

Working With a Managed Payroll Provider

*A Guide for
Accounting Firms*

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You've made the big decision: to partner with a managed payroll services (MPS) provider. **That one choice** can lift a lot off your plate—improving payroll accuracy, reducing compliance risk and freeing up your team to focus on what they do best.

Now what?

The real transformation begins after the contract is signed. This guide will walk you through the next phase: building a strong, seamless relationship with your MPS provider, so you can deliver reliable, efficient payroll to your clients, with less stress and more confidence.

What to Do Before You Get Started

Like any good partnership, success depends on a strong foundation. That means laying the groundwork. Here are a few smart moves to make early on.



Assign a Clear Point of Contact

Designate someone (or a small team) within your firm to work directly with your MPS partner. This keeps communication flowing, questions answered and tasks on track. Typical responsibilities include:

- Submitting payroll and time data
- Managing key deadlines
- Acting as the go-between for clients and the payroll team

It's a small step that makes a big difference in keeping things running smoothly.

Align on Expectations

The more clarity upfront, the better the results. Be specific about:

- How much control and visibility your firm expects
- What types of reports you'll need—and how often
- How clients will share hours and payroll details

Getting aligned early avoids missteps later.





Making Payroll Easier for Your Clients

A good MPS partner will give your clients flexible, secure options to share payroll data. One option is a client-specific portal where they can submit hours directly. An even easier option is to add an integrated timekeeping system that feeds data straight into payroll, saving time and reducing errors for everyone.

Smooth Onboarding: How to Start Strong

The onboarding process is where trust is built, and the tone is set. Your MPS partner should make it feel organized, efficient and secure. Here's what to expect:

1. System Walkthrough

Start with a demo of the payroll system. Your partner should answer technical questions, walk you through setup steps, and make sure everything functions as expected.

2. Client Enrollment

Your onboarding specialist will help collect everything needed to bring each client onto the system. This usually includes:

- Service agreements
- Tax forms (8655, POAs)
- Business info, EINs, bank details
- Historical payroll records
- E-signatures and secure documentation

It's a lot—but the right partner will guide you through it, step by step.

With IRIS, for example, all onboarding takes place through a secure, cloud-based portal with multi-factor authentication, 24/7 monitoring and built-in fraud protection—so you and your clients stay protected.

3. Training and Tools

Once your client data is uploaded and verified, your MPS provider should offer training and access to essential tools, like integrated time-tracking systems and other features that make payroll easier for you and your clients.

4. Journal Entry and Software Integration

A great MPS partner won't just help with payroll—they'll help it work with the rest of your tech stack. That means journal entries that sync with accounting platforms like QuickBooks® or Accounting CS®, so no one's stuck double-entering data.

Staying Aligned: Support That Keeps You Moving

Once you're up and running, your MPS provider becomes an extension of your team. Here's what that partnership should look like in action:

Day-to-Day Support

You'll have a dedicated payroll specialist to handle the nuts and bolts—submitting payroll, managing timelines, generating reports, and flagging any compliance concerns.

At IRIS, that support extends to your clients, too. Our platform gives them 24/7 access to pay stubs, tax forms, direct deposit preferences and more. They can clock in and out, track hours and manage their own records, without needing to go through you.

Real-Time Reporting

Modern platforms should allow you and your clients to track everything in real time, from payroll summaries to tax statuses. That kind of visibility means better insight and better service, with less back-and-forth.

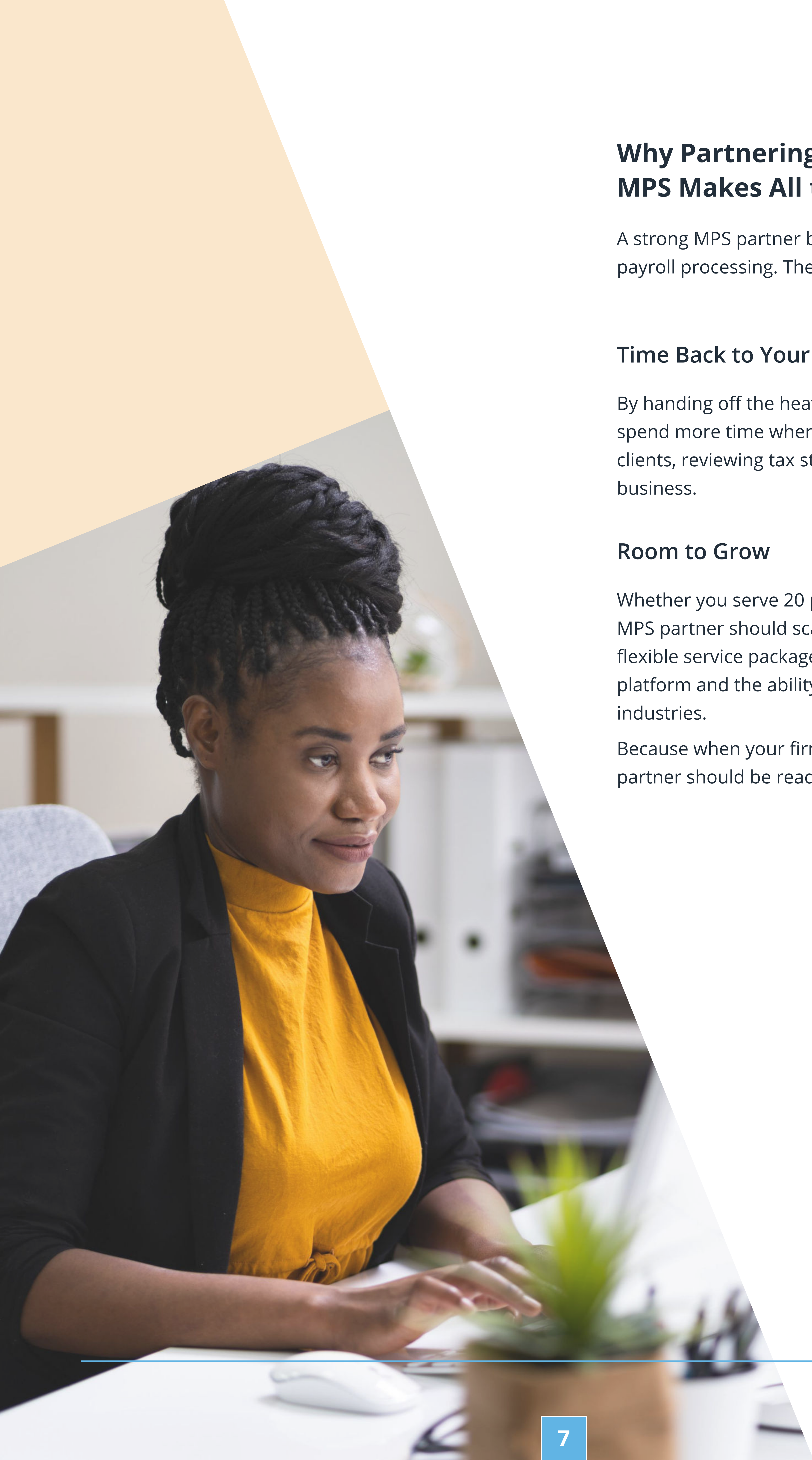
"We simply upload the notice, send it over, and they handle everything on behalf of our clients. We're completely out of it—and so are our clients—which has been a huge benefit."

Bryan Girdler, partner, EHA CPAs and Advisors

Built-In Compliance

As your client base grows, so does your compliance workload. That's why your MPS partner should offer full tax liability protection, covering filings at every level—local, state and federal—and managing communications with agencies on your behalf.

At IRIS, that support extends to your clients, too. Our platform gives them 24/7 access to pay stubs, tax forms, direct deposit preferences and more. They can clock in and out, track hours and manage their own records, without needing to go through you.



Why Partnering with the Right MPS Makes All the Difference

A strong MPS partner brings more than just payroll processing. They also bring:

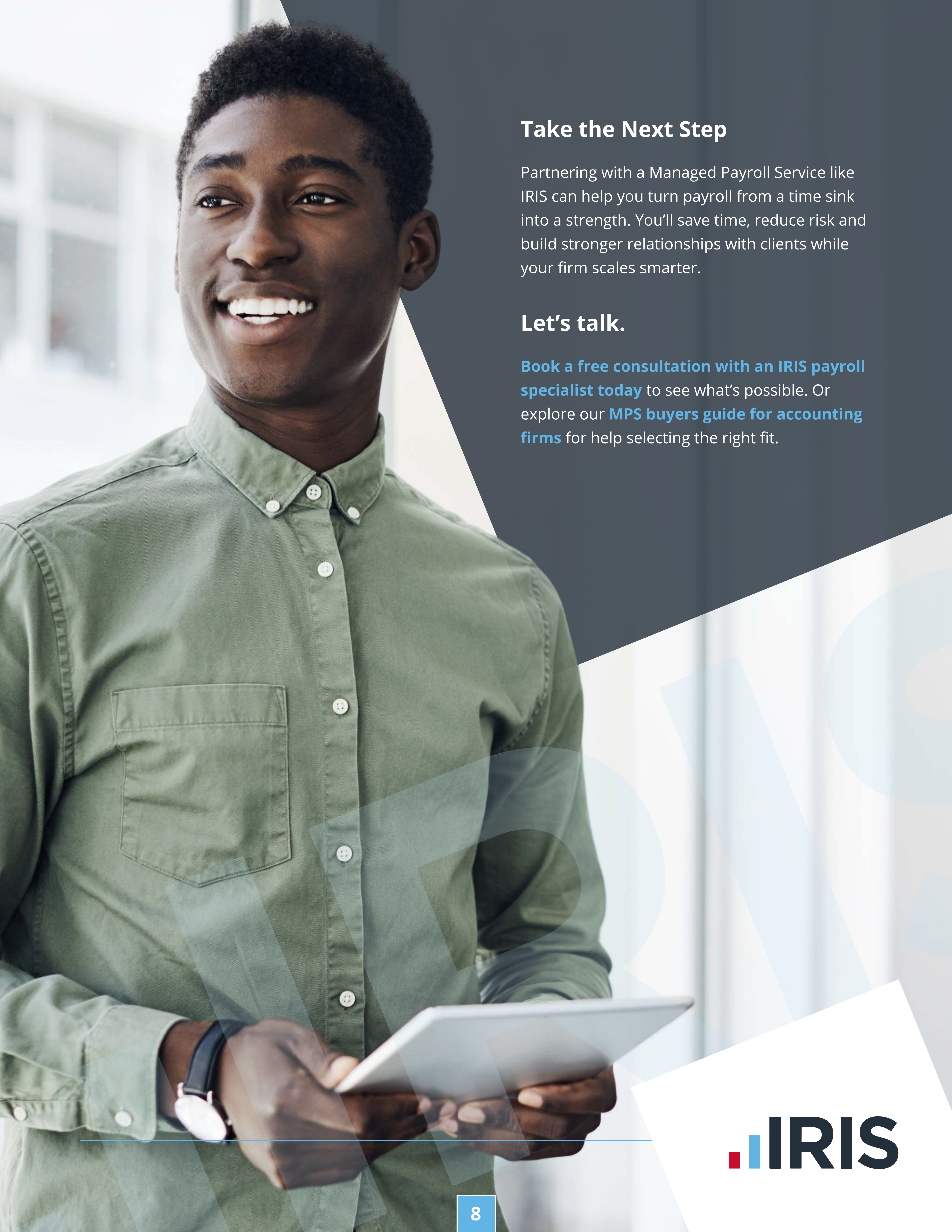
Time Back to Your Team

By handing off the heavy lifting, your staff can spend more time where it matters: advising clients, reviewing tax strategy and growing the business.

Room to Grow

Whether you serve 20 payroll clients or 200, your MPS partner should scale with you. Look for flexible service packages, a secure cloud platform and the ability to support clients across industries.

Because when your firm grows, your payroll partner should be ready to grow with you.



Take the Next Step

Partnering with a Managed Payroll Service like IRIS can help you turn payroll from a time sink into a strength. You'll save time, reduce risk and build stronger relationships with clients while your firm scales smarter.

Let's talk.

Book a free consultation with an IRIS payroll specialist today to see what's possible. Or explore our **MPS buyers guide for accounting firms** for help selecting the right fit.

