



# Tax & Artificial Intelligence

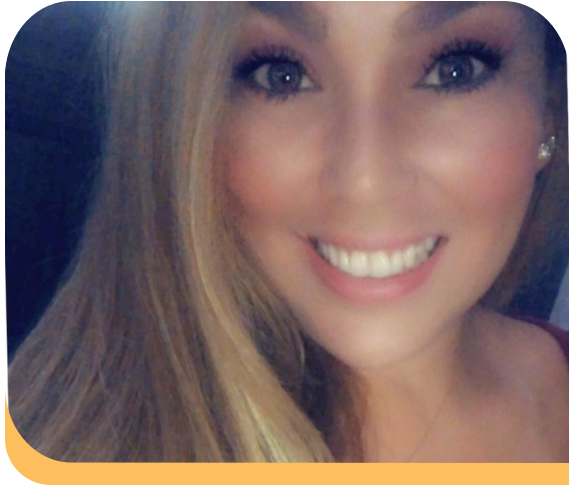
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2024 Asure Reseller Partner Conference

Presented by Janel Weinke & Kyala Smith



# Speaker Introduction



**Janel Weinke**

**Sr. Director of Tax  
Operations**



**Kyala Smith**

**Sr. Solutions  
Consultant**

# Session Agenda

01

Intro New & Update  
Technology

02

Tax Registration  
Services

03

Tax Portal – New

04

Q&A





# Asure PTM Payroll Tax Registration Services

# Asure PTM Payroll Tax Registrations Service


Powered by  MidDesk

## Common Challenges

- **Labor Intensive** - Average time to process a state registration is 5 hours per state
- **Complex** - State filing requirements vary by jurisdiction; Conditional/Contingent filings with other agencies adds to the complications
- **Costly** – Operating with agencies in an “Applied For” status requires Manual efforts; Incur Services Fees & Increased Risk of Deposit & Filing Errors
- **Risk** – P&I and Business Continuity can be impacted, if found out of compliance



# Asure PTM Payroll Tax Registrations Service

Powered by  MidDesk



## Register with states in minutes

Set up state unemployment and withholding accounts in minutes, instead of days. Our common application streamlines hundreds of confusing questions and intelligently pre-fills information for you.



## Stay compliant as you grow

Let Asure PTM take on the burden of back-and-forth communications with state agencies. Rely on us to receive and process all of your postal mail from state agencies.




## Use one source for government accounts

Asure's Payroll Tax Registration Services brings together all your state registrations. See the status of your applications in an easy-to-use dashboard and be notified when you need to take action.

# Asure PTM Payroll Tax Registrations Service



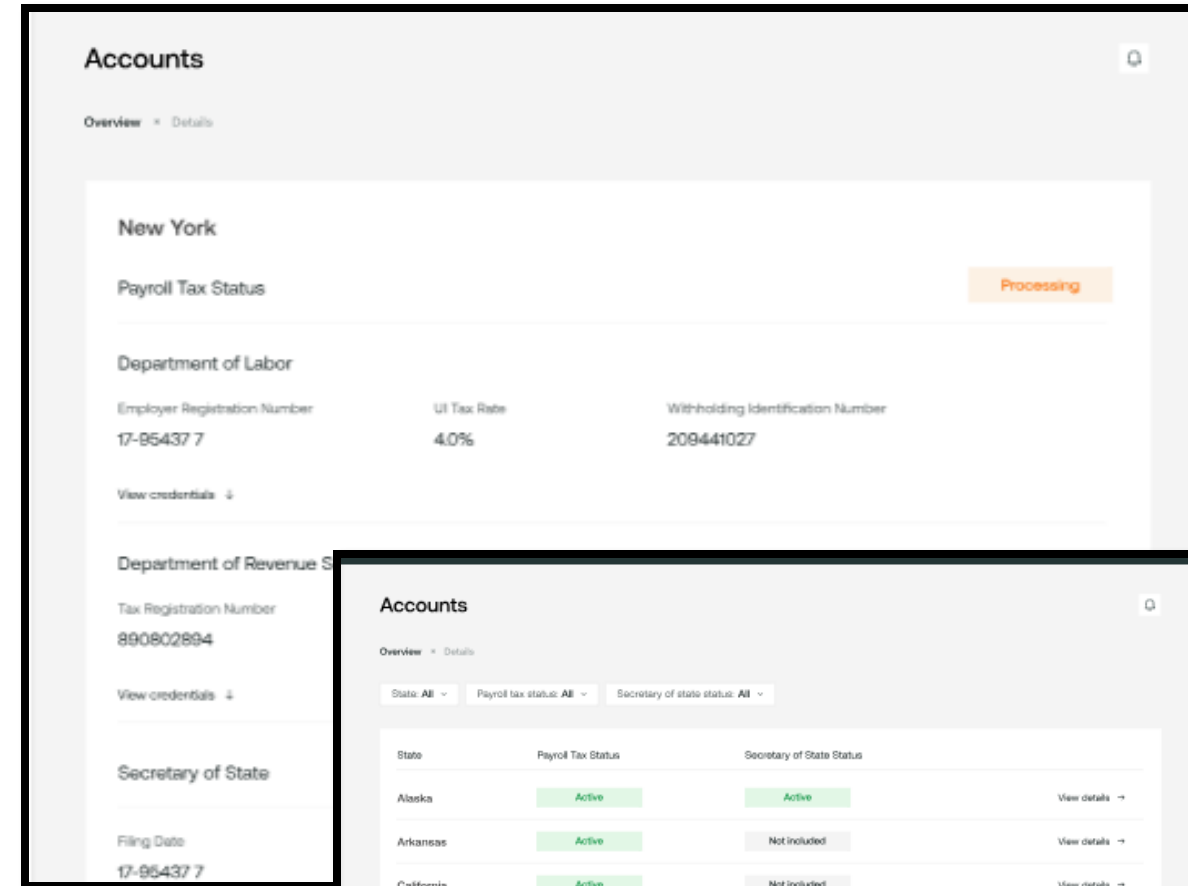
Powered by  MidDesk

- **Prepare, File, Monitor, and Post Registrations**

- **Dynamic Portal & Dashboard**

Asure PTM Payroll Tax registration Services via the Asure PTM Dashboard and Support Team, including:

- State-specific questions, intuitively dynamic, ensuring you register appropriate filings, according to the latest state requirements
- State Withholding and Unemployment Insurance accounts created on your behalf and monitored for renewals.
- Our team monitors status and pushes out to you when ready, so you don't have to.
- Virtual Mail receiving, processing, and tagging for associated registrations
- Your APTM CSM team will update your PTM system with new incoming Registration details, daily.



State	Payroll Tax Status	Secretary of State Status	
Alaska	Active	Active	<a href="#">View details →</a>
Arkansas	Active	Not included	<a href="#">View details →</a>
California	Active	Not included	<a href="#">View details →</a>
Delaware	Active	Not included	<a href="#">View details →</a>
Illinois	Active	Active	<a href="#">View details →</a>
Kansas	Action required	Not included	<a href="#">View details →</a>
Maryland	Action required	Not included	<a href="#">View details →</a>
New York	Processing	Processing	<a href="#">View details →</a>
Oklahoma	Processing	Processing	<a href="#">View details →</a>
South Dakota	Processing	Processing	<a href="#">View details →</a>

# Asure PTM Payroll Tax Registrations Service

Powered by  MidDesk



Do you offer Agency Registration Services?

**Yes, we do!**

Can you provide these services if I'm not a Payroll Tax Client?

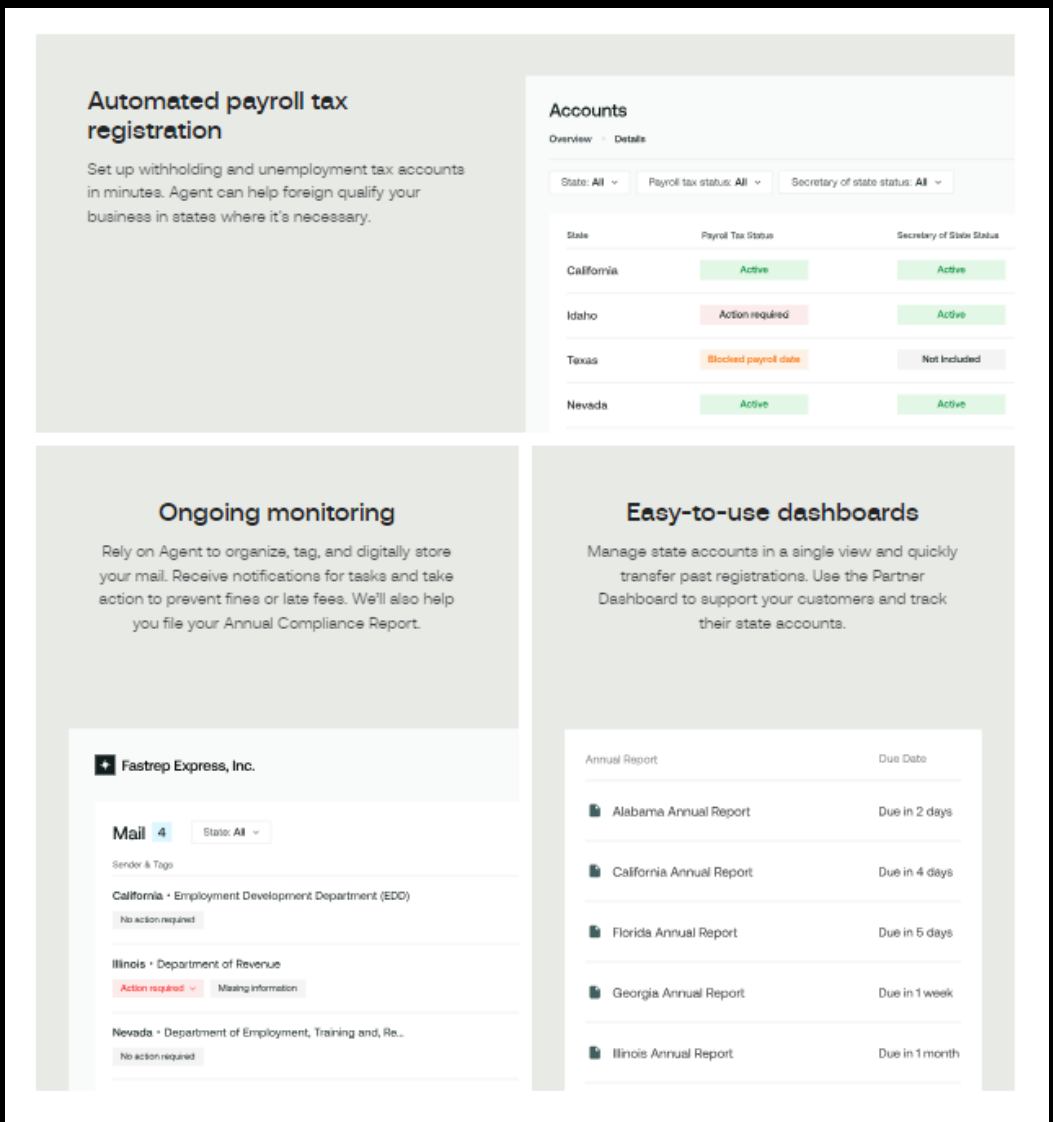
**Yes, we can!**

We are just looking for Payroll Registration Services!

**Perfect, we can help!**

What is the cost?

**\$225 per Agency Registration. Our fees include a dynamic portal and virtual mail service. We also update your APTM system with new ID's/Rates on a daily basis.**



**Automated payroll tax registration**

Set up withholding and unemployment tax accounts in minutes. Agent can help foreign qualify your business in states where it's necessary.

**Accounts**

Overview · Details

State: All · Payroll tax status: All · Secretary of state status: All

State	Payroll Tax Status	Secretary of State Status
California	Active	Active
Idaho	Action required	Active
Texas	Blocked payroll date	Not included
Nevada	Active	Active

**Ongoing monitoring**

Rely on Agent to organize, tag, and digitally store your mail. Receive notifications for tasks and take action to prevent fines or late fees. We'll also help you file your Annual Compliance Report.

**Easy-to-use dashboards**

Manage state accounts in a single view and quickly transfer past registrations. Use the Partner Dashboard to support your customers and track their state accounts.

**Fastrep Express, Inc.**

**Mail** 4 State: All

Sender & Tags

California · Employment Development Department (EDD)  
No action required

Illinois · Department of Revenue  
Action required · Missing information

Nevada · Department of Employment, Training and, Re...  
No action required

**Annual Report** Due Date

Alabama Annual Report	Due in 2 days
California Annual Report	Due in 4 days
Florida Annual Report	Due in 5 days
Georgia Annual Report	Due in 1 week
Illinois Annual Report	Due in 1 month



# FAQs

- ***Which states require Secretary of State filings?***
  - New Mexico, Vermont; New Jersey and Missouri are conditional, depending on responses
- ***What is the average turnaround time to get ID's?***
  - Varies from immediately to 42 days, once we have required information (See spreadsheet)
- ***Is there anything that can be done for clients that don't want to give or delay giving information?***
  - No
- ***What other large clients does Middesk partner with?***
  - Rippling, Gusto, and many others
- ***Do PTM exception fees still apply?***
  - Yes. For existing clients with agencies in “applied for” status, exception fees apply until the new ID's are received and entered into APTM.



# Asure PTM Tax Portal



DOUGH NUTS INC. ▾

## Client List

Search...

Payroll ID	Legal Name	FEIN	Status	Client ID
04150	DOUGH NUTS INC.	12-3456789	Active	APTM0001
06500	BH BAKERY INC.	12-3456789	Active	APTM0002
	TIBERIUM SYSTEMS LLC	12-3456789	Active	APTM0003

1 - 3 of 3 items

« < 1 > »

Dashboard

Tax Packages

Profile

Liabilities Issues **1**

**3**

Funding Issues **2**

**\$45,606.19**

NSF Hold **4**

**\$9,190.28**

Applied For **5**

**\$106.40**

## Recent Liabilities

Search...

Check Date	Entry Date	Amount
06/30/23	06/29/23	\$9,190.28
06/26/23	06/23/23	\$9,190.28
06/23/23	06/22/23	\$46,287.63
06/19/23	06/16/23	\$45,729.20
06/16/23	06/15/23	\$45,678.07

1 - 5 of 41 items

« < 1 2 3 ... > »

## Applied For: \$106.40

Search...

Agency ID	Description	Check Date	Amount	Due Date
IDWORKFORC	ID WORKFORCE DEVELOPMENT	06/10/22	\$100.00	07/24/23
TXSUI	TX SUI	06/03/22	\$6.40	08/04/23

1 - 2 of 2 items

« < 1 > »

1 - 5 of 9 items

« < 1 > »

1 - 4 of 4 items

« < 1 > »

Dashboard

Tax Packages

Profile

## Company Details

**Legal Name:** Dough Nuts Inc.  
**DBA:** Dough Nuts Inc.  
**Address:** 123 City Drive  
Irvine, CA 92602

**FEIN:** 12-3456789  
**Client ID:** APTM0001  
**Payroll ID:** 04150  
**NSF Hold:** Yes

## Contact

**Contact Name:** Tom Edison  
**Phone:** (714) 555-1234  
**Fax:** (714) 555-4321  
**Email:** tom.edison@doughnuts.com

Tax Agencies Banking

## Agency

Search...



Active ▾



Agency ID	Description	Main Agency ...	Client Tax ID	Frequency Ty...	Frequency	Tax Rate %	Status
FUTA	FUTA	FUTA	12-2121212	FEDQTR	Quarterly	0.6	Active
IRS	IRS - 941/944	IRS	12-2121212	FEDSWQREC	Semi-Weekly		Active
AZASSESS	AZ JOB TRAINING TAX	AZSUI	1212121 1	FEDQTR	Quarterly	0	Active
AZSPASSESS	AZ SPECIAL ASSESSMENT	AZSUI	1212121 1	FEDQTR	Quarterly	0	Active

Dashboard

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## Company Details

**Legal Name:** Dough Nuts Inc.

**DBA:** Dough Nuts Inc.

**Address:** 123 City Drive  
Irvine, CA 92602

**FEIN:** 12-3456789

**Client ID:** APTM0001

**Payroll ID:** 04150

**NSF Hold:** Yes

## Contact

**Contact Name:** Tom Edison

**Phone:** (714) 555-1234

**Fax:** (714) 555-4321

**Email:** tom.edison@doughnuts.com

Tax Agencies

Banking

## Agency

IRS

Active ▾



Agency ID	Description	Main Agency ...	Client Tax ID	Frequency Ty...	Frequency	Tax Rate %	Status
IRS	IRS - 941/944	IRS	12-2121212	FEDSWQREC	Semi-Weekly		Active

1 - 1 of 1 items

5 ▾ items per page << < 1 > >>



DOUGH NUTS INC. ▾

Dashboard

Tax Packages

Profile

## Tax Packages Q1 ▼ 2022

File Name

QePkg\_APTM0001\_04150

RtnPkg\_APTM0001\_04150

1 - 2 of 2 items



ARIZONA DEPARTMENT OF ECONOMIC SECURITY  
PO BOX 52027  
PHOENIX, AZ 85072-2027  
Telephone (602) 771-6601

UC-018-FF (8-11)

ARIZONA ACCOUNT NUMBER 1212121  
CALENDAR QUARTER ENDING 03/31/2022  
TO AVOID PENALTY MAIL BY 04/30/2022  
FEDERAL ID NO. 123456789

**MAKE SURE FEDERAL ID NO. IS CORRECT!**

DOUGH NUTS INC.

APTM0001

123 CITY DRIVE

IRVINE

CA 92601

### UNEMPLOYMENT TAX AND WAGE REPORT

#### A. NUMBER OF EMPLOYEES –

Report for each month, the number of full and part-time covered workers who worked during or received pay subject to UI Taxes for the payroll period which includes the 12th of the month.

JANUARY	0
FEBRUARY	0
MARCH	0

**B. WAGES –** List all employees in Social Security number order, or alphabetically by last name. For additional employees use white paper in the same format, or form UC-020. Filing via the internet at [www.azuitax.com](http://www.azuitax.com) is preferred for reporting up to 999 employees. Magnetic Media filing via compact disk is preferred for reporting 1,000 or more employees, see the Arizona Magnetic Media Reporting (PAU-430) publication at the above website for specifications and application instructions.

RETURN ORIGINAL

1. Employee's Social Security Number	2. Employee's Name (Last, First)	3. Total Wages Paid in Quarter

### TYPE OR USE BLACK INK ONLY

#### C. WAGE SUMMARY – See instructions

1. TOTAL WAGES PAID IN QUARTER	0.00
From Section B. Wage Listing	
2. SUBTRACT EXCESS WAGES	0.00
Cannot exceed Line 1 – See Instructions	
3. TAXABLE WAGES PAID	0.00
Up to \$7,000 per Employee – Line 1 minus Line 2	
4. TAX DUE	0.78
Line 3 X Tax Rate of	
The decimal equivalent =	
5. ADD INTEREST DUE	
1% of Tax Due for each month payment is late	
6. ADD PENALTY FOR LATE REPORT	
0.10% of Line 1 (\$35 min / \$200 max)	
7. ADD SURCHARGE DUE	0.00
Applicable percentage of Line 3 – see instructions.	
8. TOTAL PAYMENT DUE	0.00
If the sum of lines 4 and 7 is equal to or less than \$9.99, payment of the tax and surcharge due is not required.	
9. SUBTRACT ANY CREDIT BALANCE	0.00
If balance is listed, subtract from Line 8.	
10. AMOUNT PAID	0.00
Make check payable to DES Unemployment Tax	

**LIEN MAY BE FILED WITHOUT FURTHER NOTICE ON DELINQUENT TAXES.**



Multi Client

aptm.clientmulti

Download



< 1 > >>

# ASURE TAX PORTAL



The screenshot displays the Asure mobile application interface. At the top, the time is 7:29, 7:30, and 7:30. The app header shows the Asure logo and the user's name, Multi Client (aptm.clientmulti). The main dashboard is divided into several sections:

- DOUGH NUTS INC.** (Client Name)
- Liabilities Issues:** 3
- Payments Issues:** 2
- Applied For:** \$106.40
- Funding Issues:** \$45,706.19
- NSF Hold:** \$9,190.28
- Alerts:** 2

A blue arrow points to the NSF Hold value, which is highlighted with a red vertical bar. Another blue arrow points to the NSF Hold modal window, which is open and displays a table of NSF Hold details:

Agency ID	Amount
> Agency ID	Amount \$0.00
> Agency ID CAEDD	Amount \$223.96
> Agency ID CASDI	Amount \$57.86
> Agency ID COSW	Amount \$11.00
> Agency ID DESW	Amount \$575.43

Below the table, there are navigation arrows and the text "1 - 5 of 9 items".

The bottom section of the dashboard shows a table for QTD (Q1 2022) with columns for Type and Amount:

Type	Amount
Type Liabilities	Amount \$314,194.67
Type Funds	Amount \$314,194.67
Type Payments	Amount \$314,194.67

At the bottom, there is an "Announcements" section with the text "05/01/22 CAEDD Rate Change".

# Key Takeaways

01

## Scalability - Reliability - Flexibility

We are Financially secure - we are Experience you can Trust - we have Safe, Secure, and Scalable Technology.

02

## 100% Compliant Payroll Taxes

We maintain federal, state & local rate tables and file taxes on your behalf.

03

## Web-based Tax Portal Delivers Premium Visibility

Gain unprecedented transparency into tax returns, schedule, agency status, tax funding, and payment.

04

## Reduce Liability Concerns

As a provider, Asure assumes the liability of managing your payroll tax processing requirements.

05

## Asure PTM is not your competitor

We are a competitive neutral tax partner.





The hardest thing in the world to understand is tax.

Albert Einstein



# Q & A



# Thank You!

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