

Evaluation Checklist



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and as you grow

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

1. CORE FUNCTIONALITY & COMPLIANCE

- | | |
|---|--|
| <input type="checkbox"/> Payroll Processing | Does the system support various pay frequencies? Can you preview before submitting? |
| <input type="checkbox"/> Tax Compliance & Filing | Does the system automate federal, state, and local filings? Does it handle updates to tax codes? |
| <input type="checkbox"/> Multi-State Support | Can the vendor handle multi-state payroll, new hire reporting, and jurisdiction-specific compliance? |
| <input type="checkbox"/> Wage Garnishment | Does the system support garnishment rules and auto-deductions? |
| <input type="checkbox"/> Overtime & PTO | Are calculations automated? Is there integration with time tracking for accuracy? |

2. TECHNOLOGY & USABILITY

- | | |
|--|--|
| <input type="checkbox"/> Ease of Use | Is the platform intuitive for admins and employees? |
| <input type="checkbox"/> Mobile Access | Can employees access pay stubs, W-2s, and direct deposit updates from a mobile device? |
| <input type="checkbox"/> Dashboards & Reporting | Does it include custom and standard reports (payroll summary, GL export, compliance)? |
| <input type="checkbox"/> Security Features | Is the platform SOC 2 compliant? Does it offer MFA and data encryption? |
| <input type="checkbox"/> Role-Based Access | Can access be restricted by function/team? |

3. INTEGRATION CAPABILITIES

- | | |
|---|---|
| <input type="checkbox"/> General Ledger (GL) | Can you integrate directly with accounting systems or export custom GL files? |
| <input type="checkbox"/> Benefits Integration | Does the payroll system sync with benefits providers (401k, insurance)? |
| <input type="checkbox"/> Time & Attendance | Is time tracking embedded or integrated? Are hours pulled automatically into payroll? |
| <input type="checkbox"/> API Availability | Is there an open API for custom integrations (ERP, financial systems)? |

4. EMPLOYEE EXPERIENCE

- | | |
|--|--|
| <input type="checkbox"/> Employee Self-Service | Can employees manage direct deposit, view pay stubs, W-2s, update info? |
| <input type="checkbox"/> Onboarding to Payroll | Can new hires complete W-4s/I-9s electronically and link to payroll setup? |
| <input type="checkbox"/> Former Employee Access | Do ex-employees retain access to tax docs? |

5. SERVICE & SUPPORT

- | | |
|---|--|
| <input type="checkbox"/> Implementation | Is there a clear implementation methodology and dedicated team? |
| <input type="checkbox"/> Support Model | Do you receive a dedicated support team or a shared queue? Is support phone-based or case-based? |
| <input type="checkbox"/> Managed Payroll | Can you outsource payroll processing if needed? |
| <input type="checkbox"/> SLA/Uptime Guarantees | Are service levels defined in your contract? How often is the platform updated or down? |

6. COST & CONTRACT TERMS

- | | |
|--|--|
| <input type="checkbox"/> Pricing Transparency | Are there hidden fees for off-cycle payrolls, W-2s, etc.? |
| <input type="checkbox"/> Contract Flexibility | Can you scale up or down easily? Are there penalties for early termination? |
| <input type="checkbox"/> ROI & Time Savings | Does the vendor offer case studies or data to support cost and time savings? |

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