



HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Background Information						
Corporate Headquarters	Roseland, NJ	Rochester, NY	Oklahoma City, OK	Cincinnati, OH	Arlington Heights, IL	Orlando, FL
Date Established	1961	1971	1998	1990	1997	2008
Service Locations	International	Global	Nationwide	3	Chicago, Orlando, Oakland	FL, CO, UT, MN, MI, NV, SC, VA and CA
Ownership Structure	Public	Public	Public	C Corp	Public	Private
Time (including time zone) Service is Available	Mon-Fri, 8:00 am-5:30 pm, in your local time zone	8:00 pm ET	8:00 am-5:00 pm CST (extended west coast hours)	Not specified	7:00 am-8:00 pm CST	8am-11pm EST
Service Delivery: Dedicated Account Manager or Team Approach	Team Approach	Dedicated	Dedicated Account Manager	Dedicated		Team
Total Number of Employees	50,000+	13,000	2200	1600	1,000	550
Total Number of Clients	620,000+	580,000	20,000	33,000	8,500	10,000
Target Market Size	1-3,000+	1-10,000	125-3,000	75-2000	50-3,000	50-100,000
Average Client Size	Varies	50-500	250 - 750	42	150	600
% of Existing Client Base less than 500	60%	98.7%	70%	95%	75%	55%
% of Existing Client Base less than 1000	Varies	99.5%	90%	98%	0.95	35%
Are you SSAE16 Certified?	Yes	Yes	Yes	Yes	Yes	Yes
Retention Percentage	92%	93%	92%	96%	97%	93%
Products/Services Provided			Full Service			
Payroll	Yes	Yes	Yes	Yes	Yes	Yes
Benefits Enrollment	Yes	Yes	Yes	Yes	Yes	Yes
HRIS	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Time & Attendance	Yes	Yes	Yes	Yes	Yes	Yes
Performance Management	Yes	Yes	Yes	Yes	Yes	Yes
Applicant Tracking/Online Recruitment	Yes	Yes	Yes	Yes	Yes	Yes
Payroll						Yes
Tax filing & W2 Processing	Yes	Yes	Yes	Yes	Yes	Yes
Local and State Tax Filing	Yes	Yes	Yes	Yes	Yes	Yes
Calculate Taxes Automatically for Employees that Work in One State, but Live in a Different State	Yes	Yes	Yes	Yes	Yes	Yes
Access to Unlimited Historical Tax Reports Online	Yes	Yes	Yes	Yes	Yes	Yes
Unlimited Direct Deposit Accounts for Employees	Up to 999	Yes	Yes	Yes	Yes	99
Online Paystubs & W2's	Yes	Yes	Yes	Yes	Yes	Yes
Ability to Set up Garnishments with Ending Goal and/or Date	Yes	Yes	Yes	Yes	Yes	Yes
New Hire Reporting	Yes	Yes	Yes	Yes	Yes	Yes
GL Interface	Yes	Yes	Yes	Yes	Yes	Yes
Support Unlimited Payroll History Accessible Online by Employee and/or Administrator	Admin-Yes: Employee-3 yrs.	Yes	Yes	Yes	Yes	Yes
Allow Taxable Wage/Deduction Allocations for	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Employees Working in Multiple States.						
Able to Block Certain Tax Withholdings	Yes	Yes	Yes	Yes	Yes	Yes
Able to Provide Electronic W-4	Yes	Yes	Yes	Yes	Yes	Yes
Pre-processing Payroll Reports	Yes	Yes	Yes	Yes	Yes	Yes
Ability to Print/Calculate Manual Checks Off Payroll Cycle	Yes	Yes	Yes	Yes	Yes	Yes
Batch Process Multiple EIN's	Yes	Yes	Yes	Yes	Yes	Yes
Consolidate and Site/Location Reporting Including Multiple EIN's	Yes	Yes	Yes	Yes	Yes	Yes
Ability to Enter Multiple Hire/Termination Dates	Yes	Yes	Yes	Yes	Yes	Yes
Wage Allocation to Different Site Locations	Yes	Yes	Yes	Yes	Yes	Yes
Ability to Process Payroll Remotely from any Location, if needed	Yes	Yes	Yes	Yes	Yes	Yes
Pay Cards	Yes	Yes	Yes	Yes	Partner	Yes
Salary Grades and Comp Ratios	Yes	Yes	Yes	Yes	Yes	Yes
International Payroll	Yes	Yes - limited	Third Party	No	Partner	No
If yes above, what countries						
If yes through partner, which partner						
Core HR						Yes
Track I-9 Compliance	Yes	Yes	Yes	Yes	Yes	Yes
New Hire Workflows	Yes	Yes	Yes	Yes	Yes	Yes
Paperless Onboarding Process	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Termination Workflows	Yes	Yes	Yes	Yes	Yes	Yes
Internal/External Work Experience	Yes	Yes	Yes	Yes	Yes	Yes
Job Status/History	Yes	Yes	Yes	Yes	Yes	Yes
Salary Tracking/History	Yes	Yes	Yes	Yes	Yes	Yes
Stores W-2 Earnings	Yes	Yes	Yes	Yes	Yes	Yes
Tracks Assets	Yes	Yes	Yes	Yes	Yes	Yes
Administers Bonus Plans	Yes	Yes	Yes	Please provide more detail	Yes	Yes
Administers Stock Option Plans	Yes	No	Yes	Please provide more detail	Yes	No
Tracks Job Descriptions	Yes	Yes	Yes	Yes	Yes	Yes
Skills Inventories	Yes	Yes	Yes	Yes	Yes	Yes
Maintains Union Rosters	Yes	Yes - need more info	Yes	Yes	Yes	Yes
Tracks Seniority Rankings	Yes	No	Yes	No	Yes	Yes
Tracks Grievances	Yes	Yes	Yes	No	Yes	Yes
Accident Tracking	Yes	Yes	Yes	Yes	Yes	Yes
Ability to Add Notes to Employee	Yes	Yes	Yes	Yes	Yes	Yes
Ability to Add Unlimited Documents to an Employee	Yes	Yes	Yes	Yes	Yes	Yes
Configurable Workflow	Yes	No	Yes	Yes	Yes	Yes
Custom Fields	Yes	Yes	Yes	Yes	Yes	Yes
Archiving Employee Records	Yes	Yes	Yes	Yes	Yes	Yes
HR Form Mapping	Yes	Yes	Yes	Yes	Yes	Yes
Maintain global HR data						
Alerts						Yes
Automatic Email Notification	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Supports User Alert Setup	Yes	Yes	Yes	No	Yes	Yes
Employee Alerts	Yes	Yes	Yes	Yes	Yes	No
Employee Self-Service						Yes
Browser Supported	Yes	Yes	Yes	All	All	IE 10+, Firefox, Chrome, Mac OS
View Personal Records	Yes	Yes	Yes	Yes	Yes	Yes
Update Personal Records	Yes	Yes	Yes	Yes	Yes	Yes
Online Open & New Hire Enrollment	Yes	Yes	Yes	Yes	With bSwift - Fully Integrated	Yes
Online Life Events	Yes	Yes	Yes	Yes	With bSwift - Fully Integrated	Yes
Attach Forms	Yes	Yes	Yes	Yes	Yes	No
Request Time Off	Yes	Yes	Yes	Yes	Yes	Yes
View Time Off History	Yes	Yes	Yes	Yes	Yes	Yes
View Paystub	Yes	Yes	Yes	Yes	Yes	Yes
Mobile App	Yes	Yes	Yes	Yes	Yes	Yes
Access Employee Directory	Yes	Yes	Yes	Yes	Yes	Yes
Multilingual Available	Yes	yes	No	Yes	No	Yes
Languages Available (if Yes above)		Yes		Spanish		
Expense Reporting	Yes	Yes	Yes	No	Partner	Yes
Manager Self-Service						Yes
View Team Calendar	Yes	Varies	Yes	Yes	Yes	Yes
View Employee Information	Yes	Yes	Yes	Yes	Yes	Yes
Approve Time Off	Yes	Yes	Yes	Yes	Yes	Yes
View Attendance	Yes	Yes	Yes	Yes	Yes	Yes
Initiate Salary Change Request	Yes	Yes	Yes	Yes	Yes	Yes
Hire New Employee	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Terminate Employee	Yes	Yes	Yes	Yes	Yes	Yes
Online Performance Review	Yes	Yes	Yes	Yes	Yes	Yes
Track Notes on Employee	Yes	Yes	Yes	Yes	Yes	Yes
Progressive Discipline	Yes	Yes	Yes	Yes	Yes	No
Run Reports	Yes	Yes	Yes	Yes	Yes	Yes
Manager Dashboard	Yes	Yes	Yes	Yes	Yes	Yes
Out of Office Assistant for Workflow	Yes	No	No	No	Yes	Yes
Mobile App	Yes	Yes	Yes	Yes	Yes	Yes
Benefits Management						Yes
Administer Benefit Plan Participation	Yes	Yes	Yes	Yes	Yes	Yes
Track Benefit Plan Eligibility	Yes	Yes	Yes	Yes	Yes	Yes
Track Plan History	Yes	Yes	Yes	Yes	Yes	Yes
Calculate Employee Contribution Amounts	Yes	Yes	Yes	Yes	Yes	Yes
Accommodate Age and Salary Banding Rules	Yes	Yes - AGE	Yes	Yes	Yes	Yes
Accommodate Voluntary Plans	Yes	Yes	Yes	Yes	Yes	Yes
Calculate Premium Payment Amounts	Yes	Yes	Yes	Yes	Yes	Yes
Produce Total Compensation Statements	Yes	Yes	Yes	Yes	With bSwift - fully integrated	Yes
Print Benefit Confirmation Statements	Yes	Yes	Yes	Yes	With bSwift - fully integrated	Yes
Email Benefit Confirmation Statements	Yes	Yes	Yes	Yes	With bSwift - fully integrated	Yes
Create Consolidated Billing Reports	Yes	No	Yes	No	With bSwift - fully integrated	Yes
Cobra Tracking	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Integrate with Carriers	Yes	Yes	Yes	Yes	Yes	Yes
401K Enrollment and Contributions	Yes	Yes	Yes	Yes	Yes	Yes
Passive Enrollment	Yes	Yes	Yes	Yes	Yes	Yes
Training & Development						No
Track Certifications and Licenses	Yes	Yes	Yes	Yes	Yes	Yes
Track Hours/Dates Required for Training, Certifications and Licenses	Yes	Yes	Yes	Yes	Yes	Yes
Upload Certifications and Licenses	Yes	Yes	Yes	Yes	Yes	Yes
Administer Training Enrollment	Yes	Yes	Yes	Yes	Yes	Yes
Track Training Class Participation	Yes	Yes	Yes	Yes	Yes	Yes
Track Training Costs	Yes	Limited	No	Yes	Yes	Yes
Maintain Course Library	Yes	Yes	Yes	Yes	No	Yes
Update Employee Qualifications	Yes	Yes	Yes	Yes	Yes	Yes
Evaluate Training Requirements	Yes	Yes	Yes	Yes	Yes	Yes
Generate Notices	Yes	Yes	Yes	No	Yes	Yes
Schedule Courses	Yes	Yes	Yes	Yes	No	Yes
Alerts for Employee	Yes	Yes	Yes	No	Yes	Yes
Performance Management						yY
Appraisal Tracking	Yes	Yes	Yes	Yes	Yes	Roadmap
Configurable Evaluation Forms	Yes	Yes	Yes	Yes	Yes	Roadmap
Goal Management	Yes	Yes	Yes	Yes	Yes	Roadmap
Access to Competency Library	Yes	Yes	Yes	No	Yes	Roadmap

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Career Planning	Yes	Yes	No	No	Yes	Roadmap
Dashboard	Yes	Varies	Yes	No	Yes	Roadmap
360° Performance Review	Yes	No	Yes	Yes	Yes	Roadmap
Managers Able to Link Performance Reviews to Pay Increases/Promotion	Yes	No	Yes	Yes	Yes	Roadmap
Recruitment						
Supports Requisition Creation & Approval Process	Yes	Yes	Yes	Yes	Yes	Yes
Track Requisition Cost, Source	Yes	Yes	Tracks Source not Cost	Yes	Yes	Yes
Track Job Applied for, Date, Cost	Yes	Yes	Yes	Yes	Yes	Yes
Tracks External and Internal Job Applicants	Yes	Yes	Yes	Yes	Yes	Yes
Resume Importing	Yes	Yes	Yes	Yes	Yes	Yes
Applicant Able to Import/Upload Documents (Certifications Required etc.)	Yes	Yes	Yes	Yes	Yes	Yes
Integration with Job Boards	Yes	Yes	Yes	Yes	Yes	Yes
Integration with Social Media Marketing	Yes	Yes	Yes	Yes	Yes	yes
Key Word Search	Yes	Yes	Yes	Yes	Yes	Yes
Search by Date Applied	Yes	Yes	Yes	Yes	Yes	Yes
Sorting, Scoring and Searching by Prescreening Questions	Yes	Yes	Yes	Yes	Yes	Yes
Interview/Contacts Tracking	Yes	Yes	Yes	Yes	Yes	Yes
Schedule an Interview	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Automatically Generate Customized Communications to Applicant/Candidate	Yes	Yes	Yes	Yes	Yes	Yes
Job Descriptions	Yes	Yes	Yes	Yes	Yes	Yes
EEOC Collection and EEO-1 Reporting	Yes	Yes	Yes	Yes	Yes	Yes
Organizational Charting						
Create Org Charts	Yes	Yes - limited/export	Yes	Yes	Yes	Yes
Attendance						
Calculate Sick Time Use	Yes	Yes	Yes	Yes	Yes	Yes
Calculate Leave Time Use	Yes	Yes	Yes	Yes	Yes	Yes
Time In/Out	Yes	Yes	Yes	Yes	Yes	Yes
Supports Multiple Leave Types for Employees	Yes	Yes	Yes	Yes	Yes	Yes
Track Leave Balances	Yes	Yes	Yes	Yes	Yes	Yes
Enables Leave Forecasting	Yes	Yes	Yes	Yes	Yes	No
Make Adjustments at Employee Level	Yes	Yes	Yes	Yes	Yes	Yes
Scheduling	Yes	Yes	Yes	Yes	Yes	Yes
Reporting						
# of Standard Reports	166+	140	100+	82	189	200+
Able to Modify Standard Reports	Yes	Yes	Yes	Yes	Yes	Yes
Fully Prompted Report Writer	Yes	Yes	Yes	Yes	Yes	Yes
Query Builder	Yes	Yes	Yes	Yes	Yes	Yes
Point-in-time Reports	Yes	Yes	Yes	Yes	Yes	Yes
Reports Scheduler	Yes	Yes	Yes	Yes	Yes	Yes
Number of Different Formats Reports can be	7 (XLS, PDF, HTML, CSV, TXT, XML, and Query)	Yes	Excel, PDF, HTML, CSV	5	6	Excel, PDF, CSV, HTML,XML

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Exported Into (Excel, PDF, etc.)						
Pre Populate OSHA 300 Form	Yes	Yes	Yes	Yes	Yes	Yes
Reporting can be Generated for Multiple EIN's, Locations, Departments etc.	Yes	Yes	Yes	Yes	Yes	Yes
Consolidated Reporting of Multiple EIN's, Locations, Departments	Yes	Yes	Yes	Yes	Yes	Yes
Point-in-time Comparison Reports	Yes	Yes	Yes	Yes	Yes	Yes
Benefit Billing Reconciliation Reports	Yes	Yes	Yes	No	With bSwift - fully integrated	Yes
Manager Level Reporting-Team View Only	Yes	Yes	Yes	Yes	Yes	Yes
Security Roles are Carried Through to Reporting	Yes	Yes	Yes	Yes	Yes	Yes
Change Reports Reflecting the Login/PW of the Individual Who Approved or Initiated Change	Yes	Yes	Yes	Yes	Yes	Yes
Additional Services						
Cobra Administration	Yes	Yes	Yes	3rd party	No - full integration with Aurico	Yes
FSA Administration	Yes	Yes	No	3rd party	No - full integration with Aurico	Yes
Employee Call Center	Yes	Yes	No	No	No	Yes
401K	Yes	Yes	No	3rd party	No - 360 degree integration with over 100 platforms	Yes
HR Call Center	Yes	Yes	No	No	No	Yes
Benefit Administration Services	Yes	Yes	Yes	Yes	Yes	Yes

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Consolidated Billing	Yes	limited	No	No	Yes	Yes
Dependent/Eligibility Audits	Yes	Yes	Yes	No	Yes	Yes
Employee/HR Training Videos	Yes	Yes	Yes	No	Yes	Yes
FMLA Administration	Yes	Limited	Yes	Yes	Yes	Yes
ACA ** NEW						
Additional Cost	Yes	Yes	Yes	Yes	Yes	No
Tracking variable hours	Yes	Yes	Yes	Yes	Yes	Yes
Generation of 1094 and 1095 reports	Yes	Yes	Yes	Yes	Yes	Yes
E-filing of 1094 and 1095 reports	Yes	Yes	Yes	Yes	Yes	Yes
Dashboards	Yes	Yes	Yes	Yes	Yes	Yes
Automation of hours flow between payroll and ACA dashboard, or need to import via excel? (For employers who have multiple systems)	Automation	Yes	Yes	Yes	Yes	Yes
Measurement period tracking	Yes	Yes	Yes	Yes	Yes	Yes
Minimum Group Size	Yes	Yes	No	No	No	50
Module ACA tracking resides in	Benefits Module (Note: It is a unified database with HR/Payroll/Time/Talent, etc)	HCM system	Basic (single application)	Time/Payroll	Yes	PlanSource Benefits Administration
Mobile Capabilities ** NEW						
Mobile Optimized	Yes	Yes	Yes	Yes	Yes	Yes
Texting	Push notifications on Roadmap	Yes - Push Notifications	No	No	No	Yes
Request PTO on app	Yes	Yes	Yes	Yes	Yes	Not specified
Clock in/out on app	Yes	Yes	Yes	Yes	Yes	Not specified

HR, Benefits, and Payroll Technology Summary of Findings Report

Features	ADP	Paychex	Paycom	Paycor	Paylocity	PlanSource
Apply for job on app				No		
Enroll in benefits on app	Available on tablet app, smartphone available in October	No	Yes	No	Yes	Not specified
View benefits on app	Yes	Yes	Yes	Yes	Yes	Yes
Store ID cards	Yes	Need More Info	Not specified	No		Yes
Onboard on app	Roadmap	Yes - Mobile Friendly	Yes	Yes	No	Not specified

Price Estimates Comparison

Price Estimates – THIS IS NOT A PROPOSAL. This is intended to provide comparative pricing only and be used as a proxy. **FINAL PRICING SHOULD BE PROVIDED BY EACH VENDOR** after the demonstration process and at the completion of a final discovery with each vendor. Pricing estimates are based on # full-time employees and # part-time employees.

	ADP	Paychex	Paycom	Paycor	Paylocity	Plansource
One-time Implementation	TBD	TBD	TBD	TBD	TBD	TBD
Ongoing Monthly Fees (PEPM)	TBD	TBD	TBD	TBD	TBD	TBD

The above information was provided by a representative of each of the vendors. It is our expectation that the information provided is accurate. Purchase decisions should not be based on this document alone. During the product demonstration process we suggest that the vendors are asked to demonstrate the functionality that is represented on this document so that the functionality is validated.