SMALL-BUSINESS PAYROLL / 01

MAP THE SHARED PAYROLL CYCLE

Describe the operating rhythm with neutral labels. Keep every employee and account detail elsewhere.

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

Business A / entity count / broad work-location categories only

Cycle A / frequency / source cutoff label / approval window

Source A / time, change, benefit or other category / owner role

Reviewer A / approver role / backup role / no person names

Routine output categories / recipient roles / delivery preference

Known friction, exception category or desired outcome to discuss

Preparation only. Confirm scope and terms with the professional.

SMALL-BUSINESS PAYROLL / 02

ASSIGN RESPONSIBILITY AND EVIDENCE

Ask who acts, who decides, what evidence returns and where unresolved questions go.

Employer-retained decision or approval / provider-performed task

Routine intake / review / approval / processing / confirmation owner

Change, correction or off-cycle request / authorization and evidence

Deposit, filing or wage-reporting question / qualified reviewer route

Report, acknowledgment or record returned / access and retention question

Notice, employee inquiry or agency question / routing and escalation owner

Preparation only. Confirm scope and terms with the professional.

SMALL-BUSINESS PAYROLL / 03

CHECK TRANSITION READINESS

Tick what is organized. These checks do not approve a payroll setup, filing or employment decision.

- [ ] The same neutral cycle brief will go to every provider
- [ ] Employee identifiers, wages, bank data and credentials are excluded
- [ ] Employer and provider responsibilities are separated
- [ ] Routine and exception paths each have an owner
- [ ] Review and approval evidence is requested
- [ ] Official-source and adviser questions remain unresolved
- [ ] Setup, validation and first-cycle support are described
- [ ] Exit access, record export and transition help are compared

Secure discovery and transfer method / provider to confirm

Validation, first-cycle review and acceptance evidence

Open dependency, adviser question or transition risk / owner

Preparation only. Confirm scope and terms with the professional.

SMALL-BUSINESS PAYROLL / 04

QUESTIONS FOR THE PAYROLL PROVIDER

Record the provider's answer and where it appears in the proposal or implementation plan.

Ownership: which decisions stay with us and which tasks do you perform?

Cycle: how do sources, changes, approvals and confirmations move?

Evidence: what reports, acknowledgments and records do we receive?

Transition: how are secure setup, validation and first-cycle support handled?

Exceptions: how are corrections, notices, questions and escalation routed?

Terms: what is included, optional, excluded and available at exit?

Preparation only. Confirm scope and terms with the professional.

SMALL-BUSINESS PAYROLL / 05

COMPARE THE SAME PAYROLL BRIEF

Use Provider A and B. Clarify unlike responsibilities or transition assumptions before comparing proposals.

Provider A / B / consultation dates / shared Cycle A brief

Employer-retained and provider-performed responsibilities - A / B

Secure setup, validation, evidence, exceptions and support - A / B

Included, optional and excluded work / transition and exit terms - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Payroll request. Share a non-sensitive cycle, responsibility and transition brief so participating pros can compete with proposals. Compare ownership, secure setup, review, evidence, support, exclusions, transition terms and fit. Never include employee, bank, credential or tax-account data in the request.

One request. Every pro's best offer.

Start a request

Participation varies. A planning conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/payroll/small-business-payroll

IRS: Publication 15, Employer's Tax Guide (official reference)

Social Security Administration: Employer W-2 Filing Instructions & Information (official reference)

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