PAYROLL / 01

DOCUMENT THE CURRENT PAYROLL WORKFLOW

Use aggregate business facts only. Keep employee records and identifiers out of this worksheet.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Entities, states or work locations, pay frequencies, and approximate workforce counts

Worker categories only as already established by appropriate advisers; unresolved questions to refer out

Current payroll, time, HR, benefits, accounting, banking, and reporting systems

Current intake, review, approval, funding, processing, payment, filing, and report sequence

Recurring changes, adjustments, corrections, notices, year-end needs, and exception paths

Current pain points, desired outcome, target timing, known constraints, and facts still to verify

Preparation only. Not payroll, accounting, tax, employment, security, contract, or legal advice. Do not enter employee records or sensitive identifiers.

PAYROLL / 02

MAP RESPONSIBILITIES, SYSTEMS, AND OUTPUTS

Ask each provider to assign an owner, input, approval, output, and escalation path.

Time, attendance, leave, new-hire, change, termination, benefit, and deduction data intake roles

Payroll review, approval, funding, payment, tax deposit, filing, and notice-handling responsibilities

Corrections, reversals, off-cycle work, exceptions, year-end tasks, and agency or employee inquiry roles

System setup, integrations, file exchanges, validation, monitoring, and failed-transfer responsibilities

User roles, access administration, activity records, reports, banking or agency visibility, and record export

Primary contacts, support channels, escalation, continuity, scope change, renewal, termination, and transition

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PAYROLL / 03

PLAN PAYROLL IMPLEMENTATION AND SUPPORT

Tick what is ready. Sensitive data belongs only in a verified secure handoff process.

- [ ] Aggregate entity, location, workforce, and pay-cycle facts are recorded
- [ ] Current systems, data sources, approvals, funding, and outputs are mapped
- [ ] Employee records, identifiers, banking details, and credentials are excluded
- [ ] Employer and provider responsibilities will be assigned in writing
- [ ] Secure discovery and data-transfer methods will be verified before sensitive handoff
- [ ] Configuration, integrations, validation, cutover, and acceptance will be planned
- [ ] Access, reports, notices, corrections, support, escalation, and continuity will be compared
- [ ] Complete scope, exclusions, price structure, changes, renewal, termination, and export will be written

Discovery, secure data transfer, configuration, integration, validation, parallel-check, and cutover plan requested

Acceptance criteria, owner signoffs, first-cycle support, open issues, and fallback or continuity questions

Ongoing support, notices, corrections, records access, export, termination, and transition questions

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PAYROLL / 04

QUESTIONS FOR THE PAYROLL PROVIDER

Record the provider's answer and the workflow, report, or agreement that supports it.

Responsibilities: who owns each input, decision, approval, funding, processing, payment, filing, notice, and correction step?

Data flow: how do time, HR, benefits, accounting, banking, reports, and exceptions move between systems and people?

Implementation: what discovery, secure transfer, setup, validation, parallel checking, cutover, and acceptance work is included?

Access: what roles, activity records, reports, banking or agency visibility, notices, records access, and export are available?

Support: what contacts, channels, hours, response, escalation, continuity, correction, and issue-resolution process applies?

Terms: what implementation, recurring, optional, excluded, change, renewal, termination, and transition items apply?

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PAYROLL / 05

COMPARE THE SAME PAYROLL SERVICE SCOPE

Use A and B in every box. Clarify different responsibility or workflow assumptions first.

Provider A / Provider B / discovery dates / entities, locations, pay cycles, and aggregate scope reviewed

Responsibility matrix, systems, integrations, approvals, funding, filings, notices, corrections, reports, and records - A / B

Secure transfer, configuration, validation, parallel checks, cutover, acceptance, access, support, and continuity - A / B

Implementation, recurring and optional scope, exclusions, complete price structure, changes, renewal, termination, export, and terms - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start a Payroll request if you choose; this step is optional. Share only aggregate, non-sensitive workflow facts and the written outcome you want so participating pros can compete with proposals. Compare the responsibility matrix, implementation and validation plan, integrations, access, reporting, support, complete scope, exclusions, written terms, and fit. Do not include employee records or sensitive identifiers in the request.

Start a request

One request. Every pro's best offer.

Participation varies. A secure workflow review and implementation conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/payroll

IRS: Employment Taxes (official reference)

IRS: Outsourcing Payroll Duties (official reference)

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