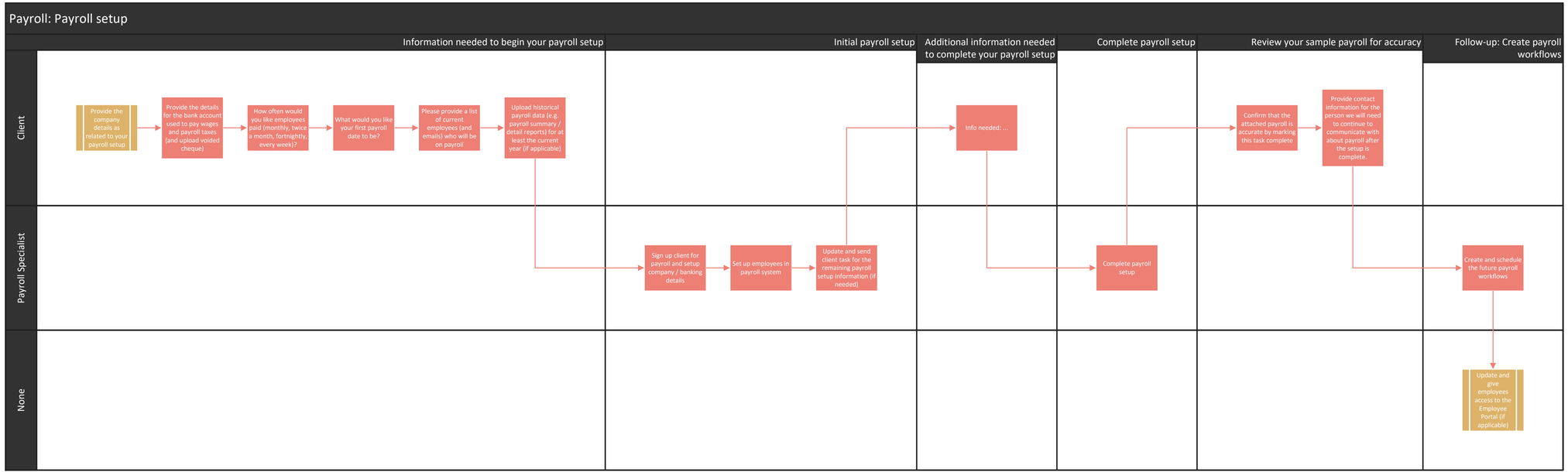
Payroll: Payroll setup
Information needed to begin your payroll setup
Initial payroll setup
Additional information needed to complete your payroll setup
Complete payroll setup
Review your sample payroll for accuracy
Follow-up: Create payroll workflows
Client
Payroll Specialist
None
Provide the company details as related to your payroll setup
Provide the details for the bank account used to pay wages and payroll taxes (and upload voided cheque)
How often would you like employees paid (monthly, twice a month, fortnightly, every week)?
What would you like your first payroll date to be?
Please provide a list of current employees (and emails) who will be on payroll
Upload historical payroll data (e.g. payroll summary / detail reports) for at least the current year (if applicable)
Sign up client for payroll and setup company / banking details
Set up employees in payroll system
Update and send client task for the remaining payroll setup information (if needed)
Info needed: ...
Complete payroll setup
Confirm that the attached payroll is accurate by marking this task complete
Provide contact information for the person we will need to continue to communicate with about payroll after the setup is complete.
Create and schedule the future payroll workflows
Update and give employees access to the Employee Portal (if applicable)