pinkpayroll

SWITCHING PAYROLL PROVIDERS

CHECKLIST

SWITCH PROVIDERS WITHOUT LETTING ANYTHING FALL THROUGH THE CRACKS.

- [ ] **Choose the right transition date**
  Decide when your current provider will stop processing payroll and your new provider will take over.
- [ ] **Discuss your payroll preferences with your new provider**
  Online payroll, employee online access, direct deposit, printed checks, and more.
- [ ] **Gather year-to-date payroll records**
  Collect employee wages, taxes, deductions, and other payroll totals already processed during the year.
- [ ] **Gather employee information**
  Confirm employee details, pay rates, tax elections, direct deposit information, and current employment status.
- [ ] **Review deductions and benefits**
  Make sure insurance, retirement, garnishments, and other deductions are transferred correctly.
- [ ] **Coordinate payroll tax filings**
  Confirm which provider will handle tax payments and filings during the transition.
- [ ] **Verify payroll tax account information**
  Confirm federal, state, and applicable local tax account numbers and filing information are accurate.
- [ ] **Transfer PTO balances**
  Make sure vacation, sick leave, and other applicable paid time balances carry over correctly.
- [ ] **Verify year-to-date payroll totals**
  Make sure wages, taxes, and deductions match your previous payroll records.
- [ ] **Review the first payroll before processing**
  Verify employee pay, taxes, deductions, direct deposits, and the pay date before submitting the first payroll.

THE RESULT: Your payroll records carry over, your setup is accurate, and your first payroll is ready to run.

Contact us at pinkpayroll.com/quote to get started or get more info