American Woodmark - Payroll Modeling Session -Vantage

- ask for the slide set after the session ends (DONE)

Follow up: sent Debbie Owens email to try and get any preparatory slide sets used in the full modeling session.
ADP Personnel:
Nancy Thomas, Debbie Owens, Allyson Dunn
American Woodmark personnel:
Gretchen - main POC

- Customer is currently using the software “Cyborg"

Expectations:
Rick (AW executive - was there at the beginning to give pep talk):
think about what is possible not just what they have now (with Cyborg)
- ADP challenges us and our old practices
- safe harbor - let the rest of the teams know what is transpiring
- he encouraged full participation; stay engaged!
- any sidebars/share conversations are great but need to be shared
- keep success criteria in mind!

BK - many sidebars I heard seem to be what something means that is being shown by ADP personnel

Nancy Thomas
BK - notice used WebEx; why are we using BlueJeans?
- brings up spreadsheet that she has worked on extensively based on previously received data from AW payroll groups.

TAB = ?
Columns in spreadsheet:
Pay Group
Parent Pay Group
Legal company name
Legal FEIN
Legal address
Legal contact names
phone

- They use weekly and biweekly pay groups (KFJ)

Correction: Legal FEIN was wrong, zip code wrong (changes in April 2018)
Unknown prior to meeting: legal contact name, contact phone

Correction: Salary Name in system

Idea - when have to use spreadsheet like interface, use similar UI in PI UI for familiarity?

TAB = First Live Processing Schedule
Columns:
FEIN
Freq
ADP

TAB=Paygroup
Columns = ?

TAB = State Tax Info
Columns:
FBN
Paygroups
State
Status
State Code
Payroll Tax Code
Tax Reporting Number
Dep Freq (department frequency)
Dis M (?)
- go through each state by state during session
- Nancy adds questions to last column in the spreadsheet
Unknown: deposit frequency and payment method

TAB=SUI Tax Info
Columns:
FEIN
Paygroup
state code
Status
SUI information

- 2-3 days after contact with ADP CSR for adding state to pay group
- They really need a floating access everywhere (?)

Nancy - makes TBD's yellow in spreadsheet
- - no sui for example

- incorrect cells also highlighted in yellow
Question to AW - is the employment unlimited sui
Question to AW - various state tax and sui information and options
Question to AW - figuring out correct rate for the payroll code

- needed verified by client, deposit, frequency, and distribution for local municipalities

Question to AW - missing many pay codes
Question to AW - is HR going to assigning new employee tax codes
- best practice is with payroll; they know the ramifications; they want to follow best practice

BK - client asked ADP implementers many times what best practice is used

- perhaps that's an approach to internal help

AW - noted that there are fewer problems with local jurisdictions if payroll does it, and not HR

Information to all payroll groups - they are starting January 1, 2018

Customer question answered - ADP delivers copies of tax returns and tax receipts both electronically and paper

V= Tax Withholding Screen
[URL = tested-vantage.com for testing during implementation]

BK - what is Federal Tax Block; then set the $150 additional withholdings or percentage
BK - what is FUTA (federal unemployment tax)
BK-what is SDI or SUI/SDI (state disability insurance)

Vantage - when certain items are selected is does remove/add discovery
Vantage - system automatically determines which state does the withholding
Client question on reciprocity override
Vantage-then can add additional states
Note - this is the kind of information that will be filled in from HR/ Pay database where we can connect to it
Client asked to see GA because conversion to Cyborg was problematic.

Client asked if employee makes changes to benefits, does it update state tax information automatically
ADP - they ask if there are any other states that need to be looked at

Vantage TAB = Local tax information

- should be auto-filled in PI?
- dialog card comes up for employee to give home information and personal address

Client question - defining work state is defined as separate thing? Would it be treated as different worked in location?
Client - need to talk to X to decide what remote workers there are; can establish code as work location - not on location codes today; hundreds of salespeople, but only need 1 code which informs system that that is a remote employee
ADP - will check on this.

BK- note that UI layout is terrible in Vantage

Vantage - at top screen it shows all employee details
ADP question: are payroll departments the same as cost center?

ADP Information: everyone will get a new employee number; if you quit and come back number remains the same
- pay group and file number may change but EE id stays the same
- she noted that they are getting rid of file numbers!!!
- pain point we will get rid of in a few years

Vantage - can transfer from hourly to salaried and playgroup/file # changes automatically (much rejoicing)

Client: Transfers are HUGE pain point

Vantage - drop down shows various information to drill down to on employee quickly; brings up mini-version of main screens
Client question - is there a log so you can look at all entries
ADP - yes, this is covered in training as well
ADP - note that this always requires security access
Vantage - popup for SSN that has brief display; 20 minutes time out before system locks
Tax - qualified pension
- is EE eligible

Client question - would select default pay group?
ADP - easier to say yes to all and the deselect EE that are not eligible
Client - would you like us to remove the 1099; Nancy had to check to see if can make change whereas we will just not show it automatically; no developer needed

Nancy - showed off how state income tax > select county works; effective date changes automatically
Client - wanted to see the question mark help please
BK - Vantage has it in a popup style
Client question - what about employees that salary splits between jurisdictions?
Client question - can we track it by the time system?
ADP- could happen; BP = don't track hours for that state
Client - they need to be able to do future state when paying state income tax

Direct Deposit
TAB = Banking General

- funding for net payroll, garnishments, etc.

Nancy - checking on transit/ABA number & account number
ADP - does check printing etc.
Client question - are we taking money from their account and dispersing; once they start the payroll process it will produce a system summary
ADP - takes all taxes and we get the "float" on the money; all configured into per employee contact

Nancy - reverse wire used by ADP; need to be done at 2 months before production

—BREAK— come back at 10:20

Payroll Check layout
General Ledger - cc explained code system based on labor distribution
Client question - what is clock number?
answer: employee number

Information - time deals with rates

Client question - are Roth contributions covered?
Client question - how does it handle overflow?
answer: creates a second page

ADP - mentioned logo on check; name and address
Total pay product - lets checks be distributed based on state ee lives in
Client question - based on resident or work state?
ADP - needs to check

*what can we do with the NOTES area that would help customer even more
BK- what is a "pre-note" (can do a 5 day pre note) - dummy deposits for a data integrity check
*No SSN on check unless state requirement; need to add that to our distribution policy
Information - we have up to 10 DD allowed or a pay card

- the ee can send their pay to any of the above

Best Practice - usually 3-5 maximum as the norm

Reports

Master control report - lists every ee on that paygroup
- contains all details of ee from sex, race, to active, hire dates
Client question - can we do accumulators? yes (Nancy took note to implementer)
BK- report layout is horrendous
Columns:
Personal information
Salary calc
Marital stats etc
Medical
Taxes and accumulators/deductions
- not going to use this a lot but check register will show current pay period?
Also delivered online; can also be stored via ADP and via CD
LWW=last week worked
NWW=next week worked?

Next report - payroll register
Columns:
Personnel
Hours
Earnrings
Gross—statutory deductions
Voluntary deductions
Net pay (DD)
-totaled by department
Client question - add ee number to the report?
Answer: yes

Ancillary reports
Payroll Audit reports

1 page report on reconciliation, distribution, control totals, number of pays by range of gross earnings
- can tell where the gross of your payroll is reporting to look for anomalous payments

Personnel change report
- new hires, terminations, re-hires
Other changes - tart, temps, depart number (any change made on a system (for example ee changes deductions, etc)
Client question - pay period to pay period report
  Answer: yes
Client information - managers must approve any rate change when see a pay rate changed; this is canned report
ADP - but we should be able to generate what customer needs

Report - per payroll basis of deductions not taken by EE
- can restore an recoup; example someone on leave, stops and starts when they leave and come back
Client question - what if ee wants deductions while on leave? OK
Client question - can be set by deduction code; company level versus ee
- can set up weekly and biweekly differently

Labor distribution report
- broken out by dept it was charged to.
- this is what the GL is charged to BK???

Payroll summary
- one line entry per department
Columns:
Dept
Hours
Earnings
Gross
Stats
vol deductions
net pay
ADP - not used much as it is in paper; in GL will be able to pull up specific reports

Total Page
- breakdown by state

Statistical summary
- taxes debited
- overall ADP takings and what is left is what they can fund their ee payroll from

New hire report
- reported on each stage
Columns:
File
Name
ssn masked
Address
hire date
birth date
SUI
Status
RPTD
Client question - how can these be a “No” (entered social is invalid)
- corporate hr would want access this report

?Return to check
- can add vacation time and sick time and accruals - YES
- number one thing ee ask for salaried ee
- all paid accruals to show

? are life status changes - can system take that into account
a. not sure how that is handled or passed from benefits

Dates
- require 3 dates passed to payroll
Hire Date - most recent hire date; if never left
Birth Date
Term Date
BP Examples: what most companies do?
401K eligibility date
Additional service date
Sometimes track:

- adjusted service dates
- service dates
- rehire dates

- vacation eligibility date
- most recent hire date
- how they track vacation; not needed can be tracked via hire date
- last day worked

q=Hour to Salary transfer date tracking
- some data entry needed

TAB = Delivery Instructions
Columns:
Paygroup
Output
Company name
Address 1-2
City
State
Zip
County
Contact name
tel number
email address-delivery method
delivery criteria
output to be received

ADP uses a 3rd party
Client question - delivered via FedX?
Answer: yes
- for new hires or bank account changes
- also needed for one off's
Client question - can hand a new hire a card?
*could be part of a page on our PI site

Information - if process payroll in AM; process that afternoon and out by time to be delivered by selected method

Information - first paycheck delivered by system; first one is delivered on a card.
Client question - if want to go to 2 separate locations
- home or work location?
- home workers could be home (WFH) or not

Client question - ee asked to change location will they get a pay card in the interim?

Direct Deposit page
- can navigate ee page by page
Nancy - will show how to do a split deposit type
- demonstrated what you do to change from manual check to DD.

Client question - after pre-note is validated they can go in and put in the full amount
BK- would be nice to have this happen atomically with pre notes; not sure what to do as everyone doesn't this already.

Holidays
ADP has 6
AW has 8; date after t-giving or xmas depending on when date falls

—LUNCH BREAK—

Payroll Departments
"Labor Levels"
Cost Centers 10100 - about 50

1= location
01= division
00= department

Brent - *were going to use all 5 numbers as the actual department
"function" - where is it in the P&L of the GL?
- can transfer a department, function and shifts

(pph=pieces per hour)

*we may need "user defined fields" in PI

Note: first digit of Location and every after is the division - then comes 3 department numbers
Vantage = all of level 1 is pay group; their label level 01
Class = wage profile (BK - what are these?)
- adjustment roles replaced wage profiles
Best Practice - leave 2 in reserve for future use and growth (most clients don't)

Example 116 SA - direct labor

-what is the difference between “direct” and “indirect”
Q. how does it hit the GL
a. function code

New Codes
1=location becomes paygroup
2=loc/dept = 116sa, 116/sb, 116/61 or 122/90 122/92
3=function
4=blank
5=team becomes reports to (drives the differences between)
6=blank
7=shift becomes job or job code

TIME-they are using Chronos

Nancy - can use qualifiers on people (eligibility as part of base pay - night shift policy)

*seems like the customers use different nomenclature for their payroll
Allyson - suggested using live meeting to test one part of the process

They have a lot of “job codes” because they need them for the variety of roles the company.

- currently has 40 locations with different job code lists
- 9 plant locations, 9 job code, and everything in-between based on the locations they can get a hire wage
- would be hard to bring them into same pay level structure $$
- can work on job code but won’t be tied to salary level?

ADP; use wage profile
- workers comp codes are attached to the job code (some states restrict code use based on wage); there we would still need that designation
- some will have to keep their own instances

Client question - do they currently store a “home function” on ee?
Answer - yes
- everything will come out so it’s close to the GL

Paycodes = labor levels to them
Department = description
- if not paid not going to GL where autopay would pick it up

Client need - contract employees need to be tracked

Payroll Dept # -(location) where their payroll is charged; not going to GL
only used for sorting report; register and check sorting
-total by ee
-by super- NO
-by shift-NO
-by location (major sort)
-by dept

Cost number > reports to the GL
Brent - currently have 2 digit shift code, we only handle one in Vantage

Nancy- are there any other fields that we need to store for payroll?
- multiple worksites? (rolled into?)

Nancy/Gretchen will take offline - headcount reporting > separate meeting

- Any employees you pay 40 no matter what

Client - no; everyone is punch
Salaried employee - 72 reg at 20
- everything hits the GL
Nancy - no change

Normal salaried sees 80 hours (biweekly)
- we will store 2 pieces of information
q. what if they transfer from exempt to nonexempt during a pay period; we will have to change to add 40 hours to first week
- they don't run in arrears
Client question - can you enforce no changes during a period?
Answer - no, had to be trained to not make those changes
- only Saturday dates would be ideal; no manually process if not a Saturday date

Hours & Earnings

Earnings codes and Deductions codes
ADP tries to make 3 letter code that mimics the description
- need to go through codes to see what works

Hourly vs. Salaried

- if they ignore an existing code it will show up without a ADP code near it
BK - what is FLSA overtime? (Federal Labor Standards Act)

- only CA are allowed 24 hours of sick pay no matter what
-- different accrual than other codes
Client question - what happens when other states adopt the CA law?
- can they be the same sick code? or does it need to be split for the GL?

BK - notice that they combine codes as well; do we do that on the left side of the mapper in PI?
- before they drag drop on existing ADP policy?

BK - Current Hourly Code and Current Salary Code - don't we have to account for this in the mapper?

*special taxation would be handled in the policy?

Both ADP/AW -talked vacation code for quite a while

Noted: CA Meal Premium - if not punched within 5 hours have to pay ee full work hour; not counted towards hours worked

Car Allowance - Earning
- additional earnings

Cash Awards (rare) - cash contest paid via this code
-taxable (not a taxable fringe)
CRTL+5 = strikethrough in Excel Nancy (she may have a reason to not use power keys)

Deceased Wages - ?
BK -what does "Posting = Both" mean

BK - isn't a negative deduction the same as an earning?
- because you don't have to show that money in gross
- shows as positive on their pay

BK - Nancy used "run the GL" - how do you 'run' the general ledger? Some things post according to GL and some via Pay date or end date?

BK - what is an "in and an out" (intakes money, outflow money" so it's earning and a deduction?

BK- how/when will the client ever not need the assistance of an ADP implementer?
— baby steps baby

Note that they stripped out many pay codes from the Cyborg system

ADP question - do they ever reduce the salaried workers pay or dock their pay?
Answer - leave of absence may be a concern

Nancy - asked them to put all questions on a list for her and implementer reviews and anomaly fixes.

STOPPING POINT FOR TODAY

Day 2 - 03/07/17

Nancy: Still working on pay codes

Shift-pay and what they expect to see on the checks?
BP (best practice)
- customers see it both ways
Hours_Earnings TAB
Current Hourly Code
Current Salary Code
Current Short Desc.
ADP Paycode
Report Desc.
Earnings Statement Desc.
Cyborg Desc.
Posting
Hours Worked
Special Calc
Special Taxation

Spreadsheet Worksheets:
Change log
Hours_Earnings
Memos
Misc Hours Earned
Deductions
WGPS Deductions
Direct Deposit Deductions
ADP question - What's eligible for shift pay?
Answer - hours worked, not things like Jury duty, vacation
Best Practice = hours worked

ADP question - How many facilities pay shift?
Answer - just mfg so only 9 locations; so are there different pay rules in Chronos? To do this would require a change in Chronos; $ in time

Talked about shift premium
BK from Google:
Shift pay is the practice of paying a **premium** to employees who work the less desirable hours a business must operate. The **premium**, also called a **shift**differential, compensates workers who are scheduled for a second or third **shift**. Some employers pay a **shift** differential for working weekends, holidays or split**shifts**.

Locations 102-116
- rates of shift pay unknown

Nancy - will break down and give sample
ADP Question - do we need to go over hours/earnings codes
- reverse deductions harder to comprehend

Client question - if I need to add another location how do I handle that?
Answer - call the implementer
Client question - is she responsible for what ADP needs to do?
Answer - Need to go one place in Vantage and other functional area impacts.

Payroll Deductions
ADP question - do they take full deductions only?
Answer - partials on some, so no overall

ADP doesn't do med surtax
- two ways to set up 401k; percentage or flat dollar amount
- percentage only; deduction codes are 401 - pretax 402 -taxed
ADP question - is there a max percentage?
Answer - NO could do 99% - yes of course rare but both are eligible for matching
- usually take out larger deductions over pay periods to limit the load
- always consistent so they see the same amount coming out every month

Payroll advances - AW used - yes
Auto-deduction - AW used - yes; but only take it for the first 10 month of the year (last pay of Oct.)

Best Practice - all over the place but reported once a year

401k loan - rename it (change on checks); 401K LOAN

Credit Union - only at one facility
Client question - can they handle ACH deductions/transactions?
    Answer - if want to add more CU then can add them later
FSA Dep care - goal limit deduction?
    Answer - every payroll
Dental
    Answer - ditto
Dep Life
    Answer - every payroll; pre-tax
Drug Screen - not used
Education Adv -not used
Health EC - may not use
EE opt tax - changed to EE Option Offset
Eyeglasses - not handled via benefits (safety glasses)

BK - *notice all the back and forth q and a; how do we handle this in the UX? We'll have to use the TurboTax interview method for this process. Seems like there has to be a memo and or a follow up field to let them track all items that cannot be answered in a wizard (see dialog in Axure)

FSA Medical
Basic Life - GTL will be generated by AP; does an in/out
HSA - yes; managed through vendor
KRE - no longer effective
Opt. Life -every pay after tax
LTF - ditto
STF - ditto
Misc MFG/MDL -rename

NOTE In as earnings - Out as deduction (in and out)
bk - what is UAT? User Acceptance Test - parallel testing (comparator) etc. *mostly about deciding whether they need to keep a pay code line item or remove it, and if keeping then what do they rename it?

Nancy - we group "like" deductions together to make it easier to deactivate all at once
- uses the column "deduction group" with an M and B as indicator

Nancy - Questions on Deductions so far?
- noted that everything is every payroll
- limited purpose FSA

BK - what does FSA stand for? calling it FSL (Flexible Spending accounts) (Flexible spending limits?)

Wage Garnishments

Nancy - preset up a bunch of codes already
Columns:
hourly current code
sal,current code
ded type
add pay code
ded group
report desc
earnings statement desc
withholding freq
W/H type
goal limits

Bankruptcy
- *usually* one at a time
- if have garnishment for child support it's done on next run and not done as part of bonus
- translating data currently in system to ADP system (BP 3-5)

Columns:
current code
app pay code
deduction group
report desc
earnings statement desc

Special calculations
- only for 401k match (need information)
- in/outs as described
- deductions generating earnings
- shift pay

Memos

HSA emp- (BK - what is 12w?)
Pension memo - becomes 'PROFSH' for profit sharing
putting pay period - beg/end on all paychecks (not just California)
401K
Medical
Vision - not used
Dental - not used
3rd party moving -track that under earning so do a reverse deduction (moved to memo)- on the 940 (BK- what does that mean?)
Client question - can we display what we paid for the move on their behalf?
BK - desire for more transparency obvious
non-tax moving -
GTL - marked as 12C
"creates a memo to pass" - assuming pass downstream and to GL
PERBLA - yes
PTOBAL - no
WRKWK - have "2 buckets of sick"

- sick and sick overflow so need 2 codes so not mixed (one accrues and one doesn't)

Bk- what is WGPS (Wage processing garnishment service)

Special Calculations
- asked about what would do to calc tax
Client question - and do we have advance deduction
answer - yes

DIA - deductions in arrears
She set up a lien for Gretchen to try in Vantage
- hands on test drive
Notes on Vantage UX - Lien entry

- check if it is responsive?

Client question - does system auto-generate lein numbers?
Answer - no
Nancy - never use the bottom of the **Make Changes** bottom 2 radio buttons (BK - why is it there in the first place?)

- can be controlled by permissions; if not audit trail can we remove it altogether
- during UAT might use them
- Client - if turned off need to have someone that has access to turn on those radio buttons

- Brent - edit or view access only; deb - can you do a workflow that prompts for approval?

**Training Point!
BK - “support” - why not “child support”
Lien sub type = M-Support-Court Ordered; simplify?
BK - FIPS code is what? (Federal Information Processing Standard)
- do not enter an end date until you know what the court date is? But court didn’t notify before 3 checks have already been issued
- either going to stop when balance is met or court date occurs
Client question - How do you know what the 55-Support” etc means?
Answer - Nancy will add more information in table
- can choose anyone of them; need to enter whether it is a percentage or dollar amt
BK - Effective date - need to be able to handle this across PI effectively and understandably
BK - buttons and checkboxes are present that are not applicable to this client - we should not show it
Client question - does it know the rules behind the state
answer - yes
Goal Limit 1, 2, 3 etc with no understanding
BK - Messaging at top of screen is not well done - shows an error on another tab so you can’t see the error!
BK - help tip popups are very dull in look and text

- earnings to exclude - once loaded could use to exclude something (like 401k, etc)

Best Practice - recommend you don’t use the earnings to exclude (BK - but it’s still on the screen)
Client question - Payee code?
Answer - based on state; is this pre-populated by system
BK - SSN is not formatted automatically when you type - it should just take one string and format; for SSN
BK - uses slashes for formatting a phone number?
BK - “Check Message 1” and 2 should be more verbose “Message on check line 1” …line 2 or something
BK - even the Tabbed UI is not very discernible
Client/ADP question - Do we have enough information from their systems to auto-generate the garnishments?

- Client: need to load and validate carefully; needs to be “eyeballed”
- huge penalty if not done correctly

*very important information that is not well represented should be manually entered and reviewed"

Client question - what does the dash mean after the effective date? 03/07/17- (had no end dates or text to explain or placehold properly)
BK - weird use of comboboxes to show pay periods. We need to do this better!
Nancy - ADP has 2 services for dealing with garnishments
Client question - does it cover everything including the contact with the employees?
    Answer - no
Client question - we would need a copy of court order? or does ADP do it - we usually have a copy and send e-copy to the EE
    Answer - n/a
Client question - can we get an electronic file that we select?
    Answer - yes
If the package deal with ADP includes the garnishment software
> NEXT subject does lien

- not the avatar discrepancy in field versus display on screen

BK - Good UI - can search for employees from the main search bar
Nancy - new search feature under the name does a shortcut to liens and earn search results
Effective Date vs Start Date - one is when you enter it, one is when it starts on EE
BK Vantage - radio buttons seem disabled when they are not

- what is their definition of "disposable earnings" versus gross? no 401k in disposable
- they are just graying out the controls that don't have to be there but it would be much more effective if the controls didn't appear

*Note: subject couldn't find the payee code?
Client question - was it just set up for child support
    Answer - no
Nancy - "Schedule adjustment is the number of days and it's always 3" (BK - so why is it there??)

Client question - can you edit an entry in a list (for lien payee)
    Answer - yes and payee operation is relatively painless
Client question - is there data validation?
    Answer - didn't ask what type of garnishment so no in some cases

BK - The tabs in this are NOT needed and could be easily replaced by using a long scroll with intelligent scrolling to errored fields
Client question - where do you get m status?
    answer - it's on the order
BK - no pre-formatted fields across the UI
BK - there's no title or "what you are doing or are in" per page, so you can't tell based on form what you are doing
BK - typeahead doesn't always work
BK - Have to hit Cancel to return to list view; PI would automatically take you to the list view

BK TODO - check and see if Vantage is responsive or not; why did they layout the fields like they did?

Setup Tables (Vantage)
Client question - "Type" is that company specific or Vantage?
    Answer - Vantage
BK - DELETE is way over on left away from Cancel Save buttons
BK - lots of horizontal scrolling in setup table
BK - giant list of stuff on left to overwhelm you; really poor layout overall in the app
Client question - can do your own payee table but if have full service then?
    Answer - ADP would do it
Client question - who sends letter of garnishment?
    Answer - ADP (using service)

Deductions (Vantage)
General Deductions and Deductions Summary
BK -note that they enter the effective date before every change as their way of tracking for audit
- note that resolution of Vantage on their projector cut everything off on her menu
Client question - arrears deduction; can take full or double if they've fallen behind

Nancy - unused deduction report - can review before you accept
BK - most reports are not needed, so we aren't sure why we promote them
BK - form error validation is not handled well overall
Client question - at what point do we set priority or deductions?
    Answer - n/a
Client question - treat taxes as deductions?

Answer - yes; done first

Job Information
Nancy - showed Advanced Search
BK Hero button Make Changes is positioned oddly on each screen
BK -display only fields are not shown with any box or background - hard to understand what they are

TABS
Job
Job Dates
Compensation
Payroll
Status Flags/Custom Areas

"Allow Draw" checkbox - BK what does that mean?

Payroll
-payroll controls
-shift qualifier
retroactive job status?
FLSA OT indicator - use those routines to calculate hourly pay
payroll status
payroll dept num
Overtime rate factor
Clock num
Data control - ?
Cost Number - assuming cost center?
Pay statement message

Status Flags.Custom Areas
-produces single 1 digit character for custom data
- used for qualifiers into or out of a selected group

Make Changes again asks for effective date to track

NOTE: what are their global icons meaning?
Action -3 letter codes that were preloaded
Reason - " "stepped Progression" (what does that mean)
Reporting To
Location
Compliance Section

Job Dates
hire time
seniority date
service date

Compensation
- giving raise enter hourly or percent change
- calcs based on percent or dollars
BK - what are “compensation equivalents” ??

RATE (table)
Hourly
Monthly
Annual

By Pay Period

Salary Structures
BK - note UI they add “JOB HISTORY” and EMPLOYMENT DATES as command links above the effective date
- confirmation on pay rate change

BK - horizontal space on dialog - table doesn’t even take up the white space that’s available
- and dialog was tabbed which is barely noticeable
- they put a “-1” after the effective date to show that there are more than one
-UI Add button is tiny and off to the far right of the page
Effective date history tracking is whacked; all contained in the drop down control

BK - Validate Address button is on far right of screen; inconsistencies on button placement
oddly placed previous/next arrows (to the left of the name and avatar)
consistency!!!

Regulatory
- shows
General
EEO compliance
Disability
Employment Dates

BK UI- main feeling is that a lot of the information is not well categorized
- very erratic use of form validation and automatic fill ins
- vertical scroll on dialog for setting emergency contact
Note - that they use Effective Date whenever a change is made to any form.

Professional Credentials page
ADA Accommodations - need to consider this

PI Data
CLIENT > COMPANY > LOCATION > WORKER > WORKER ASSIGNMENT

Some shortcuts used to view subforms for convenience
Massive drop down with heavy cognitive load menu shows categories, menu links, description on right
Person Information
Job Activities
Time & Attendance
Talent Development
Benefits
Pay and taxes
-automatic earnings
BK - No one got "Make changes" to have to edit the page; position is wrong, label is wrong
Nancy - Tax withholding: checking the lived in vs worked in state features local tax automation is coming after UAT

History
BK - Look at some of their basic controls for examples of how not to do a form

BK - Add/Delete is put to far left top of table yet hero plus is put on top right of most screens; invalid entry feedback flags are too big; if you put in a decimal point after 2 digits it errors expecting the 00 - dumb help screen usage is inconsistent

ADP - Goal Limits only have 10 so be careful how you assign them; they are removed from the drop down as used