



Payroll Analysis

Organizational Overview (Check all that apply)

Company Name:				Address:				
Contact Names:				Title:				
Type of Ownership:		<input type="checkbox"/> Public <input type="checkbox"/> Private <input type="checkbox"/> Not for Profit <input type="checkbox"/> Governmental						
# of Federal ID's:								
# of Locations:								
Year-end documents produced:		<input type="checkbox"/> W-2 <input type="checkbox"/> 1099R <input type="checkbox"/> 1099M <input type="checkbox"/> 945/5510						
Current Payroll Method:		<input type="checkbox"/> In-house <input type="checkbox"/> Outsourced - Name of Vendor						
Location Name	# EE's	Pay Frequency	Hourly/Salary EE's	Period End Date	Input Date	Delivery Date	Pay Date	Number of W-2's
		<input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Semi-Monthly <input type="checkbox"/> Monthly	___/___					
		<input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Semi-Monthly <input type="checkbox"/> Monthly	___/___					
Number of locations that require delivery:								
How many states do you pay or file taxes in?								
How many new hires do you process each payroll?								
How many garnishments/wage assignments/child support payments do you process each payroll?								
Do you pay workers comp each pay and is reporting needed				<input type="checkbox"/> Yes <input type="checkbox"/> No				
What is the name of your accounting package?								
How is information from payroll posted to general ledger?				<input type="checkbox"/> Manual <input type="checkbox"/> Imported <input type="checkbox"/> Other: <i>Provide sample</i>				
Are physical(hard copy) paychecks issued out of your bank account or your vendor's bank account				<input type="checkbox"/> Mine <input type="checkbox"/> Vendor(Net Check)				
Is your company 100% direct deposit (no physical checks)?				<input type="checkbox"/> Yes <input type="checkbox"/> No				
Do you have a 401(k) Plan?				<input type="checkbox"/> Yes <input type="checkbox"/> No 401(k) Administrator:				
How is 401(k) information sent to the Administrator?				<input type="checkbox"/> Report <input type="checkbox"/> Electronic File <input type="checkbox"/> Other: <i>Provide sample</i>				
Can employees view checks online? (Online Check View)				<input type="checkbox"/> Yes <input type="checkbox"/> No				
Do you track HR Information?(Education, training, dependents, emergency contacts, assets or certifications)				<input type="checkbox"/> Yes(HRIS & Employee Self Service) <input type="checkbox"/> No				
Employee Self Service? Can Employees update their record?				<input type="checkbox"/> Yes(HRIS & Employee Self Service) <input type="checkbox"/> No				
Time and attendance System? Do you want to change?				<input type="checkbox"/> Yes <input type="checkbox"/> No				
What is the name of your Time and Attendance System?								
Do you use physical time clocks? Type? How many?				<input type="checkbox"/> Swipe <input type="checkbox"/> Biometric <input type="checkbox"/> Fingerprint <input type="checkbox"/> Handprint # Quantity: _____				