dinsmore/steele

PRE-SIGNATURE REVIEW
PEO AGREEMENT READINESS

PEO AGREEMENT READINESS REVIEW

The proposal shows what the PEO offered. The signed agreement controls what the company receives, pays and must do. Use this review after selecting the PEO and before signing to identify unresolved terms.

COMPANY	SELECTED PEO	TARGET SIGNATURE DATE	REVIEW OWNER

MARK DOCUMENTED ONLY WHEN THE SIGNED PACKAGE WILL SUPPORT THE ANSWER.

1 COMPLETE AGREEMENT PACKAGE

Are the client service agreement, pricing schedules, benefits and workers' compensation documents, technology terms and every negotiated addendum assembled for one final review?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

2 SERVICES INCLUDED AND EXCLUDED

Does the signed package state every agreed service, what is excluded, what carries a separate charge and which service model the company will actually receive?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

3 ADMINISTRATION PRICING

Are the pricing basis, minimums, implementation charges, current administration fee, future increases and agreed headcount tiers documented?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

4 BENEFITS AND WORKERS' COMPENSATION

Do the governing documents identify the programs, responsible parties, charges, renewal mechanics and any permitted carve-outs or separate arrangements?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

5 THE NEXT RENEWAL

Are auto-renewal, notice timing, fee-change rights and every negotiated renewal protection, cap, duration or exclusion stated in writing now?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

6 CANCELLATION EXPOSURE

Are the notice period, permitted termination date, delivery method, early-exit formula, post-termination charges and obligations that survive clear?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

CONTINUE THE REVIEW ON PAGE 2

Responsibilities | Service delivery | Recourse | Data | Exit | Final document consistency

FINISH THE REVIEW BEFORE YOU SIGN

A selected PEO is not a completed transaction until the written agreement reflects the deal.

7 WHO DOES WHAT AND WHEN

Is responsibility allocated across payroll, taxes, benefits, HR, workers' compensation, employee communication and required client inputs, including timing and dependencies?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

8 SERVICE DELIVERY AND ESCALATION

Are the support model, relevant team, response expectations, escalation path, correction process and implementation responsibilities documented?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

9 RECOURSE

Does the agreement explain what happens after a missed obligation, including escalation, cure, credits or adjustments, termination rights and other agreed remedies?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

10 DATA AND RECORDS

Are access, confidentiality, breach notice, reporting, record ownership, export format, delivery timing, retention and destruction addressed?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

11 EXIT AND TRANSITION

Does the agreement cover final payroll and tax work, employee and benefits data, open claims, system access, transition support, deadlines and fees at exit?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

12 ONE CONSISTENT WRITTEN DEAL

Do the agreement and addenda clearly reflect every commercial and operational term selected, with conflicts and document priority resolved before signature?

☐ DOCUMENTED ☐ CLARIFY ☐ N/A

HOW TO READ THE RESULT

Any item marked Clarify is an unresolved commercial, operational or legal issue. The agreement is not ready for signature until the responsible reviewer resolves it in the final documents.

BEFORE SIGNATURE, CONFIRM:

1. The commercial deal matches the selected solution.
2. Responsibilities, timing and recourse are unambiguous.
3. Renewal, cancellation and exit exposure are understood.

REVIEW THE DEAL BEFORE THE LEVERAGE WINDOW CLOSES

REQUEST A PEO ALIGNMENT REVIEW

Dinsmore Steele validates the commercial and operational agreement against the selected PEO solution, then works with the company's legal counsel so the final documents clearly reflect what was agreed.

START THE REVIEW
DINSMORESTEELE.COM

If anything is unclear, resolve it before the client service agreement is signed.

Educational information only; not legal, tax, benefits, insurance or HR advice. Agreement duties and remedies vary.