

Choosing A PEO Checklist ✓

You've made the important decision to work with a professional employer organization (PEO). Now the question is: **Which PEO do I choose?** When evaluating a PEO partner, consider the below items to ensure they meet your needs.

Step 1: Determine Your Needs

Before you talk to any PEO, you should take note of your business needs. What are your current challenges? Do you anticipate changes to your company that could impact which services you need?

HUMAN RESOURCES

- Recruiting and pre-screening
- Job descriptions
- Employee handbook
- Employee training
- Insurance administration/procurement
- Employment policies and procedures

PAYROLL

- Web-based payroll software
- Simplified payroll management
- Payroll tax administration (W-2s, W-3s, SUTA, FUTA, Forms 940 & 941)
- Management of tax records
- Simplified deduction tracking

EMPLOYEE BENEFITS

- Fully insured health plan
- 401(k) retirement plans
- Profit sharing
- Supplemental insurance plans
- Benefits administration
- Group life
- COBRA
- Disability
- Dental/vision

RISK MANAGEMENT

- Workplace safety programs
- Safety manuals
- Safety guidelines
- Workplace inspections
- Drug testing
- Workers' compensation insurance
- Workers' compensation claims investigation, representation, and management

Step 2: Match The PEO Partner To Your Needs

After you've determined your business needs, ask the following questions to make sure the PEO you select can meet those needs.

Do you offer the range of services that will meet my needs?

How are your employee benefits funded?

Can you tailor your benefits packages to meet the needs of my employees?

Are you a member of NAPEO (National Association of Professional Employer Organizations)?

What is your client retention rate?

How many companies and employees do you currently represent?

What certifications or accreditations do your employees have?

Do you have any clients that are similar to my business?

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