REQUEST FOR PROPOSAL · TEMPLATE

Payroll platform vendor evaluation

This template structures a Request for Proposal for payroll bureaus evaluating platform vendors. Send it to each vendor and record responses in the space provided, then use the scorecard on the final page to compare vendors objectively.

ISSUING ORGANIZATION	VENDOR NAME	DATE ISSUED

PRIMARY CONTACT	RESPONSE DUE	APPROX. EMPLOYEE COUNT

Vendors should respond to every question. Where a capability is unavailable, note this explicitly rather than leaving the field blank.

SECTION 01 Payroll tax filing & compliance coverage

Payroll tax compliance is one of the highest-risk areas for any provider. Establish exactly what the platform handles and what remains the bureau's responsibility.

01 Which federal, state, and local tax jurisdictions are supported?

02 Are tax filing and tax payments included in the service?

03 Who is responsible for filing corrections and amended returns?

04 How are agency notices received, tracked, and resolved?

05 How are new tax rates and regulatory changes maintained?

06 Does the platform support multi-state employers, reciprocity, and special district taxes?

SECTION 02 Multi-tenant architecture

For bureaus planning to grow, architecture determines how efficiently new clients can be added and managed from a central environment.

07 Does the platform provide centralized, multi-client administration?

08 How is client data isolated and secured between tenants?

09 What role-based permission model is available?

10 Which business models are supported (Payroll Bureau, PEO, ASO, CPA, Staffing)?

11 What operational effort is required to onboard an additional client?

SECTION 03 Payroll processing capabilities

Look beyond basic calculations and evaluate the operational flexibility of the payroll engine.

12 Can multiple payrolls be processed simultaneously?

13 Are off-cycle and retroactive payrolls supported?

14 How are payroll corrections handled?

15 Can multiple pay groups be managed efficiently?

16 How are garnishments and child support orders administered?

17 Does the system support complex earnings and deduction structures?

SECTION 04 Money movement & payment infrastructure

Ask vendors to explain exactly how payroll funds move from employer to employee, and where risk sits in that flow.

18 What ACH processing and funding timelines are available (same-day / next-day)?

19 Which payment methods are supported (direct deposit, check, pay card)?

20 Describe the payroll funding workflow and banking relationships.

21 What fraud prevention controls are in place?

22 How is NACHA compliance maintained and payroll reconciled?

SECTION 05 Service level agreements

Request documented SLA commitments rather than verbal assurances.

23 What are the guaranteed response and resolution times?

24 What platform uptime is committed, and how is it measured?

25 What are the disaster recovery objectives and maintenance windows?

26 Describe the escalation procedures and account management model.

SECTION 06 Support hours & operational coverage

For bureaus serving clients across time zones, extended support coverage can be a competitive advantage.

27 What are the standard support hours, including weekends and holidays?

28 Is emergency and after-hours payroll assistance available?

29 How are critical issues escalated, and is dedicated tax support available?

SECTION 07 Security & compliance

Payroll platforms manage highly sensitive employee information; verify the controls that protect it.

30 Are SOC 1 and SOC 2 certifications maintained and available?

31 Describe data encryption, MFA, and role-based security.

32 What audit logging, penetration testing, and incident communication exist?

33 Describe disaster recovery, business continuity, and data retention policies.

SECTION 08 Integrations & APIs

Modern payroll platforms should fit within a larger HR and financial ecosystem.

34 What REST APIs, webhooks, and SSO options are available?

35 Which HRIS, time and attendance, accounting, and benefits integrations exist?

36 Is open API documentation and developer support provided?

37 Are embedded or white-label payroll offerings supported?

SECTION 09 Client onboarding & implementation

A structured onboarding process reduces risk and accelerates time to revenue.

38 What is the average implementation timeline?

39 Is a dedicated implementation manager assigned?

40 How is historical payroll data migrated?

41 What training and post-go-live resources are included?

SECTION 10 Pricing transparency

Compare total cost of ownership, not only the headline number.

42 Detail platform fees, per-employee pricing, and tax filing costs.

43 What are the implementation, training, and support fees?

44 Are API access and additional modules priced separately?

45 What annual increases and banking fees apply?

SECTION 11 Reporting & analytics

Strong reporting reduces manual work and helps clients make better business decisions.

46 What standard reports and custom report builder are available?

47 Are scheduled reporting and executive dashboards supported?

48 Describe tax, compliance, and audit reporting capabilities.

49 What export formats are available?

SECTION 12 Exit terms & data ownership

Clear exit provisions protect your business and your clients if the partnership ends.

50 Who owns the payroll data, and how is it exported (and at what cost)?

51 How long is data retained after termination?

52 What transition assistance is provided?

53 Are there termination penalties, and how much notice is required?

EVALUATION

Vendor scorecard

Score each vendor from 1 (Poor) to 5 (Excellent) across the categories below. Total the column to compare vendors side by side.

EVALUATION AREA	1	2	3	4	5
Payroll processing	○	○	○	○	○
Tax filing & compliance	○	○	○	○	○
Multi-tenant architecture	○	○	○	○	○
Money movement	○	○	○	○	○
Security & compliance	○	○	○	○	○
APIs & integrations	○	○	○	○	○
Client onboarding	○	○	○	○	○
Support & SLAs	○	○	○	○	○
Reporting & analytics	○	○	○	○	○
Pricing transparency	○	○	○	○	○
Scalability	○	○	○	○	○
Exit terms	○	○	○	○	○
TOTAL SCORE					/ 60

A structured, scored comparison reduces subjective decision-making and makes it easier to evaluate multiple vendors against the same criteria.