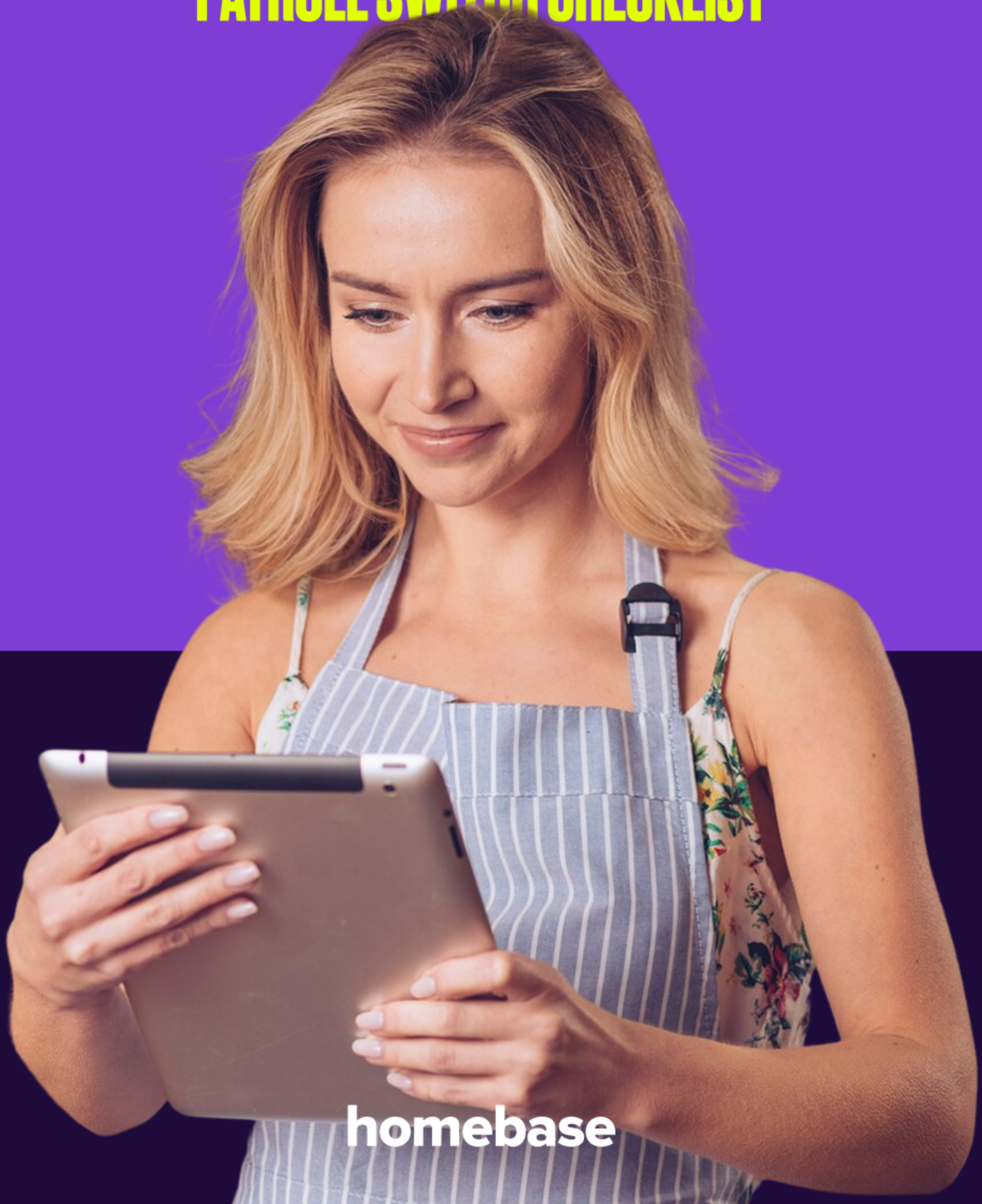


BREAK UP
WITH YOUR
PAYROLL
PROVIDER
PAYROLL SWITCH CHECKLIST



homebase

Switching payroll providers is easier than you think—especially if you're dealing with confusing software or high costs.

Homebase is built specifically for businesses like yours. Our all-in-one solution lets you hire, schedule, and pay your team from anywhere—even from your smartphone.



I've run payroll from sitting on a horse moving cattle. It is so much easier than anything I've used in the past.

— Rob Graft, President, Nemesis Industries

HOW TO USE THIS CHECKLIST

We've broken down the payroll switching process into bite-sized steps. Here's how to use it:

1. First, scan the checklist to get the full picture before diving in.
2. Pick your switch date—this can be any time, but end of quarter or year is ideal.
3. Take it step by step and check off tasks as you go.
4. Keep your docs organized in one place for easy reference.
5. Reach out anytime - we're here to help with the heavy lifting.

TIP: 90% of small business owners say switching to Homebase payroll was a breeze. You've got this!



Homebase takes the work out of payroll.

— Jody Donald, 7 South



homebase

415-951-3830

www.joinhomebase.com

1

REVIEW YOUR PAYROLL CONTRACT

Understand your current obligations and plan your exit strategy.

Task	Done
Check your contract end date: Can you wait, or is it time to break free? (Psst: Homebase doesn't require a contract for payroll!)	
Look for early termination fees: Sometimes it's worth paying to end the pain sooner.	
Note the required notice period: Avoid getting charged for extra months.	
Spot any auto-renewal clauses: Mark these dates on your calendar now.	
Document your frustrations: Handy reference when they ask why you're leaving.	

TIP

Many businesses find the savings worth any early termination fee. Small business owners save 5 hours monthly on average with Homebase payroll.

2

BOOK A CALL WITH HOMEBASE

Connect with our experts to see how Homebase fits your business needs.

Task	Done
Schedule a free consultation with a payroll expert.	
Jot down your questions about features you need for your hourly team.	
Think about your timeline. When do you want to make the switch?	
See Homebase in action with a personalized demo for your business type.	
Check out our simple pricing: Just \$39 per month + \$6 per employee/month with unlimited payroll runs.	

TIP

70% of customers say our support beats their last provider. We'll help with setup and data transfer at no extra cost.

GATHER PAYROLL DATA (WE'LL HELP!) PAGE 1/2

Collect all necessary information from your current provider for a smooth transition.

Task	Done
Company basics:	
Legal business name and DBA (if applicable)	
Federal Employer Identification Number (FEIN)	
State employer identification numbers	
Business address and contact information	
Business entity type (sole proprietorship, LLC, corporation, etc.)	
Team details:	
Full legal names and addresses	
Social Security numbers	
Tax withholding info (W-4 forms)	
Pay rates and payment methods	
Roles	
Benefit deductions	
Date of birth	
Contact information	
Direct deposit information	
Terminated vs. active employee data for any employee paid in the current calendar year	

GATHER PAYROLL DATA (WE'LL HELP!)

PAGE 2/2

Task	Done
Year-to-date data:	
Payroll reports or pay stubs for all employees	
Tax filings (federal and state)	
Quarterly reports	
PTO/sick time balances	
Tax details:	
State unemployment insurance rate	
Local tax requirements	
Whether you use NEXT for workers' comp	

TIP

Using Gusto, ADP, QuickBooks Online, Paychex, or Square? We can pull your data directly. For others, request a payroll summary for a closed quarter or payroll by payroll report for a current quarter.

4

SET UP PAYROLL WITH HOMEBASE

Configure your new payroll system with all your business information and preferences.

Task	Done
Set up your company:	
Enter your business details	
Connect your bank account for direct deposits	
Set your pay schedule	
Configure tax settings (we'll handle the filings automatically)	
Sign federal and state filing authorizations so Homebase can file and deposit taxes on your behalf	
Let Homebase add your team. We'll:	
Enter employee details and tax information	
Set up pay rates and tip distributions	
Configure PTO policies and transfer balances	
Set up any special deductions or garnishments	
Connect your other tools: Set up integrations with your POS or accounting software (btw – we fully integrate with Quickbooks accounting software!)	
Add manager access for team members who need it.	



Homebase simplifies scheduling, payroll, and HR in a way that is easy to navigate and understand. We highly recommend it.

— Mandana Shabani, Owner, Zood Restaurant

PROCESS YOUR FIRST PAYROLL

PAGE 1/2

Run your first live payroll with Homebase and ensure everything goes smoothly.

Task	Done
Ensure your timesheets are complete and accurate (our reminder system helps catch missing clock-ins).	
Review team hours that automatically sync from your time clock.	
Process payroll with our simple step-by-step workflow.	
Review the summary for any warnings before finalizing.	
Approve final payroll with one click (or set it to run automatically in the future).	
Ensure funds are available in your payroll account.	



Level up your payroll know-how with our live payroll seminars, payroll training video, and 1x1 payroll walkthroughs!

PROCESS YOUR FIRST PAYROLL

PAGE 2/2

Task	Done
Let your team know they'll get automatic notifications when paid.	
Confirm deposits arrived in employee accounts.	
Relax knowing taxes are being deposited and filed automatically.	



Before Homebase I was manually tallying up my team's work hours and entering them into payroll, crossing my fingers I hadn't made any errors. Now all I have to do is send their hours to my payroll program with the click of a button.

— Kathleen Smith, Founder, Smiling Tree Toys

6

CLOSE OUT YOUR PREVIOUS PROVIDER

End your relationship with your old payroll company and secure your historical data.

TIP

Wait until you've successfully run at least one payroll with Homebase before canceling your old provider to have a safety net.

Task	Done
Send your cancellation notice following your contract terms.	
Get written confirmation that they received your cancellation.	
Ask your previous provider for the amount they will be refunding you for taxes impounded from your account but not yet paid (e.g. Federal/State unemployment).	
Download all your historical data: Enter your business details	
Connect your bank account for direct deposits	
Set your pay schedule	
Configure tax settings (we'll handle the filings automatically)	
Sign Federal and state filing authorizations so Homebase can file and deposit taxes on your behalf	
Check for any outstanding tax items before closing the account.	
Ask about temporary account access during the transition.	

MAKE PAYDAY PAY-YAY

Switching to Homebase isn't just about changing payroll providers—it's about making work radically easier for your entire team.

NO MANUAL TIMESHEETS

Employee hours, overtime, and breaks automatically sync with payroll.

AUTOMATIC TAX FILINGS

We calculate, file, and pay your federal, state, and local taxes.

EASY TIP MANAGEMENT

Distribute pooled and individual tips while staying compliant.

ONE APP FOR EVERYTHING

Hire, onboard, schedule, and pay your team from anywhere.

TEAM FINANCIAL BENEFITS

Your employees can access earned wages before payday and track earnings in the app.

STRESS-FREE COMPLIANCE

We handle the legal details based on your location's labor laws.



Homebase has reduced our cost of doing business overall. We use Homebase for scheduling time away, payroll and team communication.

— Joi and Val Jackson, Owners, Hairizon

HOW TO GET

homebase

Add it on to any plan for \$39/month
base fee + \$6/mo per employee



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