

Payroll Preparation Checklist

Payroll & Employer Resources | Checklist | Updated October 15, 2026

Prepare employee, time, and deduction records before a payroll run.

Who should use this resource?

Designed for small business readers who want to organize records and prepare informed questions.

What this resource covers

1. Confirm employee information and pay period
2. Review approved hours, salaries, and adjustments
3. Check withholding instructions and benefit deductions
4. Reconcile totals and retain payroll reports

How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

Review checklist

- ☐ Confirm employee information and pay period
- ☐ Review approved hours, salaries, and adjustments
- ☐ Check withholding instructions and benefit deductions
- ☐ Reconcile totals and retain payroll reports

Common mistakes to avoid

Do not rely on an earlier year's rule, estimate figures without source documents, or treat this worksheet as an official tax form. Verify current instructions before filing or paying.

Official references

IRS: Publication 15, Employer's Tax Guide: <https://www.irs.gov/forms-pubs/about-publication-15>

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