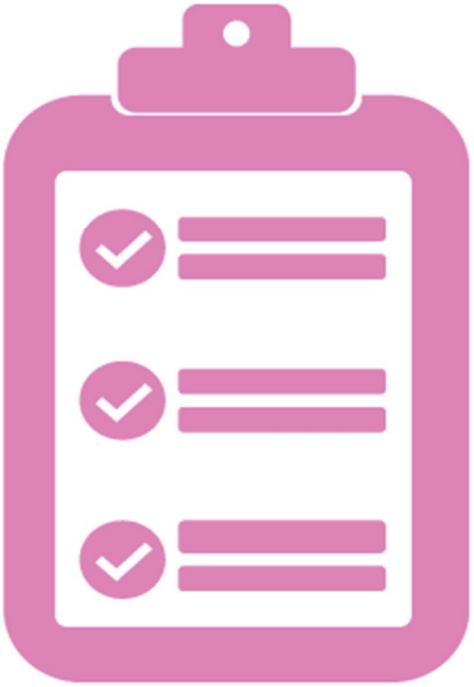
A more human resource.℠

Getting Started with ADP

New Client Checklist and Implementation Guide



Hello and Welcome to ADP!

YTD Profile Report:
- ☐ Attached (Mandatory with all New Orders)
- ☐ Not Applicable (New Company with no Payroll History)

We appreciate your business and look forward to the next step with you, your Implementation Analysis Meeting. In preparation for this meeting, please provide your sales representative with the following:

Federal Employer Identification Number (FEIN) Proof

Current IRS document (within the last 6 months) that includes the FEIN and legal name or copy of a recently completed Payroll Provider return.

Key Implementation Start Dates

First Input Date: _____ Period Ending Date: _____ First Pay Date with ADP: _____

Creation of Your Client ID

A unique identifier that describes you as our client (limited to 10 characters). It is needed to initiate your company on our system prior to our first meeting. When choosing your Client ID common practices include abbreviating your company name or stock ticker symbol. Some examples include IBM, GenCo, MSFT, and FedEx.

Choice 1:		**Choice 3:**	
Choice 2:		**Choice 4:**	

Note: Please keep in mind that you and your employees will need to know your Client ID to register online.

Current Vendor Information

Provide a copy of the most current Company Year-to-Date Profile Report to your Sales Representative. This will expedite your company setup profile. The report should contain company level information including Hour/Earnings Types, Deductions, Departments, and Tax Jurisdictions.

Additional Preferred Documentation:

- ☐ Deposit Frequencies for State and Local Taxes (typically found on a report that displays tax liability information)
- ☐ Current Year Quarterly Tax Filings and/or Deposits (Federal-941, State-941, State Unemployment Filing)
- ☐ Chart of Accounts for Payroll and Sample Journal Entry in Excel Format (if applicable)
- ☐ Paid Time Off Accrual Policy (if applicable)

Reporting Agent Authorization and Client Account Agreement documents will be presented during implementation for signature and a voided check for the designated accounts ADP should debit will be collected.

- **If Time Clocks Were Purchased:**
  Provide contact information for the IT/Network Administrator who is responsible for clock installation.
  Name: _____ Phone: _____ Email: _____
- **If the Benefits Administration Module Was Purchased:**
  Provide contact information for the Broker if you want ADP to gather setup and enrollment information.
  Broker Name: _____ Permission for ADP to talk to Broker: ☐ Yes ☐ No
  Broker Contact / Account Manager Name: _____ Phone: _____
  Email: _____
- **If a Broker Will Not Be Involved, Collect the Following Documents in Anticipation of the Analysis:**
  ☐ Benefit Plan Summary AND Benefit Rate Sheet ☐ New Hire Benefits Packet
- **If Recruitment and/or Performance Modules Were Purchased, Collect the Following Documents in Anticipation of the Analysis:**
  ☐ Job Application/Posting (if Recruitment) ☐ Sample Performance Appraisal (if Performance)

Vendor Source Document List to Collect Company Year-To-Date Profile Report

If your current vendor is not listed below, you can provide a report or list containing the following information; pay elements (hours/earnings types), deductions, departments and tax jurisdictions.

Vendor	YTD Profile Source Document	Comments
Abra	Gross to Net Detail Report	
Acc Pac	Earnings and Hours Report	
Advantage	QTD/YTD Register	
Ahola	Payroll Register - Company Summary	
AmeriPay (Millennium)	MQYtd	Ameripay uses a Millennium product
BalancePoint (Evolution)	Payroll Register Totals at end of report	BalancePoint uses an Evolution Product
California Payroll (Millennium)	MQYtd	California Payroll uses a Millennium product
CBIZ (Millennium)	MQYtd	CBIZ uses a Millennium product
Ceridian - Source 500 or HR/Payroll	Payroll Register	
Ceridian – DayForce		
Complete Payroll (Evolution)	Payroll Register Totals at end of report	Complete Payroll uses an Evolution Product
CompuPay PC Payroll v3.0.2548	ASCII Export	
CompuPay PayRight	Employee Pay History	
Corp PR Solutions	Pay History Report	
Dac Easy (Sage)	Totals at end of reports	Dac Easy uses a Sage Product
Deltek	Totals at end of reports	
Elite HR	Totals at end of reports	
Encore/E-Chx	Payroll Register Total Page	
Evolution	Payroll Register Totals at end of report	
Fidelity	Totals at end of reports	
Harpers (Millennium)	MQYtd	Harpers uses a Millennium Product
InstaPay	YTD Register Totals Page	
Intuit Complete PC or Web Entry	Payroll Journal	
Kronos Visual Tech or Kronos Workforce HR	Detailed Payroll Register Totals at end of report	
Mas 90 / Mas 200	Perpetual History Report (Standard in software)	
Millennium	MQYtd	
Mpay (Millennium)	MQYtd	
Pay-Net Solutions (Millennium)	MQYtd	
Paychex - Online, Paylink or Teledata	Total Page from Employee Earnings Record Cards	
Paychex - Preview For Windows	Payroll Journal Totals page	
Paychoice	Totals at end of reports	
Paycom	Client can create custom report, no standard	
Paycor	Client can create custom report, no standard	
Payday Inc (Evolution)	Payroll Register Totals at end of report	PayDay Inc. uses an Evolution Product
Paylocity (Millennium)	YTD Report	
PayMaster (Evolution)	Payroll Register Totals at end of report	
Payroll America (Millennium)	MQYtd	
Payroll Dynamics (Evolution)	Payroll Register Totals at end of report	Payroll Dynamics uses an Evolution Product
Payroll One	Excel Export	
Payroll People and Payroll Professional	Payroll Register Totals at end of report	Both use an Evolution Product
Payroll Solutions (Millennium)	MQYtd	
PayTime (Millennium)	MQYtd	
PCS	Payroll Register	
Peachtree	Payroll Register	
PrecisionPay	Totals at end of reports	
PrimePay	Totals at end of reports	
Priority Pay	Totals at end of reports	Local Coding is not shown
PS-Pay	Payroll Register Summary Total Page	
QuickBooks/Quickbooks Pro & Online	Employee Earnings Summary or Payroll Summary	
SAP	Different for every client	
SurePay	Totals at end of reports	
Symphony (Evolution)	Payroll Register Totals at end of report	Payroll People uses an Evolution Product
The Payroll Company (PayChoice Online)		Uses a PayChoice Online Product
USA Payroll (Evolution)	Payroll Register Totals at end of report	
UltiPro / Ultimate	Summary Payroll Register (by Date Range, YTD, QTD)	
Vista	Totals at end of reports	
Wells Fargo (Evolution)	Payroll Register Totals at end of report	Wells Fargo uses an Evolution Product
Workday		

Getting Started with ADP

ADP's goal is to consistently exceed your expectations in every area of our partnership. We also know that exceeding your expectations begins with sharing implementation considerations ***appropriately*** and ***transparently*** so that you can understand and prepare internally for your transition. The purpose of this document is to provide you with some information and best practices, gleaned from tens of thousands of successful ADP implementations, which you can review to prepare for your implementation.

Building Your Project Team

The starting point for a successful implementation is selecting your project team. An effective project team is made up of professionals with the necessary skills to partner effectively with your ADP implementation team, to ultimately deliver a quality solution. The combined team will work collaboratively toward the project's ultimate success. Initial and sustained commitment throughout the duration of the project is essential to ensure that all key milestones are met.

It is recommended that you designate the following project roles to your implementation team:	
Executive Sponsor	Responsible for identifying project priorities, allocating resources, and serving as a project advocate to employees within your organization. Assists in removing obstacles, helping to gain consensus on key decisions, and providing executive oversight and key organizational communications.
Project Leader	Responsible for project leadership and decision-making. Oversees and coordinates implementation activities, and disseminates information to your project team and stakeholders. The Project Leader and System Administrator are often the same resource.
System Administrator	Responsible for identifying permissions for all users who are authorized to access the database and other information. The purpose is to ensure that data and system access remains secure during implementation, and is appropriately maintained after implementation.
Depending on the modules purchased, subject matter expertise is recommended to complement the implementation team in the following areas:	
Human Capital Management	Responsible for providing the organizational and employee information for the Human Capital Management (HCM) modules and validating and testing the integrity and workflows for HR information. Knowledge of your human resource procedures and policies is important. Responsibilities include: ▪ Employee hiring and onboarding practices ▪ Performance management information: validating and testing, and knowledge of performance management policies ▪ Recruitment information, such as job requisition, job postings, and knowledge of recruitment policies ▪ Talent Management framework and information
Payroll	Responsible for ensuring the accuracy of payroll information. This individual should possess a thorough understanding of the existing payroll system and work closely with human resource professionals to integrate overall workflows.
Benefits	Responsible for providing benefit information, such as: plans, rates, dependents, eligibility, and account structures. Supports employees who use benefit enrollments, and validates information provided to carriers.
Time & Attendance	Responsible for providing information to configure the Time & Attendance module; knowledge of your schedules, time-off policies, time punch preferences, approval workflows, and validation and testing the integrity of the data.
General Ledger Interface	Responsible for providing General Ledger chart of account information as it relates to payroll and understands how payroll transactions are posted to your General Ledger application.

Resource Commitment

Roles / Modules	Introduction & Analysis	Configuration & Data Conversion	Validation & Learning	Production
Executive Sponsor	Low	Low	Low	Low
Project Leader	Low	Med	High	High
System Administrator	Low	Low	Med	Med
Human Capital Management	High	Med	High	High
Payroll	High	Med	High	High
Time & Attendance	High	Med	High	High
Benefits	High	Med	High	High
Performance	Low	Low	Med	Med
Recruitment	Low	Low	Med	Med
General Ledger Interface	Med	Low	Low	Med
Compensation	Low	Low	Med	Med

Level	Weekly Hours	Description
Low	0 - 2 hours	Specific start time frames will be determined with your implementation team and documented in a project plan. Time commitment can vary based on the number of data input sources, company size, number of employee benefits, and use of custom site content and self-service functionality.
Med	2 - 5 hours	
High*	5 - 8 hours	

* High-level commitment may include client's time to gather information, verify output reports and system setup, test payroll and time punches, validate benefit setup, train employees on self-service and employee registration, train supervisors, and answer employee inquiries about the new system.

Preparing for the Analysis Meeting and Implementation

The purpose of the following sections of this document is to provide a high-level overview of the type of information you will need to gather to prepare for your Implementation Analysis Meeting.

HR Information	
Please have the following items available to help with your HR setup: ▪ Organizational charts ▪ HRIS organizational reports ▪ EEO reports ▪ Job descriptions	
Affordable Care Act	Provide information related to your company's provisions for the Affordable Care Act (ACA). For more information on ACA, go to: www.adp.com/health-care-reform.
Job Classes	Categorize the type of work your employees perform into classes such as Clerical or Management.
NAICS Workers' Comp	Identify your company's North American Industry Classification System (NAICS) workers' compensation codes.
Jobs	Identify the position an employee holds in your company. The codes you assign to jobs can be used for tracking, reporting FLSA, and hours and earnings allocations.
Business Units	Organizational entities that represent the highest level in your organizational structure. Business units drive benefits eligibility, leave eligibility, security access, and reporting, and are required for each employee. Business units can be imported. Examples include department, division, company, or group of employees such as a work group or project team.
Departments for Non-Paid Positions	Specify departments for positions that are not paid through ADP.
Locations	Represent a physical location, site, area, or region where you conduct business. Locations drive benefits and time-off policies, security access, and reporting, and are required for each employee.
Unions	Identify the unions to which the employees in your company may belong.
Reason Types	Identify reason for changes, including: Status Change Reason, Compensation Change Reason, Job Change Reason, and Corporate Group Change Reasons.
Worker Categories	A class or group of employees defined by a common characteristic or attribute. Employee types can be imported. Examples include executive, operational, full-time and part-time employees.

Additional record-keeping options are available with ADP Workforce Now HR:

Pay Grades	Use pay grades to group jobs together that have approximately the same relative internal worth, and are paid at the same rate or range. The process of assigning a job to an appropriate pay grade involves job information, job evaluation, and market considerations.
Salary Structures	The range of standard earnings that your company typically pays your employees. Salary structures provide a basis for comparing an individual employee's earnings with a standard earnings range.

Payroll Information

Please have the following items available to help with your Payroll setup:

- Payroll Register, Payroll Summary, or other payroll reports
- Payroll processing schedule and holiday closures
- Federal ID numbers, which may be found on recently filed Forms 941
- State Income Tax numbers, State Unemployment numbers, current unemployment rate, and tax deposit frequencies
- Local Tax ID numbers, including city, country, school district, and other local jurisdictions

Addresses	Legal, billing, and payroll delivery addresses.
Schedules	Information to determine how often you pay your employees. For example, whether they will be paid on a weekly or biweekly basis, or how to pay your employees when a pay date falls on a weekend or recurring holiday. Selections determine how adjustments are made to your regular payroll schedule.
Labor Tracking / Cost Numbers or	Track labor costs with a number that is six to 50 digits in length. Cost numbers and descriptions can be manually entered or imported from a file using the template provided by ADP. Examples include project tracking or general ledger cost allocations.
Home Departments / Department Numbers	Define home departments with a three or six digit number and description. A department is an organizational entity or entities representing a level below a business unit.
Pay Elements	Items that make up your employees' gross pay, and allow you to select the hours and earnings that should be tracked for these employees. Specify the hours and earnings to track for benefit accruals as well the Affordable Care Act.
Tax Information	Information that ADP uses to report your State Unemployment Insurance (SUI), State Disability Insurance (SDI), and state and local tax information. In addition to SUI taxes, some states require employer or employee contributions to an SDI fund.
Deductions / Pre-Tax Benefits	Flexible benefit programs authorized by Internal Revenue Code 125 in which eligible employees can select from a predetermined list of benefits options. Examples include medical and dental plans, health savings accounts, flexible spending accounts, and adoption assistance.
Deductions / Commuter Benefits	Commuter benefit plans provide tax-exempt funds to be used for eligible transit and parking services. Examples include parking, mass transit, and bicycle.
Deductions / Wage Garnishments & Court Ordered Payments	Wage garnishment is the process by which you withhold a portion of an employee's pay in accordance with wage garnishments and court ordered payment deductions. ADP uses this information to generate wage garnishment and court ordered payment deduction codes.
Deductions / Deposits & Bank Deductions	Deduction types and all of the information related to your employees' banking information for direct deposit. ADP uses this information to generate direct deposit and bank deduction codes.
Deductions / Group Term Life (GTL)	Employer-provided life insurance coverage. If the premium for coverage exceeds $50,000, it is taxable and must be reported as additional income on an employee's Form W-2.
Deductions / Voluntary Post-Tax Deductions	Deductions that employees elect to be taken from their pay after taxes. Voluntary deductions can be paid with pre-tax dollars or after-tax dollars, depending on the type of benefit.
Deferred Compensation	Information relating to compensation plans, including deduction information, company matching, and any provisions.
Memos	Memo codes are used for tracking non-pay items and can be manually entered or imported from a file using the template provided by ADP. Examples include employer costs related to workers' compensation, 401(k) match, or health care; mileage; piecework produced; days worked; or data needed in a general ledger file.
Payroll Reports / Earnings Statement Heading	The company name and address that will appear on earnings statements attached to employee paychecks and pay vouchers.

Benefits Information

Please have the following items available to help with your Benefits setup:

- Benefit Enrollment forms and Benefit Summary Plan documents
- Benefit invoices and Employee Benefit handouts
- Benefit rate calculator
- Benefit brokers
- Current benefit reports

Benefit Plans	All benefit criteria and information including provider, rate, billing eligibility, and effective dates for your Medical, Dental, LTD, AD&D, Flex, Life, Retirement, STD, and other benefit plans.
Open Enrollment	Open enrollment information to determine your timeline and benefit needs.
Dependents	Your dependent indicative information.
Employee Enrollments	Your employee benefit enrollment information and coverage levels.
Carrier Connections	A connection is an electronic file that sends enrollment, eligibility, and demographic information to an insurance provider (carrier) or third-party vendor.

Time Information

Please have the following items available to help with your Time & Attendance setup:

- Time-entry methods
- Employee schedules and company holidays
- Employee handbook
- Lunch and break policies

Data Collection Information	Indicate the address where Time & Attendance hardware will be shipped, including number of devices and shipping contact.
Schedule Information	Schedules help you identify timecard exceptions such as late punches, missed punches, and non-worked time. Include planned shift times for an employee, with the days on which the employee is expected to work and the shift start and end times. You can assign scheduled shifts to a department or other labor charge fields.
Pay Code Master List	Hours/earnings that employees accumulate, both worked and non-worked, are grouped into hours/earnings codes. Examples of hours/earnings codes: Regular, Overtime, Sick, and Vacation.
Supplemental Pay Codes	Include earnings related to your employees' total compensation that cannot be entered on a time sheet, such as mileage, bonuses, uniform allowances, and tips. Supplemental earnings provide a way for your employees to enter pay not included in their gross payroll totals.
Labor Charge Fields	All hours that accumulate into earnings codes in the Time & Attendance module are charged to a defined cost center called a labor charge field. The labor charge structure represents your labor hierarchy and is used to track your employees' hours.
Pay Class Home	An employee's pay class assignment determines the employee's pay cycle, time-entry type, time calculation program, holiday program, attendance program, and wage rate program used by Time & Attendance when calculating the employee's time. Examples include Full Time, Part Time, Salary, and Non-Exempt.

Talent Information	
Please have the following items available to help with your Talent setup: ▪ Hiring sources ▪ Job competencies ▪ Employee development ▪ Employee skills, training and education reports	
Recruitment	Indicate who will be responsible for maintaining recruitment; if managers will be able to create job postings; and which role will initiate hiring a candidate.
Hire Sources	Enter the hiring source for your employee.
Performance	Indicate the types of performance reviews and if you will use a rating scale.
Job Competencies	ADP will provide default job competencies such as computer skills or communication. Please update the list with any additional job competencies.
Talent Profile	Indicate the employee development areas that you will be using. Areas include: Awards, Education, Language, Licenses/Certifications, Membership, Previous Employer, Skills, and Training.

Training Your Team

Knowledge transfer from ADP to your team is an essential component for a successful implementation and overall partnership beyond implementation. Education will enhance your ability to use the system in a manner that aligns with your unique needs and objectives. Your ADP team will work with you to provide training during the initial stages of your implementation. This approach will ensure that you complete your training at the appropriate time.

What Is Your Expected Number of Training Hours?

Module / Feature	Required Hours	Description
Payroll	3.5 hours	These core training hours are required to provide you with the foundation needed to begin using your system. Additional training courses are offered to address your specific solution needs and objectives. Continuous learning opportunities, throughout the life cycle of your solution, give you what you need, exactly when you need it, to maximize performance and ensure your success.
Reporting	1.0 hours	
Human Capital Management	2.0 hours	
Performance	3.0 hours	
Recruitment	2.5 hours	
Compensation	4.5 hours	
Benefits Administration	3.0 hours	
Time & Attendance	2.5 hours	
Time Off	2.5 hours	
System Administration	1.0 hours	

Data Validation

You will want to import certain data elements into your ADP solution. Often, your new ADP solution will have different field definitions than your existing system. Your ADP team will convert and jointly assist your company in converting core data from your current system. Although the ADP conversion programs include checks and balances, data validation will represent an important time commitment. Carefully managing this aspect of the project will play a large role in the ability to meet project timelines. Following are some questions to consider:

- How clean is my data?
- Where is my existing data stored?
- What data is meaningful?
- How much history is required?
- Who will use the converted data and how frequently?

The quality of the data will only be as good as the source from which it is imported, whether that import is done manually or electronically. Taking steps to review your data prior to conversion gives you the opportunity to standardize your data, identify missing or duplicate records, purge unnecessary data, and test for data integrity.

Understanding Your Billing

We want you to understand and feel comfortable with the ADP billing process and particularly what initiates your billing during the implementation. Regular invoicing begins as indicated below.

ADP Workforce Now® Bundled Billing	
Begins with the processing of your first payroll with ADP.	
ADP Workforce Now® Modular Billing	
Human Resource	Begins with the processing of your first payroll with ADP will activate module billing.
Benefits	Begins the earlier of 90 days from the signed agreement or your activation of benefits.
Time & Attendance	Begins the earlier of 90 days from the signed agreement or when you begin to use the system to track time.
Talent	Begins the earlier of 90 days from the signed agreement or when you begin to use the system to track talent data.

Note: Details of your invoicing may be found in the Terms and Conditions section of your ADP sales order.

Summary

We want you to feel prepared and confident that your partnership with ADP will begin with a successful implementation. Selecting the right team, understanding and communicating the expected time commitment, and completing training are important considerations to understand prior to and during implementation. Thank you for reviewing this information and for partnering with ADP!

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