

Getting Started with Zenefits Checklist

HR

- ✓ Company Details (EIN, Legal Name, Legal Address)
- ✓ Employee Demographic Information

Payroll

- ✓ Company Pay Schedule
- ✓ Detailed Payroll Journal with earnings and deductions*
- ✓ Year to Date Payroll History*
- ✓ Federal and State Tax Reports
- ✓ Quarterly Wage & Tax Report (941)
- ✓ Company Bank Account
- ✓ Copy of Voided Check

Benefits

Note: The following documents must be provided for each plan offered by the company.

- ✓ Summary of Benefits & Coverage
- ✓ Rate Sheet
- ✓ Invoice
- ✓ Contract and/or Renewal Packet
- ✓ Waiting Period for New Hires
- ✓ Employer Contribution for Employees and Dependents

* If switching payroll providers at the start of a new quarter, Zenefits requires a detailed journal for each closed quarter in the current year. If switching payroll providers mid-quarter, Zenefits requires a detailed journal for each individual pay run in current quarter and a detailed journal for each closed quarter in the current year.

