Learning how to set up payroll with Patriot Software's payroll software is easy. If you gather this information ahead of time, your account setup will go even more smoothly. To begin, you will need the following items:

1. Your company legal name, DBA (if applicable), and all worksite location addresses
2. All of your tax ID numbers, including:
    ○ Your federal employer identification number (EIN)
    ○ Your state tax withholding ID number
    ○ Your local tax ID numbers (if applicable)
3. Your state unemployment (SUTA) account number and SUTA rate for your company. Note: Your state unemployment agency may send your SUTA rate determination in a separate letter. This rate is based on your industry and your company's individual claim history for unemployment.
4. The business owner's information for identity verification if using direct deposit or full-service payroll: full name, SSN, address, DOB, and driver's license number. This is in accordance with the Patriot Act's Know Your Customer, Customer Identification Program. If your identity is not quickly verified, we may ask for an upload of a picture id. Acceptable picture ids are the business owner's driver's license, state id, or passport.
5. If you are paying employees with direct deposit or using our full-service payroll, you'll need to upload a copy of your **commercial/business** bank account statement. Unfortunately, we can't accept a personal bank account.
6. The employee *W-4 form* (filled out by your employees), including
    ○ name
    ○ address
    ○ Social Security number
    ○ tax filing status
    ○ details on current deductions & contributions
7. The pay rate and pay frequency (weekly, biweekly, etc.) for all employees.
8. All payroll registers for the current year, by pay date.
9. All employer taxes for the current year, by pay date.
10. Copies of all tax filings for the current year (i.e. 941, state & local tax returns, SUTA).

Once you sign up as a payroll customer, the software will prompt you to enter the information step-by-step in the onboarding wizard.

Are You a New Employer?

If you're a new employer and still need to apply for your payroll tax accounts, check out our payroll information for new employers page for information specific to your state. Check the box "I don't have my EIN right now" for these tax accounts until you receive all your tax account information and continue with your setup.

Let Us Do the Work for You with Free Setup.

Did you know that Patriot Software offers free payroll setup for all new customers? We can enter all of your data for you, including your year-to-date payroll information. If you'd like to take advantage of this option, first, sign up for a free trial. Then, call 877-968-7147 option 2, email freesetup@patriotsoftware.com, or chat us to request the free setup. We'll take it from there!