

Switch Kit Checklist

The process of switching payroll providers doesn't have to be complicated and SurePayroll will help you with the process. Making the switch at the beginning of the year allows for a clean transition and ensures your payroll needs are met from the beginning of the year.

When you sign up with SurePayroll as your new payroll provider, you will need to provide both company and employee information.



Company Information

- Business Identification Numbers & Information
 - Federal [Employer Identification Number \(FEIN\)](#)
 - State withholding tax ID number
 - State unemployment insurance account number
 - Legal business name, address and business type
 - Bank account and routing numbers
- All payroll summaries for the current quarter (only if switching mid-quarter)

Employee Information

- Employee forms and information
 - E-mail addresses, mailing addresses, social security numbers
 - Federal (W-4) and state withholding tax forms
 - Former employee details for end-of-year W-2s
- Year-to-date gross pay for each employee
- Worker classification (W-2 or 1099-NEC)
- Payroll schedule (ex. weekly, bi-weekly, monthly) pending state laws
- Payment method (direct deposit, paper check)

[Ready to make the switch?](#)

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