



New Client Information Form

Company Information			
Employer Legal Name			
Employer DBA Name			
FEIN		Applied for Date	
Previous HCM System		Access to System?	
Filing Type	<input type="checkbox"/> 941	<input type="checkbox"/> 943	<input type="checkbox"/> 944

Primary Address (printed on check)				
Street Address				
Street Address				
City		State		Zip
Phone Number			Time Zone	

iSolved Services

Time Keeping
 Benefits/Open Enrollment
 Onboarding

Authorized Contacts – All Access

The following people will be provided full Client User access to all applicable roles.
Modified access accounts will be created per request those listed below.

First Name		Last Name	
Title			
Email Address			
Contact Type	<input checked="" type="checkbox"/> All Access	<input type="checkbox"/> W3	<input type="checkbox"/> Primary
Primary Phone		Alternate Phone	

First Name		Last Name	
Title			
Email Address			
Contact Type	<input checked="" type="checkbox"/> All Access	<input type="checkbox"/> W3	<input type="checkbox"/> Primary
Primary Phone		Alternate Phone	

First Name		Last Name	
Title			
Email Address			
Contact Type	<input checked="" type="checkbox"/> All Access	<input type="checkbox"/> W3	<input type="checkbox"/> Primary
Primary Phone		Alternate Phone	

Work Locations					
<i>Please list the address of each home and office location for which you have employees working</i>					
Street Address	City	State	Zip	County	Time Zone

Tax Information				
Jurisdiction	Withholding ID	WH Payment Freq.	Unemployment ID	Rate
<i>State or Locality</i>		<i>Weekly, SemiWkly, Monthly, Qtrly</i>		

Bank Account Information				
Account Name				
Routing Number		Account Number		
Starting Check #		Logo on check?	<input type="radio"/> Yes	<input type="radio"/> No
Use Account for:	<i>mark all that apply</i>	<input type="checkbox"/> Taxes	<input type="checkbox"/> Fees	<input type="checkbox"/> Checks <input type="checkbox"/> EE Direct Deposit

Deduction Codes			
Code	Title (appears on paystub)	Description	Taxability
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post
			<input type="radio"/> Pre <input type="radio"/> Post

Deferred Compensation			
<input type="checkbox"/> 401(k)	<input type="checkbox"/> 401(k) Roth	<input type="checkbox"/> 401(k) Loan	<input type="checkbox"/> 401(k) Simple
<input type="checkbox"/> 408(p) SIMPLE IRA			
Other (please list):			
Company Match	<input type="radio"/> Yes <input type="radio"/> No	Would you like us to track the match?	<input type="radio"/> Yes <input type="radio"/> No

Do you offer Group Term Life? Yes No

Do you have a Paid Time Off policy? Yes No

Organization Values

Please list all categorical values your company uses with regard to employee organization (such as locations, departments, benefit classes, jobs, etc.)

Title	Values
<i>(ex. Department)</i>	<i>(Sales, Admin, Production)</i>

Earning Codes			
<i>Please check all that apply; add any additional codes below</i>			
<input type="checkbox"/> Regular	<input type="checkbox"/> 1099	<input type="checkbox"/> Commission	<input type="checkbox"/> Bonus
<input type="checkbox"/> Shift Differential	<input type="checkbox"/> PTO	<input type="checkbox"/> Holiday	<input type="checkbox"/> Expense Reimbursement
Additional Earnings	Taxability		Pay Out
	<input type="radio"/> Taxable	<input type="radio"/> Non-taxable	<input type="radio"/> Paid <input type="radio"/> Nonpaid
	<input type="radio"/> Taxable	<input type="radio"/> Non-taxable	<input type="radio"/> Paid <input type="radio"/> Nonpaid
	<input type="radio"/> Taxable	<input type="radio"/> Non-taxable	<input type="radio"/> Paid <input type="radio"/> Nonpaid
	<input type="radio"/> Taxable	<input type="radio"/> Non-taxable	<input type="radio"/> Paid <input type="radio"/> Nonpaid
	<input type="radio"/> Taxable	<input type="radio"/> Non-taxable	<input type="radio"/> Paid <input type="radio"/> Nonpaid
	<input type="radio"/> Taxable	<input type="radio"/> Non-taxable	<input type="radio"/> Paid <input type="radio"/> Nonpaid

Pay Group Information	
Payroll Frequency	<input type="radio"/> Weekly <input type="radio"/> Bi-Weekly <input type="radio"/> Semi-Monthly <input type="radio"/> Monthly
Pay Period Start/End Dates	
First Payroll Check Date	

If your check date falls on a weekend or holiday, would you like your check date moved to:

Previous Business Day Next Business Day

Additional Pay Group Information	
Pay Group Name	
Payroll Frequency	<input type="radio"/> Weekly <input type="radio"/> Bi-Weekly <input type="radio"/> Semi-Monthly <input type="radio"/> Monthly
Pay Period Start/End Dates	
First Payroll Check Date	

Payroll Delivery Information				
Deliver on:	<input checked="" type="radio"/> Pay Date		<input type="radio"/> Day Prior to Pay Date	
Deliver to:	<input type="checkbox"/> Primary Address	<input type="checkbox"/> Delivery Address	<input type="checkbox"/> Split-Wrap	
Street Address				
City		State		Zip
Special Instructions:	 [Frequency] / PD - [pay day]			
Year End:	<input checked="" type="radio"/> Individual Mail-out		<input type="radio"/> Bulk Delivery	

General Questions

Do you have a Pay-As-You-Go Workers' Compensation Policy? Yes No

Will you need your General Ledger set up in iSolved? Yes No

If yes, please provide your Chart of Accounts, copy of your latest journal entry, and any GL rules associated with payroll

Do you have a time and attendance provider or POS system? Yes No

Name of current provider/POS system:

Additional Notes: