

Enrollment

Checklist

For an easy and seamless process please have the below information on hand before enrolling.

- IRS proof of FEIN and Legal Business Name (Any of the following will work)**
 - IRS documentation dated within the last 3 years
 - Most recently filed 941, 1120, or Schedule C
 - Non-profit businesses need 501C3

- State Tax ID Numbers and SUI Rate**
 - Most recently filed state quarterly return(s)

- Prior Wage History (If Applicable)**
 - YTD summary from January 1st through the most recently closed quarter with each employee broken down from gross to net and each tax and deduction separated
 - Payroll summary for each check date within the current quarter with each employee broken down from gross to net and each tax and deduction separated
 - Include terminated employees if any

- Company Voided Check**
 - The voided/cancelled check must have the company name and address on the check
 - Can NOT be a starter check
 - A current letter from the bank on bank letterhead will be accepted
 - No deposit slips

- Appropriate Titles for Signing Enrollment Documents**
 - S-Corp: Officer
 - Corporation: Officer
 - Limited Liability: LLC Member
 - Sole Proprietor: Owner
 - Household: Owner

(The legal document must match exactly to the information in the online enrollment and on the signed enrollment documents.)

