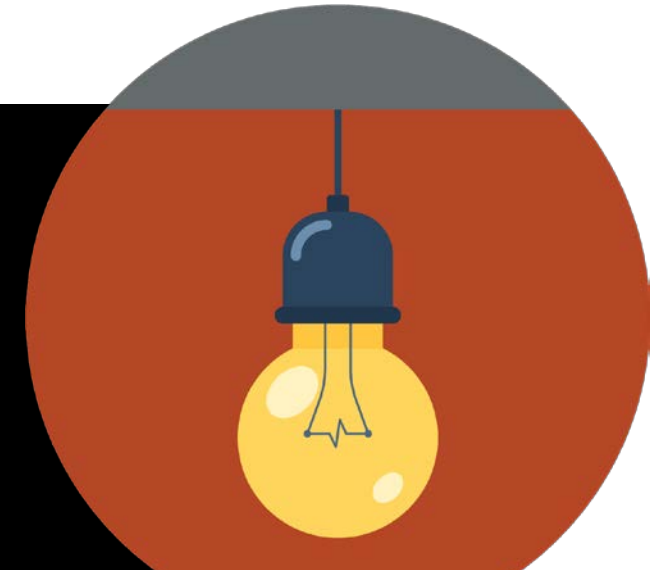


MOSAIC[®]
CONSULTING GROUP



PREMIER SUPPORT: YEAR END

Presented by: Aimée Morgan

11.6.2017

INTRODUCTION

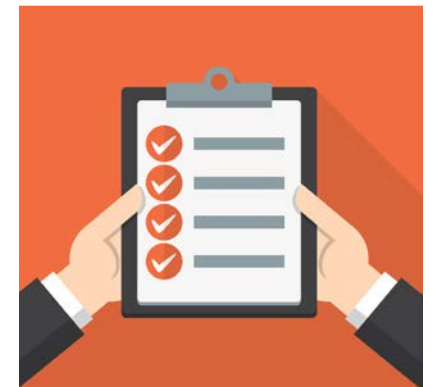
Aimée Morgan

Lead Premier Support Consultant

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AGENDA

- 8 Steps for a simple Year End
 - Team Setup and Planning
 - Data Setup
- Opportunities and Pitfalls



Chat

Feel free to ask questions during the session or
Use the Chat icon in the bottom of your screen to
submit them

YEAR END TEAM & PLAN



Team



Brainstorming



Planning

Set up your Rockstar Team

- Open communication
- Clear guidelines and responsibilities
- Plan ahead



Extend your Calendars:

- Team Calendar
- UltiPro
- Time Keeping

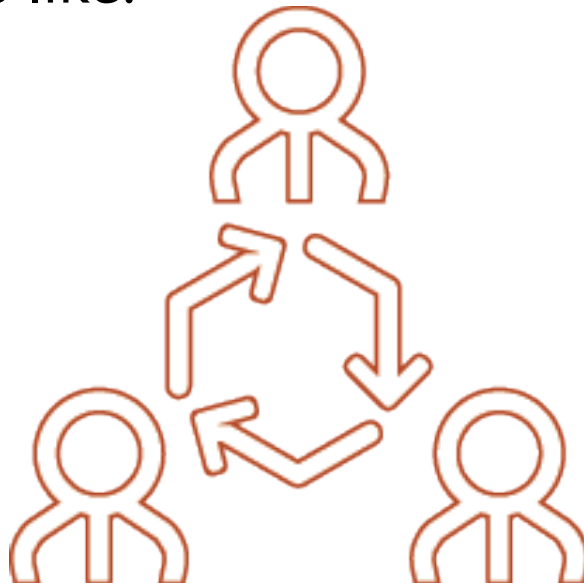
Extend your Calendars:

- Pay Calendar
- Bank Holidays
- Company Holidays



Supplemental Payroll

- Create a Supplemental Payroll for all Pay Groups to post Year End Adjustments
- Communicate about Year End Adjustments with other departments like:
 - Accounting
 - HR



Communication

DATA SETUP & EXECUTION



Data Setup




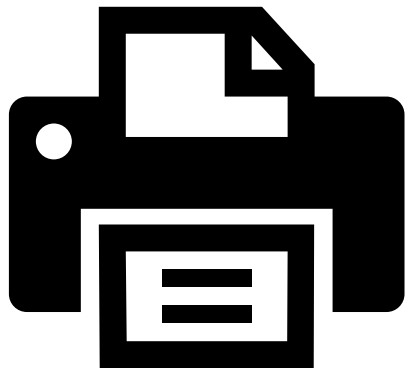
Research



Data Analysis

W2 Printing:

- Print Services  vs. Inhouse
- Inhouse:
 - Ordered?
 - Employee count?
 - Special circumstances?
- Post Marked: Jan 31st



Verify:

- Valid SSN?
- Who is claiming Except
- Who is claiming Block
- Assigned Primary Location



Tax Recon

- Verify and review
- Quarterly
- Wage Summary compared to W2 Summary
- Use the Payroll Balancing Worksheet



Earning or Deduction Codes not set up the way you want?

- Now is the time to create correct versions so you can start using them on the first pay of 2018

