

# Client Services Setup

## INSTRUCTIONS

Along with this page and the Payroll Processing Setup page, the following items should be submitted for your new client:

- 1) Voided check/bank letter (as indicated in the Primary Banking Information section below)
- 2) Signed Payroll Service Agreement (PSA)
- 3) Completed and signed Form 8655
- 4) IRS verification of client's Federal Employer Identification Number (FEIN)
- 5) Verification of each applicable state tax account number and/or rate

## COMPANY DEMOGRAPHICS (Items in BOLD are required)

**Legal Name :** \_\_\_\_\_

**DBA :** \_\_\_\_\_

**Address :** \_\_\_\_\_

**City :** \_\_\_\_\_ **State:** \_\_\_\_\_ **Zip:** \_\_\_\_\_ - \_\_\_\_\_

**Phone :** \_\_\_\_\_ **Fax :** \_\_\_\_\_

**FEIN :**   -

**Entity Type :** \_\_\_\_\_

## PAYROLL PROCESSING SERVICES

**Contact 1 :** \_\_\_\_\_

**Phone :** \_\_\_\_\_

**Email :** \_\_\_\_\_

**Contact 2 :** \_\_\_\_\_

**Phone :** \_\_\_\_\_

**Email :** \_\_\_\_\_

## PRIMARY BANKING INFORMATION

**Account :** \_\_\_\_\_

**Transit :** \_\_\_\_\_

**Bank Name :** \_\_\_\_\_

**Starting Check No :** \_\_\_\_\_  Checks off MPAY?

Electronic Signature? (please provide on Signature Form)

Please be sure to attach a voided check or bank letter as verification of the account.

Pay frequency : \_\_\_\_\_ # of active EE's : \_\_\_\_\_

# of states : \_\_\_\_\_  Full Tax Service

# of locals : \_\_\_\_\_ # Garns/support orders : \_\_\_\_\_

# of direct deposits : \_\_\_\_\_

- |  |  |
|--|--|
| <input type="checkbox"/> Employee Self Svc | <input type="checkbox"/> General Ledger    |
| <input type="checkbox"/> CashPay Cards     | <input type="checkbox"/> Time Off Tracking |
| <input type="checkbox"/> Workers Comp      | <input type="checkbox"/> Retirement/Match  |
| <input type="checkbox"/> Data Upload Svc   | <input type="checkbox"/> Custom Security   |

Is your client interested in any of the following services?

- MPAY Time & Attendance Solutions
- MPAY Flexible Benefits Administration
- MPAY COBRA Administration

## ADDITIONAL NOTES