Your account setup will be easier if you gather this information ahead of time:

1. **Company Location Information**
   - Your business mailing address
   - Any additional location addresses

2. **All of your tax ID numbers, including:**
   - Your federal employer identification number (EIN)
   - Your state income tax ID number
   - Your local tax ID numbers *(if applicable)*

   New Employers: Please check out our state specific help on getting started.

3. **Your state unemployment *(SUTA)* account number and SUTA rate for your company.**

   *Your state unemployment agency will send you a notice with your rate.*

4. **Paying your employees with direct deposit?**
   - Upload a copy of your **commercial/business** bank account statement. Unfortunately we can't accept a personal bank account for the withdrawal of employee direct deposit.
   - We will instantly verify your business bank account you want to use for direct deposit.

5. **All employee information*, including:**

   **This can be found on the W-4 form filled out by your employees.*
   - Names
   - Addresses
   - Social Security numbers
   - Tax filing status
   - Details on current deductions & company paid contributions

6. **The pay rate and pay frequency *(weekly, biweekly, etc.)* for all employees.**

7. **All payroll registers for the current year, by pay date.**

8. **All employer taxes for the current year, by pay date.**

9. **Copies of all tax filings for the current year *(i.e. 941, state & local tax returns, SUTA).***

## Be prepared to enter the following, in order for us to handle your payroll tax collections, deposits, and filings.

### (1) Your Tax Deposit Frequencies

- How often your federal, state, and local (if applicable) taxes are due (e.g. semi-weekly, monthly, quarterly, etc.)

### (2) Your Banking Credentials for Tax Payments

- Upload a copy of your **commercial/business** bank account statement. Unfortunately we can't accept a personal bank account for the withdrawal of payroll taxes.
- We will instantly verify your business bank account you want to use to pay your payroll taxes.

### (3) Complete Tax Authorization Forms

You will need to authorize us to handle your taxes.

- **Federal Tax Authorization:** The federal IRS Form 8655 will be pre-filled with your information, and you will electronically sign after we verify your personal identity. You also have the option to manually sign a hardcopy of the form and upload back to us, along with a copy of your government-issued ID (drivers license, state ID card, or passport).
- **State Tax Authorization:** Some states require third party authorization forms. You may see state-specific instructions for logging in your online state tax account that gives us permission to file state taxes on your behalf.

### (4) Select the date to begin the Tax Filing Service

Determine the exact date that you want us to start handling your taxes. Look in your records to confirm which taxes have already been collected, deposited, and filed, and which have not.

# Company Information Sheet

Company Name | Phone Number

Physical Address

Type of Ownership (LLC (Single Member), LLCA (Corporation), Partnership, Sole Proprietor

**Owner Information**

Last Name, First, Middle | Title | % of Ownership

Principal Duties

Social Security Number

Last Name, First, Middle | Title | % of Ownership

Social Security Number

**Describe Business Fully:**

**List by class a description for employees (carpenter, laborer, etc.)**

Work Description | # of Employees | Estimated Annual Wages $

Work Description | # of Employees | Estimated Annual Wages $

12701 W. Elm Street – Surprise, AZ 85374 / PO Box 1400 – Surprise, AZ 85378-1400
Phone: (623)-583-0113 / Fax: (623)-583-4451 / Email: payroll@azatwork.com

# Payroll Control Sheet

**COMPANY:** ______________________________ EIN: ____________________
Owner: ____________________________ SSN/EIN: ________________ % __________
2nd Owner: __________________________ SSN/EIN: ________________ % __________
Referred By: ____________________ Rep: ____________________ Letter Sent: _________

Address: ________________________City: _______________ State: _____ Zip:________
Phone: ____________ Fax: ____________ Other: ____________ Web Site: ______________

Weekly: _____ Bi-Weekly: _____ Monthly: _____ Other: ______ Type of Business: ______________
Check Day: ______________ # Of Employees: __________ # Of *(DD): _______

State Tax Id# ____________________ SUTA #: ____________ SUTA Rate: ________
Form 8655 ______________ Copy of Drivers License, State ID card or Passport _________

ACH: ________ Hard Check: __________ Other: ___________
Bank for Collections: _________________ Acct #: _________________ Routing #: ______________
Pre Note Date: ___________ Start Date: _____________ ID: _________________ Notice: __________
Payroll Period Start Date: _____________ Payroll Period Term Date: ______________
Date Of Termination: _______________ Reason: _______________________________________
Closed Out: ________ Employees: ________ Peachtree: _________ Excel: ______ Act: _____

**Contact Names For Payroll and/or Other Issues:**

1ST ______________________________ Title: ____________________ Notes: ____________
2nd ______________________________ Title: ____________________ Notes: ____________
3rd ______________________________ Title: ____________________ Notes: ____________
Special Notes: _______________________________________________________________

**Prior Payroll Info:**

**Pay rates _____________ Registers ______ Dates _____ All Taxes by pay date ______ copies of tax fillings CURRENT year (i.e. 941, state & local tax returns, Suta).___________**
Special Notes: _______________________________________________________________

**Preferred Method Of Receiving Payroll Totals:**

_____ **Phone** Phone #______________________________ Leave Message: YES / NO
_____ **Fax** Fax #________________________________ Cover Page: YES / NO
Attn: ________________________________
_____ **E-Mail** Email Address__________________________
_____ **Other** Special Notes: _______________________________________________

**Preferred Method To Receive Checks**

Mail To Company _____ Mail To Employees _____ Pick Up ____ Drop Off ____ Other _________
Special Notes: _______________________________________________________________

**Notes:**

_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

# Electronic Collection Consent Form
# For 3rd Party Payroll Collection

I give my consent to Unified Services I, Inc. to credit my account for the indicated payroll basis, Weekly [ ] or Bi-Weekly [ ], for payroll purposes.

Bank Name________________________________________

Checking Account [ ]    Savings Account [ ]

Routing Number______________________________________

Account Number______________________________________

This authority is to remain in full force and effect until Unified Services I, Inc. has received written notification from me of its termination in such time and in such manner as to afford Unified Services I, Inc., and depository, a reasonable opportunity to act on such notification.

Lessee Name__________________________ SSN/EIN____________________

Lessee Signature________________________________ Date:____________

## STAPLE VOIDED CHECK HERE