



CheckMark, Inc.
 323 W Drake Rd, Ste. 100
 Fort Collins, CO 80526
 Phone: 970-225-0522 - Fax: 970-225-0611
 Email: payrollservices@checkmark.com

Company Setup/Change Forms

Company Name _____	Client # _____	Date _____
Set Up	<input type="checkbox"/> New	<input type="checkbox"/> Change (only need to update information that changes)
Type of Payroll Service	<input type="checkbox"/> Pay & File Complete	<input type="checkbox"/> Pay & File Pro <input type="checkbox"/> Basic
Pay Frequency _____	First Payroll Run Date _____	

Company Name _____ DBA _____ use on forms

Address Line 1 _____ Address Line 2 _____

City _____ State _____ Zip _____

Executive Contact _____ Title _____

Work # _____ Cell # _____ Fax # _____

Email _____

Payroll Contact _____ Work # _____ Fax # _____

Email _____

After Hours Contact _____ Cell # _____ Alternate # _____

Billing Options: Credit Card ACH (Complete appropriate form for payment)

Payment Options:

Direct Deposit Pay Card CheckMark Checks PDF Checks (Provide a voided company check)

If CheckMark Checks is selected, do you want a signature file created? Yes No (If yes, fill out Signature Scan

Form – Extra fee will apply)

If CheckMark Checks is selected, where will checks be sent? Company (overnight charges will apply) Employee

Will CheckMark be signing your quarterly forms? Yes No (If yes, complete Form 2848 Power of Attorney and Form 8655 Reporting Agent)

Year-end W2s: none Printed W2s e-file W2s

Year-end 1099s: none Printed 1099s e-file 1099s

Federal Reporting Information (Please attach a copy of the IRS frequency notification)

Fed ID # _____

Federal Filing Status Semi-weekly Monthly

Federal Unemployment Tax (FUTA) Exempt Taxable

Will CheckMark be filing Federal Tax Forms? Yes No (If yes, list forms below and provide copies from current and prior year)

State Tax Information

State Unemployment Tax (SUTA) Exempt Taxable

How many states do you process payroll in? _____ (Complete State Tax Set Up form)

Will CheckMark be filing State Tax Forms? Yes No (If yes, list forms below and provide copies from current and prior year)



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Local Tax Information

Do you have a local tax deduction? Yes No **(If yes, complete the Local Tax Set Up form.)**
 Will CheckMark be filing Local Tax Forms? Yes No **(If yes, list forms below and provide copies from current and prior year)**

Department Information

Do you process payroll using departments? Yes No **(If yes, complete the Department Set Up form.)**

Wage Information

Wages are calculated for payroll by Hour Salary Both
(If hour or both is selected, complete the Hour Category set up form.)

Additional Income Information

Do you have additional income categories other than wages? Yes No
(If yes, complete the Additional Income Category set up form.)

Deduction Information

Do you have deduction categories other than federal, social security, Medicare, state and local taxes? Yes No
(If yes, complete the Deduction Category set up form)

Employee Information

Complete an Employee Set Up form for each employee. **Please provide a copy of each W-4, garnishment orders and YTD earning for each employee.** (YTD Earning are only required if this is a mid-year setup for payroll)

Payees Information

Will CheckMark be providing payment for taxes and/or deductions? Yes No
(If yes, complete the Employer Payees Set Up form.)

Accounting Information

Will CheckMark be providing you a posting summary file or report? Yes No
(If yes, complete the Ledger Account Set Up form or attach a chart of accounts.)

<i>In-house Use only:</i>		Date _____
Salesperson _____	Payroll Specialist _____	
Type of Service: <input type="checkbox"/> Pay & File Complete	<input type="checkbox"/> Pay & File Pro	<input type="checkbox"/> Basic
Billing: <input type="checkbox"/> Credit Card	<input type="checkbox"/> ACH	
Payment: <input type="checkbox"/> Direct Deposit	<input type="checkbox"/> Pay Card	<input type="checkbox"/> CheckMark Checks <input type="checkbox"/> PDF Checks
Signature File: <input type="checkbox"/> Yes	<input type="checkbox"/> No	
Federal: <input type="checkbox"/> 941 <input type="checkbox"/> 943 <input type="checkbox"/> 944		
State: _____	Locality _____	
Year-end W2s: <input type="checkbox"/> none	<input type="checkbox"/> Printed W2s	<input type="checkbox"/> e-file W2s
Year-end 1099s: <input type="checkbox"/> none	<input type="checkbox"/> Printed 1099s	<input type="checkbox"/> e-file 1099s