



NEW CLIENT-EMPLOYER CHECKLIST

- Client Service Agreement (CSA) with Customer Certification
Signed by Authorized Representative
- Power of Attorney forms: Taxes (2848) Reporting Agent (8655) Work Comp
- ACH Authorization Form and Payment Agreement
- Employee Wage/Work Comp List Completed
- ORS/Garnishment and Special Projects Form completed
- Workers Compensation Information (need both) Dec Page _____ Certificate _____

EMPLOYEE PACKET CHECKLIST

- I-9 Forms Fully Completed AND Signed for ALL Employees
- W-4 Forms Fully Completed AND Signed for ALL Employees
- Direct Deposit Forms Completed AND Signed for ALL Employees
- Signed Employee Application/Co-Employer Acknowledgement form for ALL Employees
- Signed Employee Handbook Acknowledgement