



## Checklist for Getting Started with Payroll

- Gather Your Documents**
  - CRA number
  - Employee profile information
    - Address, bank details, pay rates, vacation etc.
  - Last payslips from previous payroll service (this will contain your YTD numbers)
  - TD1 forms for employees
  - Per payrun premium amounts per employee for any benefits/deductions
    - Ask us if you need help with this!
- Complete Epay forms-** complete and send these in while you work on the other stuff. You can download the form here:
  - <https://www.paymentevolution.com/ePay>
- Benefit/Deduction Discovery**
  - Speak to your accountant/bookkeeper or benefits provider about the tax implications for any benefits/deductions you use for your employees
  - Write what you find out down, you will need it later.
- Accounting integration**
  - Do you need to add items to the Chart of Accounts in your accounting program that you need to integrate?
  - If yes, speak to your accountant/bookkeeper to find out what they want for reporting
- Set up company**
  - Payroll Options
    - **Hint\*** if you will be setting up an integrated accounting program, fill out the GL with the numbers you want to report on the PE side only.
  - Pay Rules
    - Create the benefits/deduction rules for the company
    - <https://help.paymentevolution.com/hc/en-us/articles/115002217823-Q-Can-I-create-custom-deductions-benefits->
  - Add-ons- connect your accounting integration- make sure you complete the setup guide
- Add employees**
  - Personal information- use an email so they can access paychequer easier
  - Don't forget the vacation settings
  - Tax details- the GL code allows you to departmentalize
  - TD1 values are dollar values
  - Benefits/deductions
    - This is where you apply those per pay premiums to each employee.
  - YTD- add these before first payrun from the last payslip you gathered in step 1
    - If your payslips do not include Federal and provincial taxes broken down, put the full amount in Federal Tax
- Ready to run!**
- Need more help? See our FAQ or help pages here:** <https://help.paymentevolution.com/hc/en-us>



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