

Understanding & Leveraging AsureHR



2023 Asure Reseller Partner Conference





Speakers Introduction





Paul Trahan

Implementations



Session Agenda





Demo



De	ploy	yme	ent
	-		



General Use Best Practices



Integrations



Q&A



Latest Releases



New Mega Menu

Take me to th	e new menu! HR Admin ~ Quick Links	· ·	₽.
	Q find menu item		
count	Applicant Tracking	Company Setup	Employee Actions
Account List Jpdate Account Privacy Policy Jayroll Data Cut-Over PR Service Location List User/Company Assignment Jser/Company Exclude	? Question Bank ↔ Status Setup ⊠ Form Setup ₽ Application Version ■ Job Posting ✔ App Tracking Dashboard	Achievement Certificate Class Compensation Change Reason EE0 Enployment	Ad New Hire Self-Service Setup Terminate Employee
ompany Home Dashboard Setup	Onboarding	Ethnicity Frequency Conse Pay Grade	 Employee Summary Achievement Alternate Rate Auto Labor Distribution
Home Dashooard Setup Announcements Company Documents Company List User List	☐ Task List ☐ OnBoard Prep ☐ Onboarding Dashboard	 ✿ Pay Group ✿ Position ✿ Position/Org Change Reason ✿ Review 	Certificate Child Support Class Cla
ompany Structure	Benefits Delan / Policy	✿ Shift ✿ Skill ✿ Status	Compensation Direct Deposit Document (employee)
Drg Level 1 Drg Level 2 Drg Level 3 Drg Level 4	I Employee Benefit	 Termination Reason Worker Comp 	Document (company) Education Emergency Contact Employment Detail
Org Level 5	General Agent General	Payroll \$ Payroll Payroll Reports	Employment Detail I-9 License Note
Porting Standard Reports Quick Report Writer	Beneficiaries Open Enrollment Setup Monitor Open Enrollment	Check Calculator	Pay Stub Review Time Off Accrual
ıdit	Communication		Scheduled E/Ds Skill Tax (Federal)
Auditing Email Record List Error Log	A Notifications		Tax (Local) Tax (State) Tax Form
me Clock	Data Import Payroll Data Sync		Time Off Requests W4s
Setup/Configuration Jser Credentials			Quick Links \$ Evolution Payroll TimeClock (Admin) © TimeClock (ESS)
ecurity			
Maintenance Permissions Resources Roles Solgyee Record Filtering		Legacy Me	nu

- Fly-down menus which covered the dashboard
- Basic listing of screens, grouped and bundled by detail level

	A Sure demo company	Old Layout Take me back, I am not 🗠 ACME I ready!	Products 1 (BR Dei $$ $ imes$	Employee Search		JL Jacks HR Adm	in
					Birthday	Employee	
٩		L.			August 8	Clark, David (573)	
		I-9 forms	W-4 forms		August 8	Huges, Darrell (590)	
ර	Account				August 8	James, Samantha (5	61)
2	Applicant Tracking	You have 3 forms waiting to be processed.	You have 5 forms waiting for approval.	August 8	Pizzo, Shelly (601)		
۵	Audit				SHOW MORE		
ક્તુ	Benefits	Complete I-9 Forms	Complete W-4 form	าร			
Q	Communication				Certificat	te Expirations	
▣	Company				Expire	Employee	Туре
şQq	Company Setup		മ	10/27/2023	Benna, Alana (44)	CPR	
Ē	Company Structure	Direct deposits	Employee on	oard	03/23/2024	Quetin, Dale (48)	PHYS
<u>к</u> ек та	Employee Actions				Licopool	Tuninationa	
		You have 3 direct deposits You have 3 onboardings to be waiting for approval. processed.		ngs to be	Expire	Expirations Employee	Туре
ŝ	Employee Maintenance				CXpire	Migliorini, Judson	Type
ISI	Onboarding	Approve direct deposits Complete onboa		ings	08/19/2023	(47)	FHL
ŝ	Payroll				09/15/2023	Benna, Alana (44)	LAC
₽	Quick Links				09/30/2023	Manning, Steven (53)	CNA
ම්	Reporting	Time off requests			10/30/2023	Manning, Steven (53)	DL
8	Security Maintenance	Hooley, Shantay (46): 07/17/2023: 40 Hours Approve Deny			SHOW MORE		
©	Time Clock	Migliorini, Judson (47): 07/17/2023: 40 Hours Approve Deny			Scheduled Reviews		
98 88	Tools				Scheduled	Employee	Туре
		Company Announcements			08/22/2023	Hooley, Shantay (46)	90 Dav

- Consistent look and feel to AsurePR product family with a simplified Menu
- Provides simultaneous display of menu options and Dashboard



Latest Release!

Electronic Onboarding with required e-sign documents:

- E-sign documents that are generated but not completed during onboarding, will now also be displayed with Pending status in the document component for Admin
- When an admin attempts to approve an onboarding process with e-sign documents, all e-sign documents are systematically reviewed to confirm "Signed" status. When validation completes, a warning message now displays to alert the admin of unsigned documents. Admin is then allowed to return to the onboarding dashboard to reset the status of the onboarding or continue to approve the onboarding



Improvements!

- AsureTime Users: Before concluding the approval process for Onboarding an employee, a Pop-up now presents reminding users of the importance of the TLM fields and their accuracy. Users may now select Cancel for the opportunity to go back and confirm applied settings or Continue to complete the process.
- Organizations with pre-existing DBDT Structure: DBDT Name assignments can now be updated and/or unhidden as needed via AsureHR



Upcoming Roadmap

Reporting

 Monthly Admin E-Sign document count for billing purposes



• Pay Rates & alternate Rates





New Import Module

- Positions
- Supervisors
- Benefits



Give it your best Demo



Prepare a Successful Demo

Know your prospect

Understand your prospects current needs and be prepared for potential needs: It not just about knowing what they do need, it's also important to validate what they don't

Prepare a Demo Client & Sample Users

- Build a Demo Client... or 2... or 3. They're free! Be prepared to show the bells and whistles, and how easy the process might be.
- Present from their perspective and what their typical day will look like
- The AsureHR application is designed to engage various roles: The HR Admin, the Payroll Manager, the Employee, the New Hire

Define your workflow

- Onboarding to Payroll: help the prospective client see the easy flow of information from start to finish
- Add a New Hire and Welcome them to the organization
- Prepare for payroll with any maintenance and/or needed Approvals
- Team effort vs one-man show: The day-to-day maintenance can be shared amongst team members, and provide important compliance validations along the way or it's just as easy for PR/HR Manager

Be the client

Present from their POV



Deployment



Successful Implementation

Understand what an HRIS provides

• Familiarize with HR Functions, terminology and compliance needs

Know the capabilities and understand the solution

- Simple yet scalable and expansive HCM to accommodate the growing needs and wants of employers
- Difference between AsureHR Essentials and Advanced

Know your client

- Thorough discovery with your client about who they are, their current needs, and potential future expansion will help you to prepare a proper project plan
- Are they looking for Onboarding, Applicant Tracking, Document Sharing & Storage, e-Signatures on vital documents, integrations
- Do they know how they can benefit from the various Asure HR offerings and data integrations?

Plan ahead

- Utilize template(s) settings when creating new client/company with necessities predefined
- Follow provided guidance regarding required details and setting applications to ensure flawless cutover
- Determine which details and modules you and your client will benefit from the greatest first #1 option is Electronic Onboarding

Engage your client in the project

 Ask your client to get involved while learning the system along the way: Documents, communications, etc. (Hint: This is a great way to get in some hands-on training with your client)



Effective Training

Know your audience

- Familiarize with the users and the roles of those you will be training.
- What processes and features will they need to know?
- What will they need to be aware of to be able to train to others, like their employees?

Define the workflow

- Navigation is key: Show and provide definition to the key features of the application when they first log in (Hint: Have you accessed the new Product Tour yet?
- Be consistent, with the common features: Using the Dashboard, what they currently have access to and any additional items the y may potentially utilize to further streamline their HR workflows
- Present something familiar: their own information and where they can maintain their Company details such Positions, Position/Org Change Reasons, Comp Change Reasons, etc
- Employee maintenance is a must: what can you maintain and how do you do that?
- Based on the client's elected modules, priorities and potential timelines, what do they need to know to start using today?
- Where can they find other custom details and items they should know for tomorrow Invite them to explore
- Reports: Housed vs Quick Report Writer
- Review Employee Views so they are prepared for potential employee questions
- Payroll judge your audience

Help them get their hands dirty

• Invite them to bring new hire paperwork with them to use during the process, as well as various employee maintenance items



Best Practices



What you should know

General Best Practices

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- Use the default security roles ease administration:
 - o Base Employees,
 - o Base Managers,
 - o Base Admins, and
 - o Base Anonymous.
 - o The four default roles SHOULD not be deleted, renamed or altered
- Carefully clone, reconfigure, rename and assign to customize to the clients needs.
- Always document role configurations, noting revision dates!
- Encourage following Compliance procedures from the start
 - Take advantage of recorded and stored e-signed documents
 - Maintain true dates for DOB, DOH, and DOT with effective dates which impact so many variables such as ACA, EEO and State Reporting



Capitalize on Integrations



Expand your offerings with Integrations

JazzHR **PayKonnect** Seamless Recruitment and Job Automated 401K Integrations Postings Ť Ħ وه کا در کې در کې ۳۵ دریکری ••• •!<u>}</u> **AsureTime AsureMarketPlace Employee Navigator** Common UI and smoother Employee to Carrier Benefits Current and Future Integrations workflows Integration









Resources & Contact



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Thank You!



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