

— PLANSOURCE —
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Keep Calm and Automate Payroll Adjustments

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Agenda

Product Overview

User Testing Results

Product Demonstration

Q&A



Advanced Payroll Deductions

Product Overview

Adjustment Exercise

What is the adjustment amount?

- Her employer paid for four weeks of maternity leave.
- She then took an additional four weeks of unpaid leave from 03/01 - 04/01.
- She pays \$650 for medical coverage and \$95 for dental coverage
- Lisa's employer has a rule that they can only deduct 1.5X the normal premium for arrears collection in a single pay period.

What will Lisa's payroll adjustments be for the next two pay periods?



Lisa
New Mother

The Pain of Payroll Adjustments

- Time Consuming
 - Calculate the Adjustment
 - Communicate the Adjustment with the Employee
 - Process the Payroll Deduction for the Adjustment
- Costly
 - Actual Labor Cost
 - Opportunity Cost
 - Missed Adjustments Are Paid by Employer



Simplify the Complex

View and track deductions and adjustments over time

(less likely to make errors, easier to communicate to employees)

Save Time

Automate time-consuming, manual deduction calculations

(HR Admin time and opportunity cost)

Save Money

Capture outstanding arrears balances

(i.e. deductions never taken from employee paychecks)

Adjustments Made Easy!

Advanced Payroll Deduction Features



Retroactivity

Create adjustments to handle retroactive changes



Refunds

Automate the calculation of refunds when employees have overpaid



Catch-up Deductions

Automate catch-up deductions across multiple paychecks



Pre and Post Tax

Calculate pre and post-tax deductions automatically



Paycheck History

View paycheck history details for employees and benefits



Multiple Payroll Calendars

Set up your company's payroll schedules and rules



Overlapping Plan Years

Calculate deductions for benefit plans with different plan years



Adjustment Rules

Define thresholds and max per paycheck carryover amounts



Self-Balancing

Import actual deductions taken and auto-generate adjustments

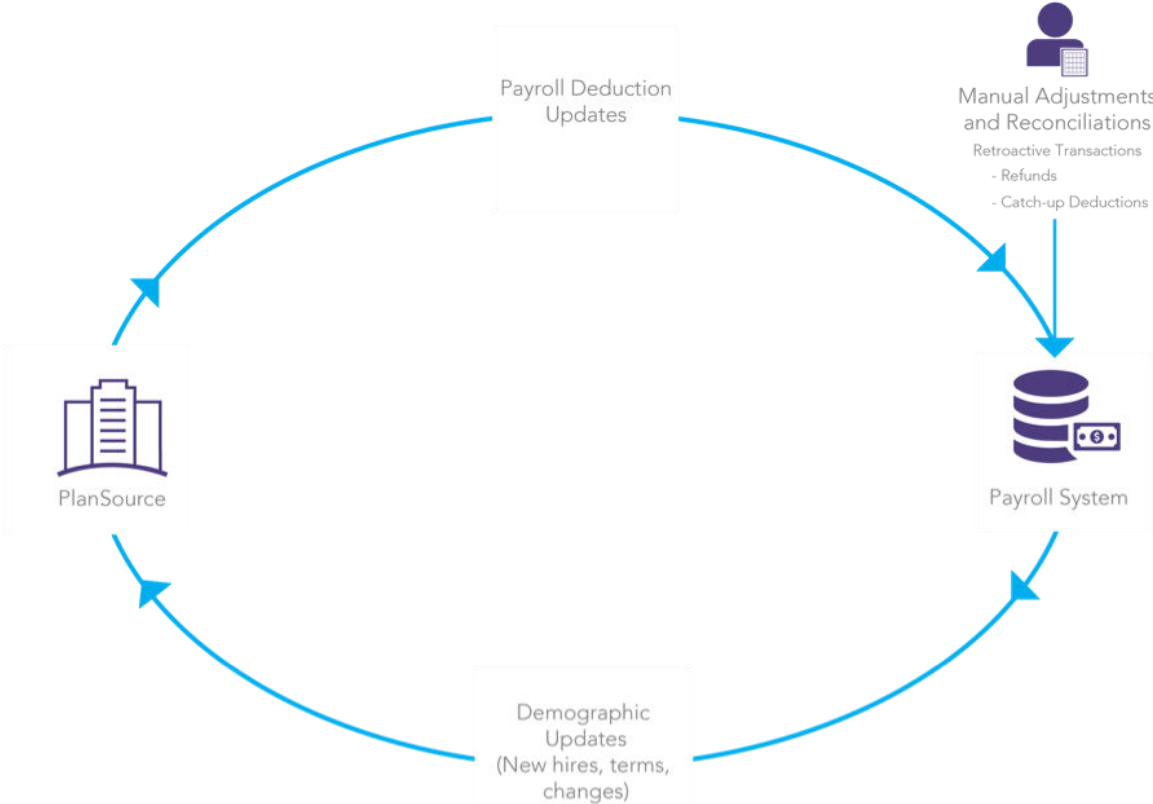


Assumed Deductions

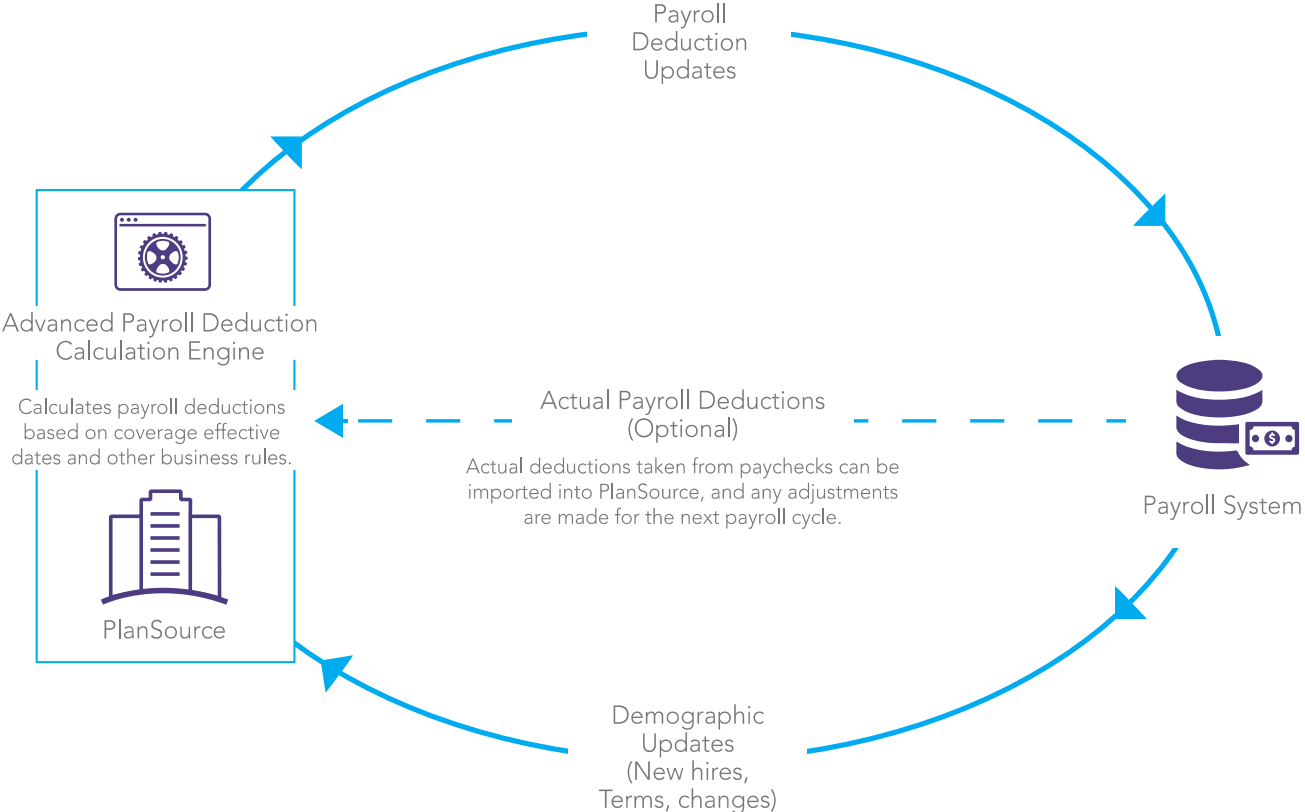
Use calculated deductions instead of importing actual deductions

Adjustments that are customized for your organization

Eclipse Template for Tables



Eclipse Template for Tables

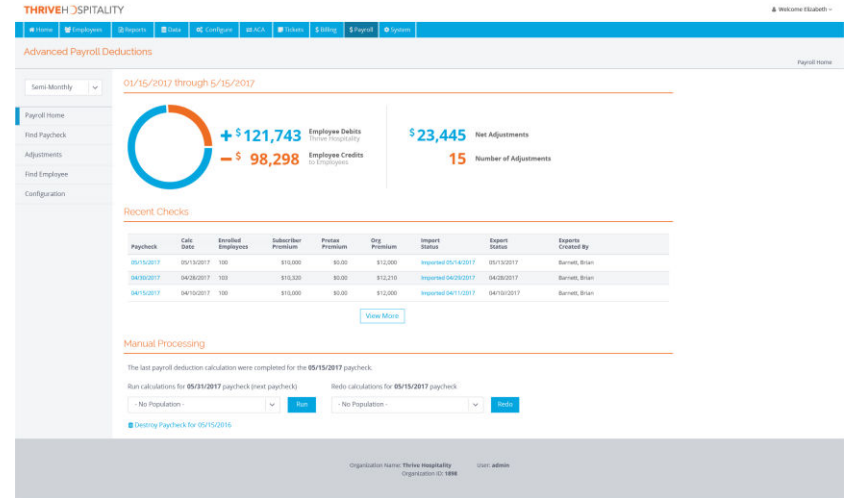




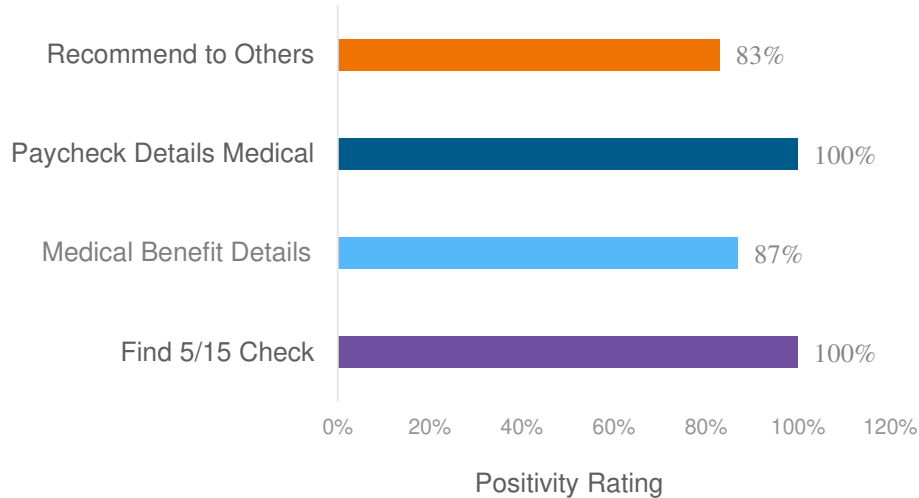
Advanced Payroll Deductions

User Testing Results

- For Advanced Payroll Deductions 2.0, we are actively interviewing random users on their experience, usage and feedback.
- Interviews follow a script of tasks with similar questions so we can compare later
- Interview Candidates are chosen to represent those with payroll software experience.
- Feedback is collected and compared
- Insight is also created by look at system usage analytics



Task Results



1. How likely are you to recommend this site to a friend or colleague (0=Not at all likely, and 10=Very Likely)?

Result: 83% rated 8 or higher

2. Were you able to find the paycheck details for the Medical benefit? (Yes/No)?

Result: All 30 said Yes

2. How easy was it to find the paycheck details for the Medical benefit? (0=Very Difficult, and 5=Very Easy)?

Result: 87% rated 5

3. How easy was it to find the detailed view of the 5/15/2017 check? (0=Very Difficult, and 5=Very Easy)?

Result: All 30 users rated 5



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Product Demonstration



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