



# Request for Information

Date \_\_\_\_\_ Metro Agent/Referral Partner Joan Winnington

## Payroll Administrator

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

Company Physical Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Industry \_\_\_\_\_ Current Payroll Provider \_\_\_\_\_

Pay Period Frequency:     Weekly     BiWeekly     Semi-Monthly

### Payroll Profile: (Per Pay Period)

# of Employees/paid \_\_\_\_\_ # of Emp/paper checks \_\_\_\_\_

# of Employees/Direct Deposit \_\_\_\_\_ # Wage Garnishments \_\_\_\_\_

# of New Hires (Estimate) \_\_\_\_\_ # Year-End w-2's \_\_\_\_\_

In addition to filing & remitting to the IRS and primary state, how many additional jurisdictions will need to receive reports (i.e. local taxes) \_\_\_\_\_

## Owner/President Contact Info

Name \_\_\_\_\_ Title \_\_\_\_\_

Contact # \_\_\_\_\_ Email \_\_\_\_\_

## Payroll Profile Continued – A Check Means YES

- Do you want signed & sealed Check Service?
- Do you want Primepoint to remit wage garnishments to their respective agencies?
- Do you want LIVE checks to be drawn on Primepoint's Bank of America checking account?
- Do you want Primepoint to produce 1099 payments each pay period?  
• If yes, how many each pay period \_\_\_\_\_
- Do you want a G/L Upload File or Report? If yes, what accounting system do you use (be specific) \_\_\_\_\_
- Do you have any employees that you pay on a different frequency than the regular employees?  
If yes, what is the frequency \_\_\_\_\_  
How many employees \_\_\_\_\_
- Do you have any seasonal employees?  
If yes, how many seasonal employees \_\_\_\_\_  
How many pay periods are they paid \_\_\_\_\_
- Do you want Pay As You Go Workers Comp Service? Primepoint will send a file to your carrier each payroll and your carrier will then debit your account based on your exact payroll
- Do you want Paid Time Off Tracking which would reflect your policy and/or your State's Sick Leave Law?

## Time and Labor Management

- Do you want a web-based time and attendance tracking system?
- Approximately how many employees would be using the time system \_\_\_\_\_
  - Do you want to collect employee time via PC, Smart Phone, or Clock? \_\_\_\_\_
    - If Clock – What kind and how many:
      - Proximity Card Reader      How many \_\_\_\_\_
      - Hand Reader                      How many \_\_\_\_\_

## Additional Options to Consider – A Check means YES

- Would you like to learn how you can become paperless?
- Do you have interest in learning about Debit Cards for employees who do not have a checking account?
- Do you want a new Labor Law Poster sent to you whenever there is a Federal and/or State update? How many posters do you need? \_\_\_\_\_
- Would you like an HR portal with a library of HR documents & forms, templates for a company handbook, and job descriptions?
- Would you like access to a hotline to ask HR and labor related questions to a live HR expert?

**Thank you for taking the time to help us understand the business needs of your company.**

**We look forward to working with you!**