

PAYROLL ONBOARDING & SETUP CHECKLIST

Company Name:

Employee Name:

Federal EIN:

Hire Date:

State Tax ID:

Pay Frequency:

1. REGULATORY & TAX DOCUMENTATION

	TASK / DOCUMENT REQUIRED	ASSIGNED TO	DATE COMPLETED	INITIALS
☐	Collect completed Form W-4 (Federal Withholding)	-----	-----	-----
☐	Collect completed State Withholding Form (if applicable)	-----	-----	-----
☐	Complete Form I-9 (Employment Eligibility Verification)	-----	-----	-----
☐	Verify identification documents for I-9	-----	-----	-----
☐	Collect Direct Deposit Authorization Form & voided check	-----	-----	-----
☐	Submit New Hire Reporting to State Registry	-----	-----	-----

2. PAYROLL SYSTEM CONFIGURATION

	TASK / CONFIGURATION DETAIL	ASSIGNED TO	DATE COMPLETED	INITIALS
☐	Enter personal details (Legal Name, Address, SSN, DOB)	-----	-----	-----
☐	Configure tax withholding settings (W-4 parameters)	-----	-----	-----
☐	Input payment method & bank account routing details	-----	-----	-----
☐	Set compensation structure (Salary / Hourly Rate)	-----	-----	-----
☐	Assign standard working hours, department, & cost center	-----	-----	-----

	TASK / CONFIGURATION DETAIL	ASSIGNED TO	DATE COMPLETED	INITIALS
☐	Configure time & attendance tracking integration	-----	-----	-----

3. BENEFITS & DEDUCTIONS SETUP

	TASK / CONFIGURATION DETAIL	ASSIGNED TO	DATE COMPLETED	INITIALS
☐	Configure retirement plan deductions (401k/403b)	-----	-----	-----
☐	Set up health, dental, & vision insurance deductions	-----	-----	-----
☐	Configure statutory deductions (FICA, FUTA, SUTA)	-----	-----	-----
☐	Input garnishment or voluntary post-tax deductions	-----	-----	-----

4. FINAL VERIFICATION & APPROVAL

	TASK / VERIFICATION STEP	ASSIGNED TO	DATE COMPLETED	INITIALS
☐	Perform trial payroll run / verification check	-----	-----	-----
☐	Confirm employee profile matches contract & W-4	-----	-----	-----
☐	Release employee access to digital pay portal	-----	-----	-----

Prepared By (Signature)

Date

Authorized Approver (Signature)

Date