

# Enrollment

## Checklist

For an easy and seamless process please have the below information on hand before enrolling.

**IRS proof of FEIN and Legal Business Name (Any of the following will work)**

- IRS documentation dated within the last 3 years
- Most recently filed 941, 1120, or Schedule C
- Non-profit businesses need 501C3

*(The legal document must match exactly to the information in the online enrollment and on the signed enrollment documents.)*

**State Tax ID Numbers and SUI Rate**

- Most recently filed state quarterly return(s)

**Prior Wage History (If Applicable)**

- YTD summary from January 1st through the most recently closed quarter with each employee broken down from gross to net and each tax and deduction separated
- Payroll summary for each check date within the current quarter with each employee broken down from gross to net and each tax and deduction separated
- Include terminated employees if any

**Company Voided Check**

- The voided/cancelled check must have the company name and address on the check
- Can NOT be a starter check
- A current letter from the bank on bank letterhead will be accepted
- No deposit slips

**Appropriate Titles for Signing Enrollment Documents**

- S-Corp: Officer
- Corporation: Officer
- Limited Liability: LLC Member
- Sole Proprietor: Owner
- Household: Owner

