

SQUARE PAYROLL**SETUP GUIDE**

About this document

This is a checklist of everything you'll need to get fully set up to run payroll with Square. Each section corresponds to different sections within the Square Payroll dashboard, so you know what to have ready for each step.

Company Details

Business Info

- Business Name

- Address

- Business entity type (for example, LLC, Non-Profit)

Federal Tax Info

- Federal Employer Identification Number (EIN)**
This is the unique identification number assigned to your company by the IRS. Do not use a social security number.

- Federal Filing Frequency**
You'll select quarterly (Form 941, which is the most common) or annual (Form 944). Filing frequency is assigned to your company by the IRS.

State Tax Info

The state tax information we collect may vary depending on your work locations(s). Head to [Payroll Tax Filings Information](#) on our Support Center and select your state to learn what state tax info you need to provide.

- State income tax withholding account number

- State unemployment account number and tax rate

Payroll setup

Verify bank account

We use Plaid (a financial technology service) to securely connect your bank account to your Square Payroll account in just a few minutes. If you don't want to verify your bank account with Plaid, you can also manually verify your bank information through test transactions. If you choose to link your bank account manually it'll take 2-3 days.

- Online bank account credentials (for faster verification) or your routing and account numbers**
-

Pay schedule

Many states have regulations for pay schedules -- learn about yours in our [Support Center](#).

Check your state and local requirements regarding pay period intervals. Some states may require pay periods to occur at defined intervals based on whether the employee is exempt or non-exempt.

- Pay frequency**
-
- Pay period duration**
-
- First pay period**
-
- Deadline to run payroll**
-

Authorized signer

Your authorized signer information helps us identify individuals permitted to approve and authorize payroll-related actions. The business owner can serve as the authorized signer.

- First and last name**
-
- Title**
-
- Date of birth**
-
- Social security number**
-

Add Team

Employees

- First and last name

- Email

- Job title and compensation details

- Hire date

- Work address(es)

- YTD pay history (for employees previously paid this calendar year)

- Personal info (optional)**
 - You can invite your team to fill out their own personal details

 - Address

 - Social security number

 - Direct deposit details

 - Tax withholding details

Contractors

- First and last name

- Email

- Contractor pay history

- Benefits and deductions

- Personal info (optional)**
 - You can invite your team to fill out their own personal details

 - Address

 - Social security number

 - Direct deposit details

Benefits & Deductions

Benefits, garnishments, and other post-tax deductions are entered when creating an employee. Once a benefit or deduction type has been created, you can easily add it to other employees' payroll profiles.

- Employee deduction details

- Company contribution details

Payroll history

If you're brand new to running payroll or are switching to Square Payroll for your first payroll of the year, you can skip this section.

If you've already paid employees this calendar year, we will need to know the YTD amounts paid to all current and former employees to accurately file taxes on your behalf and help your business stay compliant.

Note: It's critical to provide previous payroll information to Square Payroll when setting up your account because an employer can only issue one W-2 per employee per year. Head to our [Support Center](#) for more information on how to find payroll history from your previous provider.

Year-to-date report from your current payroll provider

Former employee info

It is important to enter information from all employees you've paid from the current year, as we need this info to generate all W-2s at the end of the year.

Full name

Total gross wages paid this calendar year

Work address

Social security number



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