|  |  |
| --- | --- |
|  |  |
| **CLIENT DETAILS** |  |
| BUSINESS NAME: |       |
| DATE REVIEWED: |       |
| NUMBER OF EMPLOYEES: |       |
| NUMBER OF CONTRACTORS FOR PAYROLL PURPOSE: |       |

EMPLOYEE NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**File review**

[ ]  Employee contact details and emergency contact complete

[ ]  Fair Work Information Statement provided (declaration form from employee signed)

[ ]  Superannuation Choice Form

[ ]  Tax File Number declaration on file

[ ]  TFN completed and lodged with ATO

[ ]  Award or workplace agreement provided

[ ]  Employee agreement signed

[ ]  Duty statement signed

**Software setup review**

[ ]  Hourly rate or annual salary correct per agreement or award

[ ]  Base rate of pay: $

[ ]  Pay cycle

[ ]  Timesheets required

[ ]  Superannuation fund details match super choice form

[ ]  Tax File Number and all details match TFN Declaration

[ ]  Earnings categories review

[ ]  Deductions review and set up

[ ]  Allowances review and set up – check against award

[ ]  Entitlements review and set up

[ ]  Salary sacrifice arrangements

[ ]  Salary sacrifice written agreement held

[ ]  Other

EMPLOYEE NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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[ ]  Tax File Number and all details match TFN Declaration

[ ]  Earnings categories review

[ ]  Deductions review and set up

[ ]  Allowances review and set up – check against award

[ ]  Entitlements review and set up

[ ]  Salary sacrifice arrangements

[ ]  Salary sacrifice written agreement held

[ ]  Other

EMPLOYEE NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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[ ]  Entitlements review and set up

[ ]  Salary sacrifice arrangements

[ ]  Salary sacrifice written agreement held

[ ]  Other

EMPLOYEE NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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**Software setup review**

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[ ]  Tax File Number and all details match TFN Declaration

[ ]  Earnings categories review

[ ]  Deductions review and set up

[ ]  Allowances review and set up – check against award

[ ]  Entitlements review and set up

[ ]  Salary sacrifice arrangements

[ ]  Salary sacrifice written agreement held

[ ]  Other

EMPLOYEE NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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[ ]  Superannuation fund details match super choice form

[ ]  Tax File Number and all details match TFN Declaration

[ ]  Earnings categories review

[ ]  Deductions review and set up

[ ]  Allowances review and set up – check against award

[ ]  Entitlements review and set up

[ ]  Salary sacrifice arrangements

[ ]  Salary sacrifice written agreement held

[ ]  Other

CONTRACTOR NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Software setup review**

[ ]  Hourly rate correct per agreement

[ ]  Superannuation

[ ]  Superannuation fund details match super choice form

[ ]  Superannuation processed through payroll

[ ]  Voluntary withholding agreement

[ ]  VWH %

[ ]  Other