



GUSTO PAYROLL SETUP WORKFLOW - NO PREVIOUS PAYROLL

Send questionnaire: Gusto Payroll Setup Questionnaire - No Previous Payroll

Gather any additional information from client not included in questionnaire

Create a new Gusto payroll account

Setup company name and information

Input all company locations

Add all employees

Complete the Federal Tax setup

Complete the State Tax setup

Setup the company's bank account

Configure the payroll schedule

Setup a company signatory to sign forms on behalf of company

Verify bank account



GUSTO PAYROLL SETUP QUESTIONNAIRE - NO PREVIOUS PAYROLL

Below is a checklist of things to provide in order for us to get started. You may have already provided most or all of the information, but just to be on the safe side, please check off the boxes that apply, fill in any blanks, and return this list to us as soon as you can.

Have you completed the New Client questionnaire? If not, please do so by copying and pasting the following link into your browser:

Yes No

I have completed the following:

Review Gusto payroll demo video

Provide last quarter of payroll reports for identification of account numbers for payroll conversion process (if applicable)

STEP 1: COMPANY INFO

Your Name

Company Name

Phone Number

Fax Number

Email

Mailing Address

Filing Address

(if different from
mailing address)



GUSTO PAYROLL SETUP QUESTIONNAIRE - NO PREVIOUS PAYROLL (continued)

STEP 2: ADD EMPLOYEES

Number of employees on the payroll

Please provide us with the following for EACH employee

Name

Hire date

Compensation (hourly or salary)

Title (optional)

Email address (optional)

STEP 3: FEDERAL TAX SETUP

Employer Identification
Number (EIN)

Tax deposit schedule

Semi-weekly

Monthly

Employer's Federal Tax Return

941-Quarterly

940-Annual

STEP 4: STATE TAX SETUP

What state(s) will you be filing in?

Have you setup already?

Yes No

If yes, what is the number for the state withholding?

If yes, what is the number for state unemployment?



GUSTO PAYROLL SETUP QUESTIONNAIRE - NO PREVIOUS PAYROLL (continued)

STEP 5: BANK ACCOUNT SETUP

Company bank account number

Company bank routing number

STEP 6: CONFIGURE PAYROLL SCHEDULE

Weekly

Twice per month (semi-weekly)

Every other week (bi-weekly)

Monthly

Please provide the date or day of the week you would like payroll to be deposited into employees bank accounts (pay day)

Does client have a vacation policy? Yes No

If yes, please describe client's vacation policy for payroll setup purposes? (Optional)

Does client have a sick days policy? Yes No

If yes, please describe sick policy for payroll setup purposes? (Optional)

Does client have a PTO policy? Yes No

If yes, please describe PTO policy for payroll setup purposes? (Optional)

STEP 7: SET UP A COMPANY SIGNATORY

Setup signatory to sign forms on your behalf (this will be done for the client by
and client will review forms and sign)

STEP 8: VERIFY BANK ACCOUNT

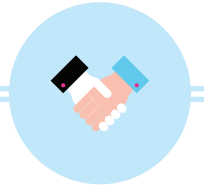
Find the 2 small deposits Gusto sends to the bank account

Verify client bank account by confirming the amount of the (2) deposits

Yes No

Finished! I'm awesome!





YOU HAVE RECEIVED A NEW CLIENT QUESTIONNAIRE - EMAIL TEMPLATE

Subject: You have received a questionnaire

Hello [INSERT FIRST NAME],

Thanks again for taking the time to stop by [INSERT YOUR COMPANY NAME]! Please kindly complete this questionnaire, which will help us get a better understanding of your company and your needs.

I look forward to speaking with you and getting your accounting records in tip-top shape. [INSERT YOUR TAG LINE].

Sincerely,

[INSERT NAME], Owner
[INSERT COMPANY NAME]
[INSERT PHONE NUMBER]
[INSERT WEBSITE]

