



Professional Employer Organization

Service & Responsibility Guide

Optimum HR is a full-service PEO offering outsourced Human Resources, Payroll, and Benefits for small to midsize businesses. We handle the complexity so you can focus on what you do best.

HR

Expertise, compliance & workforce support

Payroll

Accurate, on-time payroll & tax filing

Benefits

Market-leading plans & administration

What Makes Optimum HR Different?

- Real humans answer when you call
- Average email response time under 2 hours
- OC Business Journal "Best Places to Work" — ten years in a row
- Dedicated HR professionals assigned to your business

Ready to get started?

Call us: (888) 466-5521 | www.optimumhr.com

Who Handles What?

Below is a clear breakdown of responsibilities between OptimumHR and your team.

LEGEND: ✓ = Handled by OptimumHR ✓ = Client's Responsibility

HUMAN RESOURCE MANAGEMENT

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
HR audit & best practices advice	We review file setup, file retention, and regulatory items for compliance should you ever be audited.	✓	
Hiring process assistance	We review your process to discuss gaps, best practices, and legal reminders (questions you can & can't ask).	✓	
Recruiting, interviewing & hiring			✓
Onboarding new employees	We provide the online onboarding technology and guide clients to ensure employees upload necessary paperwork and identification. Client inputs EE info.	✓	✓
Background check administration	Submit and monitor background checks for new hires.	✓	
Employee handbook development	We review statutory and optional policies for your employees to follow.	✓	
Job description development	We assist clients in developing job descriptions once they provide the duties and details for each role.		✓
Salary & total compensation surveys	We produce salary surveys for job postings, salary grading, and more.	✓	
Performance review advice & process development		✓	
Employee performance reviews and meetings			✓
Integrated, online performance management software	Optional — see Pricing Exhibit.		✓
Employee relations / conflict resolution meetings, documentation & process			✓
Employee relations / conflict resolution support	We provide guidance on how to handle your unique conflict with steps to fully resolve.	✓	
Employee disciplinary documentation and meetings			✓
Disciplinary / corrective action support	We review documentation you've created and provide feedback to minimize liability.	✓	
Employee termination meetings			✓
Termination assistance	We review your termination inquiry and provide guidance on steps, risk exposure, and documentation.	✓	
Complaint investigations	We assist with employee grievances and steps to thoroughly handle a complaint from start to finish.	✓	

■ HUMAN RESOURCE MANAGEMENT (CONTINUED)

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
Client contact training	Quarterly HR trainings on legal updates, best practices, and leadership.	✓	
Employee on-the-job training			✓



"The White Glove Service with live (not AI) & AMAZING people at Optimum is one of the main reasons we love working with Optimum."

— Sr. Vice President, Technology & Media Company

HR TECHNOLOGY PLATFORM

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
Integrated software suite	Fully integrated modules: payroll, timekeeping, electronic onboarding, benefits enrollment, ATS, employee & manager self-service portal.	✓	
Web-based system	Access from any computer or device, anytime, anywhere.	✓	
Self-service & custom reporting	You and your employees can access the self-service portal and run custom reports.	✓	

PAYROLL & TAX ADMINISTRATION

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
Web-based payroll processing		✓	
Payroll approval & review			✓
Direct deposit or paper checks		✓	
Payroll tax deposits and filings		✓	
W-2 preparation and mailing		✓	
Employee deductions and garnishments	Employees input information during onboarding — Optimum ensures deductions and garnishments are entered and communicated to tax entities.	✓	
Timekeeping	Optimum provides timekeeping software available for purchase. Client team must clock in/out or report hours.	✓	
Paid time off tracking		✓	



*"Optimum is clear about what they say and what they provide.
Their pricing is transparent, and there are no hidden fees."*

— Accountant, Software Development Company

COMPLIANCE & RISK MANAGEMENT

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
Federal & state law updates	See Pricing Exhibit.	✓	
State required labor posters		✓	
Unemployment claims administration, reporting & hearings	We support client responses to UI claims. If a claim goes to a hearing, we provide guidance; client must attend all hearings.	✓	
Employee leave administration — legal adherence	Client is responsible for following all applicable leave laws and approving leave. Must notify us at least 10 days in advance. Optimum provides documents and resources.		✓
Employee leave administration — guidance, support, compliant EE notices & documents	We also assist with questions and guidance on leave types, discussing options to limit liability.	✓	
Employment practices liability insurance (EPLI) policy		✓	
Sexual harassment prevention training	Optimum assigns training to employees and new hires.	✓	
Online employee & manager training	Additional online trainings available; HR Pro reviews topics beneficial to your company.	✓	
Risk prevention training (WC carrier)	Optional — client is responsible to conduct or distribute training to employees. Optimum must be notified in advance.	✓	
Safety training (WC carrier)	Optional — client is responsible to conduct or distribute training to employees. Optimum must be notified in advance.	✓	
Maintain employee files	Client shares documentation with Optimum.		✓



"Optimum tailored its services to my organization. Now I can spend my time managing the operations of my business."

— Owner, Financial Services Company

WORKERS' COMPENSATION MANAGEMENT

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
Pay-as-you-go program		✓	
No year-end audits or deductibles		✓	
Reporting employee injuries	<i>Client must inform Optimum within 24 hours of a workplace injury.</i>		✓
Claims reporting		✓	
Claims administration		✓	

BENEFITS ADMINISTRATION

TASK / SERVICE	DETAILS	OPTIMUMHR	CLIENT
Plan setup and administration	<i>Based on selection of plans by client.</i>	✓	
Section 125 plan setup and administration		✓	
401(k) setup, administration & compliance testing	<i>Based on plan design by client.</i>	✓	
ERISA compliance		✓	
COBRA administration		✓	
ACA reporting (50+ FTE)	<i>Additional fees apply for employee forms.</i>	✓	
Employee eligibility tracking		✓	
Online open enrollment process		✓	
Open enrollment — yearly benefit plan offering	<i>Client reviews the renewal and provides updates/changes for the upcoming benefit plan year.</i>		✓
Employee education meetings		✓	
Ongoing customer care for employee questions		✓	



"What truly sets Optimum apart is their partnership mindset — thoughtful, responsive, and genuinely invested in our success."

— Executive Team Member evaluating PEO options



Let's Work Together.

Focus on your business. We'll handle the rest.

(888) 466-5521

www.optimumhr.com

info@optimumhr.net



OC Business Journal 'Best Places to Work'

Ten years in a row