

Accountant's mid-year payroll switch checklist

Follow these steps to manage your mid-year payroll switch.



Evaluate capabilities

- Verify the new provider handles your clients' specific pay schedules, frequencies, and industry requirements.
- Confirm they'll process any specialized tax situations (clergy housing, FUTA exemptions, etc.).
- Check integration compatibility with current HR + accounting tools.

Prepare data for migration

- Compile a complete list of employees each client has, including SSNs, mailing addresses, W-4s, and direct deposit information.
- Document any special wage types, garnishments, or deductions.
- Export year-to-date payroll summaries by employee and quarter.

Collect tax documentation

- Export previous quarterly tax filings (Forms 941, state returns) and gather company tax identification numbers (tax IDs) for each client.
- Verify accuracy of Form 941, especially regarding pre-tax and post-tax deductions.
- Confirm SUI rates are correct for each state where clients pay employees and send them to the new provider.

Confirm how support and the transition will work

- Confirm whether the new provider will handle data migration.
- Schedule onboarding and training sessions for your team or clients.
- Verify support channels (phone, email, chat, or help center with resources).

Get ahead of gaps

- So employees don't miss a payday, determine whether you'll need to run ONE last payroll for each client with your current provider.
- Send the "last payroll" data you have for each client to the new provider.
- Verify who is responsible for tax filing.

Review data for accuracy

- Double-check employee profile information for every client and verify YTD wage totals match previous records.
- Verify that the correct contribution limits were applied for retirement plans (401(k), Roth IRA).
- Confirm Section 125 cafeteria plan deductions (medical, dental, HSA, FSA, vision) were properly categorized as pre-tax or post-tax, as they'll impact W-2 reporting and tax filings.

Employee communication

- Encourage clients to announce the change (email, company-wide meeting, or both).
- Demonstrate the new system's interface for each client.
- Explain how employees find pay stubs, tax documents, and provide instructions for the new PTO request process.

Multi-state employees

- Provide the new provider with each client's withholding and unemployment account numbers for each state they operate, each worksite's address, plus remote employees.
- If any client employees commute across state lines and there's a tax reciprocity agreement, let your new provider know to prevent double taxation.
- This [article](#) can help you see if clients are located in a tax reciprocity state.

Create a documentation access plan

- Establish a process for how client employees will access historical pay stubs.
- Determine how your clients will distribute W-2s and 1099s at year-end.
- Archive payroll reports from the previous system you used.

Conduct a post-implementation review

- Set a date to evaluate the new system's performance.
- Collect feedback from payroll administrators and employees.
- Address any outstanding issues with your new provider.

Make a seamless switch

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