New Employee Add Requirements

Employee Details:

Name: [Full Name]
Position: [Job Title]
Start Date: [Start Date]
Monthly Salary: [Salary Amount]

To proceed with adding the new employee to the payroll, we kindly request the following documents and information:

1. **Employee Information Form**: Please provide the employee's complete information, including their full name, address, contact details, emergency contact information, and any other relevant personal details required for payroll processing.

2. **Tax Forms**: The new employee must complete all the necessary tax forms, such as the W-4 (for U.S. employees) or their respective country's tax declaration form. These forms are crucial for calculating the appropriate tax deductions.

3. **Bank Details**: Obtain the new employee's bank account information to facilitate direct deposit. Please ensure that the bank details are accurate to prevent any payment delays.

4. **Employment Agreement**: Ensure that the employee has signed their employment agreement, which should include their job title, start date, salary, benefits, and any other relevant terms and conditions of employment.

5. **Identification Documents**: Request copies of the employee's identification documents, such as a passport or driver's license, to verify their identity and comply with legal requirements.

6. **Work Authorization** (if applicable) **: If the new employee is a foreign national, ensure that they have the necessary work authorization or visa to work in the country.

7. **Benefits Enrollment**: If applicable, provide the employee with information regarding our benefits package and assist them in enrolling for health insurance, retirement plans, or any other available benefits.

8. **Payroll System Access**: Grant the employee access to the payroll system and ensure they receive the necessary training to understand how to use it effectively.

Please complete the above steps as soon as possible to ensure that the new employee's salary is processed correctly and that they receive their payment on time. If you encounter any difficulties or have any questions during the onboarding process, please do not hesitate to reach out to me for assistance.

Thank you for your prompt attention to this matter. We look forward to welcoming your new team member and ensuring a seamless transition onto the payroll system.

New Employee Form

Please make sure all fields are accurately completed and printed legibly. Missing or misread data can result in payroll delays.

Client Name

Client name

Employee Information (Attach W-4, and Picture ID: Current DL or Permanent Resident Card)

Last name   First name   MI   Employee #   Date of birth

Social security number   Date of hire   Pay rate
                                              ☐ Salary *(per pay period)*
                                              ☐ Hourly

Address

City   State   Zip code

Disable	☐ Yes ☐ No
US Vet	☐ Yes ☐ No

Personal Email is needed to receive paychecks and W-2's electronically

Phone Number

Bank Information (If you want your pay direct deposited)

Account #1   **Account #2**

Bank name   Bank name

Bank routing number (ABA #)   Bank routing number (ABA #)
          ☐ Checking ☐ Savings   ☐ Checking ☐ Savings

Account #   Account #

Deposit (amount or %)   Deposit (amount or %)

attach a voided check for each account here

Authorization and Disclaimer

Employee's signature   Date

_____   _____

Employer's signature

_____

I, the above named employee, authorize my employer as named above to initiate direct deposits into my personal account of the net pay for my salary on the scheduled pay dates. I, the above named employee, *also* authorize my employer and/or my bank as named above to **withdraw any funds** that were inadvertently deposited into my account and/or any amount that was more than the net pay. This authorization will be in effect until my employer receives a written termination notice from myself and has two weeks to put into effect.