Quick On-boarding Checklist

Adding clients to SurePayroll is easy. The initial step is to organize all the necessary client information so it's ready to enter into SurePayroll.

Please note that you will need to add the client's basic information to your account ***before*** you can access some of the forms noted below. To add a client, simply go to your **Client List** and click the **Add Client** link.

Here is what you will need for each client: **Start-Up Item**	**Location**
☐Completed Employer Information Sheet	Attached
☐Completed Employee Information Sheet	Attached
☐Completed Contractor Information Sheet	Attached
☐Electronic Services Authorization Form	1. Log into client's account 2. Click on **Setup**> **Electronic Services** 3. Select the electronic services you want for this client 4. Print the customized authorization form for client to sign
☐Authorization for Direct Deposit	1. Log into client's account 2. Click on **Taxes &Forms>Employee & Contractor Setup Forms** 3. Print the **Bank Verification Form** for each employee or contractor to be paid via direct deposit
☐Employer Setup Forms	1. Log into client's account 2. Click on **Taxes &Forms>Employer Setup Forms** 3. Print the necessary federal and state forms
☐Employee & Contractor Setup Forms	SurePayroll provides the necessary setup forms for each employee or contractor, once they have been added to the account. If you need blank forms beforehand, we have provided a few useful links below to help you get the forms directly from the government agency web sites.