MULTISTATE PAYROLL ROUTING

LABEL THE WORK LOCATIONS

Use neutral labels and state names only. Keep employee and payroll data out of this workbook.

Location A label / state / why the location needs review

Location B label / state / why the location needs review

Location C label / state / why the location needs review

Current payroll provider or adviser role / no person names

Change that prompted review / effective-date question only

Private information needed later / approved secure method

MULTISTATE PAYROLL ROUTING

MAP THE OFFICIAL ROUTES

Record the directory path and review date. A directory route is not an applicability decision.

Location A / IRS state employer-information route / review date

Location A / DOL state labor-office route / review date

Location B / IRS state employer-information route / review date

Location B / DOL state labor-office route / review date

Location C / official routes reviewed / date / still open

Broken, moved or unclear route / who will verify it

MULTISTATE PAYROLL ROUTING

CHECK THE ROUTING MATRIX

Tick what is organized. These checks do not decide which rule, registration or filing applies.

Applicability question still open / qualified reviewer

Registration, setup or filing question / owner after review

Location-change handoff / next check / acknowledgement

READY CHECK

- [ ] Neutral location labels are used
- [ ] Employee names and addresses are excluded
- [ ] Compensation and schedules are excluded
- [ ] Tax and account identifiers are excluded
- [ ] Each official route has a review date
- [ ] No applicability decision is inferred
- [ ] Every open question has an owner
- [ ] Private records use an approved secure channel

MULTISTATE PAYROLL ROUTING

QUESTIONS FOR THE PAYROLL PROVIDER

Ask the provider to explain its review and handoff process without sharing employee data here.

Locations: which neutral labels need professional review?

Routes: which official employer-information and labor-office references should we retain?

Decisions: which questions belong with payroll, accounting, legal counsel or an agency?

Ownership: who handles each approved setup, registration or filing task?

Changes: how are new work locations reported and acknowledged?

Privacy: what is needed later and how is it transferred securely?

MULTISTATE PAYROLL ROUTING

COMPARE THE SAME LOCATION BRIEF

Use Providers A and B with the same neutral location labels and unresolved questions.

Provider A / B / review dates / same location brief

Official-route review and applicability-escalation approach - A / B

Responsibility ownership, change handoff and secure-data process - A / B

Written scope, exclusions, communication, timing and open questions - A / B

OFFICIAL REFERENCES AND PLANNING GUIDE

- PickYourPro.ai planning guide (click to open)
- IRS: State Government Websites (click to open)
- U.S. Department of Labor: State Labor Offices (click to open)

OPTIONAL NEXT STEP

Create an account on PickYourPro.ai, start a request, and let participating pros compete with proposals. Compare scope, pricing, timing and fit.

https://www.pickyourpro.ai/request?category=payroll