

NEW CLIENT ONBOARDING CHECKLIST

For ALL Businesses (new or existing):

- Federal Employer Identification Number (FEIN)
- State Withholding Tax ID (for IL employers, this is the same number as their FEIN). Fill out a State Withholding Application Form.
- State Unemployment ID (SUI) and rate
 - o for new businesses, fill out this portion as “applied for” on the state withholding application
 - o for an existing business this can be found on their UI 340 (IL SUI Return)
- Voided Business Check
- Business Phone and email address
- Employee Information
 - o Name
 - o Address
 - o SSN
 - o Marital Status
 - o Number of Dependents
 - o Hire and Birth Date
 - o Rate of Pay (hourly rate or salary amount)
 - o Routing and account information if employee wants direct deposit

Additional Information for EXISTING Businesses:

- **Federal 941**
- **State 941**
- **UI 340 (IL SUI Return)**
- **Year-to-Date totals with tax breakdown per employee**
- **Quarter-to-Date totals**
- **Payroll packet/Payroll Journals for All April Wages paid.**