

Payroll: getting started

Pay your 1099 contractors and W-2 employees by direct deposit, right from your portal. You set up your organization once, add your people, and Teddy texts each of them a secure link to set up their pay. After that, every payroll is three steps: enter pay, approve, done.

Your staff never create an account or password

Money comes straight from your own bank account

Taxes and year-end forms are filed for you

Ask Teddy on any payroll page if you get stuck

The whole picture

Steps 1 to 3 are done once. Step 4 is done once per person. Steps 5 and 6 are every payroll, and everything after that happens automatically.

1 Choose who you pay → 2 Set up your company → 3 Name your approvers →

4 Add people and send links → 5 Enter pay → 6 Approve and pay → Deposits and texts go out

Find everything under **Payroll** in the left menu of your portal: **Organization, Employees & Contractors, Hours & Pay, Approve & Pay, Reports** and **What's next**.

BEFORE YOU START

Have this ready

Company setup takes about 15 minutes if you have these on hand. You enter them on a secure page; Tourney Direct never stores them.

Your business

Legal business name and EIN, with your IRS EIN letter (CP-575 or 147C). Your Articles of Organization or Incorporation.

The owner

Date of birth, Social Security number, home address, ownership percentage, title, and a photo ID.

Your bank

The account payroll will come from. You'll confirm two small test deposits, which take 1 to 3 business days to arrive.

Possibly requested

A certificate of good standing from your state. If the verification team asks for one, you can order it online from your state's business records office.

Why all the paperwork? Because payroll moves money on your behalf, federal banking rules require every business to be verified before payments can go out. It's the same for every organization, and you only do it once per EIN.

PART 1 • ONCE

Set up your organization

Payroll → Organization

- 1 Choose who you pay.** The first question is "Who will you pay?" Pick **1099 contractors**, **W-2 employees** or **Both**. This tailors the rest of setup: contractors need far less than employees. You can change it later with **Change**.
- 2 Have more than one EIN?** If your organization pays people from more than one business (for example separate clubs), click **+ Add an EIN** at the top of the page and name it. Each EIN is set up on its own, with its own bank. Use the **EIN** dropdown at the top to switch between them. If you only have one EIN, skip this.
- 3 Answer one question.** "Did this EIN pay anyone through another payroll provider earlier this year?" If the answer is **No**, setup skips the step for bringing over earlier payroll history. If you pay only 1099 contractors, your company is also set up for contractors only, which keeps setup short.
- 4 Company setup.** Click **Start** under **1. Company setup**. A secure page opens inside your portal where you enter your business details, owner details, agreements, bank account and any requested documents. If a step won't move forward (like the ID or bank step), use **Open in a new tab**. You can close it and come back; it picks up where you left off.
- 5 Confirm your bank deposits.** Two small deposits land in your bank account within 1 to 3 business days. When they arrive, click **Confirm bank deposits** and enter the amounts. You don't need to wait for this to keep going: add your people and enter pay in the meantime.
- 6 W-2 employers only.** Three more steps appear if you pay employees: **Add a work location** (each place your staff work), **Taxes** (**Set up federal taxes** and **Set up state taxes**), and **Set pay schedule** (weekly, every two weeks, twice a month, or monthly). 1099-only organizations skip all three.
- 7 Name your approvers.** Under **Approvers**, enter a primary approver's name and email, and a backup if you like. Click **Save approvers**. Once approvers are saved, only those people can approve a payroll, and either one can do it. The person who approves is recorded with each run.

Watch the Payments card

The **Payments** card at the top of the Organization page tells you when you can pay, and exactly what's left if you can't yet. With more than one EIN, each has its own card.

YOU SEE	WHAT IT MEANS
Ready to pay	You're verified. Go ahead and run payroll.
Business review in progress	Your details are being verified. The card says "Payments unlock when your business review has been completed" and lists anything still needed.
Final setup steps needed	Review is done, but something is left, such as a work location or federal tax setup. The card lists exactly what.
Prior payroll history needed	You paid people through another payroll provider earlier this year, so that history needs to come over. If that's not right (for example a brand-new EIN), contact us and we'll get it cleared.
Paying only 1099 contractors? You can pay contractors as soon as your business details are verified. Federal and state tax setup is only needed for W-2 employees.	

PART 2 · ONCE PER PERSON

Add your people and send their links

Payroll → Employees & Contractors

1

Add people. Click **Add people** and choose one of three ways:

2

Sync from staff directory

:
brings
in
everyone
in
your
Staff
Directory.

3

Upload a spreadsheet

: click **Download the template**

for
the
columns:
First
Name,
Last
Name,
Email,
Mobile
Phone,
Work
State,
Type
(W-2
or
1099).
People
are
matched
by
email,
so
re-
uploading
updates
them
instead
of
creating
duplicates.

4

Add one at a time

: first
name,
last
name,
email,
mobile
phone,
work
state,
and
W-2
or
1099.

If you have more than one EIN, pick the EIN at the top of the page before you upload, and everyone in the file is assigned to it.

5

Check each person's details. Use the **W-2 / 1099** toggle on each row. You decide each person's classification; the page links to a 5-question tool if you're unsure. With more than one EIN, set **Paid by** on each row. Make sure every person has a **mobile number** and a **work state**.

6

Send their onboarding link. Click **Send link** on a row, or **Send links to all pending** to text everyone who isn't finished. Teddy texts each person a secure link. They don't log in anywhere or create a password.

7

Watch them finish. Each row shows their progress, such as "2 of 3." When they're done, it shows **Good to go**. If someone doesn't finish, Teddy texts them a reminder with a fresh link 24, 48 and 60 hours after their link was sent. Use **Filter by: Pending** to see who still needs to finish, and **Resend link** to send a new link yourself (this restarts their reminders).

TYPE	WHAT THEY COMPLETE ON THEIR LINK
1099 contractor	Confirm their identity, sign a W-9, add direct deposit.
W-2 employee	Confirm their identity, sign a W-4 (federal and state), complete their I-9, add direct deposit.

No mobile number means no link. If someone has no mobile number on file, or has opted out of texts, the page tells you it couldn't text their link. Add or correct their number and click Resend link. For W-2 employees, you can choose who handles the I-9: **We already have it**, or **Have Tourney Direct collect it** (a one-time \$15 fee).

Enter pay, then approve

Step 1 · Enter pay

Payroll → Hours & Pay

- 1 **Set each person's rate.** Pick **Per hour** or **Flat** and enter the rate.
- 2 **Enter Qty for this period.** For hourly people, Qty is their hours. For flat-rate people, Qty is how many times to pay the flat amount (1 = once). Tab out of the field to save, and **Gross** fills in automatically. Anyone with no Qty this period isn't paid.
- 3 **Shortcuts.** **Copy last period** fills in last period's quantities as a starting point, so you only adjust what changed. **Upload CSV** imports a spreadsheet: click **Download the CSV template** for the columns (Staff name, Email, Hours). People are matched by email, or by name if there's no email, and anyone who doesn't match is listed for you instead of imported.

Good to know. Pay is saved to the pay period you're in when you enter it, so enter it before the period ends. If you approve right after a period ends, the Approve & Pay page shows that period automatically.

Step 2 · Approve and pay

Payroll → Approve & Pay · approvers only

- 1 **Check the period.** The banner at the top shows which period you're paying, for example "Paying September 2026." If the period has just ended and your hours were entered in it, the page shows that period automatically.
- 2 **Review who's being paid.** Everyone with an amount shows as **Ready** or **Held**, with the reason it's held. Only people marked Ready are paid.
- 3 **Leave the pay date empty.** It automatically uses the earliest available date, which is about three business days out. Direct deposit needs that lead time, so same-day or next-day pay dates aren't available. You can pick a later weekday if you prefer.
- 4 **Click Approve and pay**, then confirm. You'll see "Payroll submitted for 3 people, \$540.00" and the pay date, and each person is marked **Scheduled**. Teddy texts each of them right away that their pay is on its way.

HELD BECAUSE	WHAT TO DO
Missing W-9, Missing signed W-4, Missing direct deposit, I-9 identity check not complete	They haven't finished their link. Resend it from Employees & Contractors.
No rate set	Set their rate on Hours & Pay.
Hours not matched to this worker	Enter their hours in the grid.
State payroll not registered yet	W-2 only: finish that state's tax setup on the Organization page.

AUTOMATIC

What happens after you approve

You don't have to do anything for this part.

Your account is debited

About two business days before the pay date, one total amount comes out of your bank account. Tourney Direct never holds your money.

Everyone gets paid

As soon as you approve, Teddy texts each person their amount and the day it arrives. Pay lands by direct deposit on the pay date.

Taxes are handled

For W-2 employees, taxes are withheld and filed for you. For contractors, state new-hire reports are filed for you in most states.

Year-end forms

W-2s and 1099-NECs are generated and filed for you. Once issued, find them under **Reports** → **Year-end tax forms**.

Paying contractors in New York or Connecticut? Those states' contractor new-hire reports aren't filed automatically yet. Contact us and we'll help.

What your people receive

Examples use a club called Metro Lacrosse and a coach named Jordan. Texts come from Teddy at (443) 582-0095.

When you add them

Welcome email, once per person

Subject: Action needed: set up your pay with Metro Lacrosse

Hi Jordan,

Metro Lacrosse has set you up to be paid through Tourney Direct, and there is one quick step for you.

What happens next

In the next little while you'll get a text from Teddy, the Tourney Direct text assistant, at **+1 (443) 582-0095**. The text has a secure link to set up your pay. Please save that number in your phone as "Teddy - Tourney Direct" so you know the link is really from us. It takes about five minutes, your information stays private and is never shared with Metro Lacrosse, and you do not need to create an account or a password.

Have this ready (you'll enter it on the secure link, not here):

Your Social Security number or ITIN

Your home address and date of birth

Your bank login, or your account and routing numbers, for direct deposit

The email ends with who to contact for help, and a note that Tourney Direct can't advise on how to fill out tax forms.

Thanks, Metro Lacrosse

When you click Send link

Text from Teddy

Hi Jordan, this is Teddy from Tourney Direct helping Metro Lacrosse onboard staffers like you so you can get paid. Tap the link to set up your pay in a few minutes. It is secure. <https://pages.tourneydirect.com/r/...>

Opens their secure setup page

If they haven't finished

24, 48 and 60 hours later

Hi Jordan, just a quick reminder from Teddy at Tourney Direct. You have one step left to get paid. Tap here to finish your pay setup: <https://pages.tourneydirect.com/r/...>

Stops as soon as they finish

When you approve payroll

Text from Teddy

Hi Jordan, your pay has been approved. \$180.00 is on its way by direct deposit and should arrive on Wednesday, October 7.

Reports and statements

Payroll → Reports

Payroll history lists every payroll you've approved, with its pay date, total, and status (**Scheduled** until the pay date, then **Paid**). Click **Statement** for a printable record of that payroll, including your Tourney Direct service fees, or **CSV** for a spreadsheet. **Totals by person** shows what each person has been paid this year, which is what appears on contractors' 1099-NECs. **Year-end tax forms** lets you view and download W-2s and 1099-NECs once they're issued.

If something isn't working

YOU SEE	WHAT TO DO
"Payments unlock when your business review has been completed" or "...when your setup has been completed"	Check the "Still needed" list on the Payments card. If it's waiting on the review, there's nothing for you to do yet.
"You can view this payroll but you are not an approver"	Only listed approvers can approve. An approver can add you on the Organization page.
"The earliest pay date available now is..."	Choose that date or later, or leave the pay date empty.
"This pay period has already been approved and paid"	That payroll already went out. Refresh the page to see it.
"This payroll couldn't be submitted, and nothing was charged"	Nothing was paid or charged. Our team follows up with you.

Questions? Click Ask Teddy on any payroll page, or email info@tourneydirect.com