

New employee checklist

Gather the following information about your client's employees prior to adding them to QuickBooks Online Payroll



Personal information

- Legal name
- Email address
- Address*
- Phone number
- Date of birth*
- Social Security number*
- Employment eligibility (use Form I-9 to verify this)

Payment details

- The employee's wages (salary, hourly, or commission)
- Their vacation/sick pay
- Payment method
- Bank details for direct deposit*
- Any fringe benefits

Employment details

- Employment status
- Hire date
- Pay schedule (including the date and frequency the employee is paid)
- Work location
- Job title
- Employee ID
- Workers' comp class

Tax withholding

- W-4 details*
- Federal status*
- State tax based on location (to determine employee withholding)
- Details of any exemptions*

Deductions and contributions

- Retirement plans
- Health insurance
- Garnishments

Multi-state

- Multi-state payroll is automatically enabled by QuickBooks Online Payroll based on employee addresses

*These details can be added by the employee via QuickBooks Workforce