

Enrollment

Checklist

For an easy and seamless process please have the below information on hand before enrolling.

IRS proof of FEIN and Legal Business Name (Any of the following will work)

- IRS documentation dated within the last 3 years
- Most recently filed 941, 1120, or Schedule C
- Non-profit businesses need 501C3

(The legal document must match exactly to the information in the online enrollment and on the signed enrollment documents.)

State Tax ID Numbers and SUI Rate

- Most recently filed state quarterly return(s)

Prior Wage History (If Applicable)

- YTD summary from January 1st through the most recently closed quarter with each employee broken down from gross to net and each tax and deduction separated
- Payroll summary for each check date within the current quarter with each employee broken down from gross to net and each tax and deduction separated
- Include terminated employees if any

Company Voided Check

- The voided/cancelled check must have the company name and address on the check
- Can NOT be a starter check
- A current letter from the bank on bank letterhead will be accepted
- No deposit slips

Appropriate Titles for Signing Enrollment Documents

- S-Corp: Officer
- Corporation: Officer
- Limited Liability: LLC Member
- Sole Proprietor: Owner
- Household: Owner

