



Needs Analysis Discovery – FusionHR

Do you require services in Spanish?

Yes No

Do you require mobile capabilities?

Yes No

What are the key items you are looking for in a new system/vendor?

Discovery - Benefits

Strategic initiatives for employee benefits programs

Total number of employees on current benefits:

What are your key decision points in selecting a new broker/system?

Functionality	Importance		
	Critical	Important	Not Important
Price	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Benefits Administration and System Functionality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HR System Functionality and Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payroll System Functionality and Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Talent Management Functionality and Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Time and Attendance Functionality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ongoing Support and Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implementation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical Deployment and Reporting/Analytics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reputation, Stability, Longevity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transparency, Contract Flexibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What are key items you're looking for in a new agent?



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Who is involved in the vendor selection project?

- Senior Management
- Finance
- Human Resources
- IT
- Consultants
- Other

How has the Affordable Care Act impacted your business and some of the decisions you are making around healthcare?

How did you report 2015 ACA information? (Manual/Payroll/Another system)

- Manual
- Payroll
- Another system
- Other

How are you working with your broker to help navigate PPACA?

Do you have a strategy in place to keep you compliant in 2016?

- No
- Yes

Comments:

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Benefits Administration

What benefit plans are offered to your employees

Type	# of Plans	Type	# of Plans
Medical		Pension	
Vision		Short Term Disability	
Dental		Long Term Disability	
Life		Long Term Care	
Supplemental Life		Cancer	
AD&D		HSA	
FSA		Section 125	
Flex Benefits		Stock Options	
401(k)		403(b)	
		Other	

How is COBRA administered?

In house Outsourced via:

Open Enrollment Process

Managed In-house Broker managed

Paper enrollment forms Automated enrollment

If automated what system?

When is open enrollment?

When does your plan year begin?

Are you looking to automate the Benefit Enrollment Process? Yes No

How do you currently communicate employee/benefit changes to the carriers?

Are you looking to automate this process? Yes No



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Discovery - HRIS

What is your current HRIS system

What are your reasons for seeking a replacement for your current system/vendor?

When does your contract with your current HRIS administration provider expire?

How many system administrators do you have/anticipate administering the system?

Please indicate the current state, future desired state and if this is in the scope of this project for the following items.

	Current System, Version/Provider:	Current State	Future Desired State	Is this in scope for this project?
Personal information:	<input style="width: 100%; height: 25px;" type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
W-4 information:	<input style="width: 100%; height: 25px;" type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope



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Please indicate the current state, future desired state and if this is in the scope of this project for the following items.

	Current System, Version/Provider:	Current State	Future Desired State	Is this in scope for this project?
Current salary information:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Historical salary information	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Direct deposit:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Current job information:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Historical job information	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Deduction information:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Disciplinary actions:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input checked="" type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Grievances:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope



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Time-off requests (vacation, sick, etc.):	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Education:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Licenses/skills information:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Performance appraisals:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Paycheck/W2:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Company survey:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Job posting:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Training Tracking and/or Enrollment:	<input type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope



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Please indicate the current state, future desired state and if this is in the scope of this project for the following items.

	Current System, Version/Provider:	Current State	Future Desired State	Is this in scope for this project?
Review and sign on-line policies/procedures:	[]	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Previous Employment History	[]	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope
Emergency contacts:	[]	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope

What systems are you interested in evaluating?

Are there any other projects planned or in progress that could impact this project?

Will you have IT assistance with the implementation?
 Yes No

Once a vendor is selected, how long do you anticipate it will take to finalize a contract with vendor based on your experience with your legal team?

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Needs Analysis

Discovery – FusionHR

How many years would you like the new contract to run?

- 1 year 3 years
 2 years other (specify)

Organizational structure (check all that apply)

- Companies Departments
 Locations Cost Centers

Discovery - Payroll

What pay schedule frequencies are used?

	Number of employees paid weekly	Number of employees paid biweekly	Number of employees paid semimonthly	Number of employees paid monthly
FEIN #1				
FEIN #2				
FEIN #3				
FEIN #4				
FEIN #5				

Payroll processing schedule

	Weekly Payroll	Bi-Weekly Payroll	Semi-monthly payroll	Monthly payroll
Pay period begin day/date				
Pay period end day/date				
Payroll Processing Date				
Pay date				

Payroll input method

	Phone in	Fax in	Email	Web based
Current input method	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Desired input method	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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Check delivery location

Multiple state tax filing? Mark all that apply.

<input type="checkbox"/> AL	<input type="checkbox"/> CO	<input type="checkbox"/> HI	<input type="checkbox"/> KS	<input type="checkbox"/> MA	<input type="checkbox"/> MT	<input type="checkbox"/> NM	<input type="checkbox"/> OK	<input type="checkbox"/> SD	<input type="checkbox"/> VA
<input type="checkbox"/> AK	<input type="checkbox"/> CT	<input type="checkbox"/> ID	<input type="checkbox"/> KY	<input type="checkbox"/> MI	<input type="checkbox"/> NE	<input type="checkbox"/> NY	<input type="checkbox"/> OR	<input type="checkbox"/> TN	<input type="checkbox"/> WV
<input type="checkbox"/> AZ	<input type="checkbox"/> DE	<input type="checkbox"/> IL	<input type="checkbox"/> LA	<input type="checkbox"/> MN	<input type="checkbox"/> NV	<input type="checkbox"/> NC	<input type="checkbox"/> PA	<input type="checkbox"/> TX	<input type="checkbox"/> WI
<input type="checkbox"/> AR	<input type="checkbox"/> FL	<input type="checkbox"/> IN	<input type="checkbox"/> ME	<input type="checkbox"/> MS	<input type="checkbox"/> NH	<input type="checkbox"/> ND	<input type="checkbox"/> RI	<input type="checkbox"/> UT	<input type="checkbox"/> WY
<input type="checkbox"/> CA	<input type="checkbox"/> GA	<input type="checkbox"/> IA	<input type="checkbox"/> MD	<input type="checkbox"/> MO	<input type="checkbox"/> NJ	<input type="checkbox"/> OH	<input type="checkbox"/> SC	<input type="checkbox"/> VT	<input type="checkbox"/> WA

How is 1099 filing completed?

Direct Deposit

	Current System, Version/Provider:	Current State	Future Desired State	Is this in scope for this project?
Direct deposit:	<input style="width: 100%; height: 20px;" type="text"/>	<input type="checkbox"/> On-premise system (internally managed) <input type="checkbox"/> Hosted system (externally managed) <input type="checkbox"/> Not applicable	<input type="checkbox"/> Hosted system—move to new vendor <input type="checkbox"/> Hosted system—keep current vendor <input type="checkbox"/> Not interested	<input type="checkbox"/> In scope <input type="checkbox"/> Possibly in scope <input type="checkbox"/> Not in scope

How many rates of pay on a per employee basis?



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How many earning types?

Earning types (check all that apply)

REG SICK BONUS

OT VAC COMM

HOL PTO OTHER

If applicable what types of garnishments are used?

Number of active wage garnishments:

Number of garnishment payments per month:

Types of garnishments

How are these garnishments processed?

Pay agent

3rd party check

other: