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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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 |

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| **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.***

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|  | **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 that the vendors are asked to demonstrate the functionality that is represented on this document so that the functionality is validated.