

# Introduction to Payroll

Welcome to QuickBooks Online Payroll. You're about to experience what it's like to take the pain out of payday and tax time by simplifying the task of preparing payroll. You'll save time and gain peace of mind that your payroll records are up-to-date and complete pay information is at your fingertips. With QuickBooks Online Payroll, you can pay employees, track payroll taxes, and pay and file your tax forms. Let's get started.

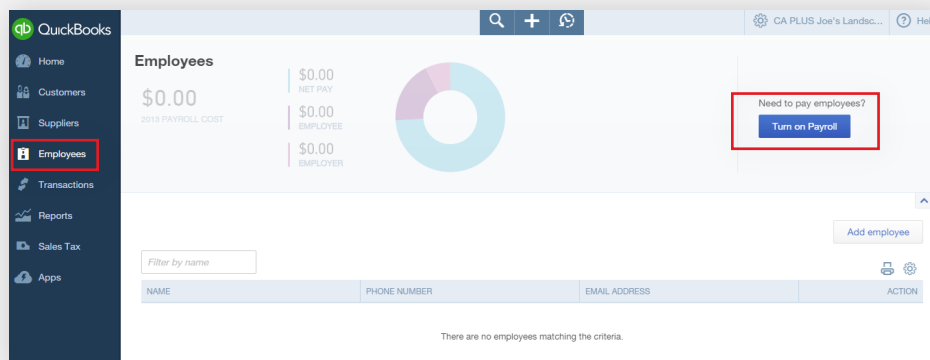
This QuickGuide will show you how to:

- Sign up and activate QuickBooks Online Payroll
- Prepare to set up and use QuickBooks Online Payroll

**Note:** QuickBooks Online Payroll is an online subscription service that is available with each QuickBooks Online plan. You'll have the opportunity to try Payroll for free for a limited period of time before paying. Be sure to set up the information accurately to ensure a smooth transition from the trial to the live versions.

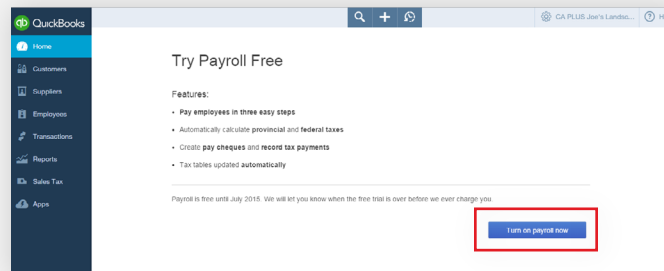
## Turn On Payroll

- 1 From the left-hand navigation bar, select **Employees**.
- 2 Click **Turn on Payroll** in the top right corner.

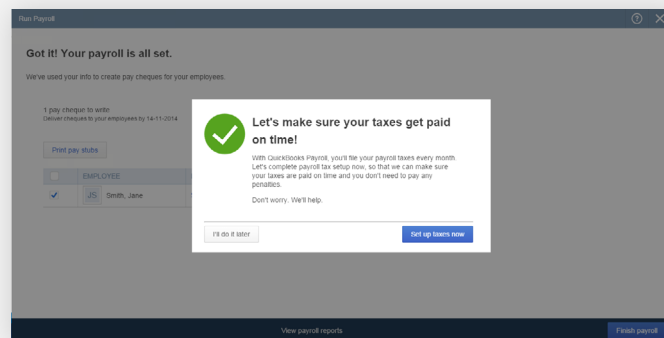


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- 3 In the Try Payroll Free window, click **Turn on Payroll Now**.



- 4 Next, click **Get Started with Payroll** to begin setting up employee and payroll information. You will be asked a series of questions about your pay processes that will help you complete the setup process accurately.



## Before You Begin

QuickBooks Online Payroll takes you through the payroll setup process with a series of simple questions. You may know some of the answers off the top of your head, but to help you out, we've provided a list of the types of information you will want to have at your fingertips to help the setup process go smoothly. Be sure to gather this information before adding employees.

If this is your first time setting up employee information, pay schedules, deductions and contributions, or if you're transitioning from a service or manual system, you may want your accountant or tax advisor to assist you.

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## QuickBooks Online Payroll – Setup Information Checklist

Category	Type of Information Needed
<b>Company</b>	<ul style="list-style-type: none"><li>• The frequency that employees are paid such as: weekly, every other week, twice a month, or monthly</li><li>• The date you plan to start using Payroll and the first pay period that you'll run within QuickBooks Online Payroll</li></ul>
<b>Compensation, Benefits, Contributions and Deductions</b>	<ul style="list-style-type: none"><li>• Types of compensation you give employees and senior executives such as hourly wages, salaries, commissions, vacations</li><li>• Sick and vacation time policies</li><li>• Insurance benefits such as health, dental and vision</li><li>• Retirement benefits offered, such as a retirement savings plan (RSP)</li><li>• Additional deductions that the employee wants withheld, such as child support, repayments of employee advances or loans, and life insurance</li><li>• Additions you may include in a paycheck, such as bonuses, travel reimbursements, employee advances or loans and tips</li></ul>
<b>Tax Information</b>	<ul style="list-style-type: none"><li>• Your federal tax business number (BN)</li><li>• Your CRA Payroll number</li><li>• Your T4 transmitter number</li></ul>
<b>Employees</b>	<ul style="list-style-type: none"><li>• Employee names, addresses and Social Insurance Numbers from your employees' Social Insurance cards, and T4 forms</li><li>• Employee withholdings from the employee's TD1 form</li><li>• Current employee wages/salaries, additions, deductions, and company contributions</li><li>• Sick and vacation time hours and monies accrued</li></ul>

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Category	Type of Information Needed
<b>Year-to-Date History</b>	<ul style="list-style-type: none"><li>• You need to enter year-to-date payroll information ONLY if you are using QuickBooks Online Payroll after January 1 of the calendar year AND if you've already ran payroll at least once since January 1. (If you start using QuickBooks Online Payroll after January 1 but have not yet run a payroll this calendar year, you will have no year-to-date information to enter.)</li><li>• Year-to-date information for each employee is available on the employee's most recent paystub from the previous system.</li></ul>
<b>Liability Payment</b>	<ul style="list-style-type: none"><li>• Quarterly and pay period summaries of payroll liability payments from the beginning of the calendar year to your payroll start date</li><li>• Copies of payroll liability checks from the first day of the current quarter until today</li><li>• Payment and filing methods</li></ul>

Once you have gathered this information, you're ready to begin setting up payroll. But don't worry, even if you don't have all the answers, you can get started and add the missing information before you process your first payroll.