

AVIONTÉ  
CONNECT

# Unlocking Back-Office Excellence

TOOLS FOR EFFICIENCY

# Meet the Team



**Rupi Rajbhandari**

Director of Product  
Management



**Kristy Miller**

Product Owner



**Kristine Olson**

Director of Compliance





# About Me:

- Rupi Rajbhandari
- Director of Product Management
- 18 years with Avionté





# About Me:

- Kristy Miller
- Product Owner
- 19 years of experience in payroll/payroll software





# About Me:

- Kristine Olson
- Director of Compliance & Services
- 8 years with Avionté



# The Agenda

1

Back Office

2

Partnerships

3

AviontéBOLD

4

What's Coming

5

Q&A



# Disclaimer

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# Back Office

TOOLS FOR EFFICIENCY

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# DRMs

IMPROVE DATA ACCURACY

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# Data Requirement Messages (DRMs)

## What is a DRM?

- They are simply errors and warnings during time entry and payroll
- DRM's are used for error reporting and preventing user errors
- Editing or disabling DRMs could produce undesired results

## Why should I use them?

- DRMs are there to catch errors you may not have caught yourself
- Time saving for tax filing
- Accuracy

## Where are they located?

- Admin Tools | System | Data Requirement Message



System | Data Requirement Message

Data Requirement Message Type

Type	Error Type	Stored Procedure	Message	IsActive
PayrollProcessV...				<input checked="" type="checkbox"/>
	Warning	ppv_CheckForInvalidTaxMarita...	There are employees who have had default taxes created that need review.	<input checked="" type="checkbox"/>
	Warning	ppv_CheckForCAMandatoryTax	The following tax types are missing from the employee: {0}	<input checked="" type="checkbox"/>
	Severe	ppv_CheckForMandetaryTax	The Mandatory Tax type for the check is missing.	<input checked="" type="checkbox"/>
	Warning	ppv_CheckForEHTRateSetup	There are checks with a worksite in Ontatio with no Active EHT rate in Admin Tools.	<input checked="" type="checkbox"/>
	Warning	ppv_CheckForCustomerStatus	There are Payment Check Records whose Customer cannot place order due to Custo...	<input checked="" type="checkbox"/>
	Warning	ppv_CheckForMandatoryTax	One or more mandatory tax types are missing from check.	<input checked="" type="checkbox"/>
	Warning	ppv_CheckForTaxExempt	{EmployeeName} is marked as tax exempt for one or more taxes.	<input checked="" type="checkbox"/>

Add New

Cancel

New Data Requirement Message

Message Type: AccountingPeriodVerificati...

Error Type: Warning

Message SP Name: apv\_CheckForARBatchStatus

Message: AR Batch {ARBatchID} is still open.

Active

Shared By

SiteName	SiteDesc	Staffing Supplier	IsActive
			<input checked="" type="checkbox"/>
Minneapolis	Minneapolis Branch	ABC	<input checked="" type="checkbox"/>
New York	New York	ABC	<input checked="" type="checkbox"/>
Eagan	Eagan Branch	ABC	<input checked="" type="checkbox"/>
Los Angeles	Los Angeles	ABC	<input checked="" type="checkbox"/>
Madison	Madison	ABC	<input checked="" type="checkbox"/>
Eagan	Eagan	Sales	<input checked="" type="checkbox"/>
Atlanta	Atlanta	Sales	<input checked="" type="checkbox"/>
Kalispell	Kalispell	Sales	<input checked="" type="checkbox"/>
Minneapolis	Minneapolis	Sales	<input checked="" type="checkbox"/>
Eagan	Eagan - Demo	Demo	<input checked="" type="checkbox"/>
Rosemount	Rosemount	XYZ Staffing	<input checked="" type="checkbox"/>
Jen	Jen	Sales	<input checked="" type="checkbox"/>

Save



# Recommended DRMs



**SSN - Warning**  
Employee is  
missing SSN



**Missing Geocodes -  
Warning**  
Missing a GEO code  
for resident  
or worksite



**Missing PSD - Severe**  
Missing or Incorrect  
PSD code  
on Employee  
or Worksite



**Missing WC -  
Warning**  
Missing a worker's  
comp code or rate



# Recommended DRMs



## **PA Multiple Worksites - Severe**

To accurately calculate PA taxes, you should not have more than one PA location



## **W2 and Non W2 - Severe**

For tax purposes W2 and non W2 transactions cannot be processed in the same batch



<b>Jimmie Presnell</b>		Home Phone	Email
125 South St Plymouth, MA 02360		Cell Phone (773) 555-0200	<a href="#">Contact Methods</a>
▼ Details			
<b>Personal Information</b>		<b>Address</b>	
First Name	Last Name	Address Type	Country
Jimmie	Presnell	Home Address <a href="#">See All</a>	United States
Middle Name	Nickname	Street 1	Street 2
		125 South St	
Maiden Name	Previous Aliases	City	State
		Plymouth	MA
SSN	Employee ID	Zip Code	
- -	3206	02360-	
Salutation	BOLD Talent ID	GEO Code	School District
	136690711	220230800	NO SCHOOL DIST
<b>Background Summary</b>		<b>Hiring Data</b>	
E-Verify Status		Current Status	Branch Name
Not submitted		Applicant	ITP branch 1
<input type="checkbox"/> Misdemeanors	<input type="checkbox"/> Felonies	Agency/Vendor	Recruiter
Comments			kristy.miller
		Entered By	Interviewed By
		kristy.miller	
		Entered Date	Interview Date
		03/29/2024	
		Orientation Date	Hire Date
		Rehire Date	Termination Date
		Availability Date	
		Tax Credit Status	Potential Tax Credit
		Survey not complete	
		<input checked="" type="checkbox"/> W2	<input type="checkbox"/> Resume on File
		<input type="checkbox"/> On Assignment	<input type="checkbox"/> I-9 on Record
<b>Employee EEO <a href="#">Add/Edit</a></b>			
Date of Birth	Race		
Veteran Status	Disability		
Gender			

TIME ENTRY

# Missing SSN

- In BO navigate to the employee missing an SSN
- Click Edit Employee - Depending on settings you may have to 'unmask data'
- Add the SSN



<b>Missing Geocode Walmart</b>		Home Phone	Email
125 Main St Plymouth, MA 02360		Cell Phone	<a href="#">Contact Methods</a>
Details			
<b>Personal Information</b>		<b>Address</b>	
First Name	Last Name	Address Type	Country
Missing Geocode	Walmart	Home Address <a href="#">See All</a>	United States
Middle Name	Nickname	Street 1	Street 2
		125 Main St	
Maiden Name	Previous Aliases	City	State
		Plymouth	MA
SSN	Employee ID	Zip Code	GEO Code
125-89-6533	45680	02360-	
Salutation		School District	
<b>Background Summary</b>		<b>Hiring Data</b>	
E-Verify Status <a href="#">Details</a>		Current Status	Branch Name
Not submitted		Active	OH DIVE SHOP
<input type="checkbox"/> Misdemeanors	<input type="checkbox"/> Felonies	Agency/Vendor	Recruiter
Comments			
		Entered By	Interviewed By
		avi-Yolo.Sup2	
		Entered Date	Interview Date
		07/01/2024	
		Orientation Date	Hire Date
		Tax Credit Status	Potential Tax Credit
		Survey not complete	
		<input checked="" type="checkbox"/> W2	<input type="checkbox"/> Resume on File
		<input type="checkbox"/> On Assignment	<input type="checkbox"/> I-9 on Record
<b>Employee EEO <a href="#">Add/Edit</a></b>			
Date of Birth	Race		
Veteran Status	Disability		
Gender			

TIME ENTRY/PAYROLL

# Missing Geo Codes

- In BO navigate to the employee missing a Geo Code
- Click Edit Employee - Depending on settings you may have to 'unmask'
- Under the Address section, click the Geo Code drop down and select the correct Geo Code

Tip: Don't forget to select a school district too for OH, PA ,KY.





**Address**

Address Type	Country
Home Address <span>See All</span>	United States
Street 1	Street 2
125 Main St	
City	State Zip Code

**EmployeeAddress**

New Address

Address Type	ShortName	State
Home Address		PA

**Address**

Address Type	Home Address
Country	United States
Street 1	125 Main St
Street 2	
City	Macungie
State	PA Zip Code 18062-
Geo Code	390774620
School District	NO SCHOOL DIST
Short Name	
In Care Of	
PSD Code	

**EmployeeAddress**

Save Address Cancel

Address Type	ShortName	State	Zip C
Home Address		PA	1806

**Address**

Address Type	Home Address
Country	United States
Street 1	125 Main St
Street 2	
City	Macungie
State	PA Zip Code 18062-
Geo Code	390774620
School District	EAST PENN SD   39230
Short Name	
In Care Of	
PSD Code	390306

PAYROLL

# Missing PSD Code

- In BO navigate to the employee missing a PSD Code
- Click Edit Employee - Depending on settings you may have to 'unmask'
- Click See All in Address Type
- Select a School District from the dropdown
- PSD Code will populate based on the Geo Code and School District

Tip: Use this website for locating accurate PSD codes for PA <https://munstats.pa.gov/Public/FindLocalTax.aspx>



ErrorType

ErrorType : Severe (1 item)

ErrorMessage	Approve	PayeeName
Paycheck includes transactions with multiple PA worksites. These must be processed separately in order to ensure proper local tax calculations.	<input type="checkbox"/>	Walmart, Allentown

Walmart, Allentown	xxx-xx-5565	Walmart - PA	Corporate	OH DIVE SHOP	06/30/2024	\$511.00		
Walmart, Allentown	xxx-xx-5565	Walmart - Poconos	Corporate	OH DIVE SHOP	06/30/2024	\$137.38		

Remove Confirmation

Removing the transaction will also remove checks associated with this batch. Are you sure you want to remove this transaction from payment batch?

PAYROLL

# Multiple PA Locations

- Go to View Transactions
- Find the employee with multiple transactions for PA
- Click the red X next to one of the transactions
- On the confirmation prompt say Yes
- You can create a separate batch for the removed transaction



Order\_Temp

Search Type  Order ID Search

Start Page Search Summary **Detail**

Order Customer

Customer Minnesota Work Employee Co

Department Corporate

Order ID 4503

Order Info

Branch PA - Dive Shop

Address 1234 Main Street

Wc Code

Type TE

Job Title

Rate

Mark Up

Type	PayRate	BillRate
▶ Reg	\$10.00	\$15.00
OT	\$5.00	\$22.50
*		

Status Partially Filled

Date

Start Date	End Date	Requi	Plac	Schedule Sta
▶ 01/01/		36	2	Partially Fille

Pay Period Weekly

OT Plan US Fed OT Plan Tab Stop

15 Walmart, Wyoming

15 Work in WI, Live

15 Work Minnesota

zzRoushAgency,

zzTest, zz2020T

Summaries

See Employee

See Customer

See Order

See Assignment

Card View

End Assignment

Copy Transaction

Insert Transaction Type

Refresh Transaction

Update from Order/Assignment

Delete Transaction

Delete Transaction Item

TIME ENTRY

# Missing WC Code

- Find the order with the missing WC code
- Edit the order and add the WC code
- In time entry, right click on the transaction and select Update from Order/Assignment
- Verify Batch
- Warning should no longer appear



Supplier Administration : Bahamas Dive Shop Inc

Detail Branch User **Wc Code** Bank Tax Locality

WcCode	Locality	Description
8017	AK	Retail
8017	AL	Retail
8017	AR	Retail
8017	AZ	Retail
8017	CA	Retail
8017	CO	Retail
8017	CT	Retail

Add New Cancel

WcCode Detail

Wc Code: 8017  
Description: Retail

Country: United States  
State: AK  
Processing Method: RG

Rate			
Rate (%)	Cost(%)	StartDate	EndDate
0.25	0	01/01/2024	12/31/2044
*		01/01/2024	12/31/2044

TIME ENTRY

# Missing WC Rate

- Navigate to Admin  
Tools | Employer | Wc Code
- Find the state with the missing rate
- Add a rate on the rate table
- Click Save
- Back to Time Entry, verify batch
- Warning should no longer appear



Comprehensive Assignment AQ

Comprehensive Assignment AQ  
Comprehensive Assignment AQ

DisplayName	
Branch (Assignment)	A Real Branc
Branch (Employee)	A Real Branc
Date Type	Assignment
Start Date	01/01/2024
End Date	12/31/2024
Customer Name	%
Extra Value	# Checks Pro

Drag a column header here to group by that column.

EmployeeBranch	EmployeeID	BoldTalentID	EmployeeName	SSN	EmployeeStatus	PrimaryContact	EmployeeEmail	IsW2
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Value
Real Branch,Another Real Branch,Atlanta,August2019 branch A,
Real Branch,Another Real Branch,Atlanta,August2019 branch A,
Assignment Date Entered
1/2024
1/2024
Checks Processed/Week

Run Query

Drag a column header here to group by that column.

JobTitle	WCCode	OrderID	BoldJobID	OrderType	OTPlan	AssignmentID	AssignmentType	MarkUp
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		5441		TE	US Fed OT Plan	195146	Regular	

IsW2	DateofBirth	Gender	BoldCompanyID	CustomerID	CustomerName	DepartmentName
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>				5193	Grey Sloan Hospi	Corporate

ResidentStreet1	ResidentStreet2	ResidentCity	ResidentState	ResidentZipCode	ResidentGeoCode	WorksiteStreet1	WorksiteStreet2	WorksiteCity	WorksiteCounty	WorksiteState	WorksiteZipCode	WorksiteGeoCode
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
521 Test St		Minneapolis	MN	55405	240530650	111 Test St		Minneapolis	Hennepin	MN	55405	240530650
321 Test St		Adel	IA	50003	160492456	852 Test Ave		Adel	Dallas	IA	50003	160492456

# How to prevent corrections/DRM alerts

Run the Comprehensive Assignment AQ



# Large Batch Processing

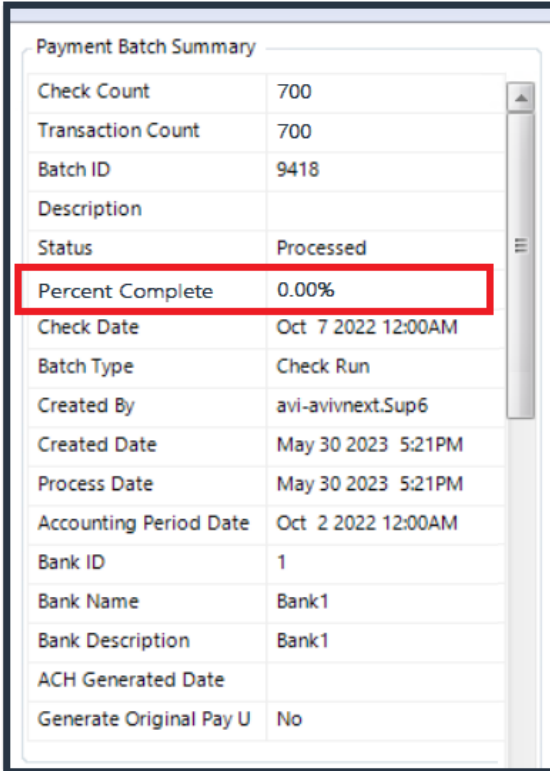
PAYROLL PROCESSING EFFICIENCY

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# Large Batch Processing

- Asynchronous processing of high volume of data in a single batch rather than smaller groups.
- Benefits :
  - Eliminates the cap on the max. number of transactions in a single batch.
  - Utilize other parts of the application while the batch is processing in the backend.



The screenshot shows a 'Payment Batch Summary' table with the following data:

Payment Batch Summary	
Check Count	700
Transaction Count	700
Batch ID	9418
Description	
Status	Processed
Percent Complete	0.00%
Check Date	Oct 7 2022 12:00AM
Batch Type	Check Run
Created By	avi-avivnext.Sup6
Created Date	May 30 2023 5:21PM
Process Date	May 30 2023 5:21PM
Accounting Period Date	Oct 2 2022 12:00AM
Bank ID	1
Bank Name	Bank1
Bank Description	Bank1
ACH Generated Date	
Generate Original Pay U	No



# Paystub & Invoice Management

PAYROLL & BILLING EFFICIENCY

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# Emailing Paystubs, Invoices & Statements



**Convenience and  
Accessibility**  
Access directly  
in email inbox.



**Speed and Efficiency**  
Instantaneous &  
saves time.



**Cost Saving**  
Eliminates printing,  
postage & manual  
handling cost.



**Personalization**  
Customized or add  
other relevant info.



# Self-Service Access

Talent Portal

## View Paystubs & Tax forms

WORKTRON | myDashboard | Timesheets | Profile | Pay History | My Ready

Bentley Dahms

CHANGE Card Portal

Assigned Tasks  
Equifax Workforce Solutions I-9

Assigned Workflows  
No Assigned Workflows.

Paychecks | Taxes

W2

Employer: Staffing | Tax Year: 2023 | Download

WORKTRON | myDashboard | Timesheets | Profile | Pay History | My Ready

Bentley Dahms

CHANGE Card Portal

Assigned Tasks  
Equifax Workforce Solutions I-9

Assigned Workflows  
No Assigned Workflows.

Paychecks | Taxes

Paychecks

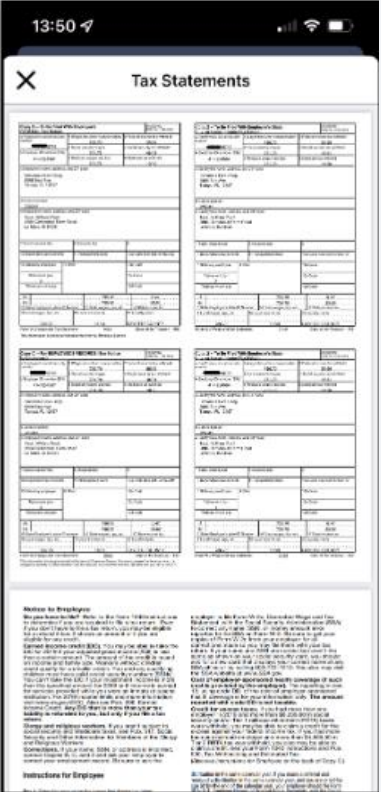
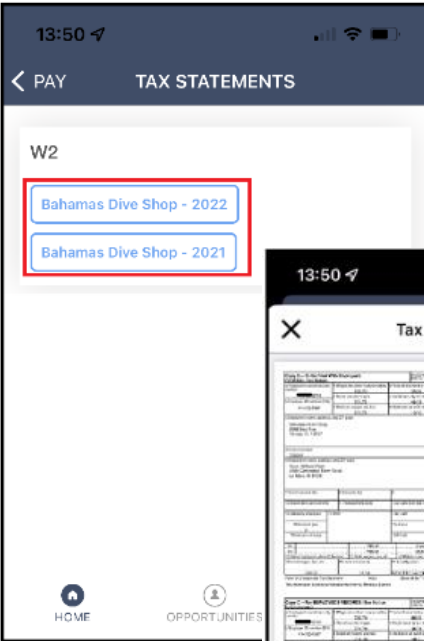
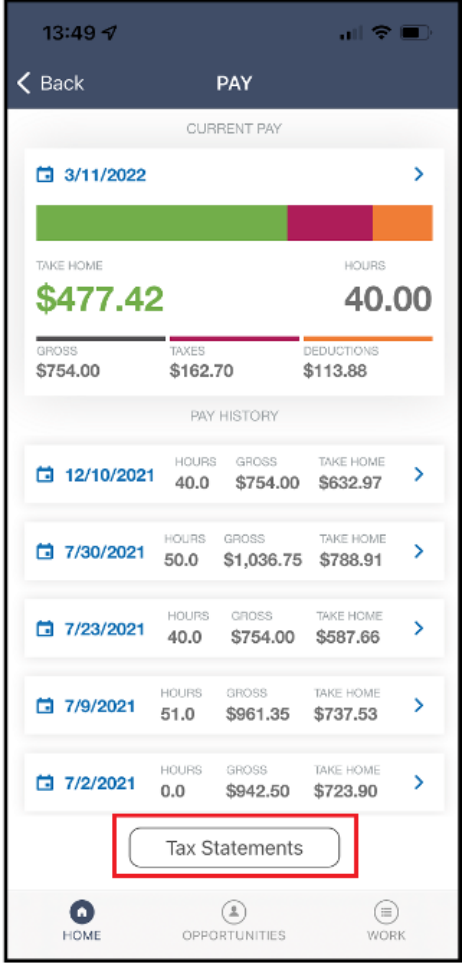
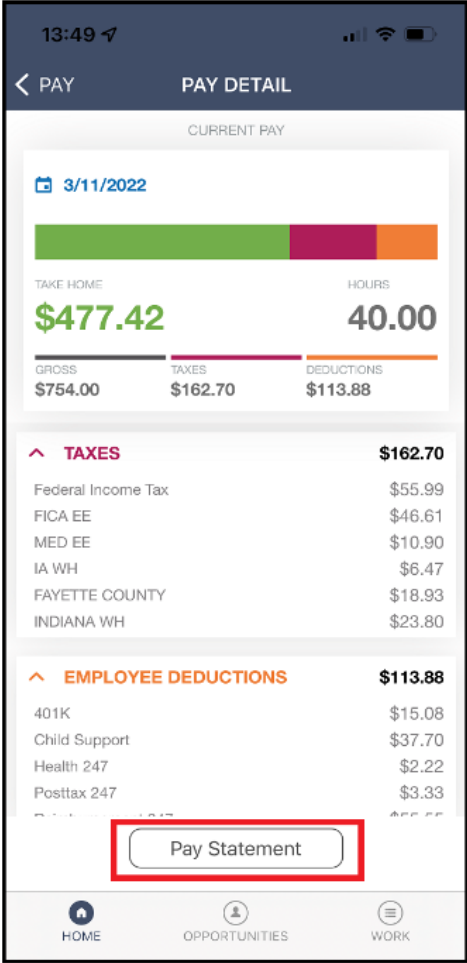
Check #	Check Date	Gross	Taxes	Deductions	Net Amount	Direct Deposit
12012216	Mar 15, 2024	\$1,400.00	\$332.11	\$0.00	\$1,067.89	<input checked="" type="checkbox"/>
rit-12012205	Feb 26, 2024	\$0.00	\$0.00	\$1,179.55	-\$1,179.55	<input type="checkbox"/>
12012209	Feb 26, 2024	\$0.00	\$0.00	-\$1,179.55	\$1,179.55	<input type="checkbox"/>
12012205	Dec 29, 2023	\$1,600.00	\$420.45	\$0.00	\$1,179.55	<input type="checkbox"/>

Total: 4 (Showing Items: 1 - 10)

# Self-Service Access

Avionté 24/7 App

## View Paystubs & Tax forms



# Self-Service Access

Manager Portal

## View Invoices

**WORKTRON** | myDashboard | Jobs | Timesheet | **Invoices**

### Invoices

Select company: Amazon Warehouse | Select company branches: Main |  Include only open invoices | Start Date: Dec 9, 2023 | End Date: Jan 29, 2024 | [View Invoices](#)

#### Open Invoices

View Invoice	Invoice #	Office	Invoice Date	Invoice Amount	Balance	Due Date
	11	Corporate	12/29/2023	\$3,000.00	\$3,000.00	01/08/2024
	12	Corporate	01/10/2024	\$1,600.00	\$1,600.00	01/20/2024

2 Outstanding Invoices

#### Invoice Summaries

View Invoice	Invoice #	Office	Invoice Date	Invoice Amount	Balance	Due Date
	10	Corporate	12/26/2023	\$520.00	\$0.00	01/05/2024
	11	Corporate	12/29/2023	\$3,000.00	\$3,000.00	01/08/2024
	12	Corporate	01/10/2024	\$1,600.00	\$1,600.00	01/20/2024



# Partnerships

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# ADP Employment Tax

PAYROLL TAX EFFICIENCY & EXPERTISE

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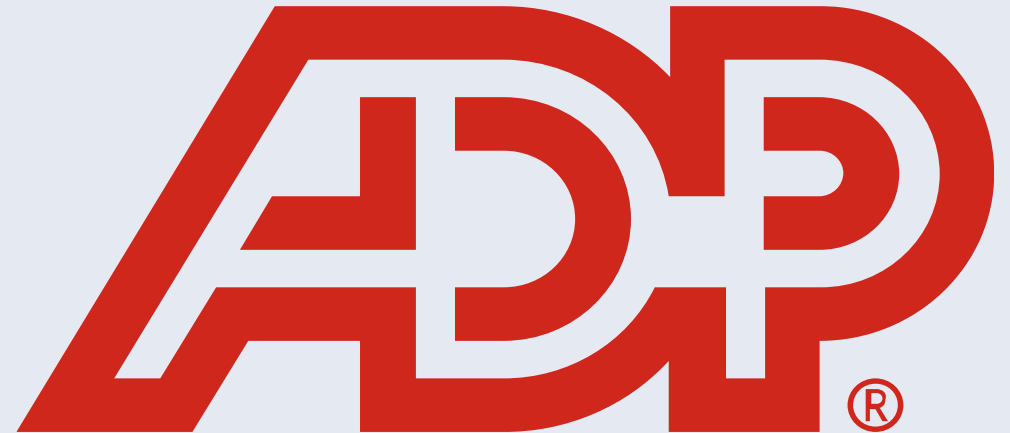


Payroll Tax  
Compliance

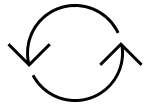
## ADP Employment Tax

Tax compliance experts offering solutions for depositing and filing payroll tax payments & returns.

- Deposits based on payment schedule and compliance
- Quarterly and annual tax returns
- Federal W-2, both e-filing and print and mail services
- Tax account registration assistance



# ADP Employment Tax



## Periodic Processing

Automated submission to  
ADP



## Interim (Monthly)

Used for IL only; manually run  
by user & upload to ADP.



## Quarterly

Manually run by user; can  
be run multiple times

ADP Employment Tax is fully integrated with Avionté payroll





# HRlogics

ACA REPORTING EFFICIENCY

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ACA Tracking and  
Reporting

## HRlogics (formerly SyncStream)

ACA compliance experts offering solutions for ACA eligibility tracking and IRS reporting.

- Affordability measurement and eligibility reporting, including both lookback and monthly measurement
- E-Filing to IRS and states
- 1095-C delivery to employees



ACA Tracking and  
Reporting

# HRLogics

Fully integrated with Avionté payroll

- Employee Census Export: basic employee demographic data
- Payroll Export: hours paid to employees
- Upload to HRLogics



# Insurance

BENEFITS EFFICIENCY

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Insurance

# Essential StaffCARE

Leading provider of healthcare benefits  
to staffing industry.

- Offer MEC and MVP (Bronze) plans
- Mobile-friendly enrollment via AviontéBOLD
- Integration with payroll



New Feature

## ESC - ICHRA

Individual Coverage Health

Reimbursement Arrangements (ICHRA)

- Now available as a standard export
- Allow an ALE under the ACA to comply with the Employer Mandate by reimbursing employees for a portion of their qualified individual health insurance plan premium.

**The Simple ICHRA<sup>SM</sup>**

 **ACA-Compliant**



Insurance

## Coming Soon

Expanding our partnership  
opportunities



***Benefits in a Card™***



**HOORAY  
HEALTH**



Retirement Savings

## Coming Soon

Expanding our partnership  
opportunities

- Reduce administrative burden in states that mandate retirement savings plans





# AviontéBOLD

CONFIGURATION FOR EFFICIENCY

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# Avionté ONBOARDING

ONBOARDING EFFICIENCY

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# ONBOARDING



## Direct Deposit

Standard onboarding task  
Maps to the Account Info



## EEO Information

Standard onboarding task  
Maps to the Tax section



## Federal & State W4

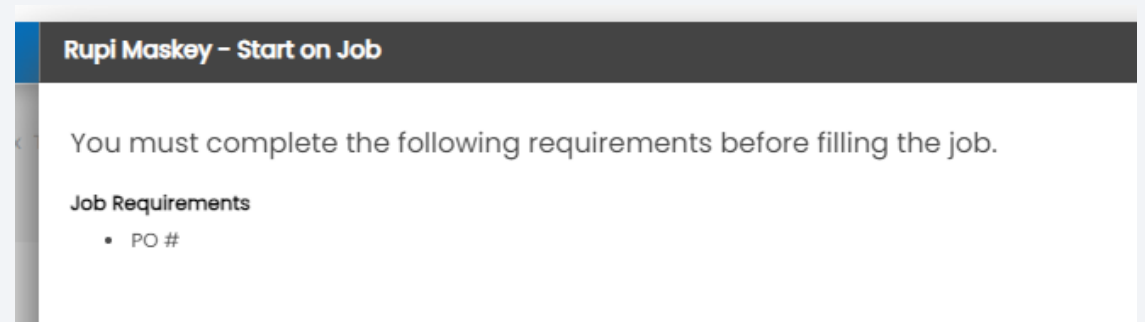
Standard Adobe Templates  
24/7 Symmetry Self-guided mobile friendly  
Maps to Tax section in BO

Avionté 24/7 ONBOARDING empowers talent to quickly complete task online or in-app



# Filled Job Requirements

- Allows you to turn on number of fields that need to be completed prior to starting a candidate on a job.
- Some examples-
  - SSN/SIN
  - I-9 completed
  - Direct Deposit
  - PO #
  - Commission Info, etc



# Coming Soon

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# Coming Soon

## Employment Type

- Specify a 1099 talent in AviontéBOLD and sync that to back office along with FEIN and address.

## Billing Setup

- Input Billing preferences from AviontéBOLD and sync that information to back office.

## Accrual Enhancement

- Enhancing accrual setup in Back Office with more configurable options.



# Takeaways

1

These slides will be available on our Knowledge Base after CONNECT for you to reference, as well as other KB articles for DRMs.

2

Contact your Account Manager if you would like additional training in any of these areas or are interested in learning more about features or partnerships.

3

Don't forget to visit the Avionté+ Sponsor Showcase to talk with reps from some of the great partner companies we mentioned during this presentation!



# Questions & Answers

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**Thank You**

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Leave further feedback...

SEND

Cancel

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- Rate the session
- Optional to leave further feedback

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