

AVIONTÉ CONNECT

**Tax Preparation Strategies for Financial Excellence:
Elevate Your Year-End Process**

Tax Preparation Strategies

For Financial Excellence – Elevate Your
Year-End Process

OPERATIONAL EFFICIENCY



FRONT OFFICE

BACK OFFICE

MOBILE

AI & AUTOMATION

VMS

INTEGRATIONS

ANALYTICS

Introductions

Welcome to **CONNECT!** Thank you for joining our session.



April Wood

CUSTOMER SUCCESS
TRAINING SPECIALIST

TRAINING



Becky Fox

LEAD PRODUCT TRAINER

TRAINING

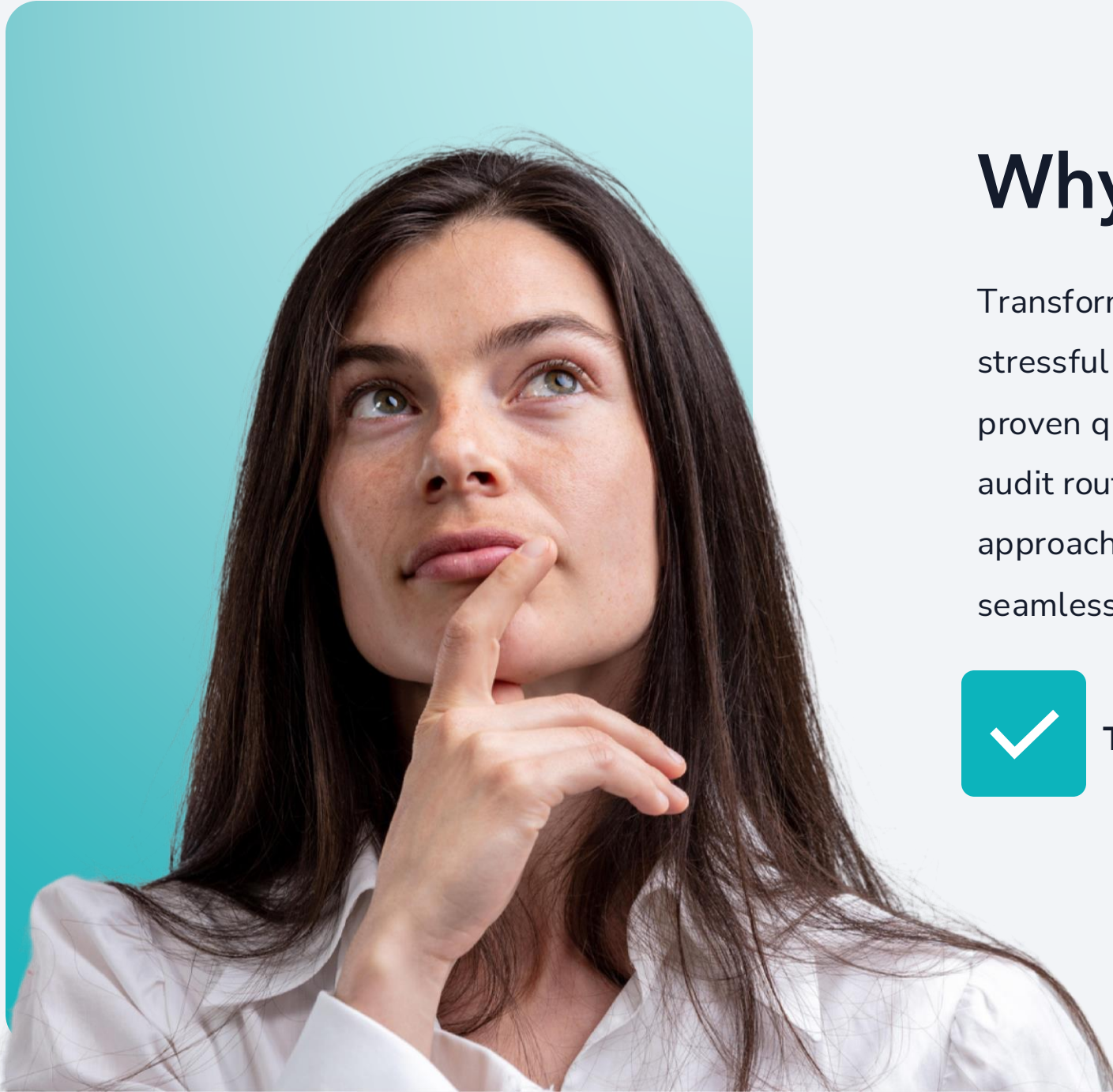
Tax Preparation Strategies for Financial Excellence: Elevate Your Year-End Process

Transform your year-end tax compliance from a stressful crisis into a strategic advantage

- 1 Why Start Now?
- 2 Internal Partnerships
- 3 Quarterly Review
- 4 Monthly Maintenance
- 5 Action Items
- 6 Q&A

Disclaimer

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Why are we here?

Transform your year-end tax compliance from a stressful crisis into a strategic advantage with proven quarterly validation protocols, monthly audit routines, and a coordinated support approach to prevent costly mistakes and ensure seamless reporting.



TRANSFORM COMPLIANCE INTO CONFIDENCE

Common Pain Points

- December scramble
- Multi-state taxation
- Classification challenges
- Internal turnover



Partnerships

Build your team



Data Integrity & Validation

Ongoing, not a one-time thing



Focus

Stay on track throughout the year

Build Your Internal Team - Considerations

- 1 Onboarding Document Creation

- 2 Onboarding Completion

- 3 Back Office Admin Team

- 4 HR / Benefits Admin

- 5 Payroll / Tax Expert

- 6 Operations Team Member and/or Leader

Establish Responsibility

	HR Manager	Back Office Admin	Payroll/Tax Expert	Operational Leadership
Electronic W2 Consent	✓	–	–	✓
Review Transaction Types	–	✓	✓	✓
Benefit Offerings	✓	–	–	✓
EEO Mapping	✓	✓	–	✓
SOC Codes (AK, IN, LA, SC, WA, WV)	–	✓	✓	✓

Quarterly Review



Generate Greenshades

Review & resolve issues throughout the year! Pair this with your 940 & 941 process.

- Taxes Summary AQ
- Taxes Summary Lite AQ



Duplicate Talent Report

Review, update & merge talent records as needed.



Comprehensive Talent Record Report

INSIGHTS resource showing talent information, or the lack thereof, to view what may be missing or require updates.



Candidate Contact Details Report

Standard report offering allowing visibility to possibly missing or outdated information to review & update.

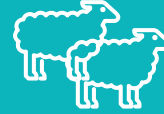
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Monthly Data Maintenance



SSN Verification

- E-Verify
- SSN Verification Services



ACA Error AOs

- ACA Companion Employee Sync SSN Errors AQ
- ACA Companion Employee Primary Address Error AQ



ACA Counters

- ACA End Active Ded/Cont
- ACA End Active Offer
- ACA Full Time w/o Offer

Implementation Steps



**Review Year-End
Checklist**



**Identify Your
Team**



**Create Quarterly
Review**



**Monitor Items
Monthly**



Elevation Resources



Professional
Organizations
& Member
Resources



- Year-End Checklist
- Support Team
- Year-End Webinar Series
- Account Manager
- Customer Success

Implementation Resources

✓ [Year-End Checklist \(US\)](#) OR [Year-End Checklist \(CA\)](#)

✓ [Taxes Summary AQ](#)

✓ [Taxes Summary Lite AQ](#)

✓ [Comprehensive Talent Record Report](#) OR [Candidate Contact Details Report](#)

✓ [Duplicate Talent](#)

✓ [SSN Verification Services](#)

Questions?

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2. Locate **Tax Preparation Strategies for Financial Excellence: Elevate Your Year-End Process**
3. Rate and leave feedback



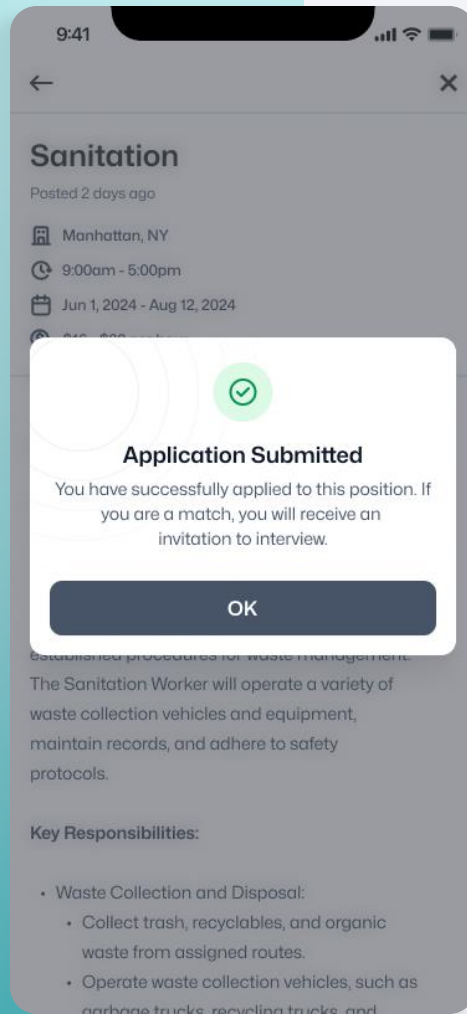
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- Get expert guidance for your specific goals
- Four focused areas aligned with your success
- Leave with strategies you can implement now

DesignLab

Step into the future of staffing technology. Preview upcoming innovations, share your feedback, and help shape what comes next.

The screenshot displays the AVIONTE Back Office interface. The top navigation bar includes the AVIONTE logo, a search bar, and various menu items: myDashboard, Jobs, Talent, Timesheet, Companies, Documents, Back Office (highlighted), Analyze, Sub Vendors, QuickPlace, and Automation. On the right side of the navigation bar are icons for search, notifications, chat, settings, and a user profile.

The main content area is titled "Payment Batch ID: 10513". Below the title are several action buttons: "Select Transactions", "Process", "Print Checks", "Post", "Discard Batch", "View Paychecks", and "Email Paychecks".

The "Payment Batch Summary" section provides the following details:

Check Count	0	Transaction Count	5
Batch ID	10513	Description	
Status	Processed	Check Date	08/08/25
Batch Type	Check Run	Created By	avi.next1
Accounting Period Date	08/03/25	Bank ID	1
Bank Name	Bank of Avionte	Bank Description	Bank of Avionte
ACH Generated Date		Generate Original Pay Units	No

The "Transactions" section contains a table with the following data:

Talent Name	SSN	Company Name ↓	Department Name	Total Pay	Total Bill
Ethan Campbell	XXX-XX-XXXX	Williamson & Harris Co.	Corporate	\$1000.00	\$1250.00
Orlando Diggs	XXX-XX-XXXX	Pinnacle Solutions	Accounting	\$600.00	\$750.00
Demi Wilkinson	XXX-XX-XXXX	FedExpress	Corporate	\$640.00	\$800.00
Kate Morrison	XXX-XX-XXXX	Coca Cola	Corporate	\$800.00	\$1000.00

The left sidebar contains a search bar and a list of navigation items: Time Entry, Payroll, Search (highlighted), Transactions, Checks, Billing, Invoice, Paycheck, Accounts Receivable, Weekly Process, Import / Export, Unemployment Claims, and WC Claims.