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Set-Up Checklist

1. Completed & Signed Form 8655 – Reporting Agent Authorization
2. Completed & Signed Form 2848 – Power of Attorney & Declaration of Representative
3. Signed Basic Pay Payroll Tax Processing Agreement
4. New Client Enrollment Form
5. Voided Company Business Check
6. Federal Tax ID Number (EIN) – This can be obtained from a Quarterly report, 8109 deposit coupon, an SS-4, or any document from the IRS showing your company name and ID #.
7. State Unemployment Rate and ID number – This can be found on a Quarterly report or state unemployment form.
8. Active employee list with the following information:
 - a. Name
 - b. Address
 - c. Rate of Pay (i.e. Hourly, Salary per Process, or Annual Salary)
 - d. Social Security Number
 - e. Marital Status
 - f. Exemptions
 - g. Work State
 - h. Completed W-4 (this should be retained on file by the employer)
9. Quarter to Date and Year to Date earnings of all employees including all tax deposits made to the IRS, state, and local agencies (if applicable).
10. For Direct Deposit, please have each employee complete the direct deposit form and provide a voided check or bank letter confirmation routing/ABA number and bank account number.
11. Check signing – please fill out the Check Signature form.