Name of the Business:

Type of Business:

1. Who is your current payroll provider?
2. How many employees do you have?
3. Do you have any independent contractors, if so, how many?
4. What is your company’s frequency of payroll runs? (weekly, bi-weekly, etc.)
5. Do all your employees and ICs get paid via direct deposit or do some or all get physical checks?
6. Do you currently use additional services for the business, i.e., geo-location time keeping, biometric clock, WC Pay-by-Pay, etc.?
7. Can you tell me what your workers’ compensation package looks like and who is insuring you at this time?  (Please provide a Policy Number, class code(s), expiration date to confirm BOR process)
8. Who manages your Workers’ Compensation insurance?
9. Does your company offer additional benefits like 401K to your employees?  If so, please list.
10. If your business offers 401K benefits, who manages the 401K plan?
11. If your business offers 401K benefits, can you provide the first page of the account which shows total money in the 401K plan and total employees with a balance (total numbers, not names)
12. Do you utilize your payroll provider strictly as a record keeper for health benefits where they report numbers on a W2, or do they pay insurance providers on the employees’ behalf and report on W2?
13. Do you have any employees with Garnishments?
14. Who is your provider for personnel management and how do they help you? How do you currently stay compliant with State and Federal labor laws and any changes? (i.e. HR Services)
15. Who is helping the business stay ACA compliant?
16. Is the business under a PEO arrangement?
17. Do you have a specific date as to when you are looking to terminate your services with your current provider?
18. Please provide current invoice(s) (some services like time keeping and 401K are not included in monthly invoicing) of all the services you receive now from your provider. There is a possibility we will need more, so if you can send one month of invoices, that would make the quoting process more efficient.