



Payroll Tax Filing Strategies for a Changing Landscape



2023 Asure Reseller Partner Conference



Speakers Introduction



Janel Weinke

Director Tax Operations

- 20+ years in Payroll & Tax Operations.
- Joined Asure Software in December of 2020.
- Evolution, Mid-Market HCM and APTM user for 2years.



Kevin Donohue

Channel, Sales Executive

- 25+ years in Payroll & Tax Operations.
- Joined Asure Software in December of 2018.
- APTM user for 5years.

What's Driving Payroll Tax Filing Change?

01

Federal Law Additions

02

State and Local Legislation

03

Evolving Remote Workforce

04

Tax Filing Expertise

Session Agenda



Payroll Tax Complexities



Federal, State & Local
Legislation Resources

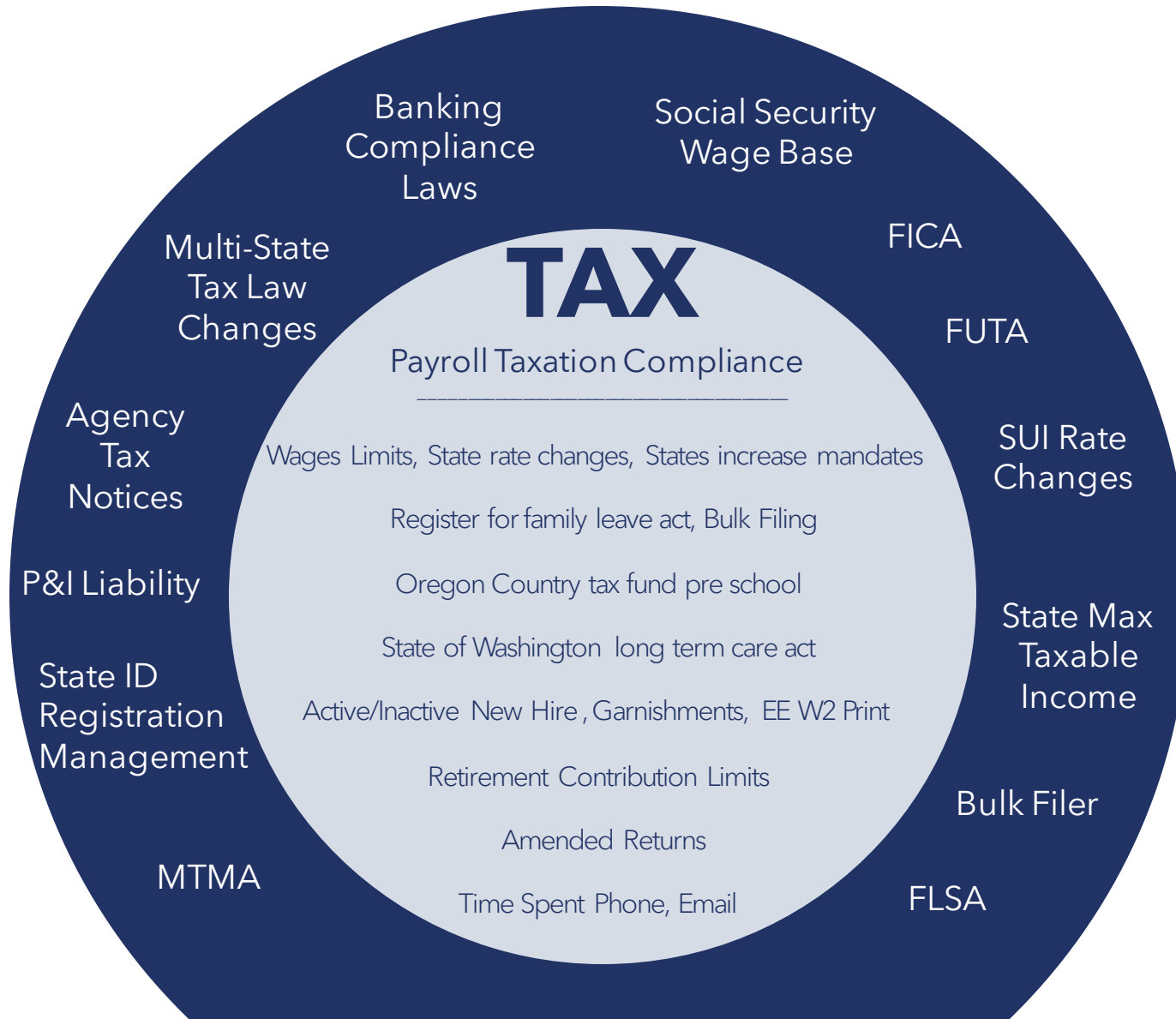


Outsource Tax Solution



APTМ Partners

Payroll Tax Complexity



Payroll Tax Expectations



Employers

Expect providers to seamlessly work with their current vendors - and they don't want to change



Employees

Expect data (and their money) to flow from their employer to the banks, vendors, apps they use every day and accurate W2.

A photograph of the U.S. Capitol building in Washington, D.C., showing the iconic white dome and the surrounding neoclassical architecture. An American flag is visible on a tall pole to the left of the building. The sky is a clear, bright blue.

Federal, State & Legislative Resources

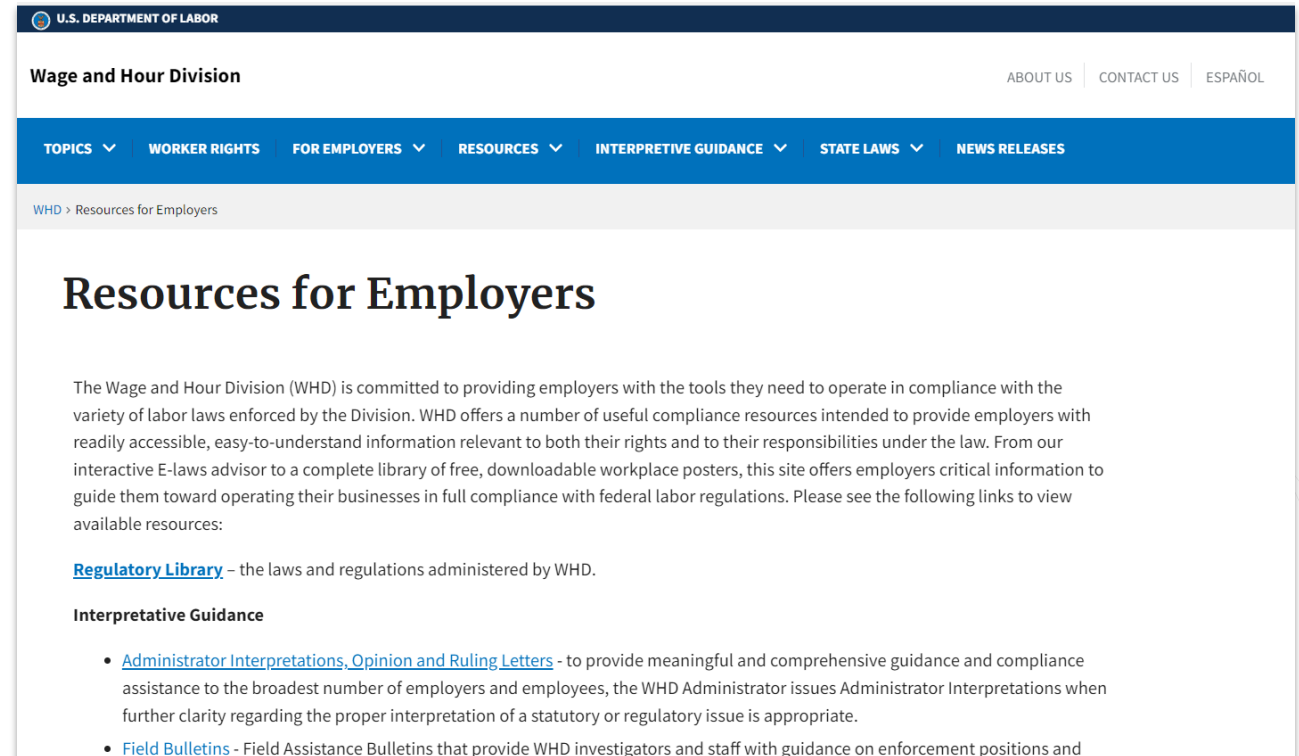
Resources for Employers

Federal and State Tax Agencies

01

WAGE & HOUR DIVISION WEBSITE

The Wage and Hour Division (WHD) provides employers useful compliance information enforced by the Division. WHD offers resources intended to provide employers with easy-to understand information relevant to both their rights and to their responsibilities under the law.



U.S. DEPARTMENT OF LABOR

Wage and Hour Division

ABOUT US | CONTACT US | ESPAÑOL

TOPICS ▾ WORKER RIGHTS FOR EMPLOYERS ▾ RESOURCES ▾ INTERPRETIVE GUIDANCE ▾ STATE LAWS ▾ NEWS RELEASES

WHD > Resources for Employers

Resources for Employers

The Wage and Hour Division (WHD) is committed to providing employers with the tools they need to operate in compliance with the variety of labor laws enforced by the Division. WHD offers a number of useful compliance resources intended to provide employers with readily accessible, easy-to-understand information relevant to both their rights and to their responsibilities under the law. From our interactive E-laws advisor to a complete library of free, downloadable workplace posters, this site offers employers critical information to guide them toward operating their businesses in full compliance with federal labor regulations. Please see the following links to view available resources:

- [Regulatory Library](#) – the laws and regulations administered by WHD.

Interpretative Guidance

- [Administrator Interpretations, Opinion and Ruling Letters](#) - to provide meaningful and comprehensive guidance and compliance assistance to the broadest number of employers and employees, the WHD Administrator issues Administrator Interpretations when further clarity regarding the proper interpretation of a statutory or regulatory issue is appropriate.
- [Field Bulletins](#) - Field Assistance Bulletins that provide WHD investigators and staff with guidance on enforcement positions and

www.dol.gov/agencies/whd/employers

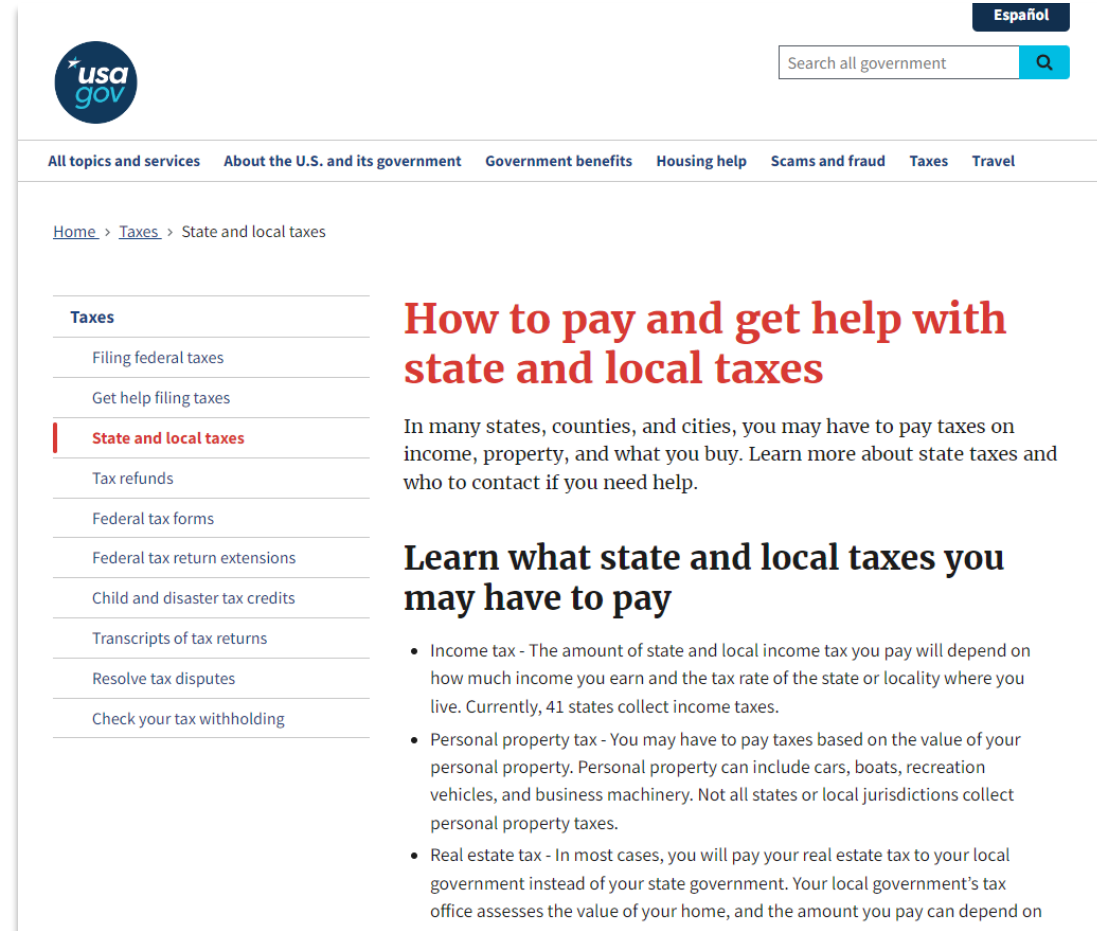
Resources for Employers

Federal and State Tax Agencies

03

PAYMENT GUIDANCE FROM USA.GOV

The Federation of Tax Administrators serves the principal state tax administrators of the 50 states: which monitors and report on activities in Congress, the IRS and other federal agencies affecting state taxation. This includes insuring state interests are effectively represented before federal policy makers and agencies, as appropriate. Particular attention is paid to federal legislation that would improperly preempt state tax sovereignty and authority.



The screenshot shows the USA.gov website interface. At the top right, there is a search bar with the text "Search all government" and a magnifying glass icon. Below the search bar is a navigation menu with links for "All topics and services", "About the U.S. and its government", "Government benefits", "Housing help", "Scams and fraud", "Taxes", and "Travel". The "Taxes" link is highlighted. Below the navigation menu, the breadcrumb trail reads "Home > Taxes > State and local taxes". A sidebar on the left lists various tax-related topics: "Taxes", "Filing federal taxes", "Get help filing taxes", "State and local taxes" (highlighted with a red bar), "Tax refunds", "Federal tax forms", "Federal tax return extensions", "Child and disaster tax credits", "Transcripts of tax returns", "Resolve tax disputes", and "Check your tax withholding". The main content area features a large red heading: "How to pay and get help with state and local taxes". Below this heading is a paragraph: "In many states, counties, and cities, you may have to pay taxes on income, property, and what you buy. Learn more about state taxes and who to contact if you need help." Below this is another heading: "Learn what state and local taxes you may have to pay", followed by a bulleted list of three types of taxes: Income tax, Personal property tax, and Real estate tax.

[How to pay and get help with state and local taxes | USAGov](#)

Resources for Employers

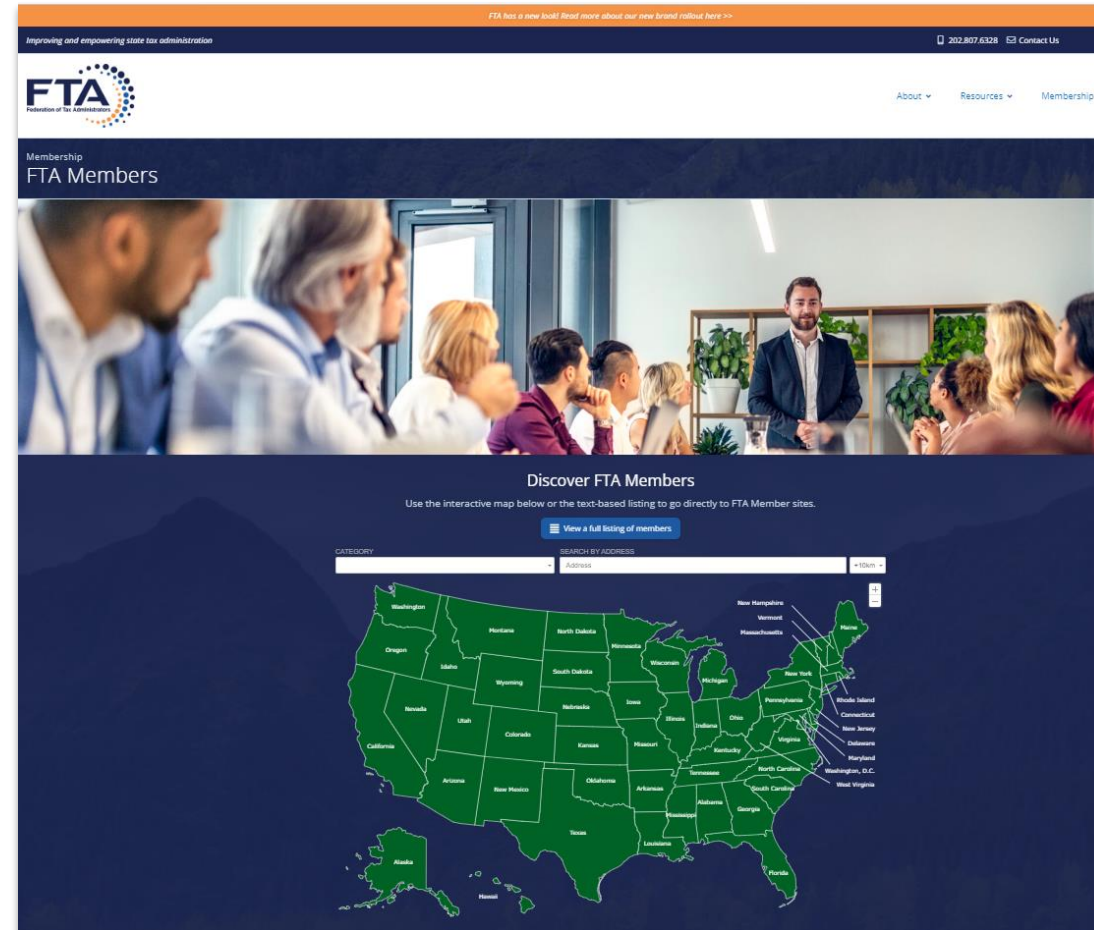
Federal and State Tax Agencies

02

FEDERATION OF TAX ADMINISTRATORS (FTA)

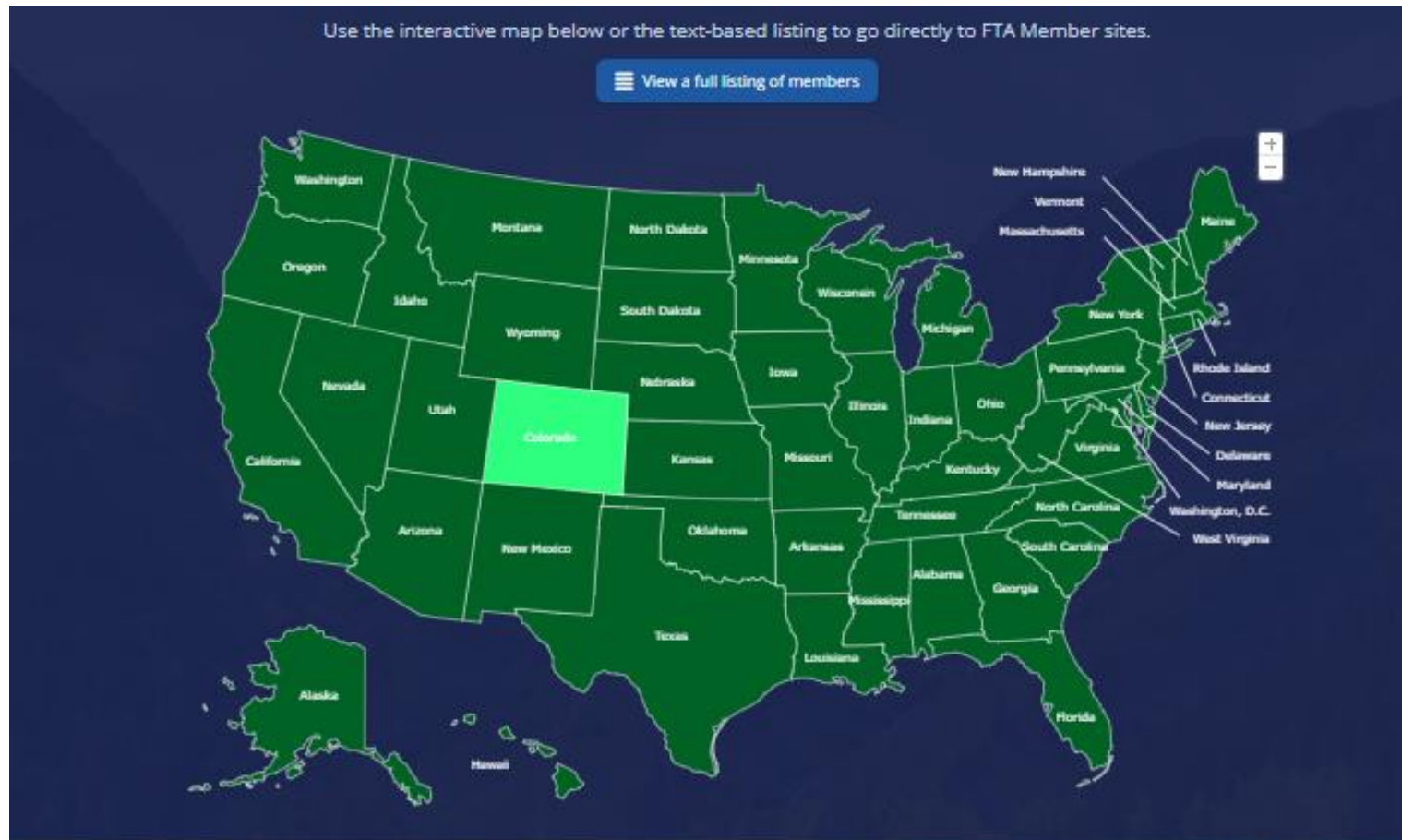
Federation of tax administrators provides access to useful inactive state map.

Serve as an information and expert resource for state administrators and others on state tax agency and system operations as well as issues affecting tax policy and administration. Also conduct research projects in several areas including state tax policies and structures, compliance and enforcement of federal and state court decisions.



FTA Members - Federation of Tax Administrators

Interactive U.S. Map



A woman with long dark hair is sitting at a desk in an office, looking at a large computer monitor. The desk has a microphone and some papers. The background shows a brick wall and a window with a view of trees. The image is overlaid with a semi-transparent blue filter.

Payroll Tax Management

Payroll Tax Management Solution



Sophisticated Tax Dashboard

- 24/7 Access, Mobile Visibility
- Full Visibility Forefront Task
- Easily Export Reporting



PTM Platform

- Industry Proven Full Service
- Built to serve Payroll Processors
- Payroll Agnostic Integrations



Advanced Features

- Automatically Bulk File Upload
- Built in Calendar Automation & POA Generation Tool
- Single Tax Engine – Self to Full Service



Full Service – Time Savings

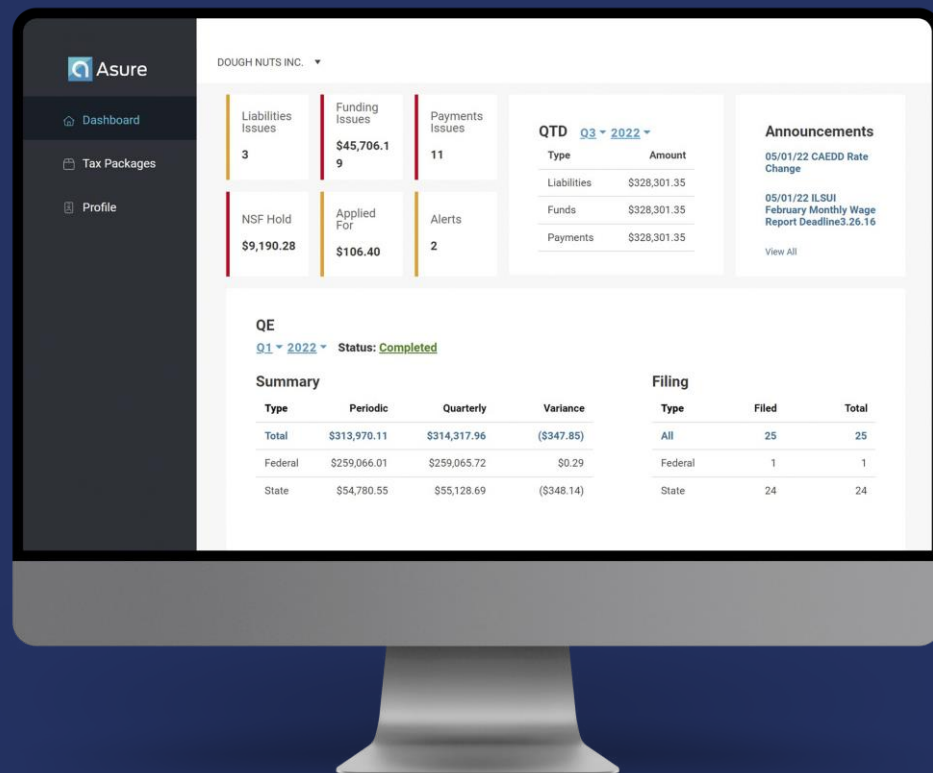
- Multi State Compliance
- Filing Quarterly Returns
- Notice Research & Resolution



Reduce Risk and Liability

- Adhere to Money Transmission Laws
- Reduce Cost Exposure: P&I, State Licenses,
- Lower Staffing Expertise – Growth

Sophisticated Tax Dashboard



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- ➔ Full Visibility Forefront Task
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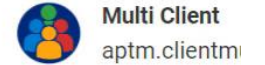


- ➔ Adhere to Money Transmission Laws
- ➔ Reduce Cost Exposure: P&I, State Licenses,
- ➔ Lower Staffing Expertise - Growth

See the Tax Portal in Action



DOUGH NUTS INC. ▾



Dashboard

Tax Packages

Profile

Liabilities Issues

3

Funding Issues

\$45,706.19

Payments Issues

32

QTD Q3 ▾ 2023 ▾

Type

Amount

Liabilities

\$0.00

Funds

\$0.00

Payments

\$0.00

Announcements

01/01/23 CAEDD Rate Change

01/01/23 ILSUI February Monthly Wage Report Deadline

[View All](#)

This interactive demo will show you some of the features of the Asure Tax Portal. Let's take a look around.



Quarter End Q2 ▾ 2023 ▾ Status: Not Filing

Summary

	Periodic	Quarterly	Variance
	\$0.00	\$0.00	\$0.00
Federal	\$0.00	\$0.00	\$0.00
State	\$0.00	\$0.00	\$0.00

Filing

Type	Filed	Total
All	0	0
Federal	0	0
State	0	0

v0.006



Type here to search



66°F



9:30 PM
8/14/2023

Why APTM for Partners?

Scalable Standalone Payroll Tax Solution with Robust Features

Trusted Tax-Complexity Experience

- 25 Years in Marketplace
- Over 14k Tax Jurisdictions
- Dedicated AM & AE
- Client's/Clients Database Structure
- Client's/Clients Portal
- CTO Market Reputation
- One of Top 3 Major Players in Market

Payroll-Agnostic

- Alternate Option for Partner's Clients
- Competitive-Neutral Tax Partner
- Dual Support Models on One Platform
- Multiple Integration Options

Go-To-Market Flexibility

- Revenue-Share Model (Optional)
- Reseller/Referral or BPO-Enabler
- Direct ERP, SBO, PEO, ASO
- Customization (Optional)

Payroll Software Provider (Referrals or Resellers)



Payroll Service Bureaus (Resellers)



BPO Payroll Administration (White Label)



Enterprise Direct (Customers)





“APTM has simplified the QE process for us significantly as we are in all 50 states. There is no more waiting for returns to process out of Evolution or having to run certain jobs overnight to get the returns to process. Our QE process used to take 3-4 weeks to complete and now we can get most of QE complete in a week. The software also does a good job of reconciling the different taxing authorities quarterly and gives us better visibility into YTD variances. There are less reports we must run out of Evo because APTM already does these reconciliations quarterly. This allows us to fix issues on the front end instead of waiting for the notice. I also like that I no longer must worry if tax payment files were uploaded to the bank.”

- Matt Ray, Ministryworks

Key Takeaways

KEEPING YOU ON THE RIGHT SIDE OF COMPLIANCE

01

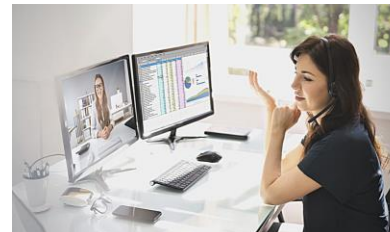
Dealing with Federal, State & Local Legislation



Payroll is already complicated. Managing **multistate payroll taxes** can be overwhelming, especially with changing state and local laws and an evolving remote workforce.

02

Outsource Full-Service Solutions



We offer complete tax, pay, and file services through our full-service **PayTax** solution. That allows you access to a comprehensive online system and gives you the flexibility and benefits of in-house payroll tax processing.

03

Automate & Streamline Your Processing



Tax Portal is our web-based tax system includes 24/7 online and mobile access to tax liabilities, deposits, tax notices, and more to address evolving workforce and reduce risk & exposure.

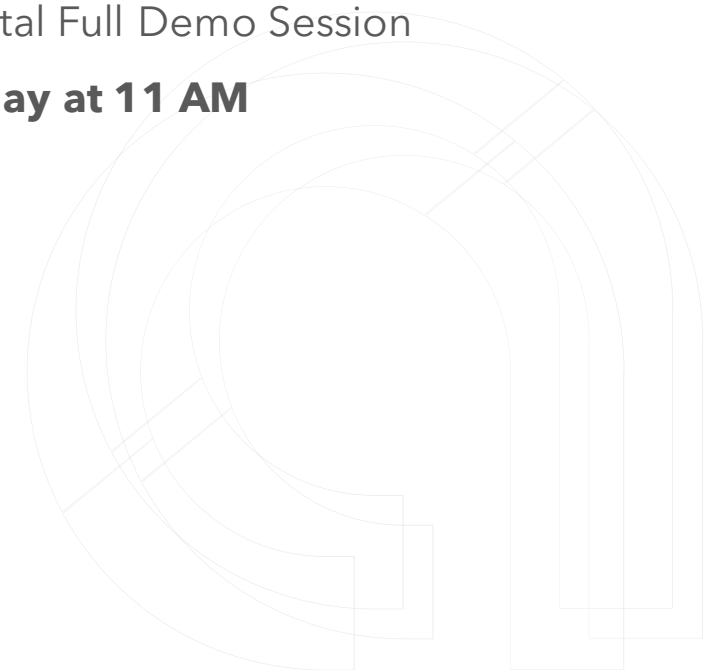
Resources & Contact



Rodney Murrell, VP, Tax Division
(562) 225-1010



Tax Portal Full Demo Session
Thursday at 11 AM



Q & A



Thank You!



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