

CHECKLIST

Switching to a PEO: Implementation Checklist

Everything to prepare for a smooth move to (or between) a PEO — from documents to first payroll.

SPIRIT HR · RESOURCE CHECKLIST

Switching to a PEO (or between PEOs) is straightforward when you prepare. This checklist keeps your first payroll and benefits transition clean.

Before you sign

- ☐ Scope, pricing, and what's included confirmed in writing.
- ☐ Named service team and response expectations confirmed.
- ☐ Cost analysis completed so you know the all-in numbers.
- ☐ Target effective date chosen (a quarter start makes tax reconciliation cleaner).

Gather your documents

- ☐ EIN and business registration details.
- ☐ Year-to-date payroll and tax records.
- ☐ Current employee roster with pay and status.
- ☐ Benefit plan documents and current workers' comp policy.

Plan the transition

- ☐ Assign an internal point person.
- ☐ Map the implementation timeline with your PEO.
- ☐ Plan an employee communication: the why, what changes, and when.

Onboard to the platform

- ☐ Set up company and employee accounts.
- ☐ Import and verify payroll and employee data.
- ☐ Run a parallel/test payroll to confirm accuracy.
- ☐ Complete benefits enrollment and confirm workers' comp is active.

Go live & follow up

- ☐ Run the first live payroll and confirm taxes/filings handoff.
 - ☐ Verify benefits and deductions are correct.
 - ☐ Hold a 30-day check-in to catch anything early.
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