

Firm Code: _____

Client Code: _____

Change of Address!!!

Employee Payroll Information

Use this worksheet for Employee setup/changes for Payroll Services

Client Name: _____

Accountant Name: _____

2. Employee Information:

First Name: _____ Last Name _____ Middle _____
 Address1 _____ City _____ County _____ State _____ Zip _____
 Address2 _____ City _____ County _____ State _____ Zip _____
 Date of Birth _____ Male Female SSN: _____ - _____ - _____

3. Employment Information:

Hire Date _____	<input type="checkbox"/> FUTA Exempt	Department _____	% _____
Last Review Date _____	<input type="checkbox"/> SUTA Exempt	_____	_____
Termination Date _____	<input type="checkbox"/> FICA Exempt	_____	_____
W-4 Date _____	<input type="checkbox"/> Covered by a Pension Plan	_____	_____
I-9 Date _____	Annual Salary _____		
W-5 Date _____	Hourly Rate _____		
<input type="checkbox"/> Salaried <input type="checkbox"/> Hourly	OT Rate _____ (If blank, will default to 1.5 X Reg)		
<input type="checkbox"/> Full Time <input type="checkbox"/> Part-time	Other Pay Rate _____		
	<input type="checkbox"/> Corp Officer <input type="checkbox"/> Seasonal <input type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt <input type="checkbox"/> Statutory Emp		
Pay Schedule _____	(Enter only if more than one pay schedule for Employer)		
Job Category _____	(Required for Worker's Compensation Reporting)		

4. Taxes:

Federal Filing Status _____	Exemptions: _____	Additional W/H: _____	
<input type="checkbox"/> W-4 Attached			
Unemployment State _____			
State 1 Withholding _____	State 1 Filing Status _____	State 1 Allowances _____	Additional W/H _____
Local 1 Withholding _____	Local 1 Filing Status _____	Local 1 Allowances _____	
Other 1 Withholding _____	Other _____		
State 2 Withholding _____	State 2 Filing Status _____	State 2 Allowances _____	Additional W/H _____
Local 2 Withholding _____	Local 2 Filing Status _____	Local 2 Allowances _____	
Additional Tax Information:			

5. Deductions:

From the pool of available deductions available at the Employer level, select the deductions to apply to each employee. If a start date is NOT entered, the deduction will begin with the next payroll period.

Deduction Name	Amount	% of Gross	% of Net	% Gross-Tax	Amt per Hr	Start Date	End Date	Goal	
1.									<input type="checkbox"/> Inactive
2.									<input type="checkbox"/> Inactive
3.									<input type="checkbox"/> Inactive
4.									<input type="checkbox"/> Inactive

6. Accruals:

Accrual Amt in Hrs	Accrual Period (circle one)	Start Date	Accrued Hrs	Used Hrs	Max Carryover	Unused Hrs
Vacation	Pay period, Monthly, Yearly					
Sick	Pay period, Monthly, Yearly					
Personal	Pay period, Monthly, Yearly					