

Eliminate the Payroll Juggling Act

Tips & Tricks for Smooth Payroll Management

Greenshades



Today's Presenter

John Ogonowski

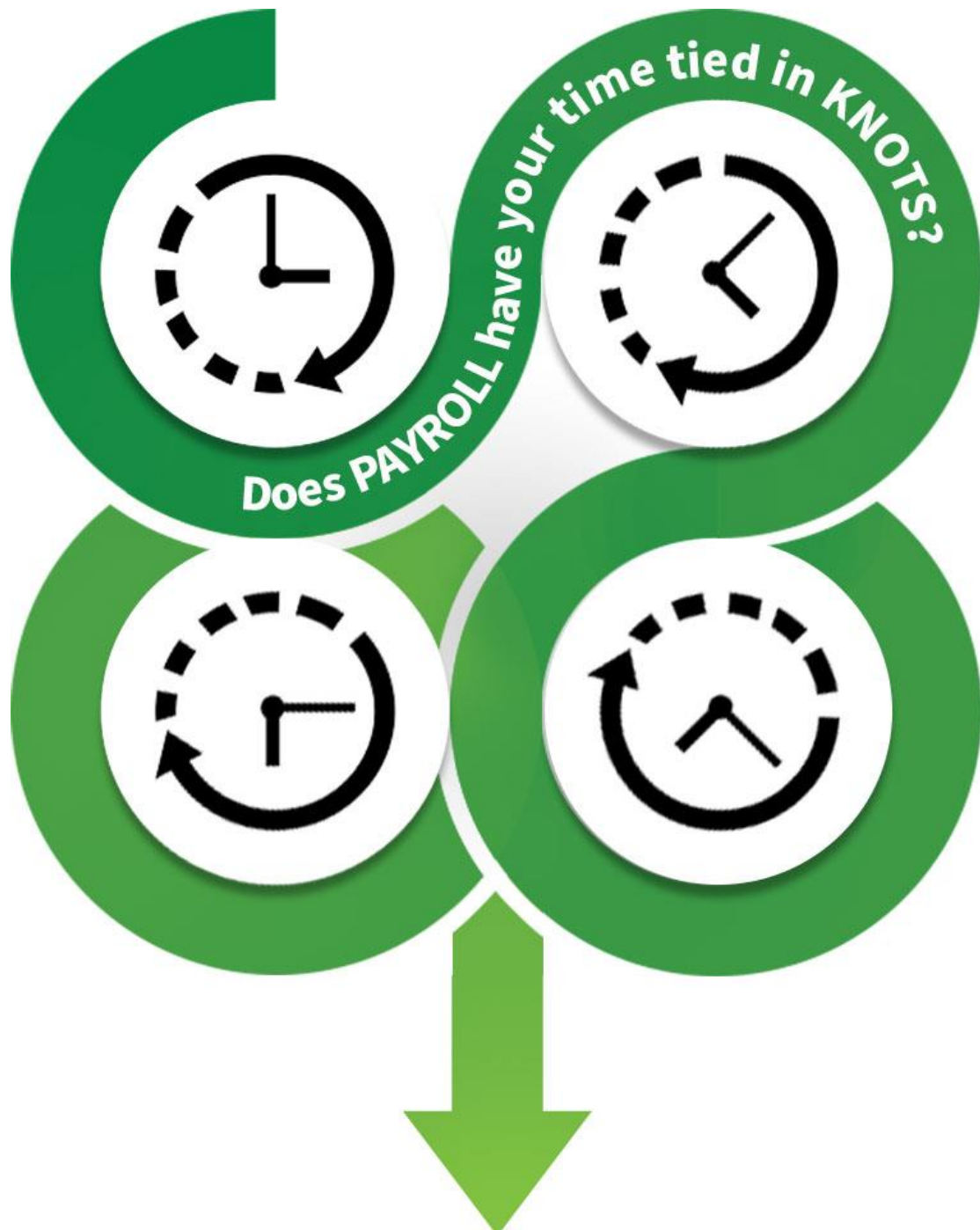
Account Executive, Payroll

About John

- 20 + Years in HCM/Payroll Industry
- Extensive experience helping clients in – Staffing, Transportation, Healthcare, Non-Profit, Construction and Manufacturing
- Lives in North Carolina

POLL QUESTION

How many employees came asking for their W-2 this year?



The Payroll Team's Juggling Act

"Can I get a copy of my W-2?"

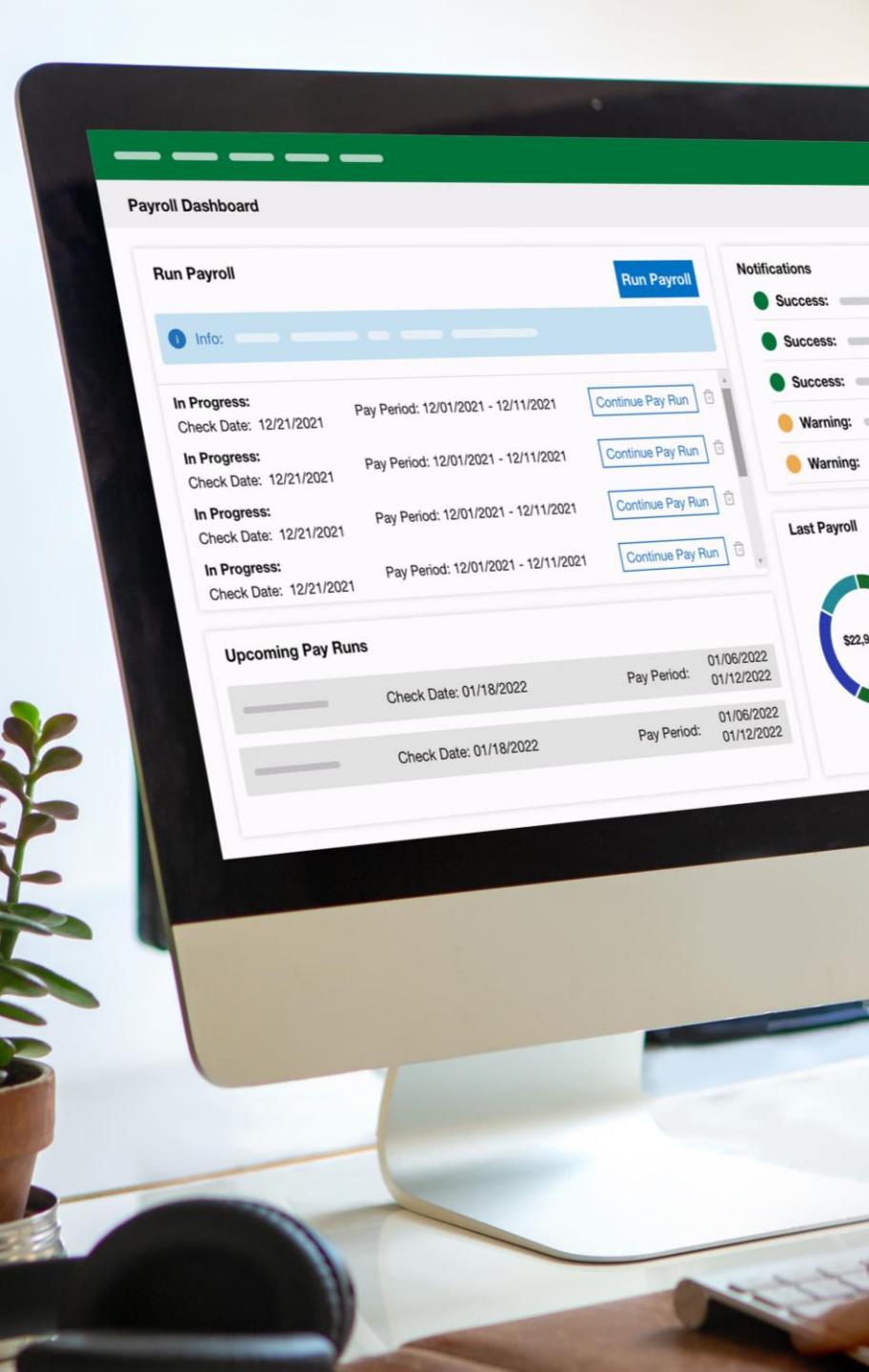
"I need to change my address."

"When do we need to file again?"

"Payroll is due tomorrow!"

Hours per month OVERTIME that the typical payroll organization employee works:*

25hrs



Smooth Payroll Management

Tip/Trick #1

Utilize Automation to Enhance Compliance

Automation Plays a Key Role in Successful Payroll

Organizations that are “highly automated” are*:



2x

*more likely to find
compliance very easy*

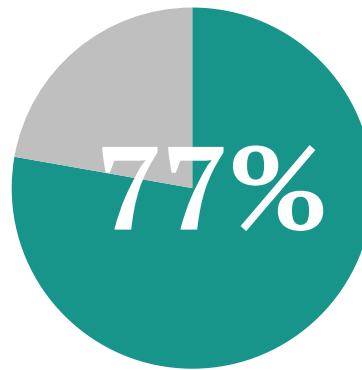


4x

*more likely to say compliance
takes little time and effort*

Automate To Streamline & Simplify

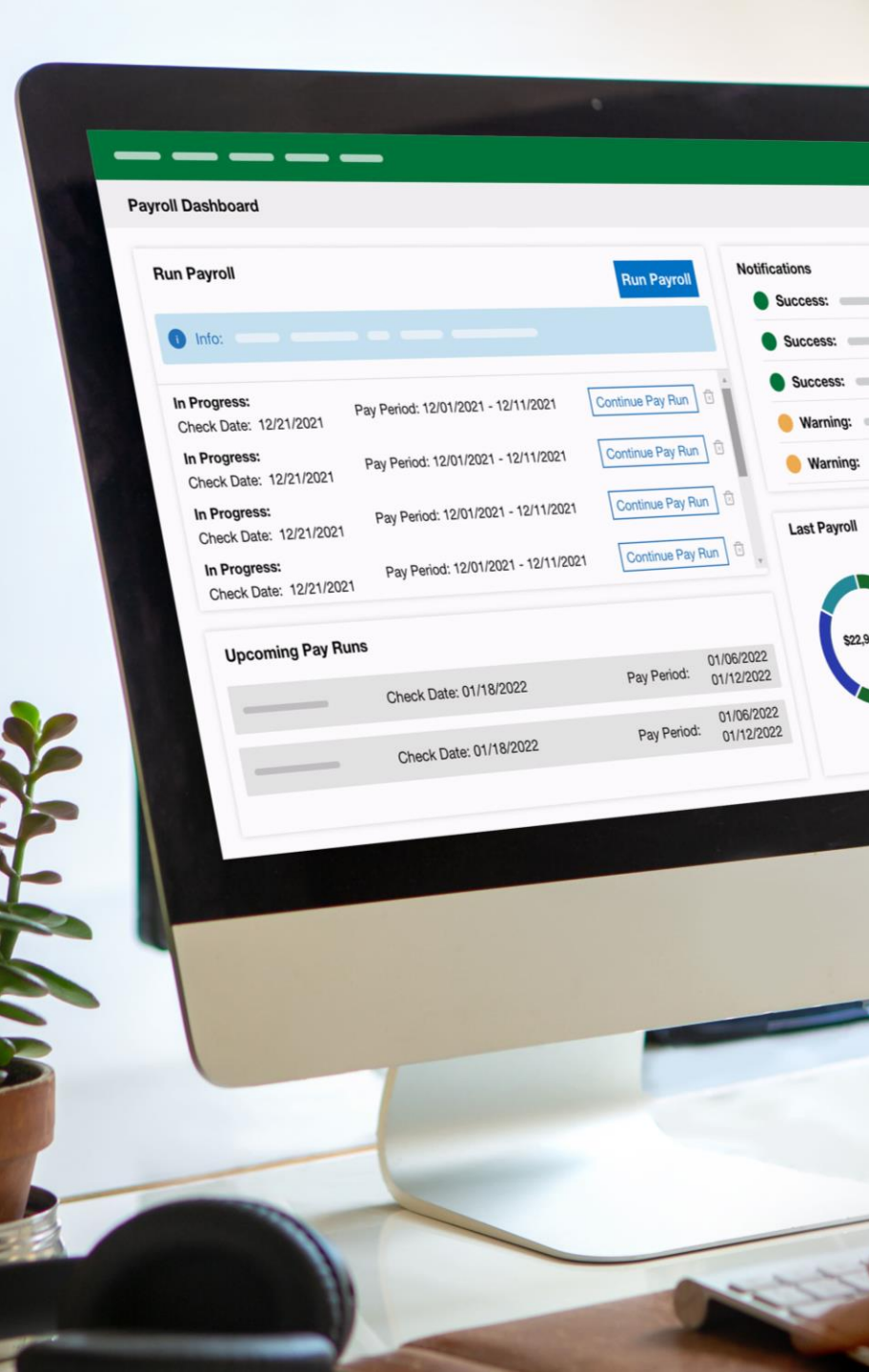
Of organizations that are “highly automated,”



*say their ability to track national regulatory changes is above or well above average**

Automations such as these help ease the burden of compliance:

- Automated tax code assignment and earning code application
- Alerts on errors that can impact payroll runs – red flags prevent issues
- Employee work hour deviation notifications – flagged to catch problems early



Smooth Payroll Management

Tip/Trick #2

Encourage Employee use of Self-Service

Use Self-Service, Save Valuable Resources

Employee self-service centers decrease the workload of HR teams AND increase employee engagement.

- ✓ Equip employees with the tools to handle their HR needs.
- ✓ Minimize the maintenance of employee data.
- ✓ Encourage employee independence.
- ✓ Reduce the number of requests to payroll & HR for pay stubs, W-2s, and other important documents.
- ✓ Free up payroll & HR to focus on other strategic initiatives.

The screenshot displays the Greenshades Employee Self-Service portal. The top navigation bar includes links for Home, HR Profile, Pay History, Documents, Employee Management, and LearnUpon. The user is logged in as KARTIKEYA. The main content area is titled 'Welcome to Sales Demo NJ / NY' and features three primary sections: 'Company bulletins' with an announcement for the 'Annual Company Barbeque!', 'Employee directory' with a search bar and a list of employees (Adam Smith, ALICE JOHNSON, AMAL CRANFORD), and 'Recent paystub' showing a net pay of \$132.23. A footer contains copyright information for Greenshades Software.

Home HR Profile Pay History Documents Employee Management LearnUpon

Hello! KARTIKEYA

Welcome to Sales Demo NJ / NY

Company bulletins

Annual Company Barbeque!
Please join us at our annual company barbeque! After missing the past 2 years, we're excited to come together again for this fun celebration!

3/17/2022 5:17 PM [Read More...](#)

Employee directory

Search by Name

[View Complete Organizational Chart](#)
[View Complete Directory](#)

Adam Smith

ALICE JOHNSON

AMAL CRANFORD

Recent paystub

Net Pay
\$132.23
YTD \$724.92

| | |
|------------------|----------|
| Employee Net Pay | \$132.23 |
| Taxes | \$468.32 |
| Deductions | \$942.45 |

Your most recent check was on 2/10/23

[View Paystub](#)

Employee discount program

Copyright © 2003-2023 Greenshades Software. All Rights Reserved. - End User Subscription Agreement - Privacy Policy



Smooth Payroll Management

Tip/Trick #3

Find the Right Payroll Partner



The Right Partner Makes all the Difference

Payroll is one of the most complex and time-sensitive functions of an organization. The right partner will:

- ✓ Make the process easier and save your team valuable resources.
- ✓ Increase your organization's ability to maintain compliance.
- ✓ Be flexible enough to work *with* your current processes.
- ✓ Provide applicable data and reports on your payroll processes.
- ✓ Reduce the number of manual workarounds and duplicate work.

POLL QUESTION

What tasks are you doing outside your payroll & HR system?



The Greenshades Difference

The Greenshades Platform: A Complete Solution

| Payroll | Human Resources | Benefits Management | Tax and Compliance | Time and Labor Management |
|---|--|--|--|--|
| <p><i>Pay your employees on time and on their terms</i></p> <ul style="list-style-type: none">→ Modern, Real-time Payroll→ Simplifying complex conditions→ Easy Configuration for any Business→ ERP and GL Integration→ Dashboard and Reporting | <p><i>Empower HR to create a better employee experience</i></p> <ul style="list-style-type: none">→ Employee Self-Service→ Employee Onboarding→ Certification Management→ Documents and Organization Charts→ Learning Management→ Applicant Tracking and Recruiting | <p><i>Ensure every employee has what they need to thrive</i></p> <ul style="list-style-type: none">→ Open Enrollment→ Life Event Management→ ACA Compliance→ Voluntary Benefits→ Personalized Programs | <p><i>Confidently navigate tax complexities</i></p> <ul style="list-style-type: none">→ Automated Payroll Taxes→ Year End Forms→ Managed Payroll Tax Service→ Comprehensive Tax and Information Returns→ ACA and HR Compliance | <p><i>Oversee employee time and productivity</i></p> <ul style="list-style-type: none">→ Time and Attendance→ Flexible Time Management→ Manager tools→ Absence and Leave Management |

The Greenshades Difference

Streamline Payroll in a Snap With Wizardly Automation

- ✓ Step-by-step wizard guides your processes with ease.
- ✓ Timesheet validation is quick and simple.
- ✓ Automatic alerts to areas of concerns.
- ✓ Enjoy the freedom of real-time recalculations.
- ✓ Easily sync your payroll information into your GL.

The screenshot displays the 'Payroll' section of the Greenshades software. The top navigation bar includes links for Home, Employees, Payroll, Pay History, Tax Service, Year-End Forms, Reports, and Settings. The main header shows 'Payroll' with a sub-header 'Pay Run: Weekly 02/03/2023 (Scheduled)', 'Check Date: 02/03/2023', and 'Pay Period: 01/22/2023 - 01/28/2023'. A 'Cancel Pay Run' link is visible on the right. Below the header is a wizard progress bar with six steps: 1. Employees (active), 2. Hours & Earnings, 3. Deductions, 4. Benefits, 5. Arrears, and 6. Review & Submit. A note states: 'The following are all the employees that can be included on the pay run as they have been added to this schedule. To add more employees, click the Add employees button below. This will only add the employee to this pay run, it will not add them to the scheduled pay runs in the future. To do that please go to the employee card under pay settings and add them to a schedule.' Below this note is a search bar labeled 'Filter Table...' and a '+ Add Employees' button. A table lists six employees with columns for Employee ID, Employee Name, Department, Class, Division, Position, Location, Hire Date, and Termination Date. The table data is as follows:

| | Employee ID | Employee Name | Department | Class | Division | Position | Location | Hire Date | Termination Date |
|--------------------------|-------------|------------------|--------------|--------|----------|------------|-----------------------|------------|------------------|
| <input type="checkbox"/> | AFHEW001 | ELDRED WORKS | Department B | CLASSA | | Position A | Alabama Work Location | 09/05/2021 | |
| <input type="checkbox"/> | AFSDK001 | DANAE KROPP | Department B | CLASSA | | Position B | Alabama Work Location | 10/03/2021 | |
| <input type="checkbox"/> | AFSDM001 | DOREEN MCSWEENEY | Department B | CLASSA | | Position B | Alabama Work Location | 10/10/2021 | |
| <input type="checkbox"/> | AFSEG001 | ELWOOD GARRETT | Department B | CLASSA | | Position B | Alabama Work Location | 10/17/2021 | |
| <input type="checkbox"/> | AFSER001 | KARENDA HALDEMAN | Department B | CLASSA | | Position B | Alabama Work Location | 10/24/2021 | |

Below the table, it says 'Total Employees: 21'. At the bottom right, there are 'Save & Exit' and 'Next' buttons. The footer contains the copyright notice: 'Copyright © 2003-2023 Greenshades Software. All Rights Reserved. End User Subscription Agreement' and a unique identifier: 'D3C1WAZRGOWEB01:GO:100084425'.

With the payroll wizard, our average customer can quickly run and process payroll within 10 minutes from start to finish.

The Greenshades Difference

Tailor Your Experience with Flexible & Configurable Tech

Simple on-screen configurations and intuitive management capabilities make it easy to tailor the system to your organization's needs.

- ✓ Easy to configure earning codes, benefits, and deductions.
- ✓ With a cloud-based format, updates flow across the platform simultaneously.

The screenshot displays the Greenshades Employee Management interface. The top navigation bar includes links for Home, Employees, Payroll, Pay History, Tax Service, Year-End Forms, Reports, and Settings. The left sidebar lists various management tools: Employees (with sub-links for Employee List, Organization Chart, Messages & Bulletins, Employee Access Requests, and Year End Forms Access), Profile (5 notifications), Timesheets, Time Off, Benefits (5 notifications), Documents (9 notifications), Expense Reports, and Evaluations (6 notifications). The main content area shows the 'Employee List' with filters for All, Active, and Inactive. Below the filters are buttons for 'Add employee', 'All' (dropdown), 'Search', 'Compact rows' (toggle), 'Export all', and 'Columns' (dropdown). The table lists employees with columns for Employee ID, Employee Name, Work Location, Department, Division, Position, Supervisor, Class, Employment Type, First Name, and Last Name. An 'Edit TIPS' modal window is open, showing configuration details for a 'TIPS' earning code, including Code Name, Pay Stub Name, Description, Wage Type (Reported Cash Tips), Earning Group, Calculation Details (Rate Type: Fixed Amount, Earning Category: Other, Default Amount: \$15.0000), Default Location (PRIMARY), Default Department (Department A), and Maximums (None). The modal also includes a 'Scheduling Details' section with a Frequency dropdown set to 'Biweekly' and a 'Save' button.

| Employee ID | Employee Name | Work Location | Department | Division | Position | Supervisor | Class | Employment Type | First Name | Last Name |
|-------------|--------------------|-----------------------|--------------|----------|------------|-------------|--------|-------------------|------------|-----------|
| AFHEW001 | ELDRED WORKS | Alabama Work Location | Department B | | Position A | John Carter | CLASSA | Full Time Temp | ELDRED | WORKS |
| AFHKE0012 | KARTIKEYA ESPINOZO | Alabama Work Location | Department B | | Position A | | CLASSA | Full Time Regular | KARTIKEYA | ESPINOZO |
| AFSAE001 | ATARAH EAKER | Alabama Work Location | Department B | | Position A | | CLASSA | Full Time | ATARAH | EAKER |
| AFSBA001 | BURDON ACEVES | Alabama Work Location | Department B | | Position A | | CLASSA | Full Time | BURDON | ACEVES |
| AFSBK001 | BOWMAN KASPAR | Alabama Work Location | Department B | | Position A | | CLASSA | Full Time | BOWMAN | KASPAR |
| AFSDK001 | DANAE KROPP | Alabama Work Location | Department B | | Position B | John Carter | CLASSA | Full Time Temp | DANAE | KROPP |
| AFSDM001 | DANAE KROPP | Alabama Work Location | Department B | | Position B | John Carter | CLASSA | Full Time Temp | DANAE | KROPP |

The Greenshades Difference

Easily Stay on Top of All Major Deadlines

Payroll deadlines are critical and must be met to avoid penalties and fines.

- Reminders and alerts help you keep up with important payroll deadlines, such as tax filings and year-end reporting.
- Feel confident that you are meeting all of your payroll deadlines, giving you peace of mind and freeing up time for other important tasks.

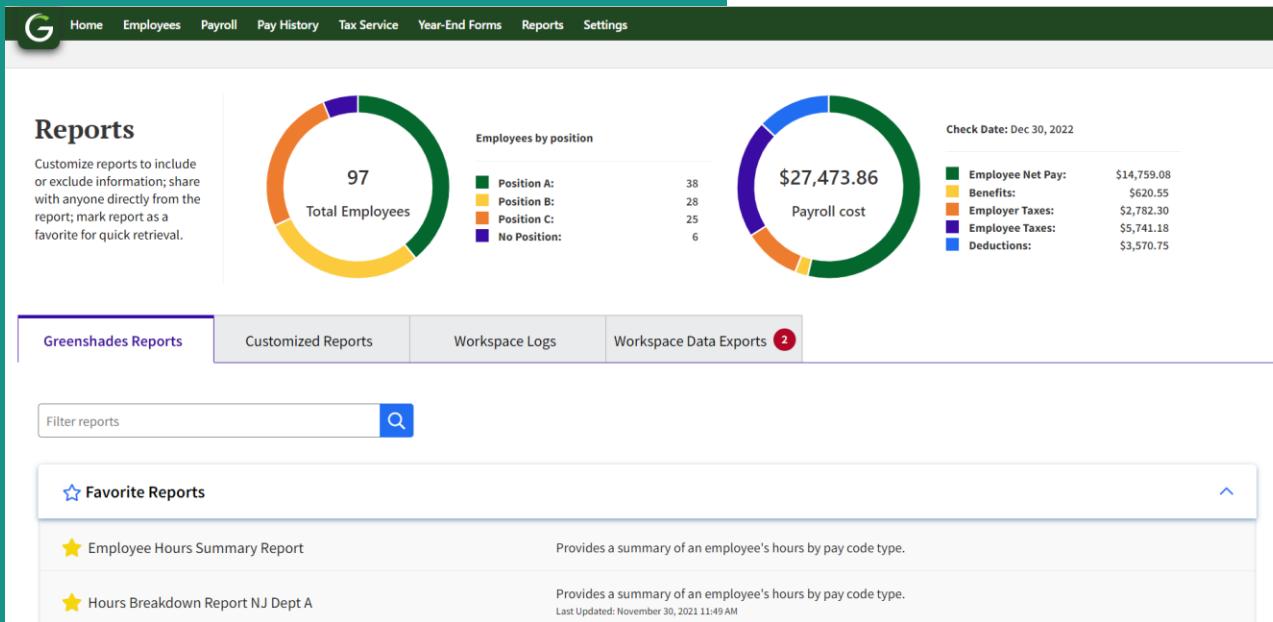
The screenshot displays the 'Payroll Tax Service' dashboard. At the top, a navigation bar includes links for Home, Employees, Payroll, Pay History, Tax Service, Year-End Forms, Reports, and Settings. Below the navigation bar, a header section states: 'Greenshades can assist you with filing returns and making payments to federal and state agencies. See our [Frequently Asked Questions](#) for assistance.' A status message indicates: 'Greenshades Online is currently helping you track 10 returns/payments and could be assisting with 4 more.' A blue button labeled 'Go to Tracking Information' is present. The main section is titled 'Upcoming Returns and Payments' and features a red alert: '6 payments totaling \$15299.79 and 11 returns are currently past due.' Below this, there are two tables. The first table, 'Upcoming Returns and Payments', has columns for 'Clear Filters', 'Jurisdiction', 'Payments/Returns', and 'Due'. It lists various tax filings with their respective due dates. The second table, 'Historical Returns and Payments', has columns for 'Tracking Number', 'Name', 'Jurisdiction', 'Type', 'Reporting Date', 'Due Date', 'Submitted Date', and 'Amount'. Both tables include 'Export Selected' and 'Show Columns' options.

| Clear Filters | Jurisdiction | Payments/Returns | Due |
|-----------------------------|-----------------|---|------------|
| All | All | | All |
| File Return | United States | W-2 Forms | 01/28/2022 |
| File Return | Colorado | Annual Withholding W-2 with DR 1093 | 01/28/2022 |
| File Return | United States | Withholding Form 941 with Schedule B | 10/28/2022 |
| File Return | New Jersey | Unemployment Form NJ-927 and WR-30 | 10/28/2022 |
| File Return | New York | Quarterly Report NYS-45 | 10/28/2022 |
| Pay Now | New Jersey | Withholding Tax \$6715.39 | 10/28/2022 |
| File Return | New York | New Hire Report | 11/04/2022 |
| Pay Now | United States | Federal Payroll Tax Liability \$7090.33 | 11/08/2022 |
| Pay Now | New York | Withholding Tax \$1193.95 | 11/08/2022 |
| File Return | Birmingham City | Employers Occupational Withholding Tax | 12/19/2022 |

| Tracking Number | Name | Jurisdiction | Type | Reporting Date | Due Date | Submitted Date | Amount |
|-----------------|------|--------------|------|----------------|----------|----------------|--------|
|-----------------|------|--------------|------|----------------|----------|----------------|--------|

The Greenshades Difference

Gain Insights With Reporting



- ✓ “At-a-Glance” payroll dashboard – all the tools you need at your fingertips.
- ✓ Simplified views of historical pay runs with one-click access.
- ✓ Front page awareness of future pay runs – see what you need without having to hunt for it.

The Greenshades Difference

Eliminate Duplication With an All-In-One Solution

Use one system, ensure key system integrations

- ✓ All –in-one Platform
- ✓ No Double Entry



The Greenshades Difference

Future-Proof Your Investment

- ERP-Agnostic including compatibility with all editions of Microsoft Dynamics
- Independent and portable
- No UI changes to roll out, no aggravation, or loss of productivity – when you change ERPs, the payroll platform adapts to the new system



The Greenshades Difference

Uniquely Designed



POLL QUESTION

When will you next evaluate payroll and HR solutions?

THANK YOU!

Let's talk about moving your payroll to the cloud and get a personalized demo!

Sales@Greenshades.com

Visit us online @ [Greenshades.com](https://www.Greenshades.com)

The logo for Greenshades, featuring the word "Greenshades" in a white, sans-serif font. The letter "G" is stylized with a green leaf-like shape integrated into its top curve.