



Roadmap for Asure **Mid-Market Platform**



2023 Asure Reseller Partner Conference



Speakers Introduction



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Session Agenda

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04

Tax Engine

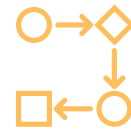


E-Signature

How E-Signature Benefits Your Payroll Clients



Reduce the amount of paper that needs to be distributed to employees and then stored



Automate and streamline the signature process; provide the ability to easily monitor who has signed required documents



Ensure compliance with signature requirements for onboarding docs like handbooks, I-9 and W4



Help companies more easily update policies and manage the signature process



Reduce employer liability by ensuring that employees acknowledge and sign off on policies

Using E-Signatures

- E-Signatures can be used to sign important documents such as:
 - Employee Handbook
 - Onboarding forms like the W-4 and I-9
 - A Non-Disclosure Agreement
 - Update to a company policy or issuance of a new policy



E-Signature Background

- Enhanced Document Management and E-Signature functionality is now available in Mid-Market HCM
- A new internal system setting “Use Enhanced Document Management and E-Signature” was created to enable the new Enhanced Document Management and Asure E-Signature
- By setting the new internal system setting to Yes - You agree to start using the Enhanced Document Management and Asure E-Signature
- By setting the new system setting to No - You will continue to use the legacy (existing Document Management functionalities)



Two Options for Enhanced Document Management and E-Signature

New and Improved			
Legacy Document Management	ENHANCED Document Management	ENHANCED Document Management with Acknowledgment	ENHANCED Document Management and E-Signature
<ul style="list-style-type: none"> • Free • Native functionality (built into the Mid-Market HCM) • Default option for customers • Requires the new system setting to be set to “No” • Acknowledgment of reading all documents during employee onboarding 	<ul style="list-style-type: none"> • Free • Bundled with Asure E-Signature • New and Improved Document Management • Requires the new system setting to be set to “Yes” • Admin can assign documents without E-Signature to all company employees , specific Departments/Locations, and onboarding employees • Managers can assign documents without E-Signature to their employees and view uploaded documents • Employees can upload and download documents • Admin and Managers can download documents 	<ul style="list-style-type: none"> • Free • Bundled with Asure E-Signature • New and Improved Document Management with acknowledgment • Requires the new system setting to be set to “Yes” • Admin can assign documents with acknowledgment to all company employees , specific Departments/Locations, and onboarding employees • Managers can assign documents with acknowledgment to their employees and view uploaded documents • Employees can upload and download documents • Admin and Managers can download documents 	<ul style="list-style-type: none"> • Fees apply • Enhanced Document Management and Asure E-Signature is a software that allows users to gather signatures on documents shared electronically. • It requires the new system setting to be set to “Yes”. • Customers can customize forms by adding multiple fields for signatures and additional custom fields on documents. • Admin can assign documents with E-Signature to all company employees, specific Departments and/or Locations, and onboarding employees. They can also view documents e-signed by employees, download and edit E-Signature documents. • Managers can assign documents with E-Signature to their employees and view documents uploaded by their employees and e-signed by their employees. • Employees can e-sign documents and upload documents

New Features at a Glance

Feature	New and Improved		
	Legacy Document Management	Enhanced Document Management	Enhanced Document Management and E-Signature
Require e-signatures of onboarding employee & new hires			✓
Require e-signatures of any or all employees			✓
Send a document during onboarding	✓	✓	✓
Send a document with E-signature during onboarding			✓
Send documents for E-signature any time during employee lifecycle			✓
Manager to send document to their employees		✓	✓
Admin to send document to specific or all employees		✓	✓
Employee to E-sing documents			✓
Require initials or signature on individual sections of a document			✓
Build custom forms including signature with text and date entry fields, etc...			✓
Cost	FREE	FREE	BASE + PER DOCUMENT FEE

New & Improved Document Management



The New and Improved Document Management option provides companies with a bundled option to:

- Add company documents
- Assign company documents to specific employees
- Assign company documents to ALL employees
- Assign company documents to a specific location and/or department
- Assign/add documents to employees
- Assign documents to onboarding employees
- Employees can upload documents
- Admins and Managers can download documents



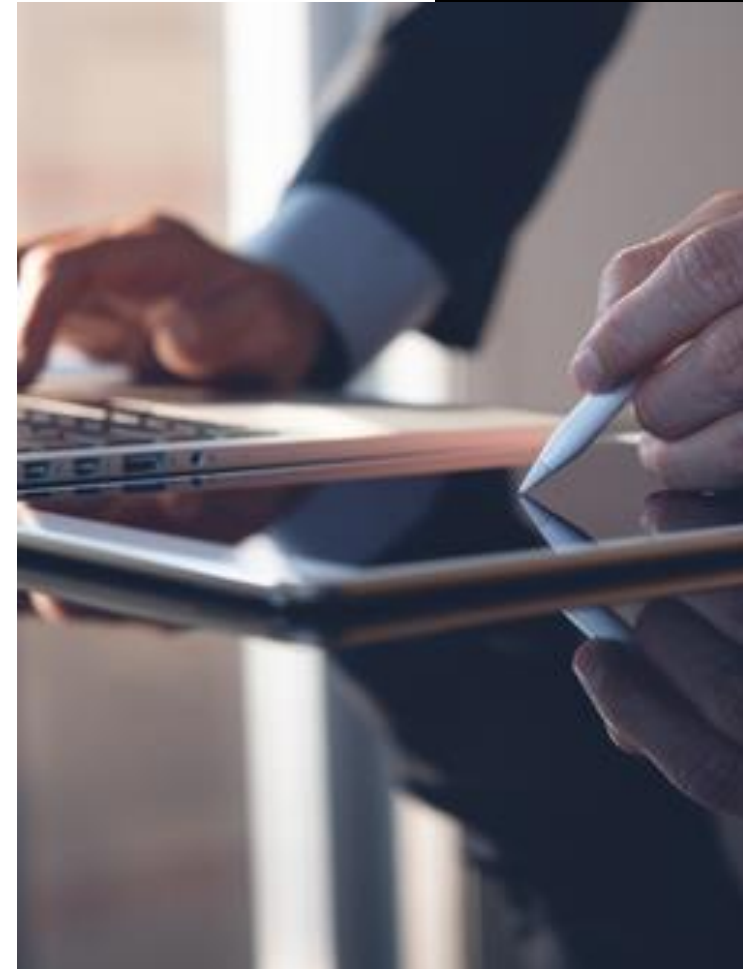
E-Signature Features



E-Signature offers the same features the New and Improved Document Management and includes the Enhanced e-signature upgrade.

The Enhanced e-signature upgrade provides an option for more complex employee acknowledgement needs. It also gives businesses a way to build custom forms that can then be embedded into documents. Companies can use the Enhanced e-Signature option to:

- Add custom fields to onboarding paperwork
- Create documents that require employees to sign on multiple pages
- Or create documents that require employees to initial or sign multiple sections
- Add additional fields besides signature, such as date signed, title, address, etc.



Turning on Enhanced Document Management & E-Signature

- Enhanced Document Management and E-Signature can be enabled by setting the new internal system setting “Use Enhanced Document Management and E-Signature” to Yes.
- A Salesforce case will have to be submitted to the Development/Product team asking for the internal system setting to be set to Yes.





E-Signature Demo



Onboarding UI Phase II

- Direct Deposit during onboarding - When an error occurs in the Direct Deposit section of the onboarding process, display a clear and concise error message under the errored field.
- All the dropdown fields under EE Onboarding module will have the ability when you enter a letter, it filters the dropdown list with the items that start with the letter entered, ability to select it, and tab off the field to confirm the selection.
- Users will be able to navigate between onboarding steps freely. This means that they will be able to go back and forth between steps as needed
- Users should be able to resume their onboarding process from where they left off if they need to leave and come back later

Direct Deposit step

- ✓ Local Tax
- ✓ I-9 Setup
- 6 Direct Deposit**
- 7 Additional Documents
- 8 Finalize

Account Type * Payment Percent Flat Amount

Checking Account

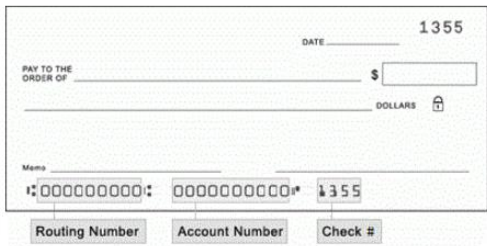
An account must have either a percent or a flat amount.

Account Number * Re-Enter Account Number *

Account number must be numeric and 4 digits or longer. Do not enter dashes or hyphens. Account numbers must match.

Routing Number * Re-Enter Routing Number *

Routing number must be numeric and 9 digits.



DATE 1355

PAY TO THE ORDER OF \$

DOLLARS

Memorandum

⑆000000000⑆ 0000000000⑆ 1355

Routing Number Account Number Check #



Drop Down fields - Easy user-friendly selection

Employee Onboarding



T TestLL

Address 1

Address 2

City * State * Zip *

Primary Phone * Additional Phone * Work Phone

Date of Birth * Marital Status *

The form contains several input fields. The 'State' dropdown menu is highlighted in yellow and shows 'fl' selected with a mouse cursor. Below it, the text 'Florida' is visible. The 'Zip' field contains the placeholder '#####-####'. The phone number fields contain the placeholder '(XXX) XXX-XXXX'. The 'Date of Birth' and 'Marital Status' fields are empty.

Bounce between Onboarding steps and resume Onboarding from where you left off

Employee Onboarding

- 1 Personal Information
- 2 W-4 Setup
- 3 I-9 Setup
- 4 Direct Deposit
- 5 **Additional Documents**
- 6 Finalize

Additional Hiring Documents

Below are some additional documents which you must review prior to completing the hiring process. To view the document, click the link beside it. Once you have finished reading all of the documents, enter your full name and password to complete the onboarding process.

Review Documents

Confidentiality Agreement and Non-Compete

Employee Handbook Your Employee Handbook

Testing Onboarding Testing Onboarding

Testing Onboarding documents

Lucy testing Onboarding

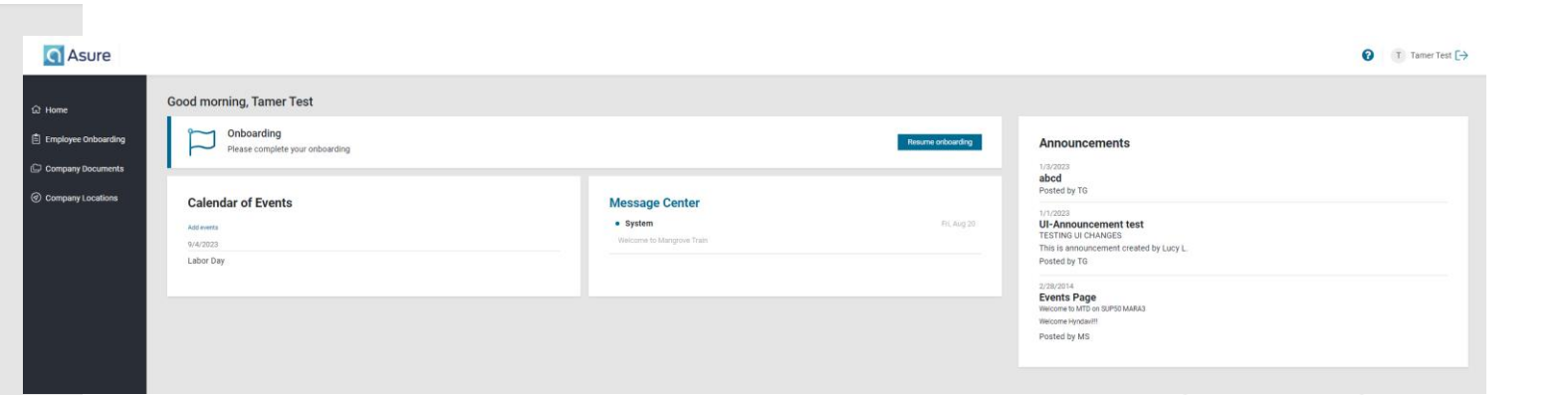
I have viewed the forms above

E-Signature

I have read my rights under the (E-Sign Act). Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

First and Last Name * Password *

[Leave Onboarding](#)
 [Return to Direct Deposit](#)
 [Next](#)



Asure

Good morning, Tamer Test

Onboarding
Please complete your onboarding [Resume onboarding](#)

Calendar of Events

9/4/2023
Labor Day

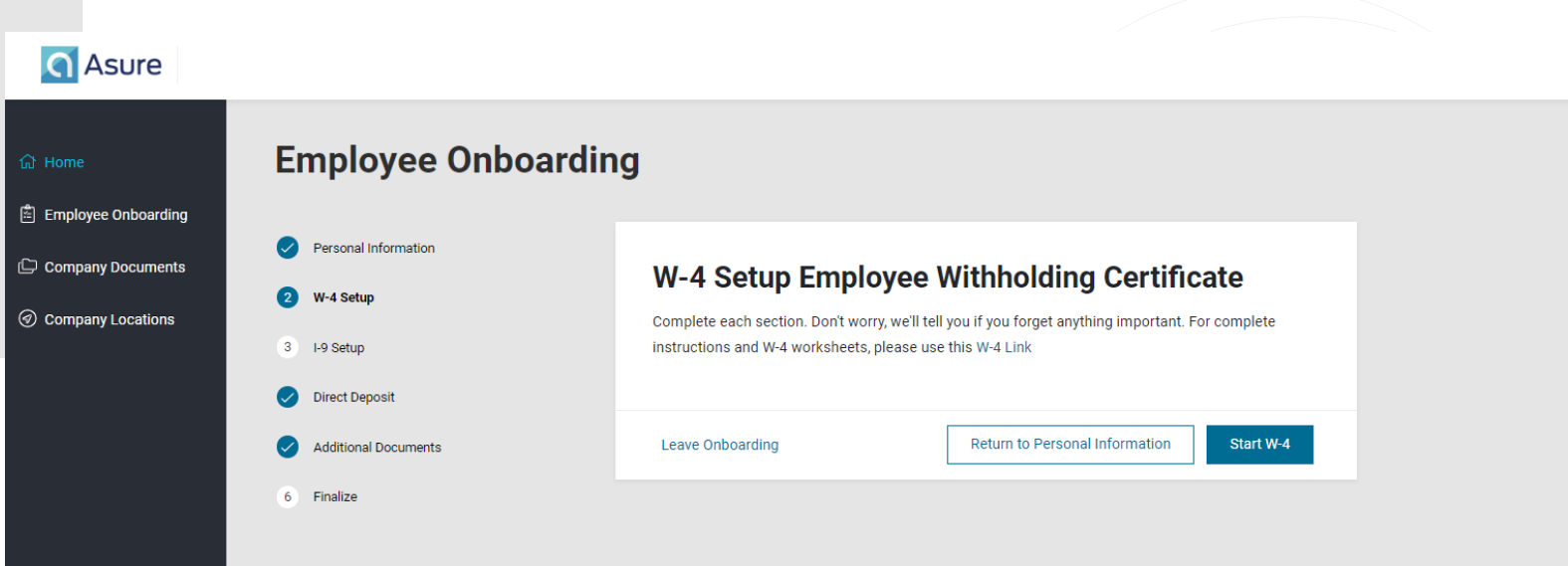
Message Center

System
Welcome to Mangrove Train

1/3/2023
abcd
Posted by TG

1/1/2023
UI-Announcement test
TESTING UI CHANGES
This is announcement created by Lucy L.
Posted by TG

2/28/2014
Events Page
Welcome to MFG on 2/28/2014
Welcome Hyndash!
Posted by MS



Asure

Employee Onboarding

- 1 Personal Information
- 2 **W-4 Setup**
- 3 I-9 Setup
- 4 Direct Deposit
- 5 Additional Documents
- 6 Finalize

W-4 Setup Employee Withholding Certificate

Complete each section. Don't worry, we'll tell you if you forget anything important. For complete instructions and W-4 worksheets, please use this [W-4 Link](#)

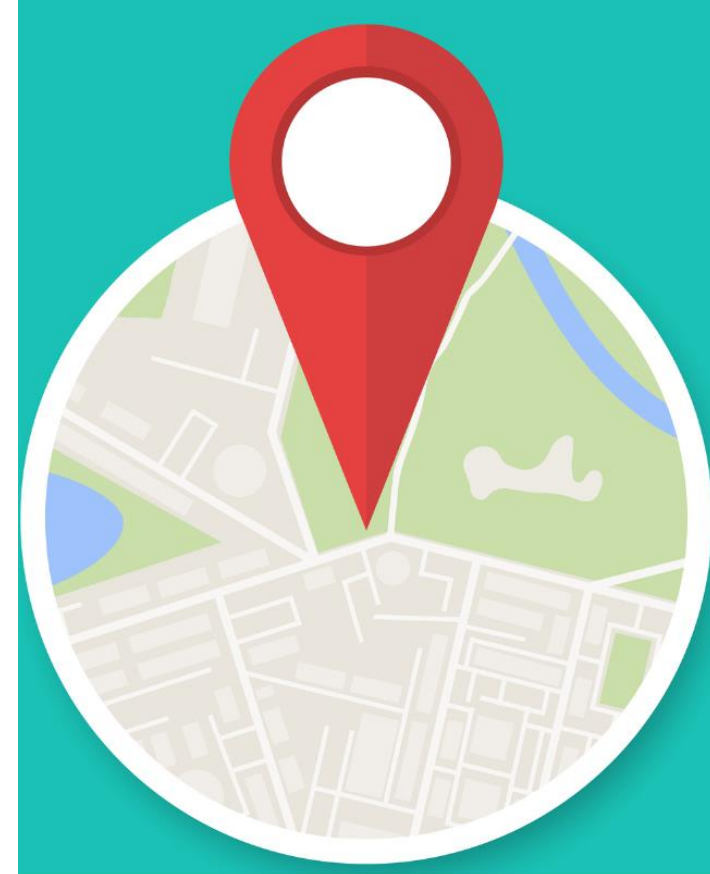
[Leave Onboarding](#)
 [Return to Personal Information](#)
 [Start W-4](#)



GeoLocator

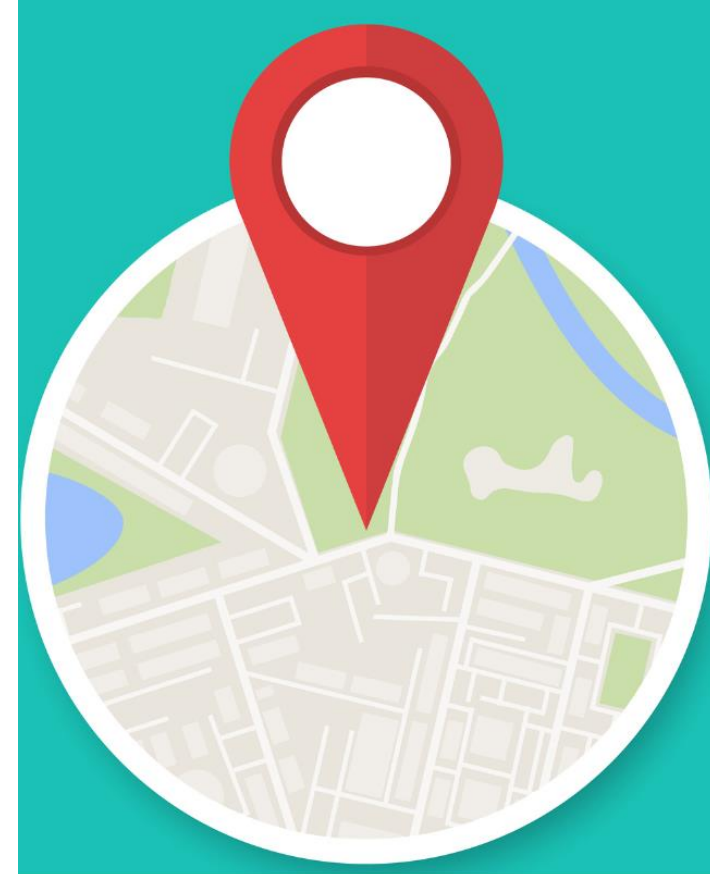
What is GeoLocation?

- An API call to lookup the address
- Based on the address lookup, the system will display the suggested locality and the selected locality



Implementing GeoLocation in the HCM Product

- Initiated every time there is an address change
- Redesign the Employee Tax Detail screen so all the employee's address and tax details reside under one screen.





New Tax Engine

Our Journey | Payroll/Tax/Tax Credits Re-Imagined



Employee Portal Development

- API - Gross to Net Calc Engine
- Payroll/Tax Engine
- Asure Identity ready for Integration
- Maintenance/Compliance
- NACHA Tokenization (MM, EVO, AHR)

Mid Market

- Upgrade to SQL Server 2022
- Geo Locator

EVO

- Client S&P Hardening
- DB Changes

AHR

- Emp Mass Update
- Performance

Q3 2023

Mid Market

- New Calc Engine
- Asure Identity

Advanced HR

- Employee Mass Create
- Asure Identity

Asure Employee Portal Treasury System

- Tax Credits
- Market Place/Vestwell
- Market Place/Notice Ninja

Q4 23
and
Q1 24

Q4 23
through
Q2 24

EVO

- New Calc Engine
- Asure Identity

Q & A



Thank You!



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