

Simplified Checklist for Getting Started with Payroll

**If you are moving from another provider part way through the year you MAY want to have them send interim ROEs for your employees, if you have a high turnover rate, to avoid manual adjustments later.

- **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
 - 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.
 - Calculate your per payrun premium amount for any premiums paid monthly
 - Example: Health benefits are \$100/month. You pay Bi-weekly. Your per payrun calculation is
 - $100 * 12 = 1200$ /yearly
 - $1200 / 26 = 46.15$ per payrun
- **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