

DISCOVERY WORKSHEET

Business Name: _____

Client Name: _____

Address: _____

Phone #: _____ Email: _____

FT EE's: _____ #PT EE's: _____ #Annual New Hires: _____

EINS: _____ Payroll Frequency: Weekly Bi-Weekly Monthly

OF LOCATIONS: _____ STATES OPERATING: _____

Average Annual EE Compensation: \$ _____ EE Turnover %: _____

CURRENT VENDORS:

Payroll: _____ Time & Attendance: _____

HRIS: _____ Applicant Tracking: _____

Ben Admin: _____ COBRA: _____

CLIENT OBJECTIVES:

1).

2).

3).

4).

5).

PAYROLL:

- Tax Filing
- Direct Deposit
- Pay Cards
- Garnishments
- Robust Reporting
- Online Pay Stubs/W-2's
- Wcomp Interface
- G/L Interface
- Mobile App for ESS
- Shift Differentials
- 401(k) 360° integration

Notes:

TIMEKEEPING:

- Clocks, computers and hardware options for real-time hours tracking
- Custom ad hoc reports
- Accruals
- Time off Requests
- Scheduling
- Exception Notification
- GPS punch tracking
- Job Costing
- CMS/PBJ Submission
- Timesheet Approval Workflow

Notes:

HRIS:

- Talent Acquisition
- Free Job Board Integration
- Candidate Self Service with Resume Parsing
- ESS Onboarding
- Online Ben Admin ESS
- Ben Admin Carrier Connectivity and Deduction Set Up
- Talent Management
- Job/Position/Salary History
- Performance Management with goals tracking
- Succession Planning
- Trainings & Certs Mngm't
- Incident/Write Ups
- Company Property Management
- Compliance (VETS-100, EEO-1, OSHA logs, new hire reporting)
- Off-boarding with term checklist, exit interview, COBRA administration and enrollment, and notification to carrier
- Unlimited Document Storage
- Employee Directory
- Org Charts
- Company Events and News
- Custom forms creator

Notes:

DYNAMIC SCHEDULING:

- Build** with workload planning, budgeting, shift and schedule definition, and pattern templates
- Fill** by scheduling groups or individuals, schedule to skill/proficiency, open shift visibility, and auto shift assignment
- Manage** with schedule alerts and notifications, skill tracking, credential/certification tracking, call list, employee self service with shift swap, requests for coverage, request to cover open shift, compare to timesheet for notifications
- Measure** with robust reporting, coverage maps and metrics, detailed audit trails, and planned to actual metrics

Notes:

ACA MANAGEMENT:

- Track Measurement Periods Compliance Alerts Notifications for ACA projected and status change
- Detailed and Summary Reports, including Ad Hoc Auto populate 1095-C's and 1094-C

Notes:

LEAVE MANAGEMENT:

- Request management with qualifier questionnaire and approval/rejection Create ad hoc reporting
- View history, balances, calendar, and entitlement Populate timesheets from leave case
- Compliance tracking by offering continuous and intermittent leave, automated tracking of eligibility including hours worked and notifications Department of Labor Forms

Notes:

CROSS PRODUCT FEATURES:

- Unlimited Custom Reports Dedicated Account Manager WOTC/FICA Tip Integration
- Marketplace Add-On's like E-Verify, SSN Verification, and Background Checks
- Daily/Weekly/Monthly Custom Auto Generated Reports Permanent Detailed Audit Trail
- Unlimited Record Retention and Document Storage Reminders/Notifications
- Exportable Reports into PDF, CSV, XLS, TXT, HTML and IIF Supported By All Browsers