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Find Payroll History From Your Previous Provider

[What's in this article?](#)

[Intuit Payroll and Quickbooks Online Payroll](#)[RUN Payroll Powered by ADPPaychexGustoSurePayrollHeartland PayrollAccountant/Other Provider](#)

If you are switching payroll services midyear, [Square Payroll](#) requires an earnings report from you. The earnings report should include every paystub from this year for all current and former W-2 employees with the following details:

- Pay date
- Gross Pay
- Federal Income taxes withheld
- FICA/Social Security
- Medicare
- Any applicable state taxes
- Any deductions (pretax, post-tax and garnishments) withheld from employees

For tax reporting purposes, a pay date is different from a check date. The check date is the date when your employee was paid, but the pay date is the date when federal and state tax payments were recorded. When providing your prior payroll reports, Square Payroll will need payroll information based on the pay date.

Additionally, several states require payroll reports to include the hours worked by your employees. If your business is located in Massachusetts, Minnesota, Oregon, Rhode Island, Washington, Washington, D.C, or Vermont, please include the hours your employees have worked prior to coming to Square Payroll.

It is very important that previous payroll information is provided to Square Payroll when setting up your account. This information is required to help ensure accurate tax withholding and reporting for current and past employees. An employer can only issue one W-2 per employee per year, regardless of how many payroll providers you've had. You will need to upload this report to your payroll dashboard. If you need help locating this, you should be able to ask your prior provider for directions on how to pull this report, or you can [contact us](#) for further assistance.

If you have 1099 contractors in addition to W-2 employees, read more about [transferring historical contractor payment information](#) for accurate reporting on Form 1099-NEC.

If you are transitioning to Square Payroll from one of the providers below, review the steps to locate your employees' earnings report.

Intuit Payroll and Quickbooks Online Payroll

1. Sign in to your [Intuit Payroll](#) or [Quickbooks Online Payroll](#) account online.
2. Click Reports.
3. Under **Employee Reports** or **Payroll**, select **Payroll Details**.
4. For the date range, select **This Year**.
5. Under Employee, select **All Employees**.
6. Click **Update Report** or **Run Report**.
7. Each employees' year-to-date gross pay is listed under the column **Total Pay**.
8. To view this information in a spreadsheet and to save it for your records, click **View in Excel** or in the drop-down under Share, click **Export to Excel**. An Excel spreadsheet will download to your computer.

For additional details on navigating your Intuit Payroll or Quickbooks Online Payroll accounts, contact [Intuit Support](#).

Once you download your report, review for the following:

1. Find all current and former W-2 employees.
2. Include every paystub from this year.
3. Check for gross pay.
4. Check for federal taxes (i.e. Federal Income Tax, Social Security, Medicare).
5. Check for state taxes.
6. Check for deductions (i.e. 401k, Medical).



Roark & Co									
Payroll Details									
Jan 01 - Mar 31, 2018									
			③	⑥					
	Pay	Hrs	Amt	Deductions	Amt	Employee-paid Taxes	Amt	Company-paid Taxes	Amt
Cortez, Adam ① Net \$259.73 02/12/2018 01/22/18 - 02/04/18	Regular	47.90	\$526.90	Meals	\$23.59	FIT ④	\$109.31	FUTA	\$7.64
	CshTip	0.00	\$747.00			SS	\$78.98	SS	\$78.98
						Med	\$18.47	Med	\$18.47
						CA PIT ⑤	\$24.08	CA ETT	\$1.27
						CA SDI	\$12.74	CA SUI	\$66.24
Cortez, Adam Net \$248.20 01/29/2018 ② 01/08/18 - 01/21/18	Regular	32.45	\$324.50	Meals	\$30.00	FIT	\$18.22	FUTA	\$1.95
						SS	\$20.12	SS	\$20.12
						Med	\$4.71	Med	\$4.71
						CA PIT	\$0.00	CA ETT	\$0.33
						CA SDI	\$3.25	CA SUI	\$16.88
Cortez, Adam Net \$296.36 01/12/2018 12/25/17 - 01/07/18	Regular	4.00	\$44.00	Meals	\$28.58	FIT	\$16.86	FUTA	\$2.83
	Hrly2	24.18	\$338.52			SS	\$29.18	SS	\$29.18
	CshTip	0.00	\$88.00			Med	\$6.83	Med	\$6.83
						CA PIT	\$0.00	CA ETT	\$0.47
						CA SDI	\$4.71	CA SUI	\$24.47

RUN Payroll Powered by ADP

1. Sign in to [RUN Payroll](#).
2. Hover over **Reports** in the top-center of the page.
3. Under **Payroll**, select **Earnings Record**.
4. In the top-left, set the year to the current year.
5. In the “**Check dates from:**” field, select the date of this year’s first payroll.
6. In the “**to:**” field, select the date of the last payroll completed.
7. Select **All** in the **Employee** field, and click **Refresh**.
8. Find each employees’ year-to-date gross pay (column: **Gross**, row: **Employee Totals**). Employees are listed in alphabetical order by last name.

If you have further questions about locating this information in your RUN Payroll account, visit [ADP Support](#).

Once you pull your report, review for the following:

1. Find all current and former W-2 employees.
2. Include every paystub from this year.
3. Check for gross pay.



4. Check for federal taxes (i.e. Federal Income Tax, Social Security, Medicare).
5. Check for state taxes.
6. Check for deductions (i.e. 401k, Medical).

Company: Roark & Co		Report: Earnings Record		Check Dates From: 1/2/2018		To: 2/15/2018					
					③	④		⑤		⑥	
Check Date	Earnings	Rate	Hours	Amount	Gross	Federal Taxes	State/Local Taxes		Deductions	Net Pay	
Employee: Cortez, Adam ①											
SSN: xxx-xx-0001											
② 1/12/18	Regular	25.0000	8.50	212.50	212.50	FED SOCSEC	13.18	CA SDI	2.13		194.11
						FED MEDCARE	3.08				Check
											No: 50828
2/1/18	Regular	25.0000	8.00	212.50	200.00	FED SOCSEC	12.40	CA SDI	2.00		182.70
						FED MEDCARE	2.90				Check
											No: 50850
2/15/18	Regular	25.0000	7.50	187.50	212.50	FED SOCSEC	13.17	CA SDI	2.12		194.13
	Premium	25.0000	1.00	25.00		FED MEDCARE	3.08				Check
											No: 50870
Employee Totals:	Regular		24.00	600.00	625.00	FED SOCSEC	38.75	CA SDI	6.25		570.94
	Premium		1.00	25.00		FED MEDCARE	9.06				
Employee: Spindel, Kaitlyn											
SSN: xxx-xx-0002											
1/12/18	Regular	25.0000	29.50	737.50	737.50	FED FIT	76.82	CA SIT	8.57		588.31
						FED SOCSEC	45.73	CA SDI	7.38		
						FED MEDCARE	10.69				

Paychex

1. Sign in to your [Paychex Payroll](#) account.
2. Click **Paychex Flex** on the left side of the page.
3. From here, click on **Dashboard > Analytics & Reports > All Reports**.
4. Once **All Reports** is selected, click on **Employee Earnings Records**.
5. Under **Custom Options**, find *Select Employee(s)* and click **All Employees**.
6. Under the **Choose Dates** field, select **Current Calendar Year**.
7. Under **Report Totals**, select *Employee and Company* and choose **Show Summed Amounts**.
8. Run the report.
9. Find each employees' year-to-date gross pay.

For more information, visit [Paychex Support](#).

Once you download your report, review for the following:



1. Find all current and former W-2 employees.
2. Include every paystub from this year.
3. Check for gross pay.
4. Check for federal taxes (i.e. Federal Income Tax, Social Security, Medicare).
5. Check for state taxes.
6. Check for deductions (i.e. 401k, Medical).

EMPLOYEE EARNINGS RECORD

(Requested Check Dates 01/01/18 - 01/31/18)

Page 2 of 5

0012 A234-2311 Roark & Co

HOURS, EARNINGS, AND REIMBURSEMENTS & OTHER PAYMENTS							WITHHOLDINGS				DEDUCTIONS			NET
CHECK DATE	DESCR	REGULAR HOURS	OVERTIME HOURS	REGULAR AMOUNT	OVERTIME AMOUNT	TOTAL EARNINGS	REIM & OTHER PAY	SOC SEC + MED	FEDERAL TAX	STATE TAX	LOCAL TAX	OTHER	401K EE CATCH	PAY
01/05	Regular	78.25		1173.75		1545.00		118.19	106.57	16.32		15.45	46.35	1242.12
01/19	Overtime		16.50		371.25									
	Regular	80.00		1200.00		1323.75		101.27	62.99	11.60		13.24	39.71	1094.94
	Overtime		5.50		123.75									
②						③			④	⑤			⑥	
This Period Total	Regular	158.25		2373.75										
	Overtime		22.00		495.00									
	This Per	158.25	22.00	2373.75	495.00	2868.75		S 177.86 M 41.60	169.56 CA					
										27.92		28.69		86.06
														2337.06
Cortez, Adam ① ID 1 Soc Sec #: xxx-xx-0123 123 Brannan Street Unit A-123 San Francisco, CA 94107 Sex: Male Birthdate: 12/12/1980 Hire Date: 09/16/2009 Inactive Date: Rehire Date: Term Date: Pay Frequency: Semi-monthly Standard Hrs: 15.00/ Hour Rate 1/ Salary: Last Raise Date: 06/12/2011 Withholding: Method: Federal: Single, 2 CA: Single, 0, 0 Earnings: PX401 ERMT px401 ermtch 2017 Deductions: 401k EE Catch 3.00% of all earnings, every pay														

Gusto

1. Login to your [Gusto payroll](#) account.
2. Click **Reports** on the left hand side of the page.
3. Select **Payroll Journal** under **Summary Reports**.
4. Confirm date range is set to *Annually* and select **All Employees**.
5. Make sure the report group is by **Employee** and **all checkboxes are checked**.
6. Click **Generate Report**.
7. Once the report is loaded, click **Download CSV** from the top right page.

For more information, visit [Gusto Support](#).



SurePayroll

- 1. Sign in to your [SurePayroll](#) account.
- 2. Click **Reports** at the top of the page.
- 3. Scroll to the left side of the Reports page and click on the **Payroll Summary** option beneath **Payroll Reports**.
- 4. Select **Current Calendar Year**, and select your **First Check Date** in the current year, and then click **Update Report**.
- 5. Click the **XLS** button on the right side to download the file.
- 6. Repeat the steps for all other check dates.

For more information, visit [SurePayroll Support](#).

Once you download your report, review for the following:

- 1. Find all current and former W-2 employees.
- 2. Include every paystub from this year.
- 3. Check for gross pay.
- 4. Check for federal taxes (i.e. Federal Income Tax, Social Security, Medicare).
- 5. Check for state taxes.
- 6. Check for deductions (i.e. 401k, Medical).

ROARK & CO

Report Type: Payroll Summary

1 CORTEZ, ADAM

Income Tax State: DE Unemployment State: DE

4 5 6

3

EARNINGS				EMPLOYEE TAXES & DEDUCTIONS			
ITEM	VALUES	PERIOD	YTD	ITEM	PERIOD	YTD	
REGULAR	35.00	\$455.00	\$2,561.00	401K 1%	\$0.00	\$6.59	
			\$0.00	FED WTH	\$32.82	\$219.00	
			\$0.00	FICA	\$28.21	\$158.00	
			\$0.00	MEDFICA	\$6.59	\$37.00	
			\$0.00	STATE-DE	\$12.54	\$67.00	
			\$0.00	WILMING	\$5.69	\$37.00	
TOTAL	35.00	\$455.00	\$2,561.00				

TOTAL:		35.00	\$455.00	\$2,561.00	\$85.85		\$551.00
PAYROLL SUMMARY TOTALS							
EARNINGS				EMPLOYEE TAXES & DEDUCTIONS			
ITEM	VALUES	PERIOD	YTD	ITEM	PERIOD	YTD	
REGULAR	35.00	\$455.00	\$2,831.00	401K 1%	\$0.00	\$70.00	
			\$0.00	FED WTH	\$32.82	\$219.12	
			\$0.00	FICA	\$28.21	\$177.26	
			\$0.00	MEDFICA	\$6.59	\$41.81	
			\$0.00	STATE-DE	\$12.54	\$62.70	
			\$0.00	WILMING	\$5.69	\$35.56	
TOTAL:		35.00	\$455.00	\$2,831.00	\$85.85		\$580.74

4. Check for federal taxes (i.e. Federal Income Tax, Social Security, Medicare).

5. Check for state taxes.

6. Check for deductions (i.e. 401k, Medical).

Client ID: XXXXXXXX - ROARK & CO.

Pay Group: ALL

ANNUAL EMPLOYEE CHECK SUMMARY (XXXXX)

ROARK & CO
DBA: ROARK & CO

1

CORTEZ, ADAM (Emp#: 8)

Check Date	3 Gross Wages	Paid Gross	Tips & Other Non-Paid Grs	Social Security	Medicare Tax	4 Federal WH Tax	5
2 6/30/2018	203.70	203.70	0.00	12.63	2.95	0.00	
6/15/2018	272.20	272.20	0.00	16.88	3.95	0.00	
5/31/2018	183.80	183.80	0.00	11.39	2.66	0.00	
5/15/2018	240.20	240.20	0.00	14.90	3.49	0.00	
5/1/2018	381.50	381.50	0.00	23.65	5.53	5.44	
4/15/2018	280.40	280.40	0.00	17.39	4.06	0.00	
3/31/2018	235.50	235.50	0.00	14.60	3.42	0.00	
3/15/2018	271.30	271.30	0.00	16.82	3.93	0.00	
2/28/2018	83.90	83.90	0.00	5.20	1.22	0.00	
2/15/2018	345.10	345.10	0.00	21.39	5.00	1.80	
1/31/2018	303.60	303.60	0.00	18.83	4.41	0.00	
1/15/2018	321.00	321.00	0.00	19.90	4.65	5.64	
Prior Qtr	3,122.20	3,122.20	0.00	193.58	45.27	12.88	
8/15/2018	84.05	84.05	0.00	5.21	1.22	0.00	
7/31/2018	298.77	298.77	0.00	18.53	4.34	0.00	
7/15/2018	129.15	129.15	0.00	8.00	1.87	0.00	
QTD	511.97	511.97	0.00	31.74	7.43	0.00	
YTD Total	3,634.17	3,634.17	0.00	225.32	52.70	12.88	

SPINDEL, KAITLYN (Emp#: 7)

Check Date	Gross Wages	Paid Gross	Tips & Other Non-Paid Grs	Social Security	Medicare Tax	Federal WH Tax
------------	-------------	------------	---------------------------	-----------------	--------------	----------------

Accountant/Other Provider

If you are coming from an accountant, or another payroll service not listed in this article, please ask them to provide a report in either Excel or PDF that includes every paystub from this year for all current and former W-2 employees. You can [download an Excel template](#) to use to transfer this information These are the following details we'll need:

- Pay date
- Gross Pay
- Federal Income taxes withheld
- FICA/Social Security
- Medicare
- Any applicable state taxes
- Any deductions (pretax, post-tax and garnishments) withheld from employees

[Learn more about: Payroll](#)

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