



## Onboarding Checklist

### Company Tax Identification Numbers

- Federal Employer ID Number (FEIN)
- State Withholding Tax ID
- State Unemployment Tax ID and Rate
- Sign and Return 8655 (Reporting Agent Authorization)

### Setting Up the OnPay System

- Set up Pay Schedule
- Enter Employee Worksites
- Add Employees
- Add Additional Authorized Users (if applicable)
- Set Up Deductions (if applicable)
- Set up Custom Payroll Pay Items (if applicable)

### Preparing for First Payroll

- Verify ACH for Company Bank Account
- Complete Direct Deposit Setup
- Send in Prior Payroll Information (if applicable)
- Order Check Stock for Printing Checks (if applicable)

### Additional Items to Consider

- Establish Worker's Compensation Coverage
- Establish Health Benefits
- Order Compliance Posters
- Set up Payroll Accrual Policies