Welcome to Sonrise PayMaster$

We'd like to give you a brief introduction to our service. Our staff consists of three people that you will be communicating with regarding your payroll and we want to provide you with a bit of information on each:

Beth Kneasel - A co-owner of the firm and the Chief Operating Officer, Beth should be able to address most of your questions and concerns and she is the "rubber-meets-the-road" person on the staff. You will find her to be very capable and a very pleasant individual to deal with.

Susan Shirk - Also a co-owner and office administrator with general knowledge of overall operations. Susie will frequently be the one who answers the phone and directs your call to Ken or Beth if she isn't able to take care of your issue directly.

Ken Shirk - Founder of the firm and primarily involved with the intake of new clients, Ken is a recognized specialist in church and clergy tax matters.

This is the Sonrise Payroll Team. We are dedicated to providing service that goes beyond simply meeting your expectation and actually delights you! We are partnering with you to provide your employees with accurate paychecks. Our top priority is to make payday trouble free for you and your employees.

If at any time you have a problem or concern regarding your payroll, contact us IMMEDIATELY! If you have an urgent problem, we will do whatever is in our power to resolve that problem promptly, regardless of who or what is responsible for the situation.

What's Next?

There are essentially three phases to getting you into our payroll system. The first phase is taking care of any necessary registrations with the various tax authorities and getting all the employer information into our payroll program.

The second phase is gathering and entering the employee data into our system.

The third is having you authorize us as your agent and testing the system prior to going "live".

A checklist is provided for you in this packet as well as all the forms needed to complete the first two phases.

Only Phase I & II need to be completed before we can issue the first payroll. Phase Ill needs to be completed before we can deposit taxes and file tax reports with the taxing authorities.

All information can be sent to us via the postal service or scanned and attached to an email. We do not recommend faxing due to the lack of clarity on the received documents. Please contact us if you have any questions or encounter any problems.

EMPLOYER'S CHECKLIST

Please use this checklist to be certain all required forms have been sent to Sonrise PayMaster$™

PHASE I

- ☐ Employer Information Sheet
- ☐ Photocopy of a check or a voided check

PHASE II

- ☐ Employee Data Sheet for each employee
- ☐ I-9 Form for each employee
- ☐ New Hire Reporting Form for each employee
- ☐ Certificate of Residency Form for each employee
- ☐ LST Exemption form (when applicable)
- ☐ Direct Deposit Authorization form (when applicable)

PHASE III

- ☐ IRS Form 8655
- ☐ Application for Electronic Funds Transfer
- ☐ Bank Debit Amount Verified & Reported

INFORMATION NEEDED FOR PHASE I OF EMPLOYER PAYROLL SETUP

1. **Please complete the *__Employer Information__* sheet that is included with this packet.** Some of the requested information may not be applicable -just skip those lines. Some of the requested information may not be clear to you - contact us.
2. **Please include a photocopy of a check from the checking account that will be used for payment of payroll taxes and employee paychecks.** I suggest you write "VOID" on the photocopy.
3. If you have already filed employment reports, please provide us with a copy of your most recent quarterly report forms.
4. **If you are not already registered as an employer with PA Dept. of Revenue, we need to know the name, address, phone, Social Security number and date of birth of the business owner.** If you are incorporated we need all of the above mentioned information for each of the officers of the corporation. **We also need to know the date of incorporation.**
5. **If you are not already registered for unemployment insurance, we will also need the following information regarding your Workers' Compensation policy:**
    - **Insurer's Name**
    - **Agent's name, address and phone**
    - **Policy number**
    - **Beginning and ending date of policy**

Thank You!

SONRISE PayMaster$

P-711

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EMPLOYER INFORMATION

Legal Name of Business ______________________________

"Trading As" Name ______________________________

Year Business Established ______________________________

Physical Business Address ______________________________

Mailing Address *(For payroll & tax purposes)* ______________________________

Business Phone ____________________ FAX ____________________

Email Address ____________________ Web Address ____________________

Fed. Emp. ID# ____________________ Deposit Frequency ____________________

PA Dept. of Rev. Acct# ____________________ Deposit Frequency ____________________

Payroll Contact Person ______________________________

Cell Phone ____________________ Home Phone ____________________

ABOVE NUMBERS TO BE USED ONLY IN URGENT SITUATIONS

Bank Information (attach copy of voided check)

Pay Frequency: (check one) ☐ WEEKLY ☐ BI-WEEKLY ☐ SEMI-MONTHLY

Pay Day: (day of week OR date of month) ______________________________

Pay period begins (check one) ☐ S ☐ M ☐ T ☐ W ☐ Th ☐ F ☐ Sat

Pay period ends (check one) ☐ S ☐ M ☐ T ☐ W ☐ Th ☐ F ☐ Sat

Estimated amount of typical payroll in $$ ______________________________

Principal Officer of Business ______________________________

Title ____________________ Date of Birth ____________________ SSN ____________________

Address ____________________ State ____________________ ZIP ____________________

Home Phone ______________________________

INFORMATION NEEDED FOR PHASE II OF EMPLOYER PAYROLL SETUP

The second phase of the payroll setup involves entering the data for your employees. The following forms need to be completed for each employee:

1. EMPLOYEE DATA SHEET
2. I-9 Form (remember to verify in Section 2)
3. New Hire Reporting Form
4. Certificate of Residency
5. LST Exemption Certificate (when applicable)
6. Direct Deposit Authorization Form (when applicable)

Thank You!

SONRISE PayMaster$