

The following steps will outline the enrollment process for Accentrix Solutions payroll. Please complete the following directions and contact us with any questions. All forms have been provided.

- 1.** Review and sign our proposal
- 2.** Review and sign the engagement letter – Please ask if anything is unclear. We recommend you keep a copy for your records.
- 3.** Fill out Employer Information Sheet – If you are unsure of an answer, let us know and we will do our best to advise you.
- 4.** Fill out Employee Information Sheet – An employee information sheet should be filled out for EACH employee. Any special instructions or information regarding an employee should be written in the “Notes” section. Each employee who requests direct deposit will also need to fill out a Direct Deposit Authorization form.
- 5.** Provide all prior payroll information – This is to ensure that all future payroll tax returns and W-2s are completed properly. These should include:
  - Payroll journals for each pay period
  - A year-to-date report of all payroll processed this year
  - All payroll tax returns processed this year
  - A quarterly payroll reporting of each payroll processed this year.

**Note:** These reports should include all active and terminated employees that have received payroll this year. If your current payroll system has these reports available online, we will gather this information for you (if you so choose). Additional reports may be required depending on the complexity of your payroll. If additional information is required, we will communicate these needs.

- 6.** Confirm Test Deposit – Once you have provided your banking information from the account you wish your employees to be paid from and your tax deposits to be drawn from, our system will make a test withdraw and deposit. Once you see this transaction in your account, please let us know.
- 7.** Sign Form 8655 – This form allows us to make tax deposits on your behalf.

**Sign and return all forms to our office by either scanning and emailing to: [info@accentrixsolutions.com](mailto:info@accentrixsolutions.com) or by faxing to (805) 233-7021.**

If there are any steps that cannot be completed or you need help completing, please contact our offices and we will do our best to accommodate.