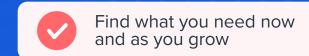
Evaluation Checklist



This checklist is designed to help you assess functionality, implementation, support and more across the vendors you are considering.

1. CORE FUNCTIONALITY & COMPLIANCE	
☐ Payroll Processing	Does the system support various pay frequencies? Can you preview before submitting?
☐ Tax Compliance & Filing	Does the system automate federal, state, and local filings? Does it handle updates to tax codes?
☐ Multi-State Support	Can the vendor handle multi-state payroll, new hire reporting, and jurisdiction-specific compliance?
☐ Wage Garnishment	Does the system support garnishment rules and auto-deductions?
☐ Overtime & PTO	Are calculations automated? Is there integration with time tracking for accuracy?
2. TECHNOLOGY & USABILITY	
☐ Ease of Use	Is the platform intuitive for admins and employees?
☐ Mobile Access	Can employees access pay stubs, W-2s, and direct deposit updates from a mobile device?
☐ Dashboards & Reporting	Does it include custom and standard reports (payroll summary, GL export, compliance)?
☐ Security Features	Is the platform SOC 2 compliant? Does it offer MFA and data encryption?
☐ Role-Based Access	Can access be restricted by function/team?
3. INTEGRATION CAPABILITIES	
☐ General Ledger (GL)	Can you integrate directly with accounting systems or export custom GL files?
☐ Benefits Integration	Does the payroll system sync with benefits providers (401k, insurance)?
☐ Time & Attendance	Is time tracking embedded or integrated? Are hours pulled automatically into payroll?
☐ API Availability	Is there an open API for custom integrations (ERP, financial systems)?
4. EMPLOYEE EXPERIENCE	
☐ Employee Self-Service	Can employees manage direct deposit, view pay stubs, W-2s, update info?
☐ Onboarding to Payroll	Can new hires complete W-4s/I-9s electronically and link to payroll setup?
☐ Former Employee Access	Do ex-employees retain access to tax docs?
5. SERVICE & SUPPORT	
☐ Implementation	Is there a clear implementation methodology and dedicated team?
☐ Support Model	Do you receive a dedicated support team or a shared queue? Is support phone-based or case-based?
	Can you outsource payroll processing if needed?
☐ SLA/Uptime Guarantees	Are service levels defined in your contract? How often is the platform updated or down?
6. COST & CONTRACT TERMS	
☐ Pricing Transparency	Are there hidden fees for off-cycle payrolls, W-2s, etc.?
☐ Contract Flexibility	Can you scale up or down easily? Are there penalties for early termination?
☐ ROI & Time Savings	Does the vendor offer case studies or data to support cost and time savings?

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