New Client Set up Check List *(company)*_____

Data Compilation & Hand-Off:

_____ New Client Transition Sheet Completed by sales contact
_____ Data reviewed and verified by set up staff - -questions addressed to sales contact/client
_____ Sales contact & Set up staff have discussion regarding client needs & expectations
_____YTD information has been received
_____Employee Data has been received
_____ Prior Quarter Returns are retained
_____ ASAP Forms & IRS RAF signed & returned

Software Setup & Review:

_____ Evo Client is Created based on New Client Transition Sheet
_____ Employees are imported into Evo
_____ 2nd Person Review of Company Set up
_____ 2nd Person Review of Employee Data comparison

Tax Staff Review:

_____ RAF Form Submitted to IRS
_____ Company Exemptions & UI Rate confirmed
_____ Earnings/Deductions set up confirmed
_____ Enrolled in EFTPS
_____ UI-100 & CR-100 are completed *if applicable*

YTD Data Entry & Tax Confirmation:

_____ YTD Data is entered per prior quarter & per payroll in current quarter
_____ 2nd Person Review of Evo YTD versus Client YTD Data
_____ Review of client quarterlies versus Evo quarterlies for prior quarters
_____ Client is provided with Employee Profiles Report, YTD Data Entry reports
_____ Client acknowledges responsibility for YTD tax payments and filings.
_____ Any Outstanding Liabilities Impounded after acknowledgment by client

Finishing Touches:

_____ Account Manager final Review of New Client Transition Form & Sales contact's notes
_____ Staff discussion regarding client needs & expectations
_____ Client Provided Instructions for first payroll run including timesheet

First Payroll Run:

_____ Review of Payroll Data submitted by client for processing
_____ Call or Email sent to re-confirm with Client all is understood & final questions if any
_____ Reports reviewed after processing & adjusted if applicable