ELIZABETH HUDSPETH & BARBARA ANDERSEN

Taking a Proactive Approach to Payroll Processing with ActivityHD

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Disclaimer

A FEW THINGS FIRST

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Elizabeth Hudspeth

IMPLEMENTATION TEAM

Barbara Andersen

SUPPORT TEAM

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Agenda

HERE'S THE PLAN

- Changes to the Employee Form
- Follows Pay
- Attributes
- Efficiency Tools
- Bots that House Payroll Imports

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What's Changed?

EMPLOYEE FORM CHANGES

- Include Historical Information
- Multi Select Automatics
- I-9 Forms

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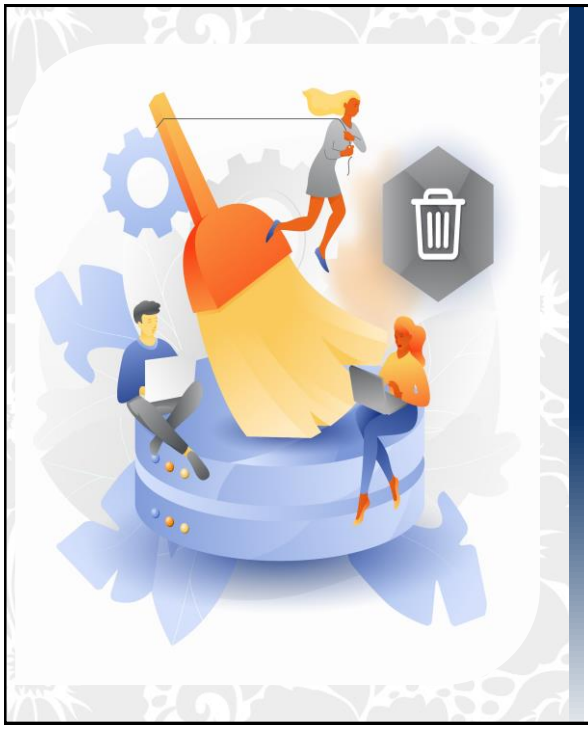

Include Historical

To see or not to see?

- Version 8.35
- Clean it up!
- Available throughout

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Include Historical

TO SEE OR NOT TO SEE?

tomatics: All — Include Historical

Line	PRCode	Description	Begin Date	End Date
1	Pay.Bonus	Bonus		12/31/2020
2	Pay.Salary	Salary		
3	Ded.401kPct	401k Percent		
4	Ded.G.CACS1	Garnishments, CA Child Sup		
5	Ded.401kAmt	401k Amount		6/30/2020
6	Ded.G.CACS1	Garnishments, CA Child Sup		1/15/2023
7	Tax.FUTA	Federal Unemployment		
8	Tax.USA	USA W/H		
9	Tax.USMed	Medicare		
10	Tax.USMedER	Medicare - Employer		
11	Tax.USSocSec	Social Security		
12	Tax.USSocSecER	Social Security - ER		

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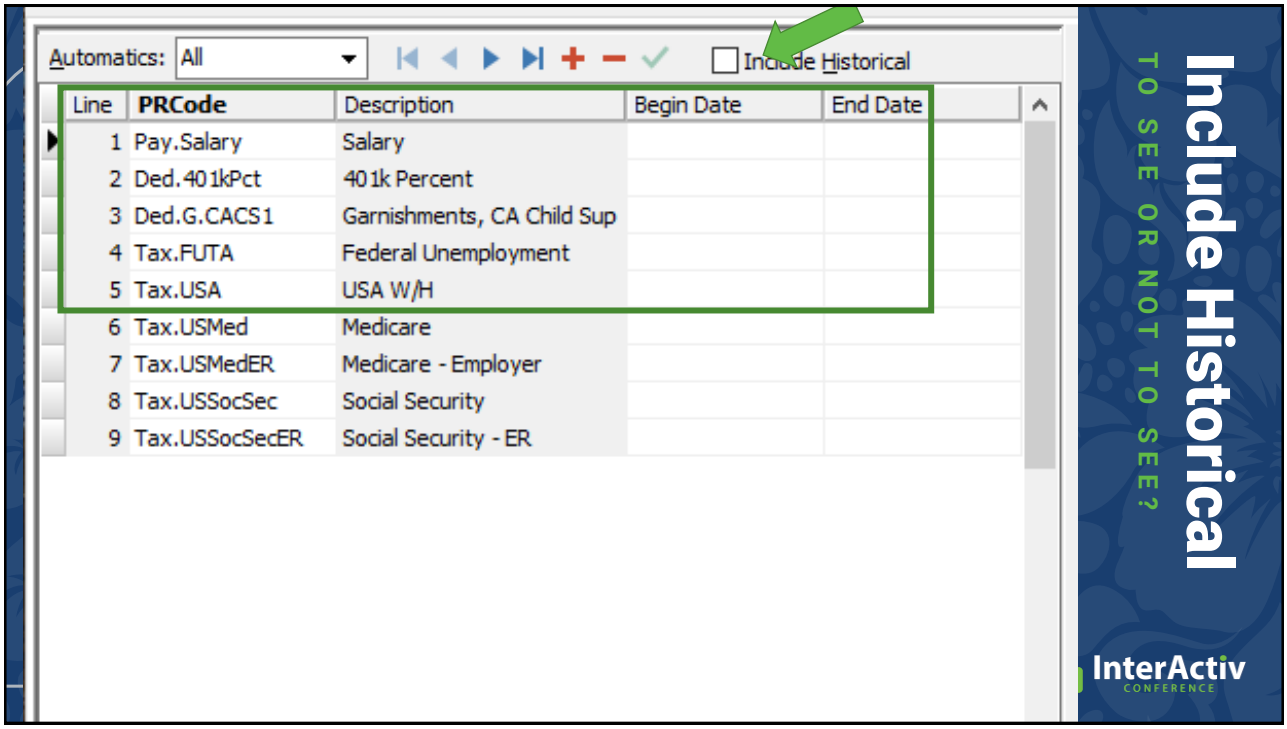
Automatics: All
Include Historical
Line PRCode Description Begin Date End Date
1 Pay.Salary Salary
2 Ded.401kPct 401k Percent
3 Ded.G.CACS1 Garnishments, CA Child Sup
4 Tax.FUTA Federal Unemployment
5 Tax.USA USA W/H
6 Tax.USMed Medicare
7 Tax.USMedER Medicare - Employer
8 Tax.USSocSec Social Security
9 Tax.USSocSecER Social Security - ER
Include Historical
TO SEE OR NOT TO SEE?
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Multi Select
Functionality
• Select more than one automatic
• Use a filter for ease
• Available in other places in the system
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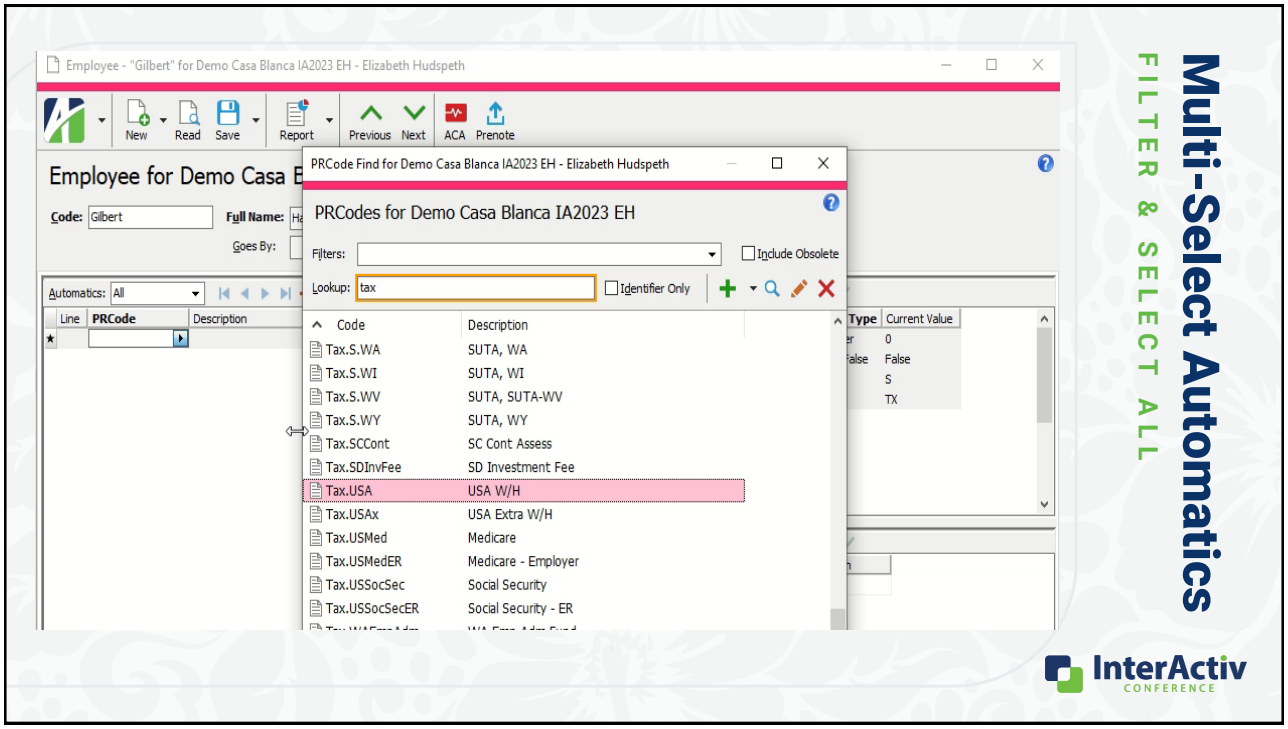

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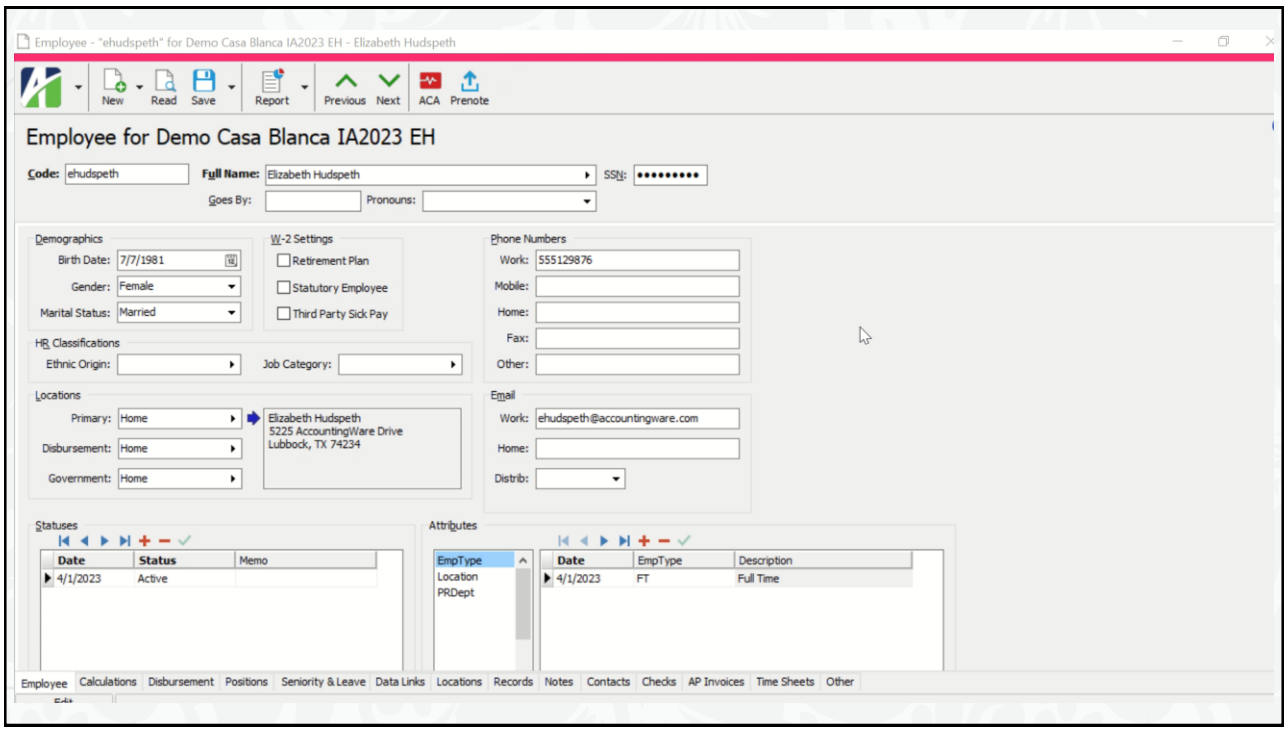
Multi-Select Automatics [mp4]



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Example with Filter [mp4]

Form I-9

Record Management

- Take Control of your I-9's
- Does NOT replace your paper forms
- Filters

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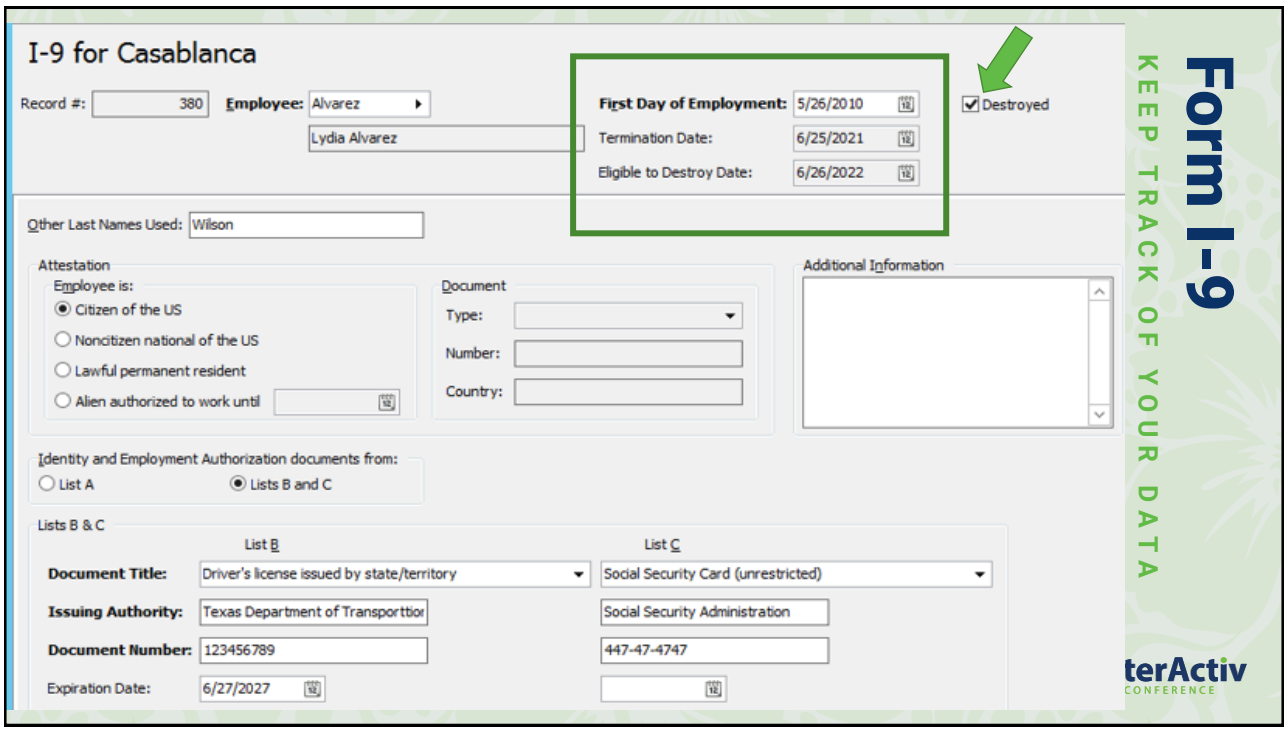

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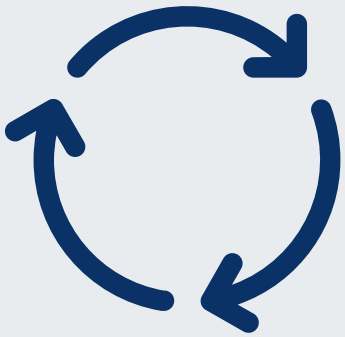

Follows Pay

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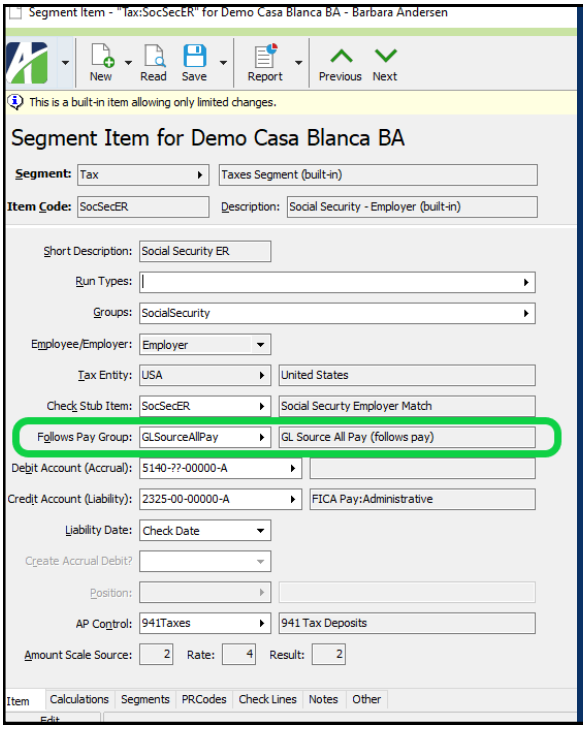

Follows Pay

ADD FOLLOWS PAY GROUP TO ER BENEFITS AND TAXES

- Employer benefit and tax expenses “follow” the same GL allocation as the wage expense
- More accurate cost analysis reporting for payroll
- Examples: Dept, Event, Project

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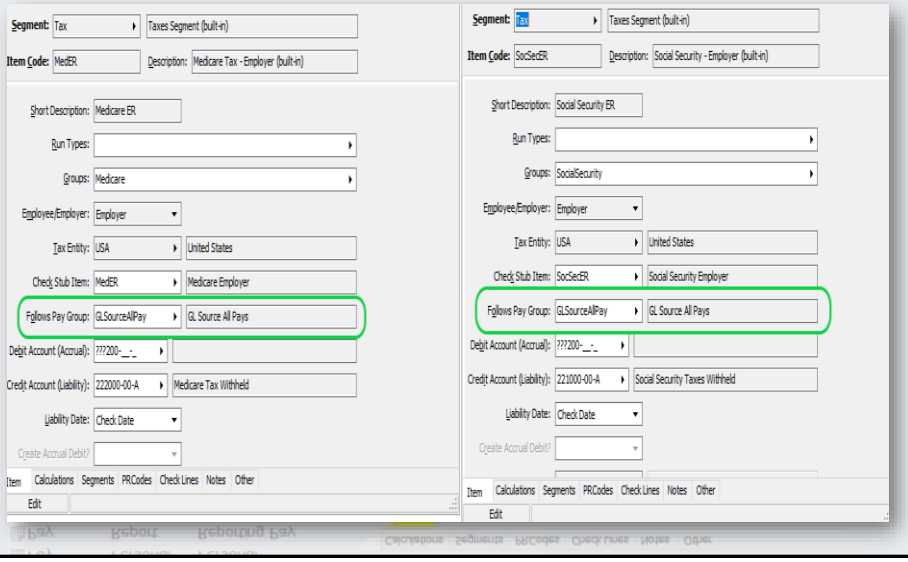
Follows Pay

SET UP



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Attributes

Why use them?

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Why use PR Attributes?

- Internal tool for payroll reporting
- Can post all the way to GL
- Helps set the expenses GL departments on check lines

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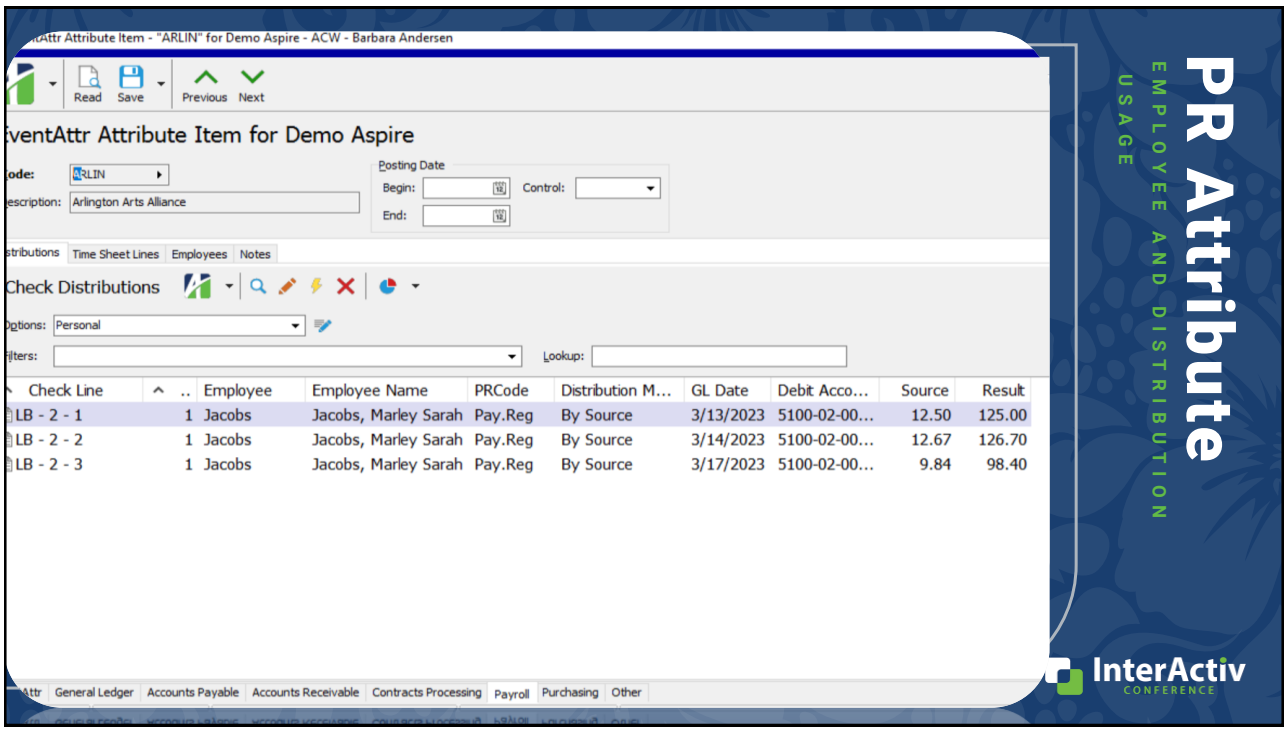

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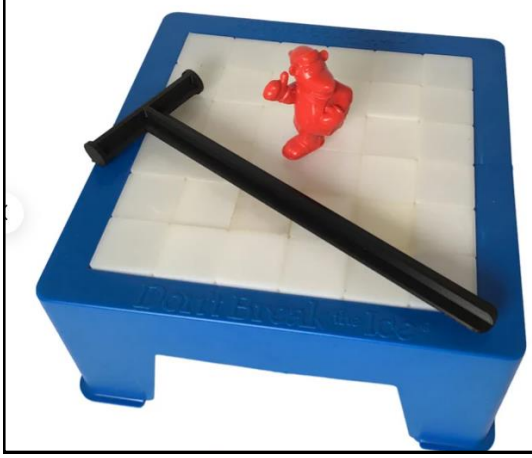
Let's Break the Ice



PR Attributes

HOW ARE OTHERS USING THEM?

- Employee Usage
  - Home Store
  - Supervisors
  - Employee Shifts
  - Dr No
  - EmpType
- Distribution Usage
  - Programs
  - Events

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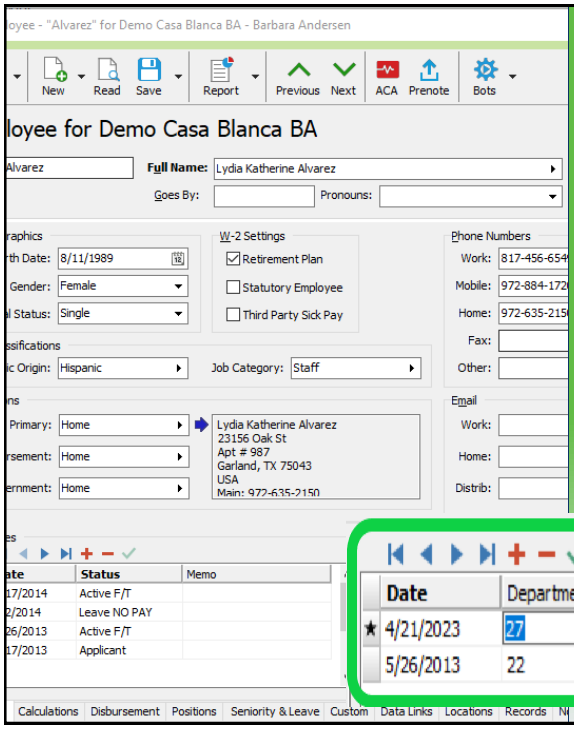

PR Attributes

EMPLOYEES

- Assign to employees for reporting
- Some are static –rarely change or some change more often
- Can be used to help set the department expenses

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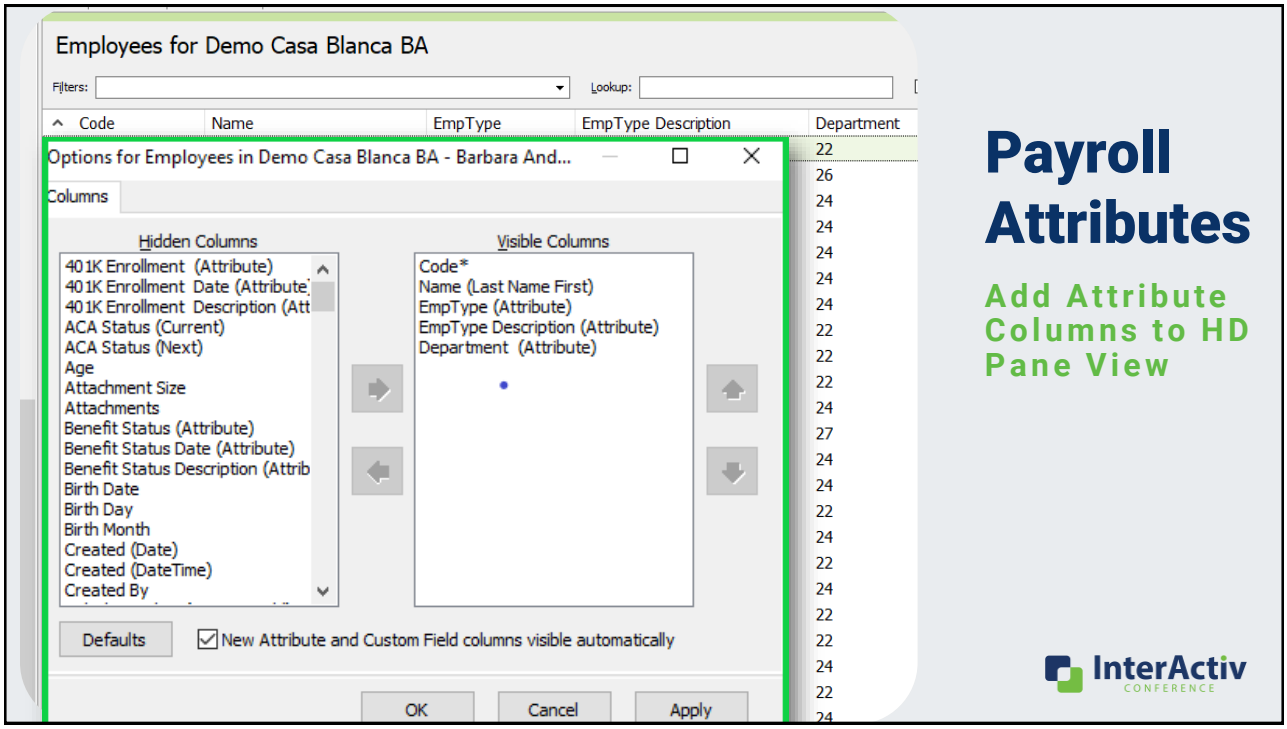

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PR Distribution Attributes

ON TIMESHEETS AND PAYROLL REPORT

Payroll Group Analysis

Demo Casa Blanca BA
Barbara Andersen

Page 1
4/11/2023 12:34:11PM

			Source	Result
Department : 20	Employees: 1	Checks: 1	1,393.32	606.08
Department : 22	Employees: 4	Checks: 6	54,761.51	19,970.33
Department : 24	Employees: 7	Checks: 22	125,563.72	67,730.05
Department : 26	Employees: 1	Checks: 4	23,214.40	10,530.85
Grand Totals:	Employees: 13	Checks: 33	204,932.95	98,837.31

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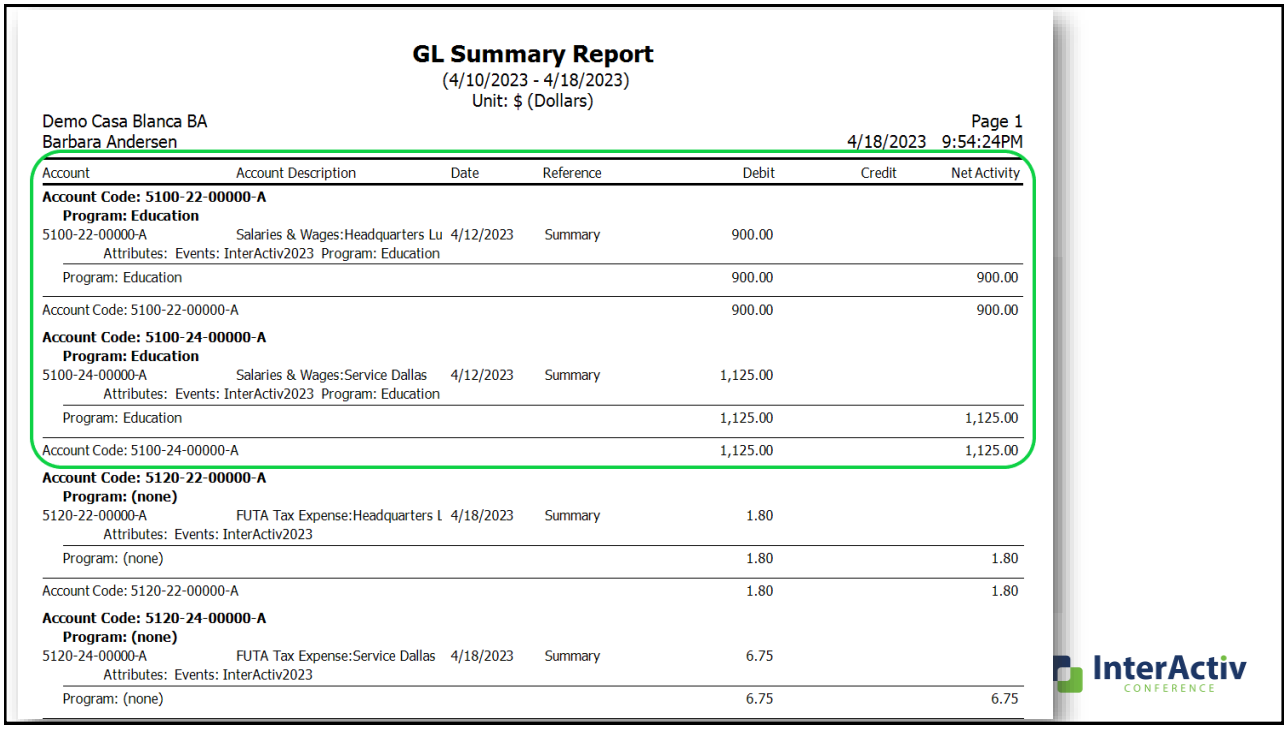

GL Summary Report
(4/10/2023 - 4/18/2023)
Unit: $ (Dollars)

Demo Casa Blanca BA
Barbara Andersen

Page 1
4/18/2023 9:54:24PM

Account	Account Description	Date	Reference	Debit	Credit	Net Activity
Account Code: 5100-22-00000-A						
Program: Education						
5100-22-00000-A	Salaries & Wages:Headquarters Lu	4/12/2023	Summary	900.00		
Attributes: Events: InterActiv2023 Program: Education						
Program: Education				900.00		900.00
Account Code: 5100-22-00000-A				900.00		900.00
Account Code: 5100-24-00000-A						
Program: Education						
5100-24-00000-A	Salaries & Wages:Service Dallas	4/12/2023	Summary	1,125.00		
Attributes: Events: InterActiv2023 Program: Education						
Program: Education				1,125.00		1,125.00
Account Code: 5100-24-00000-A				1,125.00		1,125.00
Account Code: 5120-22-00000-A						
Program: (none)						
5120-22-00000-A	FUTA Tax Expense:Headquarters L	4/18/2023	Summary	1.80		
Attributes: Events: InterActiv2023						
Program: (none)				1.80		1.80
Account Code: 5120-22-00000-A				1.80		1.80
Account Code: 5120-24-00000-A						
Program: (none)						
5120-24-00000-A	FUTA Tax Expense:Service Dallas	4/18/2023	Summary	6.75		
Attributes: Events: InterActiv2023						
Program: (none)				6.75		6.75

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Payroll Attributes

FUNCTIONS SUMMARY

Employees **1**

2 Categorize Time on Timesheets & Distributions on Checks

Used in reporting all the way to GL! **3**

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Efficiency Tools

PAYROLL DASHBOARD

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Establish Workflow

Creates a set of processes to guide someone new or a fill-in

Payroll "Wizard"

- Timesheets
- Proof Checks
- Process Leave
- Disbursements
- PR to AP
  - Tax Deposits
  - Create Upload Files to Report to 3rd parties

Import Bots

Simple Import Bots Attribute Items

- Supervisors
- Employee Types
- Employee Statuses

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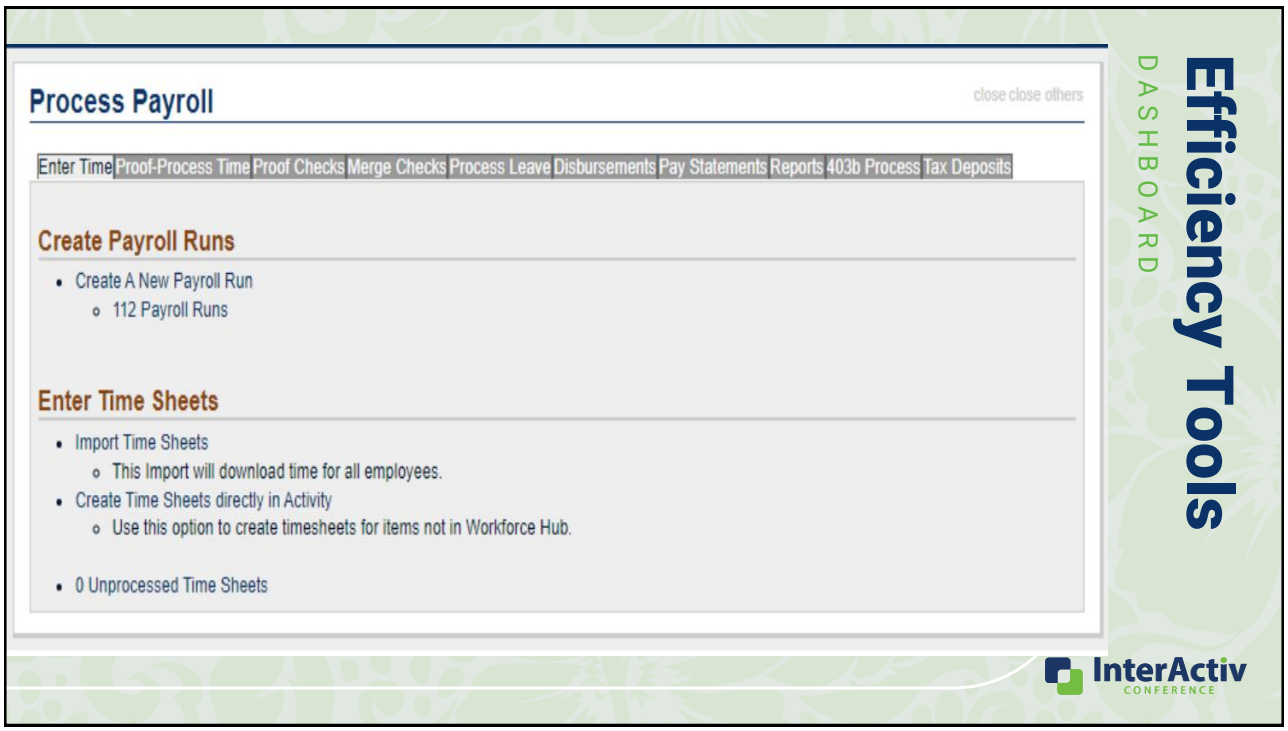

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THANKS FOR JOINING!

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https://accountingware.com/help

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