



# A Guide to Switching Payroll Companies Mid-Year

## Changing Providers is Easy Anytime of Year

Switching payroll providers can seem like a difficult process. There are many [factors to consider](#) in searching for a trusted payroll vendor. Finding the right provider can make all the difference. With the right guidance, you don't have to wait to year end to make that change. Making the switch during the year is just as [easy](#) and can [save](#) you headaches at year end. Use this guide to during a mid-year switch and ensure yourself a [smooth](#) fiscal end of year!

## Things to Consider During a Mid-Year Change

When making a mid-year switch to a new vendor, you will want to make sure you take into account factors such as:

- [Ensuring a mid-year change doesn't impact business operations](#)
- [Making sure tax payments stay up to date](#)
- [Securing a complete payroll history](#)
- [Considering how your new payroll system will integrate with other business investments](#)

Please let us know how we can make your mid-year conversion easier! We can be reached at [papertrails.com](https://papertrails.com) or at [207-721-8575](tel:207-721-8575).



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# Conversion Questions

## Questions to Ask a New Provider

When considering a new payroll provider during a mid year switch, ask the following questions to ensure a smooth transition for your business.

- ✓ Who will be involved in the conversion process?
- ✓ Will your needs be communicated from your sales representative down to your payroll processor to ensure proper system configuration?
- ✓ Will there be a plan with clear deadlines to ensure a timely transition?
- ✓ Will the new provider perform a conversion to import your historical payroll and employee history into their system?
- ✓ Will the new provider run parallel payrolls before the first live payroll to confirm all configurations are correct?
- ✓ Will you have a dedicated account team who is easy to reach?
- ✓ Does the new provider offer additional resources for you to make sure you are getting the most out of your investment?
- ✓ Will the new provider conduct live training using your company data?
- ✓ Does the new provider have an all-in-one system for all payroll services?
- ✓ Does the new provider offer integrations with other systems you use?



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# Information & Documents

## What You Will Need to Provide

There is a lot of information that you will need to provide to a new payroll vendor. You will need to provide information about your employees and your company.

### EMPLOYEE INFORMATION

- ✓ Employee list with social security numbers and addresses
- ✓ Copies of W-4s
- ✓ Any employee deductions
- ✓ Any employee garnishments and supporting documents
- ✓ Direct deposit information

### COMPANY INFORMATION

- ✓ Company tax ID numbers
- ✓ Company bank account information
- ✓ State unemployment rates for all states that you report
- ✓ Copies of current year Form 941 payroll filings (if available)
- ✓ Year-to-date payroll summary by employee and by quarter



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# Challenges

## Challenges of Conversion

Challenges may arise when converting payroll to a new vendor. Working with an experienced vendor can help navigate these challenges. Some challenges include:



### INTEGRATED PAYROLL SOLUTIONS

When deciding on a new vendor, make sure they can integrate with other systems that you use (time tracking systems, benefits administration, etc) or if they offer their own solutions.



### INFORMATION ERRORS

Make sure to provide the new provider with the correct historical information about your company or that they have the ability to pull the necessary data from your previous provider.



### TAX COMPLIANCE

Confirm that your new provider has a knowledgeable staff to keep you tax compliant. Check that their system can be configured to keep accurate taxes for your particular business.



### MULTIPLE PAY FREQUENCIES

Many businesses pay their employees at multiple frequencies. Verify that the new provider is able to support various departments, pay groups, and frequencies customized to your needs.



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