

New Gusto client checklist

(NO PREVIOUS PAYROLL PROVIDER)

Step 1: Company information

- | | |
|---|---|
| <input type="checkbox"/> Company name | <input type="checkbox"/> Phone numbers |
| <input type="checkbox"/> Company trade name | <input type="checkbox"/> Filing addresses (if different from mailing address) |
| <input type="checkbox"/> Mailing address | <input type="checkbox"/> Fax numbers |

Step 2: Add employees

- | | | | |
|--|--|--|---|
| <input type="checkbox"/> Name | <input type="checkbox"/> Date of birth | <input type="checkbox"/> Home address | <input type="checkbox"/> Social security number |
| <input type="checkbox"/> Hire date | <input type="checkbox"/> Compensation | <input type="checkbox"/> Title (optional) | <input type="checkbox"/> Email address (optional) |
| <input type="checkbox"/> Federal withholding allowance | <input type="checkbox"/> Federal filing status | <input type="checkbox"/> State filing status | |
| <input type="checkbox"/> State withholding allowance | <input type="checkbox"/> Bank account number | <input type="checkbox"/> Bank routing number | |

Step 3: Federal tax setup

- | | |
|--|--|
| <input type="checkbox"/> Employer identification number (EIN) | <input type="checkbox"/> Tax deposit schedule (semi-weekly or monthly) |
| <input type="checkbox"/> Employer's federal tax return (941-quarterly or 944-annual) | |

Step 4: State tax setup

Varies by state: please check with our [state tax registrations](#) page

Step 5: Bank account setup

Company bank account number

Company bank routing number

Step 6: Configure payroll schedule

Weekly

Every other week (bi-weekly)

Twice-per-month (semi-monthly)

Monthly

Step 7: Set-up a company signatory to sign forms on behalf of company

Step 8: Verify bank account

Gather the two small test deposits Gusto sends to your employer bank account

You're Finished!