



PEO/ASO Data Gathering Form

Section 1: Customer Information:

<i>Business Name</i>		Business Address	
<i>Locality</i>	<i>State</i>	Zip	Federal I.D. Number
<i>Phone</i>	<i>Fax</i>	Cell	Email
<i>Business Owner's Name</i>		<i>Title</i>	Years In Business
<i>Contact Person (if different)</i>		<i>Title</i>	Type of Business

Section 2: About Your Company

Number of Employees _____ Pay Period: Weekly Bi-weekly Semi-monthly Monthly

Are you currently using a PEO? Yes No Who? _____

How are you handling the following:	In-House	Outsourcing	Vendor Name
Payroll	<input type="checkbox"/>	<input type="checkbox"/>	_____
HR	<input type="checkbox"/>	<input type="checkbox"/>	_____

Current State Unemployment Tax Rate _____ Not Applicable if with PEO

Workers' Compensation Experience Modifier (if known) _____

Do you provide 401k benefits? Yes No

Do you have an employee handbook? Yes No

Do you need help with employee background investigations? Yes No

Please include the following additional items:

- Health, dental, and other **Insurance Invoices**
- Health, dental, and other **Insurance Summary of Benefits**
- Last 2 **invoices of your Payroll** or PEO provider
- Payroll Register** associated with above invoices
- 401(k)** Summary, Contact, and Employer Match
- Copy of **BWC policy** or authorization to review, and ODJFS **SUTA (SUI)** statement

Next Payroll Date:

Day Payroll Begins:

Day Payroll Ends:

Instructions: Please check the boxes you are most interested in utilizing or learning more about.

Employment Compliance

► LIABILITY MANAGEMENT

MHR provides expertise in helping companies minimize employment related risk through pro-active liability management practices.

- Human Resource Consultation
- Employee Handbooks
- Wage & Hour Law Compliance
- Forms and Agreements
- Labor Law Postings
- Progressive Discipline Assistance
- Termination Assistance
- Sexual Harassment Training
- Drug Free Workplace Support
- I-9 Compliance
- Record Keeping
- Employment Eligibility (E-Verification)
- Unemployment Claims Management
- Investigation and Resolution of Employee Claims

► RISK MANAGEMENT

Safety and health is a vital concern to any business. MHR offers support in helping companies achieve and promote comprehensive safety policies and programs.

- Workers Compensation Insurance
- Claims Administration
- Safety Audits/Inspections
- OSHA Compliance Assistance
- Safety Policy Development
- Safety Training
- Post-Accident Drug Testing
- Certificates of Insurance

Employee Benefits

► BENEFITS ACQUISITION

By utilizing MHR's "strategic buying power" you and your employees can tap into the most affordable benefits that larger companies enjoy.

- Health Insurance
- Dental Insurance
- 401(k) Retirement Plan
- Tax favored section 125 plan
- Medical Reimbursement Accounts
- Dependent Care Spending Accounts
- Term Life and Disability Insurance
- Supplemental Insurance
- Patient Care Advocacy Program
- Other Ancillary Benefits

► BENEFIT ADMINISTRATION

MHR helps companies vastly minimize their benefit administration burden by assuming numerous administrative benefit activities.

- Health Plan Administration
- 401k Administration
- Flexible Spending Administration
- COBRA Administration
- Employee Benefit Enrollments
- Premium Remittance to Carriers

Instructions: Please check the boxes you are most interested in utilizing or learning more about.

Human Resource Expertise

► NEW EMPLOYEE PROCESSING

Employee processing saves your company valuable time and helps ensure new employees are processed efficiently and legally.

- New Employee Enrollments and Orientation
- Pre-employment Background Investigations*
- Pre-employment Drug and Alcohol Testing*
- Skills Testing*
- Employment Verifications*
- Pre-employment Personality Assessments*

► HIRING ASSISTANCE

MHR offers beginning to end hiring support. Expertise and assistance in finding, attracting and selecting the most qualified candidates provides an invaluable benefit to your organization.

- Ad Design and Placement*
- Market Wage and Salary Analysis
- Resume Screening and Review
- Applicant Interviewing
- Employment Verifications*
- Offer of Employment Letter

► COMPENSATION ADMINISTRATION

Defining and executing a strategic compensation philosophy ensures the necessary balance between cost containment and market competitiveness for your company.

- Wage & Benefit Analysis
- Compensation Plan Development

► EMPLOYEE RELATIONS

Establishing effective communication in the workplace is critical in promoting employee morale. MHR provides effective strategies towards optimizing your human capital through measures that motivate and reinforce your workforce.

- Communications
- Reward and Recognition Programs
- Employee Opinion Surveys
- Exit Interviews

► TRAINING AND DEVELOPMENT

MHR provides on-site professional HR training seminars important to business owners, managers and employees alike.

- Liability and Sensitivity Training
- First Time Manager Training
- HR Topics Training

► PERFORMANCE MANAGEMENT

Systematic alignment of employee performance with targeted company objectives is the foundation for performance management. MHR provides expertise in developing effective performance management tools.

- Job Analysis
- Position Descriptions
- Performance Appraisal Tools
- HR Metrics Development

*Additional costs may be incurred in or outside of the PEO or ASO Model for certain services
Martech HR is a PEO Broker of some of the "finest" PEOs in the state of Ohio. (We help "plug" you into the right PEO for your business and manage your relationship providing you that additional personal touch expected of a "Trusted Advisor Consultant"). Outside of the co-employment model, Martech HR can provide ASO services. (We serve as your outsourced or complimenting HR department directly providing and managing employer related and human resource administration, tasks and services).