PRIMEPAY
BROKER
CONCIERGE

10 PAYROLL QUESTIONS YOU SHOULD ASK YOUR CLIENTS

Quick Tips

It may be easier to obtain the client's most recent payroll invoice to facilitate the proposal process. Your client can block out the pricing if that makes them feel more comfortable.

At the end of the day, a face-to-face payroll review/needs assessment is always best. But, preliminary pricing can be provided beforehand to show the approximate costs based on the answers to the questions in this brief.

Looking to generate payroll proposals for your clients quickly? Provide the answers to the following 10 questions to your local PrimePay representative and you will be provided a proposal within one business day.

1. **Who is the incumbent payroll provider?**
   - ☐ ADP
   - ☐ Paychex
   - ☐ CPA/In-House
   - ☐ Other _______________________________

2. **How many employees are on the payroll?**

3. **What is the frequency of pay?**
   - ☐ Weekly (52 pays)
   - ☐ Bi-weekly (26 pays)
   - ☐ Semi-monthly (24 pays)

4. **Direct Deposit vs. Live Checks**
   - ➢ How many employees receive direct deposit?
   - ➢ How many employees receive live checks?

5. **Are any live checks electronically signed and sealed in envelopes?**

6. **Can employees access pay stubs online?**

7. **Is General Ledger info imported from payroll to the client's accounting software?**
   - ➢ What accounting software is used?

8. **Is vacation tracked through payroll?**

9. **Are any special reports provided?**
   - ☐ 401(k) or retirement report
   - ☐ Labor Distribution Report
   - ☐ General Ledger Report

10. **What is the method of submitting/processing payroll?**
    - ☐ Online Web Payroll
    - ☐ Phone
    - ☐ Email/Fax

BENEFIT SERVICES REQUEST

Number of Eligible Covered EEs

I would like a proposal for:

Flexible Spending Account	☐
Health Reimbursement Arrangement	☐
Health Savings Account	☐
COBRA	☐

QUESTIONS?

Manager, Broker Concierge

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