

(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.)

HR Value Assessment Survey

offered by



Do You Currently Do or Have?

How? Owner / Exec Time?

How? Administrative Time?

Costs? (Vendor/Product/Tax)

Let's Discuss More / Need Help

Additional notes / comments

Human Resources						
1	Human Resource Forecasting / Planning assistance					
2	Employment Application updating / compliance					
3	Job Description writing					
4	Job Description updating					
5	ADEA compliance / guidance					
6	ADA compliance / guidance					
7	EEO compliance / guidance					
8	Applicant Tracking System *					
9	Supervisor Training - Interviewing					
10	Employment phone interviews					
11	Employment personal interviews					
12	Employment verifications *					
13	MVA record checks *					
14	Criminal background checks *					
15	Offer letters					
16	Employment Agreement design / writing					
17	Confidentiality Agreements					
18	Non-Compete Agreements					
19	Non-solicitation Agreements					
20	Arbitration Agreements					
21	Post-Offer Drug Testing *					
22	Pre-employment Testing *					
23	Pre-employment Testing benchmarking *					
24	PRWORA compliance / administration					
25	IRCA - I-9 compliance / administration					
26	Handbook review / receipt documentation					
27	Employee Onboarding Process					
28	Turnover cost analysis					
29	Turnover frequency tracking					
30	Compensation Plan and Strategy assistance *					
31	Wage / Salary Administration & Research					
32	FLSA compliance and guidance					
33	Incentive pay plans *					
34	Executive compensation plans *					
35	Total Compensation statements					
36	Job Analysis					
37	Performance appraisal system assistance and training					
38	Supervisor HR Training - Team Building					
39	Supervisor Training - Employee Counseling					
40	Drug Testing (Reasonable Cause, Random, Periodic) *					
41	Disciplinary/Probation policies / procedure development					
42	Disciplinary/Probation action - documentation assistance					
43	Employee Handbook development / printing *					
44	Employee Handbook changes / compliance updating					
45	Employee Litigation response					
46	Employee / Supervisor Training - Sexual Harassment					
47	Supervisor Training - Violence in the Workplace					
48	Employee / Supervisor Training - Substance Abuse					
49	Supervisor Training - Discrimination					
50	HR Audit(s)					
51	Employment Rights posters cost / updating					
52	GINA compliance assistance					
53	Wage and Hour Claims response					
54	DOL communication assistance					
55	EEO Compliance - EEO-1 *					
56	Affirmative Action Plans *					
57	Title VII compliance / guidance *					
58	Employee files management - HIPAA compliance					
59	Employee files management - Retention tracking					
60	Employee files management - Timely Destruction					

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STREAMLINE CXXO

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61 Job Costing *						
62 Supervisor Training - Termination Procedures						
63 State(s) Unemployment Claims administration						
64 Attendance at Unemployment hearings						
65 WARN compliance						
66 COBRA administration and liability (w/ ARRA reqmnts)						
67 HIPAA administration and liability						
68 Severance package design						
69 Outplacement assistance/services *						
70 Exit Interviews						
Human Resource Software						
71 Human Resources compliant forms resource						
72 Employee anniversary date tracking						
73 Tracking of Skills, Licenses, and Certifications						
74 HRS (Human Resource Software) - system mgmt & fees						
75 HRS - Manager access & training						
76 HRS - Employee Self Service access & training						
77 HR Management Reports via HRS (web or on-site)						
Payroll and Tax Administration						
78 W-4 administration						
79 State withholding forms administration						
80 Payroll Processing (pay & tax calculations, checks, etc.)						
81 Online Payroll Processing						
82 Timeclock system *						
83 Direct Deposit						
84 Pay Card (debit card) processing *						
85 941 Quarterly filings						
86 State(s) Quarterly withholding tax filings and deposits						
87 State(s) Unemployment Insurance (SUI) quarterly tax filings						
88 W-2 and W-3 preparation and distribution						
89 Federal Unemployment administration - 940 filing						
90 State(s) Unemployment Insurance account & rate						
91 SUI Experience Rate(s) verification / negotiation						
92 Certified Payroll						
93 IRS compliance / correspondence (employment related)						
94 CCPA compliance / guidance						
95 Garnishment Liability / paperwork processing						
96 Lost checks - stop payments / re-issue *						
97 Responding to employment and wage verification request						
Retirement Plan Administration						
98 Retirement Plans - Standard 401k, Safe Harbor, Roth						
99 Retirement plan fiduciary risk management						
100 Retirement Plan - Form 5500 filing						
101 Retirement Plan - Annual discrimination testing						
102 Profit Sharing Plan						
103 Profit Sharing Plan Administration						
Group Benefits						
104 PTO (Vacation / Leave) Policy development						
105 PTO (Vacation / Leave) Policy administration						
106 FMLA compliance / guidance						
107 USERRA compliance / guidance						
108 PPACA compliance / guidance						
109 ERISA reporting and disclosure (Form 5500, SARs, etc.)						
110 Retention strategies / benefit plan design						
111 Employee Benefits communication / education						
112 Insurance coverage acceptance / waivers						
113 Retirement Plan enrollment / waiver						
114 Annual shopping / comparing benefit options						
115 Annual rate negotiation						
116 Group Health / Prescription Insurance coverage						
117 Group Dental coverage						

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118	Group Vision coverage						
119	Group Life coverage						
120	Group Short Term Disability coverage						
121	Group Long Term Disability coverage						
122	Research / Answer employee questions on benefits						
123	Benefit plans premium reconciliation / payment						
124	Open-Enrollment meetings / administration						
125	Employee Eligibility / Change Tracking and Processing						
126	Health / Wellness Programs						
127	Voluntary benefits plans shopping						
128	Voluntary benefits enrollments / administration						
129	Voluntary Dental						
130	Voluntary Vision						
131	Voluntary Life						
132	Voluntary Disability						
133	529 College Savings Plan administration						
134	Premium Only Plan (125) Administration						
135	FSA (125) Administration						
136	Dependent Care (125) Administration						
137	Employee Assistance Plan (EAP)						
138	Credit Union						
Workers Comp / Risk Mgmt.							
139	Workers Compensation (WC) coverage						
140	WC - upfront deposit management/negotiation						
141	Pay-as-you-go WC coverage						
142	Annual wage & premium audit administration						
143	Experience Modifier verification / correction						
144	WC Claims administration / First Report of Injury						
145	Post accident drug testing *						
146	Return to Work programs						
147	OSHA 300 log maintenance						
148	Certificates of Insurance administration						
Recruiting							
149	Recruiting strategy assistance						
150	Help Wanted Ad Design						
151	Help Wanted Ad / Job Board placements *						
152	Help Wanted Ad / Job Board discounts *						
153	Staffing agency assistance *						
154	Recruiter / Headhunter firm assistance *						
155	Coordination of the Interview Process *						
156	Applicant resume reviews *						