



(For each function or product listed below, type an "X" in all appropriate columns that apply, along with any notes/comments about the issue to its right.)

Employment Profile Survey

offered by
Acme PEO/HRO
 for
Sample Client / Prospect

We Have This, or We Do It and Do It Well
It Takes Executive Level Time
It Takes Administrative Support Time
It Has Costs (ie, Vendor / Product / Tax)
Let's Discuss More / Need Help

Additional notes / comments

Human Resources							
1	Employment application updating / compliance	✓	✓	✓	✓		
2	ADEA compliance / guidance (20+)						
3	ADA compliance / guidance (15+)	✓	✓				
4	EEO compliance / guidance (50+ & Fed Cntrts, or 100+)						
5	Job posting ad design	✓		✓			
6	Employment verifications	✓		✓			
7	PRWORA compliance / administration (1+)	✓		✓			
8	IRCA - I-9 compliance / administration (1+)	✓		✓			
9	E-Verify						
10	Employee onboarding process	✓	✓	✓			
11	Wage / salary administration & research						
12	FLSA compliance and guidance (1+)						
13	EPA compliance and guidance (2+)						
14	Disciplinary/probation policies /						
15	Disciplinary/probation action - c						
16	Employee handbook developme						
17	Employee handbook changes / c						
18	EPLI - Employment Practices Liab						
19	Employee litigation response						
20	Employee / Supervisor Training - S						
21	PDA compliance and guidance (15+						
22	Employment rights posters cost / u						
23	GINA compliance assistance (15+)						
24	Wage and hour claims response						
25	DOL communication assistance						
26	Title VII compliance / guidance (15+)						
27	Human Resources compliant forms re						
28	Employee files management - HIPAA						
29	Employee files management - retentio						
30	Employee files management - timely d						
31	Employee anniversary date tracking						
32	HRIS (Human Resource Information Sys						
33	HRIS - manager access & training						
34	HRIS - employee self service access & training						
35	HR management reports via HRIS (web or on-site)	✓		✓	✓		
36	Supervisor Training - Termination Procedures						
37	State(s) unemployment claims administration (1+)	✓	✓	✓			
38	Participation in unemployment hearings	✓	✓				
39	COBRA administration and liability (20+)	✓		✓			
40	HIPAA administration and liability (1+)						
Benefits Management							
41	PTO (vacation / leave) policy development	✓	✓				
42	PTO (vacation / leave) policy administration	✓		✓			
43	FMLA compliance / guidance (50+)						
44	USERRA compliance / guidance (1+)						
45	PPACA compliance / guidance (50+)	✓	✓				
46	ERISA reporting / disclosure (Form 5500, SARs, etc) (1+)						
47	Employee benefits communication / education	✓		✓			
48	Insurance coverage acceptance / waivers	✓		✓			
49	Retirement plan enrollment / waiver	✓		✓			
50	Annual shopping / comparing benefit options	✓	✓	✓			
51	Annual rate negotiation	✓	✓	✓			
52	Group Health / Prescription insurance coverage	✓			✓		
53	Group Dental coverage						

A quick, simple checkmark assessment exercise generates highly custom proposal sheets for each unique prospect.

(Do NOT use this as a pain finding document. Your prospect will glaze over.)