

# These are the major players that will make your payroll transition as smooth as it should be.

#### SALES

Your payroll transition begins with your account executive finalizing your paperwork and handing all the necessary information off to your Transition Service Representative (TSR) to begin the setup process. They'll also come back to review your first payroll with you in person.

#### **TRANSITION**

After your information is reviewed by our executive team, you'll be assigned a Transition Service Representative (TSR). They'll gather all your data and calculation rules, enter everything in our system, conduct testing and generally oversee the entire process in detail.

#### **CUSTOMER SERVICE**

As your transition nears completion, your Customer Service Representative (CSR) will reach out to you to introduce themselves. Moving forward, they'll be your primary contact and will be available to help you with any payroll question or issue.

#### **TRAINING**

We have free and unlimited training available to anyone within your organization that touches the payroll operation. While our training sessions hit on a variety of topics, our primary goal is to make sure running payroll on our system is easy as pie.

## **TAX AND FINANCE**

Perhaps we'll be filing taxes on your behalf. Or maybe you need help with ACH transactions. Either way, our tax and finance departments exist to help you through any tax or finance-related questions or issues. Sometimes this stuff can be intimidating, and that's precisely why they're here.

## **AUXILIARY SERVICES**

This department takes all the would-be outliers of a payroll transition and gives them a home. They'll help set up custom payroll reports, behind-the-scenes services with your third parties and upload information to your retirement accounts, worker's compensation plans, HSAs and more.

#### **IT SUPPORT**

Our IT department is mostly behind the scenes, but you may work with them to integrate our payrol software with your current environment, set up custom software if needed or just for general troubleshooting or support.



# And here's how it actually works, for all you visual learners out there.

