

HCM



TECH ADVISORY

HCM Tech Advisory: PEO Transition Checklist	
Area	Accounted For?
HRIS System	
Onboarding	<input type="checkbox"/> Check
Payroll	<input type="checkbox"/> Check
Benefits	<input type="checkbox"/> Check
Services	
Payroll Processing	<input type="checkbox"/> Check
Benefits Administration	<input type="checkbox"/> Check
HR	<input type="checkbox"/> Check
Benefits	
Health (Medical, Dental, Vision)	<input type="checkbox"/> Check
Life & Disability	<input type="checkbox"/> Check
FSA/HRA Accounts	<input type="checkbox"/> Check
401(k)	<input type="checkbox"/> Check
Other (i.e., Employee Perks)	<input type="checkbox"/> Check
Providers	
401(k) Admin & Fiduciary	<input type="checkbox"/> Check
COBRA Admin	<input type="checkbox"/> Check
Workers Comp	<input type="checkbox"/> Check
Compliance	
HR	<input type="checkbox"/> Check
Tax	<input type="checkbox"/> Check
Benefits	<input type="checkbox"/> Check