

## W2 Signup Checklist

**YOU MUST COMPLETE ENTIRE FORM BEFORE RECEIVING A PAYCHECK**

### Biographical Info:

First name: \_\_\_\_\_  
Middle name: \_\_\_\_\_  
Last name: \_\_\_\_\_  
Socialism security #: \_\_\_\_\_  
Date of birth: \_\_\_\_\_  
Address line 1: \_\_\_\_\_  
Address line 2: \_\_\_\_\_  
City: \_\_\_\_\_  
State: \_\_\_\_\_  
Zip: \_\_\_\_\_  
Home phone: \_\_\_\_\_  
Cell phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Hourly (or salary) rate: \_\_\_\_\_

The 401K is available after 1 year of service.

### Insurance Info:

Are you taking group medical insurance? YES NO  
Have you turned in enrollment forms? YES NO  
OR, Have you turned in DECLINE forms? YES NO

Are you taking group dental insurance? YES NO  
Have you turned in enrollment forms? YES NO  
OR, Have you turned in DECLINE forms? YES NO

Are you taking group vision insurance? YES NO  
Have you turned in enrollment forms? YES NO  
OR, Have you turned in DECLINE forms? YES NO

Have you turned in AIG life forms? YES NO

**You MUST turn in a decline form if you are declining insurance**

Medical, dental, and vision premiums are deducted pre-tax. STD, LTD, and Life premiums are deducted post-tax.

### W4 Info:

W4 filing status  
(single, married,  
married at higher  
rate): \_\_\_\_\_  
W4 allowances: \_\_\_\_\_  
Additional amount to  
withhold (if any): \_\_\_\_\_  
Start date: \_\_\_\_\_

### Miscellaneous:

Have you completed your I-9 form? YES NO

Have you signed the employment  
agreement or corp-to-corp agreement? YES NO

Have you completed the background  
check release? YES NO

### Direct Deposit Info:

Do you want direct deposit? YES NO  
Bank 1 name: \_\_\_\_\_  
Bank 1 account #: \_\_\_\_\_  
Bank 1 routing #: \_\_\_\_\_  
Bank 1 account type  
(checking or savings): \_\_\_\_\_  
% or \$ to bank 1: \_\_\_\_\_  
  
Bank 2 name: \_\_\_\_\_  
Bank 2 account #: \_\_\_\_\_  
Bank 2 routing #: \_\_\_\_\_  
Bank 2 account type  
(checking or savings): \_\_\_\_\_  
% or \$ to bank 2: \_\_\_\_\_

### GTN Use:

#### Hiring:

Fax medical to:  
Fax dental to:  
Fax vision to:  
Fax STD/life to:  
Enter data in QB  
Update Sendouts  
Enter in GTNTime  
Enter in Fidelity  
Form NH to state  
Reference checks  
Employment Agmnt  
Tech Serv Addendum

#### Termination:

Notify BCBS  
Notify Dental Select  
Notify AIG-vision  
Notify AIG-STD/life  
Update QB  
Update Sendouts  
Update GTNTime  
Notify Fidelity  
COBRA notification  
Notify TX OAG