type: ☐ Individual ☐ Business

Contractor Name _____

Address _____

City, State, Zip _____

Email Address _____

Social Security No./

Employer Identification No. _____

Direct Deposit Information

Will this contractor be paid by direct deposit?

☐ Yes If so, complete the Authorization of Direct Deposit form.

☐ No

Pay Information

Has this contractor already been paid this calendar year?

☐ Yes

If so, enter the total compensation and/or reimbursement amounts that you have paid the contractor during the current year.

☐ No

Compensation amount \$ _____

Reimbursement amount \$ _____

NOTES