Payroll New-Client Setup Checklist

Employer and employee information needed to start payroll

Use this checklist to set up payroll with Toronto Tax & Accounting Solutions Inc. The matching Excel sheet (Torontax-Payroll-New-Client-Information-Sheet.xlsx) collects the details. For items marked **contact us first**: Contact Toronto Tax for document-submission instructions before sending this information.

BEFORE YOU SEND DOCUMENTS: Do not email banking credentials or passwords. For SINs, employee tax information, and full tax slips, contact us first for instructions on the safest way to send documents.

How our payroll service works

Payroll runs through your connected business bank account. You retain control; we never need your password.
Software, access arrangements and any subscription cost are confirmed in your written quote.
We assist with CRA payroll and GST/HST account setup where needed.
T4s and ROEs are included for 5+ employees. For 1-4 employees, fees are agreed separately before starting.

Employer setup

- Legal and operating business name
- Business number
- CRA payroll (RP) account, or request help opening one
- CRA remitter type (if known)
- GST/HST account, or request help opening one
- Main contact and payroll approver
- Payroll software and subscription arrangements confirmed
- Accountant access given to Toronto Tax
- Business bank account connected in the payroll system by the employer
- Province(s) of employment

For each employee

- Name, job title and start date
- Pay type and pay rate
- Standard hours per pay period
- Vacation pay policy and taxable benefits
- SIN - contact us first
- Direct-deposit details - contact us first
- TD1 federal and provincial forms - contact us first

Pay schedule

- Pay frequency (weekly, biweekly, semi-monthly or monthly)
- First pay date with us
- Deadline to send hours and changes
- Pay period and pay date calendar

Switching providers or starting mid-year

- Name of existing provider
- Last pay date processed by existing provider
- Year-to-date totals per employee - contact us first
- T4 and ROE requirements for the year

Pricing

One-time payroll setup	$100 before HST
Monthly pay processing	$35 per employee per month (monthly pay), before HST
Biweekly pay processing	$60 per employee per month (biweekly pay), $75 in a month with three pays, before HST
T4s and ROEs	Included for 5+ employees; 1-4 employees charged separately

This checklist is for payroll setup only. It is not legal or employment-standards advice. WSIB is not part of our payroll service.
This checklist helps you organize records. It is not tax, legal or accounting advice; how an item is treated depends on your own facts, and the CRA decides how returns are assessed. Keep original records, generally for six years from the end of the last tax year they relate to.