

Rapp It Up Solutions

Enrollment Process Requirements Checklist

Thank you for choosing Rapp It Up Solutions. We are excited about serving you as a customer. It is our goal is to make the enrollment process as painless and easy as possible.

We are asking for the following information because

1. The government requires us to collect most of it
2. We take processing your payroll and payroll taxes very seriously.

Requirements Checklist - We require the following:

Information: *(see attached set-up sheets or enroll online)*

- ❑ **Company Set-Up** – This provides the basic information necessary to process your payroll, pay employees and file taxes *(1 page)*
- ❑ **Employee Set-Up** - This provides information for tax calculations, direct deposit and year-end W-2s. *(1 page)*

Forms: *(Forms attached)*

- ❑ **Signed IRS Form 8655** – This allows us to file your Quarterly and annual payroll tax returns (e.g. 940 & 941s) *(2 pages)*
- ❑ **Signed IRS Form 2848** – This gives us the Power of Attorney to pay and file your Federal payroll taxes *(2 pages)*
- ❑ **Payroll Services Agreement (PSA)** – This allows us to take funds from your account to pay taxes and direct deposit employees. *(3 pages)*
- ❑ **Deposit Account Verification (DAV)** – This is for your protection and allows us to verify that you have authorized access to the bank account provided *(1 page)*
- ❑ **State Power(s) of Attorney** - This allows us to pay and file your State Unemployment taxes, state income taxes and any other applicable state payroll related taxes *(3 pages)*

Reports: *(to be provided by you)*

- ❑ **Quarter to date and year to date Payroll information** - This allows us to accurately calculate your payroll taxes and year-end W-2s. We need the employee level details. Reports from other payroll companies are acceptable. This does not apply to a new business running payroll for the first time.
- ❑ **Proof of Federal Identification Number (FEIN)** – This allows us to accurately set-up your account for tax filing with the government. This must be from the IRS and have the FEIN number, your company's legal name and address.

