



AI and the Future of HCM

2024 Asure Reseller Partner Conference

Presented by John Canada and Chris Meseke



Speaker Introduction



John Canada

VP Engineering RD



Chris Meseke

**Director of Product
Management**

Session Agenda

01 Introduction

02 Our AI Strategy

03 AI at Asure Today

04 Building for the future
with AWS

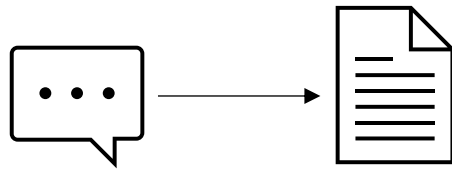
05 Payroll & Compliance
Engine Journey

06 Leveraging AWS – What
comes next?

Generative AI and the Art of the Possible

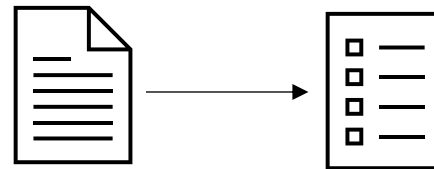
01

Generation



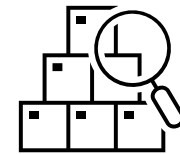
02

Summarization



03

Categorization



Our Approach

01

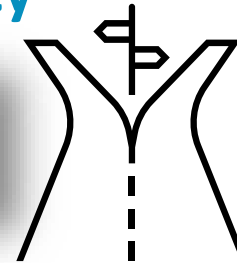
Security



02

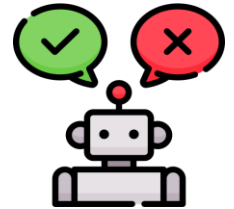
Scalability

EXPRESS LANE
AHEAD



03

Accuracy



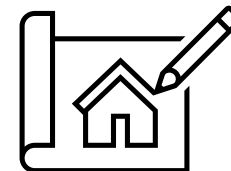
04

Correct
Partnership



05

Outcome Focused



Our Approach

Security

- Networking
- Access to Data



Our Approach



**Lane Control
Express Lane**

Our Approach

🤖 Did Luna (AI Chatbot) answer the user's question correctly?

Prompt:

User: You are an expert tax assistant. Only respond to questions related to taxes. Ensure you only respond in English.

Bot: OK, got it. I am an expert tax assistant. I will only respond to questions pertaining to taxes and I will do so in English.

Question being evaluated:

What services does AsurePTM offer for payroll tax account registration?

Model 1 Output:

Based on the information provided, AsurePTM offers the following payroll tax account registration services for their clients:

1. Registration for

Model 2 Output:

Here are the key points regarding AsurePTM's payroll tax account registration service:

- AsurePTM can register clients for payroll tax accounts with

Model 3 Output:

AsurePTM offers payroll tax account registration services for clients who have an Agency setup with a Client Tax ID set to 'Applied'. The services include

Ground Truth (Which the answer should be):

AsurePTM offers registration services for payroll tax accounts including Unemployment, Withholding, and local taxes such as Occupational, Earned Income Tax (EIT), and Local

Accuracy

Our Approach

Strategic
Partnership:
GAIIC



Our Approach

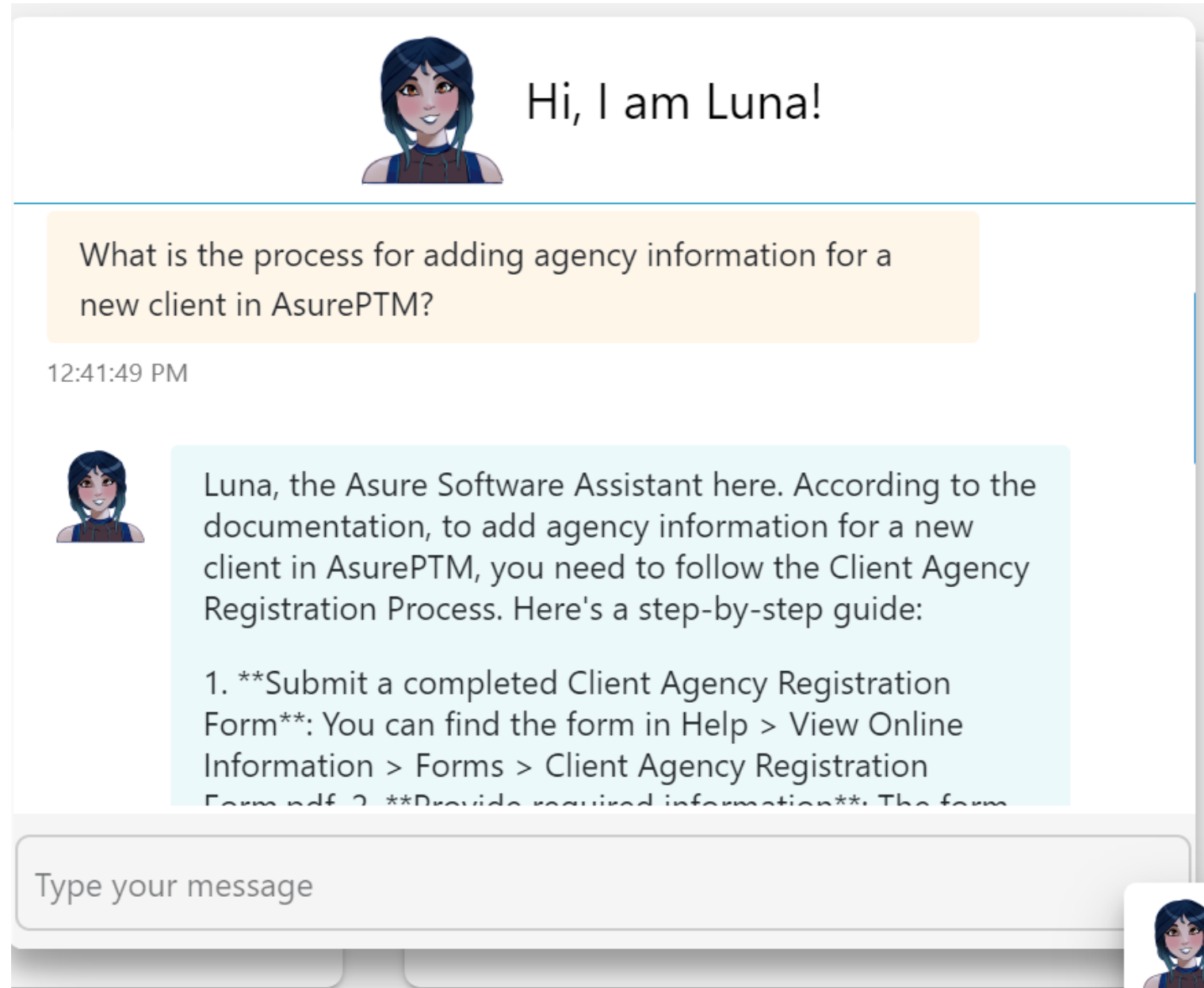
Outcome Focused:

- Answering questions and accessing data in natural language
- Self-service reporting
- Understanding and improving the customer experience



Luna: Your Digital Assistant for HCM

- AI Powered
- Data Sources:
 - Knowledge Base (Product Specific Questions)
 - DB/ API (Data or actions based on user)
 - General



Hi, I am Luna!


What is the process for adding agency information for a new client in AsurePTM?

12:41:49 PM

Luna, the Asure Software Assistant here. According to the documentation, to add agency information for a new client in AsurePTM, you need to follow the Client Agency Registration Process. Here's a step-by-step guide:

1. **Submit a completed Client Agency Registration Form**: You can find the form in Help > View Online Information > Forms > Client Agency Registration Form.pdf
2. **Provide required information**: The form

Type your message



Generative BI: Self Service Reporting



QuickSight | Data Warehouse Employee Data Validation / Original dashboard

show me the companies with a valid rating of 100 **ASK**

✓ Verified Interpreted as: Company Name where Ee Valid Ratio = 100.

CapitalPayrollHandling

Distribution of Employees with Valid and Invalid Data
Yes signifies employees with all valid data. No signifies employees with some invalid data.

Category	Count	Percentage
No	14.85K	23%
Yes	~48.15K	~77%

There are 300 distinct company names with an employee valid ratio of 100%. In total, there are 65 unique company names. The company with the highest number of employees is Maryland Manufacturing Partners with 89 employees.

REVIEW FOR ACCURACY ⓘ

Company Name
Ee Valid Ratio = 100

- Alabama Beverages Inc.
- Alabama Camping Partners
- Alabama Construction Corp.
- Alabama Plumbing LLC
- Alabama Staffing Co-op
- Alabama Stores Company
- Alaska Clothing Inc.

Unique number of Company Name
Ee Valid Ratio = 100
300

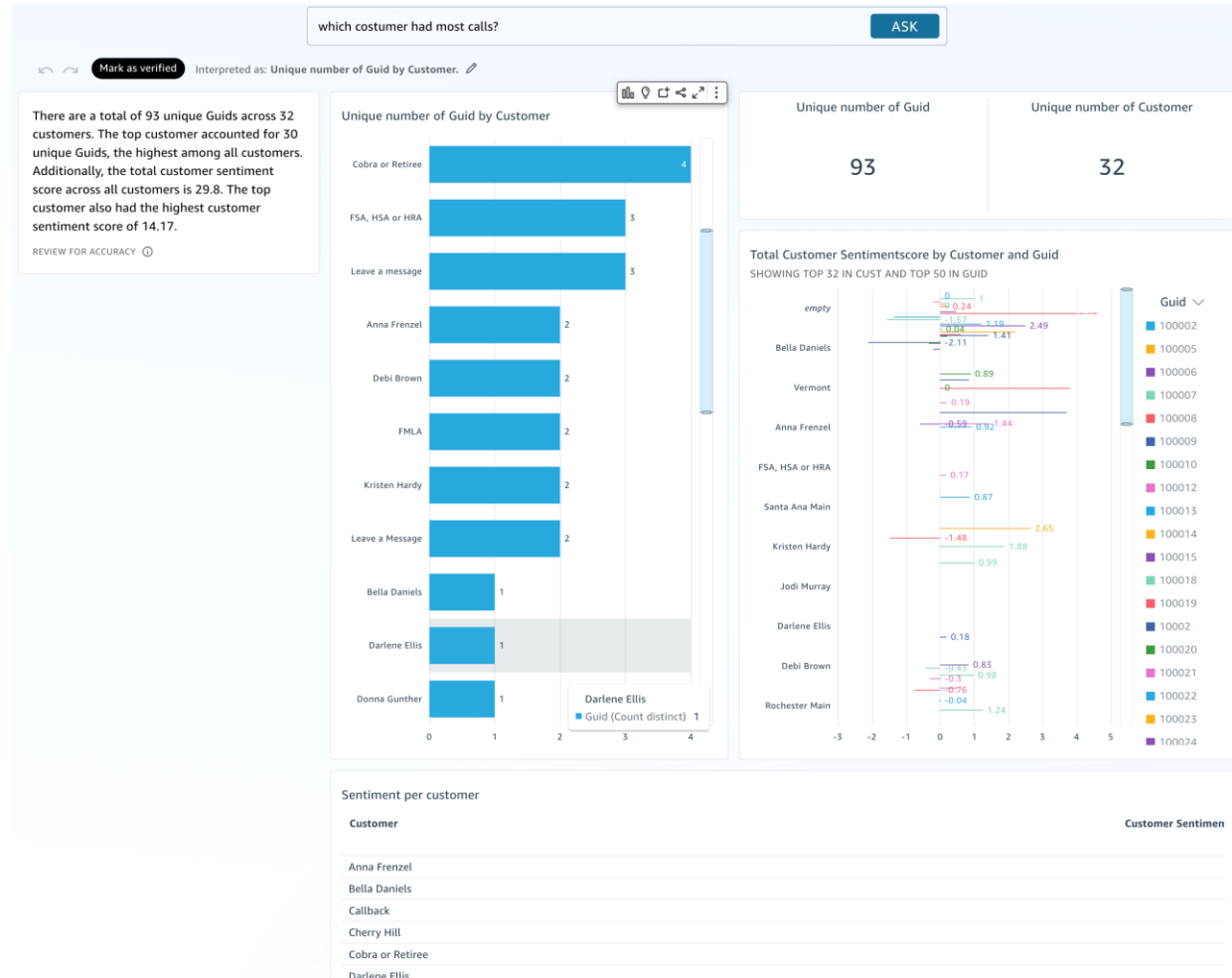
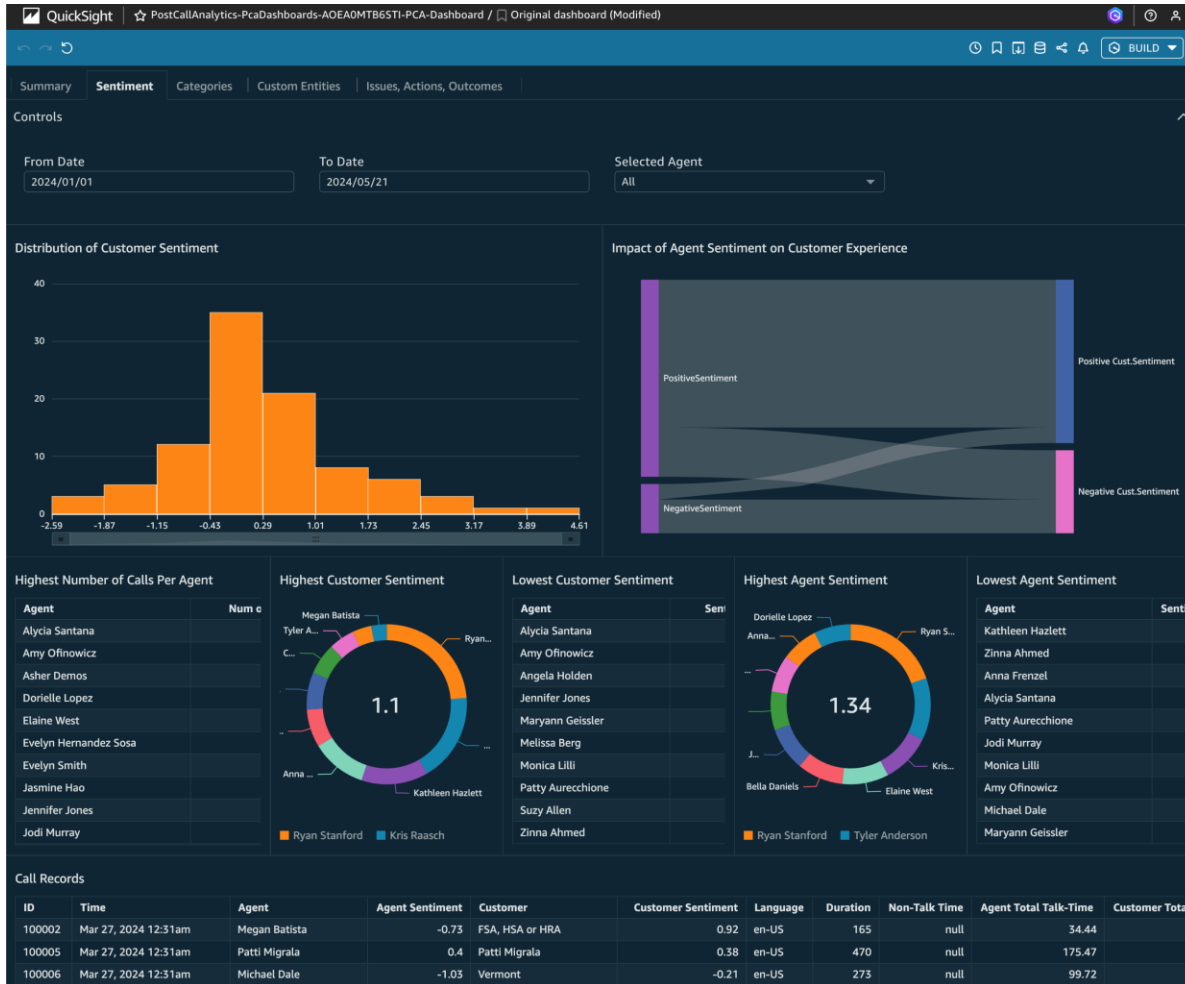
Total Employee Total by Company Name
SHOWING TOP 100 IN COMPANY_NAME

Company Name	Employee Total
South Carolina D...	89
Kansas Construct...	81
Indiana Storage ...	80
North Dakota Liv...	76
New Jersey Elect...	73

Env Name, Employee Total, Ee Valid Ratio and Company Name
Ee Valid Ratio = 100

Env Name	Ee Valid Ratio	Employee Total	Company Name
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Post Call Analytics: Improving the Customer Experience





Payroll & Compliance Engine



AWS Benefits



It leverages massive economies of scale and provides high performance and reliability.

It eliminates the need to guess capacity and allows you to scale up or down as needed.

It increases speed and agility by enabling you to deploy and manage applications faster and easier.

It frees you from running and maintaining data centers and lets you focus on your core business.

Case Study



Payroll & Compliance Engine Journey

	2023	2024			
		Q1	Q2	Q3	Q4
Phase #1 Building Foundation	Active		Active		
Phase #2 Payroll Engine		Active			
Phase #3 Compliance Engine	Active			Active	
Phase #4 Tuning & Parallel Testing			Active		
Phase #5 Implementing & Measuring	Active				Active

What comes next? Top Ideas



AI: Analyze Compliance Changes

- Interpret new legislation
- Process form changes
- Impact Analysis



AI: Generate Reporting

- Have a question from the DOL?
- Need to provide a vendor census information?
- Expanding to new markets



AI: Detect Fraud

- Bad banking information?
- Unauthorized use of systems
- Unintentional or Unusual Activity



AI: Employee Insights

- Deeper insight into patterns of time away from work
- Utilization and cost of benefits
- Identify new ways to support the employees



Other ideas?

- Your ideas here!

Live Demonstration @ Solutions Showcase

Legacy vs. New



Process Payrolls



Review Results



View Checks

Payroll Engine Validation

Asure

https://check-preview.payroll.dev.asurehcm.com

Output File Info

Output File Name: PEoutput070722.json

File Run Time: 20 seconds

File Submit Time: 2024-05-21T16:22:16

Number of batches: 1

Number of employees: 47

Number of checks: 47

Number of errors: 0

Number of warnings: 0

Check Selector

RESET FILTERS

Batch ID	Employee ID	Check ID	Period End Date	Cash Gross	Net Pay	Errors	Warnings
932d90... eda6-4cc1-9f78-c17540...	10	ef274ec0-a048-4c02-9e8a-d8e408cdfcaf	2022-07-02	\$1,982.00	\$1,102.26	0	0
932d90... eda6-4cc1-9f78-c17540...	100	cb07ccla-9f46a8-ae9d-d5c58122190...					
932d90... eda6-4cc1-9f78-c17540...	110	974fe7b3-f046-4ef5-bcb7-6cfdfdc709bd					
932d90... eda6-4cc1-9f78-c17540...	120	11e17431-ee0a645-b785e...					

Drop or select JSON file

UPLOAD

Asure

BACK

Check Info

Check ID: 974fe7b3-f046-4ef5-bcb7-6cfdfdc709bd

Employee ID: 110

Cash Gross: \$741.60

Net Pay: \$634.71

Net Check: \$634.71

DOWNLOAD PDF

Earnings

Code
E21
E01

Deductions

Code

Check Info

Check ID: 974fe7b3-f046-4ef5-bcb7-6cfdfdc709bd

Employee ID: 110

Cash Gross: \$741.60

Net Pay: \$634.71

Net Check: \$634.71

Earnings

Code	Type	Description	Rate	Hours	Amount
E21	Regular	Holiday	15.45	8	\$123.60
E01	Regular	Regular Earnings	15.45	40	\$618.00

Deductions

Code	Type	Description	Priority	Amount	Shortfall
UD01	Regular	Union Dues	1	\$4.80	\$0.00

Taxes

Code	State	Locality	Type	Description	Gross	Taxable	Gross Tips	Taxable Tip	Amount	Shortfall
FITW				Fed EE Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$32.62	\$0.00
SS				Fed EE Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$45.98	\$0.00
MED				Fed EE Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$10.75	\$0.00
FUTA				Fed ER Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$4.45	\$0.00
SS-R				Fed ER Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$45.98	\$0.00
MED-R				Fed ER Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$10.75	\$0.00
VT	VT			State EE Tax	\$741.60	\$741.60	\$0.00	\$0.00	\$12.74	\$0.00



Q & A



Thank You!



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