CHECKMARK ONLINE PAYROLL SETUP CHECKLIST

Starting new payroll software is both exciting and rewarding, but knowing where to begin can be a challenge. To help you get started, we are here to guide you through the process of setting up your payroll software with ease and simplicity.

This comprehensive checklist covers all the necessary steps, from adding tax ID numbers to configuring your employees in CheckMark Online Payroll, ensuring that your payroll setup is accurate, efficient, and in compliance with relevant regulations. Let's get started and simplify your payroll management experience with CheckMark Online Payroll.

1. COMPANY INFORMATION

- [ ] Your business mailing address
- [ ] Your tax filing address
- [ ] Federal ID (EIN #)

2. PAYROLL SETTINGS

- [ ] State ID & SUTA rate
- [ ] Pay Rates – Regular, Overtime, Sick, etc.
- [ ] Additional Incomes (Benefits)
- [ ] Deductions
- [ ] Employer Payees - Federal Tax, FUTA, SUTA, etc.

3. ACH DIRECT DEPOSIT

- [ ] If you are paying your employees with ACH Direct Deposit, enter your business bank account details to get verified instantly.

4. EMPLOYEES

- [ ] Names
- [ ] Personal Details — Phone numbers, email addresses, departments, etc.
- [ ] Addresses
- [ ] Social Security numbers
- [ ] Tax filing status
- [ ] Assign federal, state and local taxes wherever applicable
- [ ] Pay Frequency – Weekly, Bi-Weekly, Monthly, etc.
- [ ] Assign additional incomes and deductions
- [ ] Bank account details for ACH Direct Deposit
- [ ] Set up Accrued hours
- [ ] YTD details (If you are switching in the middle of the year)
- [ ] Enable employee portal access

Congratulations! Your payroll setup in CheckMark Online Payroll has been successfully configured. This means that you are now ready to start processing payroll for your employees.

If you need any help setting up CheckMark Online Payroll, please don't hesitate to call us at 970.225.0522 or e-mail sales@checkmark.com and our support team will be happy to answer any questions.

Wishing you continued success!