

EMPLOYEE PAYROLL CONFIGURATION CHECKLIST

New Hire & Payroll System Setup Record

EMPLOYEE INFORMATION

Employee Name:	_____	Employee ID:	_____
Job Title:	_____	Department:	_____
Hire Date:	_____	Pay Frequency:	_____

1. DOCUMENTATION & COMPLIANCE VERIFICATION

DONE	TASK / DOCUMENT DESCRIPTION	COMPLETED DATE	COMPLETED BY
☐	Collect and verify signed Form W-4 (Federal Withholding)		
☐	Collect and verify State Tax Withholding Form (if applicable)		
☐	Verify Form I-9 (Employment Eligibility) completion & documentation		
☐	Collect signed Direct Deposit Authorization Form & voided check		
☐	Verify signed Employment Contract or Offer Letter details		

2. PAYROLL SYSTEM SETUP

DONE	TASK / DOCUMENT DESCRIPTION	COMPLETED DATE	COMPLETED BY
☐	Create profile in payroll software (enter Name, Address, SSN, DOB)		
☐	Assign employee ID and link to cost center / department code		
☐	Configure compensation details (Salary, Hourly Rate, FLSA status)		
☐	Input tax withholding parameters based on W-4 / State forms		
☐	Set up direct deposit bank details (Routing & Account numbers)		
☐	Configure benefits & deductions (Health, Retirement, HSA, etc.)		
☐	Assign Accrual Policy for PTO, Vacation, and Sick Leave		

3. FINAL VERIFICATION & APPROVAL

DONE	TASK / DOCUMENT DESCRIPTION	COMPLETED DATE	COMPLETED BY
☐	Perform peer-review of all profile input values against source files		
☐	Run a test calculation / dry run of first payroll run		
☐	Approve profile for the active payroll run cycle		

Prepared By (Payroll Specialist Signature)

Date: _____

Approved By (HR / Payroll Manager Signature)

Date: _____