

Year End 2017





Holidays and Important Dates



2017 ADP and Bank Holidays

Date	Holiday	ADP	Bank
November 11, 2017 Saturday	Veteran's Day	*	*
November 23, 2017 Thursday	Thanksgiving	Holiday	Holiday
November 24, 2017 Friday	Day after Thanksgiving	Open	Open
December 25, 2017 Monday	Christmas Day Observed	Holiday	Holiday

* Federal Reserve Banks will be open the preceding Friday for holidays that fall on a Saturday.

2018 ADP and Bank Holidays

Date	Holiday	ADP	Bank
January 1, Monday	New Year's Day	Holiday	Holiday
January 15, Monday	Martin Luther King	Open	Holiday
February 19, Monday	President's Day	Open	Holiday
May 28, Monday	Memorial Day	Holiday	Holiday
July 4, Wednesday	Independence Day	Holiday	Holiday
September 3, Monday	Labor Day	Holiday	Holiday
October 8, Monday	Columbus Day	Open	Holiday
November 12, Monday	Veteran's Day	Open	Holiday
November 22, Thursday	Thanksgiving Day	Holiday	Holiday
December 25, Tuesday	Christmas Day	Holiday	Holiday

W2 Tax Processing Dates

Date	Processing Information
November 16, Thursday	Deadline for Qtr 1-3, 2017 adjustments to be included as amendments and reflected on returns
December 15, Friday	Tax Master File Deadline, Cancellation Deadline
January 4, Thursday	Quarter and year end close by 12:00 noon local time. Last day to release W-2s (entire company)
January 10, Wednesday	Last day to process and release partial W-2 and 1099 adjustments by 3pm local time. Blackout period begins
January 26, Friday	W2s loaded to PRWC by end of day (Puerto Rico W2's - TBA)
January 26, Friday	W-2s and 1099s to leave ADP facility for distribution by this date at the latest
February 1 st , Thursday	Begin producing Forms W-2Cs
February 2 nd , Friday	Begin distribution of fourth quarter SODs
February 28 th , Wednesday	Begin distribution of annual SODs
March 1 st , Thursday	Begin amendment process for prior quarter runs

2017 Tax deposits

Date	Federal Tax Deposits > \$100,000
December 29, Friday	Last day to process payrolls over \$100,000 in liabilities with a check date of December 31, 2017
January 2, Tuesday	Deposit due for liabilities greater than \$100,000 with a check date of December 31, 2017

Date	Federal Tax Deposits < \$100,000
January 4, Thursday	Last day to process payrolls under \$100,000 in liabilities with a check date of December 31, 2017
January 5, Friday	Deposit due for liabilities under than \$100,000 with a check date of December 31, 2017





New York Paid Family Leave

On April 4, 2016, New York Governor Andrew Cuomo signed into law legislation as part of the 2016-17 state budget that provides the nation's first 12- week paid family leave policy. It provides job-protected, paid leave to bond with a new child, care for a loved one with a serious health condition or to help relieve family pressures when someone is called to active military service.

On June 1, 2017 the DFS announced that the weekly contribution rate for Paid Family Leave Benefits is **0.126% of the employee's weekly wage**(capped at New York State's current average weekly wage of \$1,305.92). Consequently, the maximum contribution would be **\$1.65 per week** per employee for coverage beginning January 1, 2018.



October 2017 release will update the Payroll Engine to allow payrolls with a payday of 1/1/18 and greater to have the tax automatically calculated.

Set up instructions for 1/1/18



For clients that have set up NYPFL for 2017, verify that deduction code is mapped to Box 14.

2018 Limits



2018 Limits have not yet been published, when released information can be obtained from your HCM Service Consultant.

Wage Base Limits and Percentages

Limits and Rates	2017	2018
Social Security Base Limit	\$127,200	
Social Security Tax Rate	6.2%	
Medicare Wage Limit	None	
Medicare Tax Rate (FMed and FSUR)	1.45% plus .9% over \$200,000	
FUTA Wage Limit	\$7,000	
FUTA Effective Tax Rate	.06%	

Deferred Compensation Limits

Description	Limit Code	2017	2018
401(k), 403(b), and 457 Plan Limit	4KP, 43B, 45G	\$18,000	
Eligible YTD Gross Compensation	4KQ	\$270,000	
Combined limit for all contributions	4KT	\$54,000	
401(k), 403(b), and 457 Catch-up Limit	CU1, CU2	\$6,000	
401(k) Puerto Rico Plan Limit	4PT	\$15,000	
401(k) Puerto Rico Catch-up Limit	4PC	\$1,500	

HSA Limits

Description	2017	2018
Contribution Limit Self-only HDHP coverage	\$3,400	\$3,450*
Contribution Limit Family HDHP coverage	\$6,750	\$6,900*
Minimum Deductible Self-only coverage	\$1,300	\$1,350
Minimum Deductible Family coverage	\$2,600	\$2,700
Maximum out of pocket Self-only coverage	\$6,550	\$6,650
Maximum out of pocket Family coverage	\$13,100	\$13,300

* An individual who has reached the age of 55 by the end of the calendar year may contribute an additional \$1,000 per year.

2018 TAX TABLES



Downloads available to clients on
Thursday, October 26th for pick up.



YEAR END REPORTS



Company Level Reports





Calendar Level

- Review the remaining 2017 payroll processing dates
- Identify the West NSC and bank holidays
- Review the 2018 payroll process calendar
- Send calendar changes to your HCM Service Consultant

Annual Payroll Calendar Report

Meeting of the Minds

Annual Payroll Calendar Report

Meeting of the Minds Company

COMPID: MOTM

PAYGROUP: 1

** Callin or Delivery falls on Sat. or
 # Callin falls on Pro or Bank Holiday
 @ Delivery falls on or before Callin
 ? Federal Law dictates 48 business
 hours lead time for direct deposit

\$ Check Date falls on Bank Holiday
 ! Delivery falls on National Holiday
 ?H Indicates a bank holiday impacting
 the 48 hour lead time needed for direct
 deposit.

Pay Num	Callin	Delivery	Start	End	Check	G/L Per	Days Acor	Acor %	Holiday Pay	Tax Hrs	Exemption Cyc	Exception	Frequency Codes
14	Wed 07/26/0X	Thu 07/27/0X	Sun 07/16/0X	Mon 07/31/0X	Mon 07/31/0X	7	Q	Q	Q	Q	-	DWL/RPS/FXE/	M2,A2,ML,ME
15	Thu 08/1/0X	Fri 08/1/0X	Tue 08/01/0X	Tue 08/15/0X	Tue 08/15/0X	8	Q	Q	Q	Q	-	DWL/RPS/FXE/	M1,A1,MF,MB
16	Mon 08/28/0X	Tue 08/29/0X	Wed 08/16/0X	Thu 08/31/0X	Thu 08/31/0X	8	Q	Q	Q	Q	-	DWL/RPS/FXE/	M2,A2,ML,ME
17	Tue 09/12/0X	Wed 09/13/0X	Fri 09/01/0X	Fri 09/15/0X	Fri 09/15/0X	9	Q	Q	Q	Q	-	DWL/RPS/FXE/	M1,A1,MF,MB
18	Tue 09/26/0X	Wed 09/27/0X	Sat 09/16/0X	Sat 09/30/0X	Fri 09/29/0X	9	Q	Q	Q	Q	-	DWL/RPS/FXE/	M2,A2,ML,ME,QL,QE
19	Tue 10/1/0X	Wed 10/1/0X	Sun 10/01/0X	Sun 10/15/0X	Fri 10/13/0X	10	Q	Q	Q	Q	-	DWL/RPS/FXE/	M1,A1,MF,MB,OF,OB
20	Thu 10/26/0X	Fri 10/27/0X	Mon 10/16/0X	Tue 10/31/0X	Tue 10/31/0X	10	Q	Q	Q	Q	-	DWL/RPS/FXE/	M2,A2,ML,ME
21	Fri 11/1/0X	Mon 11/13/0X	Wed 11/01/0X	Wed 11/15/0X	Wed 11/15/0X	11	Q	Q	Q	Q	-	DWL/RPS/FXE/	M1,A1,MF,MB
22	Mon 11/27/0X	Tue 11/28/0X	Thu 11/16/0X	Thu 11/30/0X	Thu 11/30/0X	11	Q	Q	Q	Q	-	DWL/RPS/FXE/	M2,A2,ML,ME
23	Tue 12/12/0X	Wed 12/13/0X	Fri 12/01/0X	Fri 12/15/0X	Fri 12/15/0X	12	Q	Q	Q	Q	-	DWL/RPS/FXE/	M1,A1,MF,MB
24	Tue 12/19/0X	Wed 12/20/0X	Sat 12/16/0X	Sun 12/31/0X	Fri 12/22/0X	12	Q	Q	Q	Q	-	DWL/RPS/FXE/	M2,A2,ML,ME,QL,QE,YL,YE

***** TRANSMISSION DUE BY 10:00 AM PST *****



Company Level : LEGAL NAME

Verify information is set up accurately: Company legal name and address

The image shows two overlapping windows from the ADP Company Master software. The background window displays the 'Company Master' form with the following data:

Legal Name	Meeting of the Minds Company	Contact	Bob Black
Name		Title	Payroll Manager
Address	1234 Broadway Ave	Phone	(925) 555-1212 X 101
City	Any town	Class	
State	CA	Zip	95555-
Phone	(925) 555-5555	Ext	
FAX	() -		
Start Dt	07/01/2001	Transid	999
Chk Dist		Version	780
Hub Loc		Stand Alone	<input type="checkbox"/>
Consldt	12/11/2003		

The foreground window, also titled 'Company Master', shows the 'Directions to Client' section with several empty text input fields. At the bottom of this window, the 'Common Pay Agent' is set to 'Y', and the 'Name' field contains 'Name of Common Pay Agent' and 'As Agent For Meeting of the Minds'.

PTO Roll Logic Report

SIC	SICK	Sick Plan	PTO ROLL DATE	YTD
		ROLL WHEN Anniversary	LIMIT CARRYOVER	No
		ROLL ON n/a	ROLL LIMIT TO	n/a
		ROLL DATE n/a		
		ROLL TO n/a		
		ZERO NEGATIVES No	ROLL YTD BASED ON	Period End Date
			ROLL YTD ORDER	Process Rolls First
			YTD ROLL DATE	01/01
VAC	VACATION	Vacation Plan		
		ROLL WHEN Anniversary	LIMIT CARRYOVER	Yes
		ROLL ON n/a	ROLL LIMIT TO	n/a
		ROLL DATE n/a		
		ROLL TO n/a		
		ZERO NEGATIVES No	ROLL YTD BASED ON	Period End Date
			ROLL YTD ORDER	Process Taken First
			YTD ROLL DATE	01/01
VPT	PT VAC	Part Time Vacation		
		ROLL WHEN Anniversary	LIMIT CARRYOVER	No
		ROLL ON n/a	ROLL LIMIT TO	n/a
		ROLL DATE n/a		
		ROLL TO n/a		
		ZERO NEGATIVES No	ROLL YTD BASED ON	Period End Date
			ROLL YTD ORDER	Process Rolls First
			YTD ROLL DATE	01/01

Company Level : TAX

MOTM		Tax Jurisdictions and Rates										Report # 1182.01		Tax Year	
Tax Area	Tax Group	Tax Code	ADP Code	Tax Description	Employee-Employer	Active	Memo	Tax Id/Other Id	Tax Rate	Supplemental Rate	Update Rate	Limit/Period	YTD Hist	Activity During Year	
US	FED	FICA		Social Security (FICA)	EE	YES	NO	99-9999999	6.20000	0.00000	YES	113700.00	YES	YES	
US	FED	FICA		Social Security - Employer	ER	YES	NO	99-9999999	6.20000	0.00000	YES	113700.00	YES	YES	
US	FED	FIT		Federal Income Tax	EE	YES	NO	99-9999999	TABLE	25.00000	YES	0.00	YES	YES	
US	FED	FMED		Federal Medicare	EE	YES	NO	99-9999999	1.45000	0.00000	YES	0.00	YES	YES	
US	FED	FMED		Federal Medicare - Employer	ER	YES	NO	99-9999999	1.45000	0.00000	YES	0.00	YES	YES	
US	FED	FSUR		Federal Medicare Surcharge	EE	YES	NO	99-9999999	0.90000	0.00000	YES	0.00	YES	YES	
US	FED	FUTA		Federal Unemployment	ER	YES	NO	99-9999999	0.60000	0.00000	YES	7000.00	YES	YES	
AL	SIT	SIT		Alabama Income Tax	EE	NO	NO	APPLIED FOR	TABLE	5.00000	YES	0.00	NO	NO	
AL	SUI	SUTA		Alabama Unemployment	ER	YES	NO	*APPLIED FOR	2.50000	0.00000	NO	8000.00	NO	NO	
AZ	SIT	SIT		Arizona Income Tax	EE	YES	NO	99-9999999	TABLE	0.00000	YES	0.00	NO	NO	
AZ	SUI	SUTA		Arizona Unemployment	ER	YES	NO	APPLIED FOR	2.70000	0.00000	NO	7000.00	NO	NO	

ERROR: The following agencies do not accept returns with 'APPLIED FOR' SUI Tax IDs
 Agencies found: AL-SUTA ER

There are State and Local jurisdictions that do not allow “Applied For” IDs for filing:



Some States also require POA's and TPA's.

Special Considerations

Sample listing of State jurisdictions that do not allow “Applied For” IDs for filing:

	AL SIT/SUI		HI SUI		NM SIT/SUI
	AR SUI		LA SIT		IA SIT
	CO SUI		IN SIT		PR SUI
	DE SUI		MA SUI		UT SIT
	DC SUI		MN SIT/SUI		WA SUI
	FL SUI		GA SIT		WI SUI

Special Considerations

- Sample listing of Local jurisdictions which do not allow “Applied For” IDs for filing:



Denver, CO/Aurora, CO



Jefferson, AL



Wilmington, DE



Springboro, OH



Kenton County, KY



Scranton, OH



Kettering, OH



IN locals

- Contact ADP for information on a specific local

Special Considerations



§ ADP requires proof of the ID and a Tax Jurisdiction Change Form before **1/4/18 (or release date)** for any State / Local jurisdictions that do not allow “Applied For” status

§ Any SUI returns not filed will negatively impact the 940 Annual Return



Company Level Items

- Taxation of earning/deduction codes
- Earning/deduction codes are set up to print correctly in W-2 summary
- Verify that Roll up earning/deduction codes are correct
- Box 12 and 14 are marked accurately
- W-2 retirement box conditions

Earnings and Deduction Taxation Analysis Reports

Meeting of the Minds Company				EARNINGS TAXATION ANALYSIS				Check Date	N/A	Period	N/A		
Page 1													
TYPE	CODE	NAME	DESCRIPTION	CALC GROUP CODE	FEDERAL WAGES BOX 1	FICA WAGES BOXES 3,5	STATE WAGES BOX 16	LOCAL WAGES BOX 18	OTHER W-2 BOX/DESCRIPTION	INCL/EXCL/ROLL	W2	ROLL CODE	
** Active Earnings													
EARNING	399	DECEASE	Deceased Wage Payment	DCN	TAX	NOT W/H	N/A	TAX	NOT W/H	TABLE			
EARNING	3PP	3PARTY	3rd Party Payee	REG	ADDS	ADDS	ADDS	ADDS	ADDS	TABLE			
EARNING	3SP	3RD SICK	Third Party Sick Pay	S3P	TAX	NOT W/H	ADDS	ADDS	ADDS	TABLE			
EARNING	3ST	3SPNONTX	Third Party Sick Pay Non-tax	NTX	N/A	N/A	N/A	N/A	TABLE	Box 12/CODE J			
EARNING	400	BONUS	Bonus	SUP	ADDS	ADDS	ADDS	ADDS	TABLE				
EARNING	555	RENT	Housing/Rental Subsidies	SUP	SUPP	ADDS	ADDS	ADDS	TABLE				
EARNING	570	3RDSTD-6	3rd Party STD < 6 Months	S3P	TAX	NOT W/H	ADDS	ADDS	TABLE				
EARNING	571	3RDLTD-6	3rd Party LTD > 6 Months	S6M	ADDS	N/A	ADDS	ADDS	TABLE				
EARNING	573	3SC EXCL	Excludable 3rd Party Sick Pay	NTX	N/A	N/A	N/A	N/A	TABLE	Box 12/CODE J			
EARNING	AFB	AUTOFRNG	Auto Fringe Benefit	REG	ADDS	ADDS	ADDS	ADDS	TABLE	Box 14/AUTO			
EARNING	AUT	AUTOALOW	Auto Allowance	REG	ADDS	ADDS	ADDS	ADDS	TABLE	Box 14/AUTO			
EARNING	AWD	AWARD	Award	SUP	SUPP	ADDS	ADDS	ADDS	TABLE				
EARNING	BNS	BONUS	Bonus Pay	REG	ADDS	ADDS	ADDS	ADDS	TABLE				
EARNING	COM	COMMISSN	Commission	SUP	SUPP	ADDS	ADDS	ADDS	TABLE				
EARNING	DBL	DOUBLE	Double Time	REG	ADDS	ADDS	ADDS	ADDS	TABLE	R		OV1	

Meeting of the Minds Company				DEDUCTION TAXATION ANALYSIS				Check Date	N/A	Period	N/A		
Page 1													
TYPE	CODE	NAME	DESCRIPTION	DED TYPE	CALC GROUP CODE	FEDERAL WAGES BOX 1	FICA WAGES BOXES 3,5	STATE WAGES BOX 16	LOCAL WAGES BOX 18	OTHER W-2 BOX/DESCRIPTION	INCL/EXCL/ROLL	Pays	ROLL CODE
** Active Deductions													
DEDUCTION	3SP	3RD SICK	3rd Party Sick Pay Offset	N	NET	N/A	N/A	N/A	N/A		E		
DEDUCTION	650	MEDICAL	After Tax Medical Plan	N	MED	N/A	N/A	N/A	N/A				
DEDUCTION	ADV	ADVANCE	Advance	N	NET	N/A	N/A	N/A	N/A				
DEDUCTION	AFD	AUTOFRNG	Auto Fringe Benefit Offset	N	NET	N/A	N/A	N/A	N/A		E		
DEDUCTION	DUE	DUES	Union Dues	N	NET	N/A	N/A	N/A	N/A				
DEDUCTION	GTL	GRP LIFE	Group Term Life > \$50,000	N	NET	N/A	N/A	N/A	N/A		E		
DEDUCTION	K01	LCGP	Large Capital Growth Portfolio	N	NET	N/A	N/A	N/A	N/A			A	



Processing Third Party Sick Pay

- Processing Third Party Sick Pay depends on the following:
 - Who issues the W-2?
 - Who remits the employee taxes?
 - Who remits the employer taxes?



Third Party Sick Pay Scenarios

Issues W-2	Remits Employer Taxes	Remits Employee Taxes	What needs to happen:
ADP/ West NSC	ADP/ West NSC	Third Party	<ol style="list-style-type: none"> 1. Manual check posted to the employee to update employee and pay employer taxes 2. EE taxes will be recorded, but not withheld 3. "T" type earnings code with offset deduction
Third Party	Third Party	Third Party	Nothing additional – Employee will receive W-2 from Third Party
Third Party	ADP/ West NSC	Third Party	<ol style="list-style-type: none"> 1. Manual check posted to Recap employee recording ER wages and taxes 2. "T" type earnings code with offset deduction 3. Notify AM of Recap EE to mark TPSP flag to "Y"



Employee Level Reports



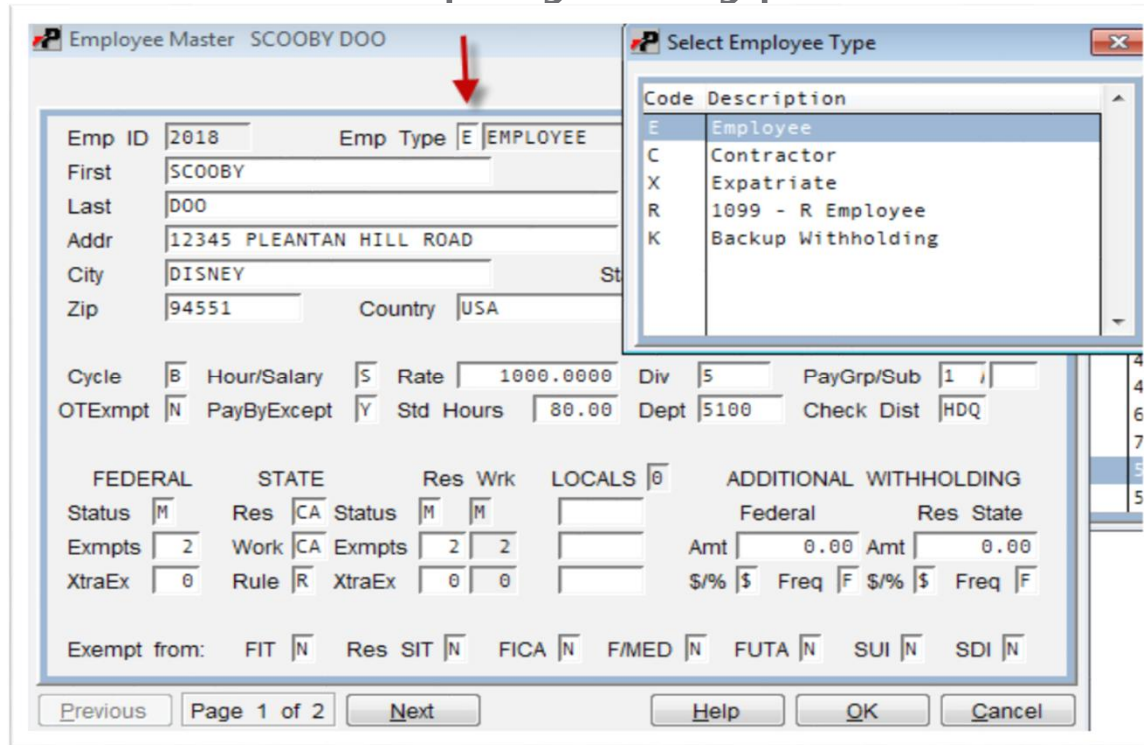


Employee Set-up

- Confirm employees have correct employee type
 - Examples:
 - “E” (Employee)
 - “C” (Contractor)
 - “R” (Retiree)
- Review tax-exempt associates



Employee Type



Employee Master SCOOPY DOO

Emp ID 2018 Emp Type E EMPLOYEE

First SCOOPY

Last DOO

Addr 12345 PLEANTAN HILL ROAD

City DISNEY St

Zip 94551 Country USA

Cycle B Hour/Salary S Rate 1000.0000 Div 5 PayGrp/Sub 1 /

OTExmpt N PayByExcept Y Std Hours 80.00 Dept 5100 Check Dist HDQ

FEDERAL STATE Res Wrk LOCALS 0 ADDITIONAL WITHHOLDING

Status	Res	CA	Status	M	M	Federal	Res	State						
Exmpts	2	Work	CA	Exmpts	2	2	Amt	0.00	Amt	0.00				
XtraEx	0	Rule	R	XtraEx	0	0	\$/%	\$	Freq	F	\$/%	\$	Freq	F

Exempt from: FIT N Res SIT N FICA N F/MED N FUTA N SUI N SDI N

Previous Page 1 of 2 Next Help OK Cancel

Select Employee Type

Code	Description
E	Employee
C	Contractor
X	Expatriate
R	1099 - R Employee
K	Backup Withholding

Tax Exempt Flags

Employee Master SCOOPY DOO

TaxInfo Rates Options

Emp ID 2018 Emp Type E EMPLOYEE ID Type A APPLD FOR
First SCOOPY ID Number APPLIED FOR
Last DOO Status A RFT
Addr 12345 PLEANTAN HILL ROAD Hire Date 03/09/2010
City DISNEY State CA Term Date / /
Zip 94551 Country USA Rehire Date / /

Cycle B Hour/Salary
OExmpt N PayByExcept

FEDERAL STATE
Status M Res CA S
Exmpts 2 Work CA E
XtraEx 0 Rule R X

Sub 1 /
List HDQ
WITHHOLDING
Res State
nt 0.00
% \$ Freq F

Federal Exempt

Code	Description
N	Not Exempt
Y	Yes - Exempt from Withholding
A	Additional Only
X	Exempt from Tax

Exempt from: FIT Res SIT FICA F/MED FUTA SUI SDI

Previous Page 1 of 2 Next Help OK Cancel



Employee Level

Verify Form 1099 information:

- Earnings are accurately distributed in Form 1099R





Employee Level

- Review Supplemental Pay
- Review Deduction Code Limit and Limit Periods For The Upcoming Year



Supplemental Limit Report

Meeting of the Minds Company		Supp Pay Limit Report				Report # 1289.01			
PAY GROUP	EMP ID	EMPLOYEE NAME	SUP CODE	STATUS	SUPP PAY NAME	SUPPAY FREQUENCY	LIMIT	PERIOD	EARNED
** Employee Status: Active									
1	4100	ZEPPORONI, MAX	AUT	A	Auto Allowance	P	5000.00	Y	
1	4244	ALWAYS, JERRY SOMETIMES	COM	A	Commission	P	5000.00	Y	
1	123417	DOE, JOHN	COM	A	Commission	P	1000000.00	Y	500000.00

** If YTD Earned is blank, it is zero.

Y - Earned amounts will clear at the end of the calendar year
A - Earned amounts will accumulate until the limit is reached
P - Indicates limit per pay period
M - Indicates limit per month

Deduction Limit Report

Meeting of the Minds Company		Deduction Limit Report				Report # 0937,01		
PAY GROUP	EMP ID	EMPLOYEE NAME	DED CODE	STATUS	DEDUCTION NAME	LIMIT	PERIOD	TAKEN
** Employee Status: Active								
2	123419	DUCK, DAFFY	3SP	A	3rd Party Sick Pay Offset	1000.00	Y	0.00
1	4103	OHMAN, KRIS	3SP	A	3rd Party Sick Pay Offset	2000.00	Y	0.00
1	123421	GATES, BILL	4K	A	401(k) Savings Plan	2000.00	Y	0.00
1	4507	HOUSTON, DEBORAH	4K	A	401(k) Savings Plan	9000.00	Y	0.00
1	4498	IBRAHIM, KHALID	4K	A	401(k) Savings Plan	5100.00	Y	0.00
1	4417	JOHNSON, RUSTY	4K	A	401(k) Savings Plan	8700.00	Y	0.00
1	4103	OHMAN, KRIS	4K	A	401(k) Savings Plan	7938.00	Y	0.00
1	4438	VASCO, RAMON	4K	A	401(k) Savings Plan	3354.00	Y	0.00
1	4608	QUAN, RALPH	600	A	Pretax Medical Plan	10000.00	Y	0.00
1	123420	MOUSE, WICKEY	601	A	Pretax Medical Plan	2000.00	Y	0.00
1	4644	AMATO, SUBBAT	ADV	A	Advance	1000.00	A	1000.00
1	123421	GATES, BILL	GR1	A	Garnishment # 1	2000.00	A	900.00
1	123420	MOUSE, WICKEY	GR1	A	Garnishment # 1	5000.00	A	108.71
1	4578	ROBERTSON, JULIA	GR1	A	Garnishment # 1	3510.25	A	3539.39
1	4639	ANDERSONVILLE, JAMES	GR2	A	Garnishment # 2	5000.00	A	524.22
1	4608	QUAN, RALPH	GR2	A	Garnishment # 2	1000.00	A	1000.00
1	4244	ALWAYS, JERRY	REP	A	Advance Repayment	100.00	A	100.00
1	4477	AZIZA, KEITH	UNY	A	United Way	20.00	Y	0.00

** If YTD Earned is blank, it is zero.

Y - Earned amounts will clear at the end of the calendar year
 A - Earned amounts will accumulate until the limit is reached
 P - Indicates limit per pay period
 M - Indicates limit per month



Negative Wage Report

Meeting of the Minds Company		Negative Wages Report						Report # 0395_01										
Page	1							Check Date	Period									
Account Manager:																		
Name ID	SSN/UM Taxarea Tax	Status	Quarter 1			Quarter 2			Quarter 3			Quarter 4			YTD			
			Gross	Taxable	Tax	Gross	Taxable	Tax	Gross	Taxable	Tax	Gross	Taxable	Tax	Gross	Taxable	Tax	
RALSTON, JORDAN 5763			A															
	US FICA-EE				-3400.00	-3400.00										-3400.00	-3400.00	
	US FICA-ER				-3400.00	-3400.00										-3400.00	-3400.00	
	US FIT				-3400.00	-3400.00	-834.49									-3400.00	-3400.00	-834.49
	US FMED-EE				-3400.00	-3400.00										-3400.00	-3400.00	
	US FMED-ER				-3400.00	-3400.00										-3400.00	-3400.00	
	US FUTA				-3400.00	-3400.00										-3400.00	-3400.00	
	CA CA-ETF				-3400.00	-3400.00										-3400.00	-3400.00	
	CA CA-SDI				-3400.00	-3400.00										-3400.00	-3400.00	
	CA CA-SIT				-3400.00	-3400.00	-241.32									-3400.00	-3400.00	-241.32
	CA CA-SUTA				-3400.00	-3400.00										-3400.00	-3400.00	
SHATTUCK, RAYMOND 4485			A															
	US FICA-EE				-10778.36	-10778.36										-10778.36	-10778.36	
	US FICA-ER				-10778.36	-10778.36										-10778.36	-10778.36	
	US FIT				-9916.82	-9916.82	-2396.73									-9916.82	-9916.82	-2396.73
	US FMED-EE				-10778.36	-10778.36										-10778.36	-10778.36	
	US FMED-ER				-10778.36	-10778.36										-10778.36	-10778.36	
	US FUTA				-10769.22	-10769.22										-10769.22	-10769.22	
	CA CA-ETF				-10769.22	-10769.22										-10769.22	-10769.22	
	CA CA-SDI				-10769.22	-10769.22										-10769.22	-10769.22	
	CA CA-SIT				-9916.82	-9916.82	-749.36									-9916.82	-9916.82	-749.36
	CA CA-SUTA				-10769.22	-10769.22										-10769.22	-10769.22	
THOMPSON, LISA 888			A															
	US FICA-EE									-2941.61	-2941.61	-182.38						
	US FICA-ER									-2941.61	-2941.61	-182.38						
	US FMED-EE									-2941.61	-2941.61	-42.65						
	US FMED-ER									-2941.61	-2941.61	-42.65						
TREDWELL, MIKE 4351			A															
	CA CA-ETF									-1603.20	-1603.20	-1.60						
	CA CA-SDI									-1603.20	-1603.20	-14.43						
	CA CA-SIT									-1603.20	-1603.20	-18.39						
	CA CA-SUTA									-1603.20	-1603.20	-54.51						
TYLER, BILL 4204			A															
	US FICA-EE									-764.60	-764.60	-47.41						
	US FICA-ER									-764.60	-764.60	-47.41						
	US FIT									-714.60	-714.60	-46.90						
	US FMED-EE									-764.60	-764.60	-11.09						
	US FMED-ER									-764.60	-764.60	-11.09						
	US FUTA									-764.60	-764.60	-6.12						
	CA CA-ETF									-764.60	-764.60	-0.76						





W-2 Preview Report Cover Page

ADPMOTM2
10/10/2017

W2 Preview Report

Report # 6001.01

Tax year 2017

Company Information

FEIN.....: 999999999

Legal Name...: Meeting of the Minds Company 2017

Address.....: 4125 Hopyard Road
Pleasanton, CA 94588

The data on this report is used for the form W-2. If the information is incorrect, contact your account manager.



W-2 Preview Report

MOTM		W2 Preview Report				Report # 6001.01		Tax year	
R T S	1								
e P t									
t S a	Employee Data, Box 1 - Box 11	State	State Totals Wages	Taxes	Code	Local Totals Wages	Taxes	Box 12	Box 14
	ALWAYS, JERRY L Div/Dept:4 /4000 Res:NJ Paygp:1 Outpt:B FIT Wages: 302200.00 FIT W/H: 75155.29 FICA Wages: 113700.00 FICA W/H: 7049.40 FMED Wages: 302200.00 FMED W/H: 5301.70	NJ NY	302200.00 302200.00	0.00 28976.74					3.40 NY-SDI
	AMATO, SUBBAT Div/Dept:4 /4000 Res:CA Paygp:1 Outpt:B FIT Wages: 500.00 FIT W/H: 125.00 FICA Wages: 500.00 FICA W/H: 31.00 FMED Wages: 500.00 FMED W/H: 7.25	CA	500.00	33.00					
	BAKER, NORMAN Div/Dept:6 /6200 Res:CA Paygp:1 Outpt:B FIT Wages: 500.00 FIT W/H: 125.00 FICA Wages: 500.00 FICA W/H: 31.00 FMED Wages: 500.00 FMED W/H: 7.25	CA	500.00	33.00					5.00 CA-SDI
	INGLIS, STEWART Div/Dept:5 /5310 Res:CA Paygp:1 Outpt:B FIT Wages: 11000.00 FIT W/H: 1617.79 FICA Wages: 11000.00 FICA W/H: 682.00 FMED Wages: 11000.00 FMED W/H: 159.50	CA	11000.00	804.27					110.00 CA-SDI
	OHMAN, KRIS Div/Dept:5 /5300 Res:CA Paygp:1 Outpt:B FIT Wages: 2148.57 FIT W/H: 172.12 FICA Wages: 2148.57 FICA W/H: 133.21 FMED Wages: 2148.57 FMED W/H: 31.15	CA	2148.57	31.98				3.00 C	21.46 CA-SDI
X	SOLECTRON, JOE Div/Dept:5 /5200 Res:CA Paygp:1 Outpt:B FIT Wages: 45000.00 FIT W/H: 0.00 FICA Wages: 0.00 FICA W/H: 0.00 FMED Wages: 0.00 FMED W/H: 0.00	CA	45000.00	0.00				5000.00 D	
X	ZEPPORONI, MAX Div/Dept:7 /7400 Res:CA Paygp:1 Outpt:B FIT Wages: 11463.19 FIT W/H: 2621.67 FICA Wages: 12474.96 FICA W/H: 773.45 FMED Wages: 12474.96 FMED W/H: 180.89	CA	11463.19	1061.33				3.00 C 1011.77 D	124.72 CA-SDI





W-2s and 1099s



Employee Level

- Correct W-2/1099 report errors
- Verify social security numbers and resolve issues





W2/1099 Error Report

ADPMOTM2

1

10/06/2017

W2 / 1099 Error Report

Report # 6003,01

Tax year 2017

Form W2

Emp ID
4244

Employee Name
ALWAYS, JERRY SOMETIMES

Severity
Fatal

Error Messages
State taxes withheld but no state wages for the state: for Emp ID: 4244

Note: Severity was added to this report.

Social Security Number Verification



- § SSNs can be sent to the Social Security Administration to be matched to your records.
- § This report complies with the Social Security Number Verification Service (SSNVS).
- § Please note that you will need a Requestor ID Code that you would receive from the Social Security Administration and is based off your FEIN. More information can be found at:

www.ssa.gov/employer/ssnv.htm.



Errors that Prevent Processing of W2's

1099 Dist Code Issues

EE has invalid Distribution Code

YTD FIT Tax/No FIT Wages and YTDSIT Tax/No SIT Wages

Federal Taxes withheld but no federal wages

State taxes withheld but no state wages for the state

FICA/FMED

Medicare wages/tips is less than SS wages/tips and SS wages/tips is at the FICA limit

SS tax withheld is nonzero, but both SS wages and SS tips are zero

Medicare tax withheld is nonzero, but Medicare wages/tips is zero

Medicare wages/tips is less than SS wages/tips and SS wages/tips is below the FICA limit

Puerto Rico Issues

The sum of box 13, 14 and 15 cannot exceed YTD wages - Box 7, 8, 9, 10 and 16 (if salary code in Box 16 is 'E')

Puerto Rico SIT Wages but no FICA/FMED wages and taxes

1099-R Preview Report

MOTM		1099R Preview Report				Report # 6011,01			Tax year 20xx		
1		1099 Employee Data				<----- State Totals ----->			<----- Local Totals ----->		
						State	Wages	Taxes	Code	Wages	Taxes
N	N	BRADEN MARK				CO	4750.00	0.00			
O	O	Emp ID: 4504									
T	T	Div: 4 Dept: 4591 Res. State: CO Paygrp: 1									
E	E	Distribution Code: GenSeq: 007									
1	2	Gross Dist.: 4750.00 FIT withheld: 0.00 Percent (%): 0.00									
3	3	Taxable Amt.: 4750.00 EE Contributions: 0.00 Total EE Contrib.: 0.00									
		Capital Gain: 0.00 Net Appreciation: 0.00 % of Total Dist.: 0.00									
		Other: 0.00									
X		BRADFORD GREG				CA	2500.00	0.00			
		Emp ID: 4633									
		Div: 7 Dept: 7300 Res. State: CA Paygrp: 1									
		Distribution Code: 7 GenSeq: 007									
		Gross Dist.: 2500.00 FIT withheld: 0.00 Percent (%): 0.00									
		Taxable Amt.: 2500.00 EE Contributions: 0.00 Total EE Contrib.: 0.00									
		Capital Gain: 0.00 Net Appreciation: 0.00 % of Total Dist.: 0.00									
		Other: 0.00									
X		BRINIDAD LEONILLO A.				CA	7950.00	0.00			
		Emp ID: 4549									
		Div: 4 Dept: 4300 Res. State: CA Paygrp: 1									
		Distribution Code: G GenSeq: 007									
		Gross Dist.: 7950.00 FIT withheld: 0.00 Percent (%): 0.00									
		Taxable Amt.: 0.00 EE Contributions: 0.00 Total EE Contrib.: 0.00									
		Capital Gain: 0.00 Net Appreciation: 0.00 % of Total Dist.: 0.00									
		Other: 0.00									
		DAUGHERTY SUSAN				CA	1500.00	0.00			
		Emp ID: 4583									
		Div: 4 Dept: 4591 Res. State: CA Paygrp: 1									
		Distribution Code: GenSeq: 007									
		Gross Dist.: 1500.00 FIT withheld: 0.00 Percent (%): 0.00									
		Taxable Amt.: 0.00 EE Contributions: 0.00 Total EE Contrib.: 0.00									
		Capital Gain: 0.00 Net Appreciation: 0.00 % of Total Dist.: 0.00									
		Other: 0.00									
X		DAVOST WENDY				CA	2000.00	0.00			
		Emp ID: 4631									
		Div: 4 Dept: 4591 Res. State: CA Paygrp: 1									
		Distribution Code: 7 GenSeq: 007									
		Gross Dist.: 2000.00 FIT withheld: 0.00 Percent (%): 0.00									
		Taxable Amt.: 2000.00 EE Contributions: 0.00 Total EE Contrib.: 0.00									
		Capital Gain: 0.00 Net Appreciation: 0.00 % of Total Dist.: 0.00									
		Other: 0.00									
		DIAZ EMILIO L.				PR	3500.00	0.00			
		Emp ID: 4574									
		Div: 6 Dept: 6200 Res. State: PR Paygrp: 1									
		Distribution Code: G GenSeq: 007									
		Gross Dist.: 3500.00 FIT withheld: 0.00 Percent (%): 0.00									
		Taxable Amt.: 0.00 EE Contributions: 0.00 Total EE Contrib.: 0.00									
		Capital Gain: 0.00 Net Appreciation: 0.00 % of Total Dist.: 0.00									
		Other: 0.00									

1099-R Distribution Code

The screenshot displays the 'Employee Master' window for 'SCOOPY D00'. The 'FUTURE CHANGES' section includes fields for Stat, Date, Rate, and Cycle. The 'W-2 ADDITIONAL INFORMATION' section includes checkboxes for Statutory, Deceased, Legal Rep, Retirement, Defd Comp, 942, W-2 Output, Total Dist, and Dist Code. The 'LOCATION INFORMATION' section includes fields for Region, Location, Building, Floor, Mail, and Wrk Site. A red arrow points to the 'Dist Code' field, which is highlighted in blue. A secondary window titled '1099 Distribution Codes' is open, showing a list of codes and descriptions. The 'Dist Code' field in the main window is set to '9', which corresponds to 'Cost of current life insurance protection' in the secondary window.

Code	Description
	Blank, no distribution
1	Early Distribution, no known exception
2	Early Distribution, exception applies
3	Disability
4	Death
5	Prohibited transaction
6	Section 1035 exchange
7	Normal Distribution
8	Excess contributions taxable in current year
9	Cost of current life insurance protection

Understanding the W-2

Objective: How to read and interpret the W-2, using handy reference documents

How to Arrive at Taxable Wages

Federal Wages, Tips, and Other Compensation

GROSS	(Taxable Fringe Benefits and Tips are included in Gross)
Minus	FEDERAL TAX EXEMPT WAGES (Federal Taxable Block)
Minus	DEFERRED COMPENSATION
Minus	MEALS
Minus	CAFÉ 125 BENEFITS (may vary depending on the benefit)
Plus	GROUP TERM LIFE
Plus	THIRD PARTY SICK PAY
Plus	OTHER COMPENSATION
Equals	WAGES, TIPS, AND OTHER COMPENSATION

QTD amounts appear on Line 2 of 941.

YTD amounts appear in Box 1 of the employee W-2.

The total YTD amount for the company will appear in Box 1 of the W-3. This amount should balance to the sum of all four quarters on Line 2 of the 941.

How to Arrive at Taxable Wages

Social Security Wages

GROSS (Taxable Fringe Benefits and Tips are included in Gross)	
Minus	SOCIAL SECURITY EXEMPT WAGES
Minus	MEALS
Minus	TIPS (Social Security Tips must print separately in Box 7 of the W-2)
Minus	CAFÉ 125 BENEFITS (may vary depending on the benefit)
Plus	GROUP TERM LIFE
Plus	THIRD PARTY SICK PAY
Equals	SOCIAL SECURITY WAGES (not to exceed current year limit)

QTD amounts appear on Line 5a of the 941.

YTD amounts will appear in Box 3 of the employee W-2.

The total YTD amount for the company will appear in Box 3 of the W-3. This amount should balance to the sum of all four quarters on Line 6a of the 941.

How to Arrive at Taxable Wages

Medicare Wages and Tips

GROSS (Taxable Fringe Benefits and Tips are included in Gross)
Minus MEDICARE EXEMPT WAGES
Minus MEALS
Minus CAFÉ 125 BENEFITS (may vary depending on the benefit)
Plus GROUP TERM LIFE
Plus THIRD PARTY SICK PAY
Equals MEDICARE WAGES AND TIPS

QTD amounts appear on Line 5c of the 941.

YTD amounts will appear in Box 5 of the employee W-2.

The total YTD amount for the company will appear in Box 5 of the W-3. This amount should balance to the sum of all four quarters on Line 5c of the 941.

How to Arrive at Taxable Wages

State Wages

GROSS (Taxable Fringe Benefits and Tips are included in Gross)
Minus STATE EXEMPT WAGES (State Taxable Block)
Minus MEALS
Minus DEFERRED COMPENSATION *
Minus CAFÉ 125 BENEFITS (may vary depending on the benefit) *
Plus GROUP TERM LIFE *
Plus THIRD PARTY SICK PAY *
Plus OTHER COMPENSATION *
Equals WAGES, TIPS, AND OTHER COMPENSATION

YTD amounts appear in Box 16 of the employee W-2. These items may vary depending on the state

What's in a Box??

WHAT'S IN A BOX?
Click the links for details on each box.

Employee Reference Copy
W-2 Wage and Tax Statement 20xx
Copy C for employee's records. OMB No. 1545-0008

d Control number	Dept.	Corp.	Employer use only
AN	USA	345	
b Employer's FED ID number 12-22xxxx	a Employee's SSA number 555-33-xxxx		
1 Wages, tips, other comp.	2 Federal income tax withheld		
3 Social security wages	4 Social security tax withheld		
5 Medicare wages and tips	6 Medicare tax withheld		
7 Social security tips	8 Allocated tips		
9 Verification Code	10 Dependent care benefits		
11 Nonqualified plans	12a See instructions for box 12		
14 Other	12b		
	12c		
	12d		
	13 Stat emp, Ret. plan, 3rd party sick pay		
15 State Employer's state ID no.	16 State wages, tips, etc.		

Box by box info can be found in the IRS website :

<https://www.irs.gov/pub/irs-pdf/iw2w3.pdf>

DISTRIBUTION PROCESS W2 AND 1099



Forms Distribution

- Split wrap distribution of W-2s
- Paperless W-2 Option
- Determine sort preference
- Verify delivery method and location
- Determine how you will distribute forms and advise mail room staff



Forms Distribution

- Schedule date to release W-2 and 1099s
- Request sample W-2s from Client Service Consultant
- Sign the W-2 and 1099 release forms
- Complete the W-2 and 1099 Delivery Verification form and email to CSC

Closeout – Things to Consider





Year End Reminders

- Post fringe benefits prior to last payroll of the year
- Post third party sick pay payments
- Mass changes/Mass deletions/Accumulator Rolls
- Deceased Employee Reporting
- Insert new benefit deductions
- 401(k) changes
- Benefit Accruals
- Limit changes
- Special calculations or updates

W-4 Information

Notify employees to update W-4 information

Separate here and give Form W-4 to your employer. Keep the top part for your records.

Form W-4 Department of the Treasury Internal Revenue Service		Employee's Withholding Allowance Certificate		OMB No. 1545-0074 20
1 Your first name and middle initial		Last name		2 Your social security number
Home address (number and street or rural route)		3 <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. Note: If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.		5
City or town, state, and ZIP code		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. <input type="checkbox"/>		
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)				6 S
6 Additional amount, if any, you want withheld from each paycheck				
7 I claim exemption from withholding for 2010, and I certify that I meet both of the following conditions for exemption. • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here				
Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.				
Employee's signature (This form is not valid unless you sign it.)		Date		
8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.)		9 Office code (optional)		10 Employer identification number (EIN)



ADP strongly urges all clients to have their employees review and update W-4 information





Mergers and Acquisitions

- **November 6** - Last day to submit Company Add-on request and FEIN or Legal Name changes effective January 1st, 2018.





Support Tools NAS Support Center Smart Compliance

ADP Smart Compliance

Client Website <https://smartcompliance.adp.com>

With ADP Smart Compliance clients can:

- § View and print ADP Statement of Deposits
- § View, print, save and export many other tax-related reports, including agency notices and responses, amendment/exception packages, tax invoices and SUI verification (SUI Rates)
- § Upload Agency notices right into Smart Compliance
- § Employee Quarter Error Report
- § Applied For ID Report

Tax Direct line: 1 (866) 667-9502

Statements of Deposits and Filings

§ **Statement of Deposits and Filings (SODs) – client should verify the following:**

- Federal, State and Local tax identification numbers
- SUI Rates
- Filing Responsibilities

SODs may be used by most agencies in place of the actual 941/940

§ **The following packages are available exclusively on the ADP Smart Compliance <https://smartcompliance.adp.com>**

- Statements of Deposit (SODs)
- Agency Notices and Responses
- Amendment / Exception Packages

SOD Example

ANNUAL STATEMENT OF DEPOSITS & FILINGS



TAX FILING SERVICE

** TAX YEAR 20XX **

YOUR COMPANY
123 MAIN STREET
ANYTOWN, USA 99999

STATEMENT DATE 09/30/XX
BR/COMPANY 03XYZ
AGENT 005
COMBO YES
SHORT NAME
FEDERAL ID: 99-9999999

ANNUAL FUTA INFORMATION

TOTAL PAYMENTS PLUS EXEMPT	44,676,913.57		FUTA TAX	FUTA TAX
EXEMPT PAYMENTS:			LIABILITY	DEPOSITED
EXEMPT WAGES	2,966.98	QTR 1	.00	.00
*SEE DETAIL RIGHT SIDE		QTR 2	1,816.45	1,816.45
EXCESS WAGES	29,142,082.44	QTR 3	16,363.95	16,363.95
TOTAL EXEMPT PAYMENTS ..	29,145,049.42	QTR 4	21,097.89	21,097.89
FUTA TAXABLE WAGES	15,531,864.15			
GROSS FUTA TAX	124,254.91	TOTAL	39,278.29	39,278.29
TENTATIVE CREDIT ALLOWED..	.00			
CREDIT REDUCTION	4,519.30	EXEMPT WAGES DETAIL:		
TOTAL FUTA TAX00	FRINGE BENEFITS		.00
		GROUP TERM LIFE INS		2.08
		RETIREMENT/PENSION		.00
		DEPENDENT CARE		2,964.90
		OTHER		.00

ANNUAL FILING RESPONSIBILITY: ADP

STATE WAGE RECAP

QBU BATCH NBR

STATE	SUI WAGES SUI ID	EXPERIENCE RATE/QTR	CONTRIBUTIONS ACTUALLY PAID
AL	435,195.03	2.8400% 2-4	12,359.54
AK	44,982.81	1.9700% 2-4 4	886.16
AZ	263,592.57	2.3500% 2-4 4	6,194.43
AR	404,408.44	1.7000% 2-4	6,874.94





940 FILING IMPACTS

940 Filing & FUTA Credit Reduction

- Avoid possible 940 drops by obtaining and providing tax identification numbers for SUI
- Eliminate “Applied For” status

FUTA Credit Reduction

- Department of Labor determines the credit reduction each year and calculates the refund in November





FUTA Credit Reduction

FUTA Credit Reduction – What is it?

FUTA is paid by employers to the Federal government as a back up to SUI. The FUTA contribution rate is 6.0% of the first \$7000 in taxable wages for a calendar year. Most employers receive a tentative credit of 5.4% after meeting certain conditions.

The following is used to calculate the FUTA TAX:

FUTA RATE	FUTA Credit	Effective Rate used to calculate FUTA Tax
6.0%	5.4%	.6% (6.0 – 5.4)

When tentative credit amounts are reduced, thus increasing the Effective Rate, ADP calculates the difference, sends an invoice to the client and debits the client separately for those amounts.





FUTA Credit Reduction, Cont'd

- § Jurisdictions with an unpaid Trust Fund loan balance on Jan. 1st of the 2nd consecutive year will be subject to a reduction of their 5.4% FUTA credit if the loan is not paid in full by Nov. 10th of the 2nd year
 - The first credit reduction will be applied starting with the 2nd year
- § Department of Labor determines the credit reduction each year and announces the update after November 10th
- § ADP Tax Service will coordinate communication details regarding possible FUTA Credit Reduction and Credit Reduction Status during the last half of the 4th Quarter

FUTA Credit Reduction, Cont'd

§ FUTA Credit Reduction

- § The credit reduction = 0.3% the first year plus an additional 0.3% each succeeding year until the loan is repaid
- § Each 0.3% credit reduction costs an employer an additional \$21.00 per employee per year (\$7,000 FUTA wage base x .003)
- § Additional credit reductions may apply beginning with the third and fifth consecutive years if a loan balance is still outstanding and certain waiver criteria are not met
 - § 3rd year – the 2.7% Add-on credit reduction
 - § 5th year – the BCR Add-on credit reduction

Tax Partners

Did you know the ADP W-2 can be easily imported into ADP's Tax Partners products and services?

It's a free program!

If you opted out in previous years, you're automatically opted out.



Payroll Related Web-sites

Homepage:	www.adp.com
Eye on Washington:	www.adp.com/regulatorynews
ADP Trust Center:	http://www.adp.com/about-us/trust-center.aspx
ADP Resource Center:	www.resourcecenter.adp.com
ADP Meeting of the Minds	www.motm.adp.com
ADP Large Business Solutions	www.adp.com/solutions/large-business.aspx
ADP Training Courses	https://ilearn.adp.com
The Bridge:	https://thebridge.adp.com
ADP Smart Compliance:	https://smartcompliance.adp.com

Professional Organizations

American Payroll Association:	www.americanpayroll.org
IHRIM:	www.ihrim.org
AICPA:	www.aicpa.org

Department of Homeland Security

E-Verify	www.dhs.gov/E-verify - new
----------	--

Internal Revenue Service

Homepage:	www.irs.gov
Forms & Publications:	www.irs.gov/formspubs

Payroll Related Web-sites

- **State Tax Links:**

- Sister States: www.sisterstates.com
- StateLocalGov.net: www.statelocalgov.net
- Tax & Accounting Sites Directory: www.taxsites.com
- Pennsylvania Act 32: www.newpa.com/act32

- **Tax-Related Resources**

- Uncle Fed's Tax Board: www.unclefed.com
- Research Institute of America: www.ria.thomson.com

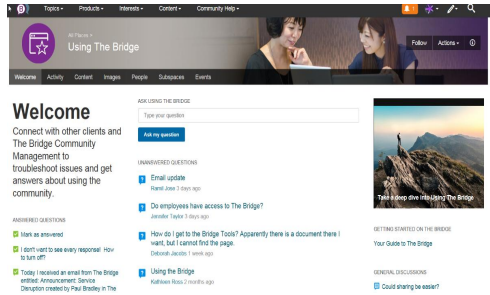
- **United States Code / Legislative Resources**

- Office of Law Revision Counsel: uscode.house.gov
- Cornell Legal Information Institute: www.law.cornell.edu/uscode
- U.S. Congress Information: thomas.loc.gov
- **Bureau of Citizenship & Immigration Services**
 - Homepage: www.ice.gov
- **Department of Labor**
 - Homepage: www.dol.gov
- **Social Security Administration**
 - Homepage: www.ssa.gov
 - SSN Verification Options: www.ssa.gov/employer/ssnv.htm

Other Client Tools/Resources

The Bridge

<https://thebridge.adp.com>

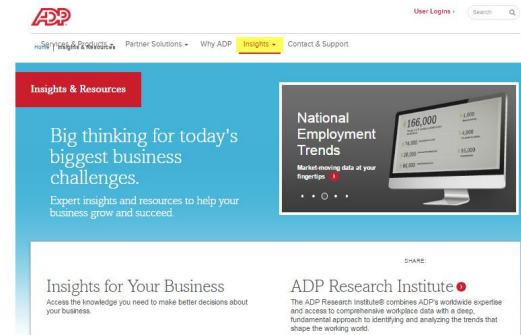


The screenshot shows the 'The Bridge' website interface. At the top, there is a navigation bar with links for Topics, Products, Interests, Contact, and Community Help. Below this is a header section with a search bar and a 'Using The Bridge' title. The main content area is divided into several sections: 'Welcome' with a call to connect with other clients; 'ASKING THE BRIDGE' with a search bar and a 'ASK MY QUESTION' button; 'UNANSWERED QUESTIONS' with a list of questions including 'Email update', 'Do employees have access to The Bridge?', and 'How do I get to the Bridge Tools?'; 'REPLY COMMENTS ON THE BRIDGE' with a link to 'Your Guide to The Bridge'; and 'GENERAL DISCUSSIONS' with a link to 'Could sharing be easier?'. There is also a 'FOLLOW' button and a 'SHARE' button.



ADP Employer Resource Center

<http://www.adp.com/tools-and-resources.aspx>



The screenshot shows the ADP Employer Resource Center website. At the top, there is a navigation bar with links for Home, Products & Solutions, Partner Solutions, Why ADP, Insights, and Contact & Support. The main content area is divided into several sections: 'Insights & Resources' with a call to 'Big thinking for today's biggest business challenges.' and 'Expert insights and resources to help your business grow and succeed.'; 'National Employment Trends' with a chart showing market-making data at your fingertips; 'Insights for Your Business' with a call to 'Access the knowledge you need to make better decisions about your business.'; and 'ADP Research Institute' with a call to 'The ADP Research Institute® combines ADP's worldwide expertise and access to comprehensive workplace data with a deep, fundamental approach to identifying and analyzing the trends that shape the working world.'





IN THE BUSINESS OF YOUR SUCCESS®



Regulatory Resources for ADP Clients.

Join discussions and get insights from subject-matter experts in the ADP Research Institute LinkedIn Group:

<http://www.linkedin.com/groups/ADP-Research-Institute-4314930>



IN THE BUSINESS OF YOUR SUCCESS®

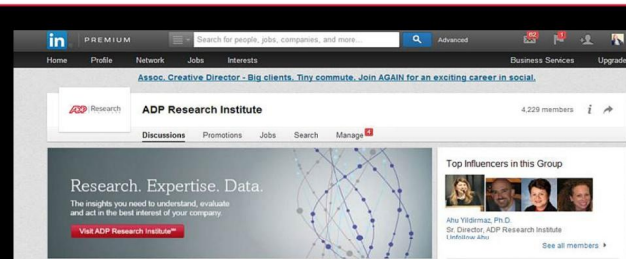
LEGISLATIVE UPDATE

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ADP TRUST CENTER

SOCIAL RESPONSIBILITY ▶

TRUST CENTER ▼

- ▶ How ADP Protects Your Information
- ▶ Protecting Your Company Information and Personal Safeguards
- ▶ Minimize the Risk of Computer Viruses and Malware
- ▶ Additional Resources
- ▶ Security Alerts
- ▶ FAQs

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ADP Trust Center

Trust is not something that occurs in a day. Trust is earned over a period of time and through proof of action. Here at ADP, establishing and maintaining the trust and confidence of our clients is the foundation of our business model, a business model we've excelled at for over 60 years in more than 130 countries for over 500,000 clients.

Phishing

Phishing or trying to trick users into giving up personal information, is one of the most common and persistent online threats. According to RSA, a leading security firm,

The privacy and security of our clients' data is of the highest importance to ADP and we consider it key to maintaining our clients' trust. ADP employs industry recognized security safeguards to help protect the personal information you provide us from loss, misuse, or unauthorized access or alteration.

We safeguard our clients' data by using the latest tools, tactics, techniques and procedures, but the job is not ours alone. There are actions you can take to help protect your information. For more details about how ADP protects your information and what you can do to help, please visit:

<http://www.adp.com/about-us/trust-center.aspx>

Meeting of the Minds 2018

ADP MEETING *of the* MINDS



Sunday, March 18 –
Wednesday, March 21, 2018
Hilton® Orlando Bonnet Creek and
Waldorf Astoria® Orlando

<https://www.adp.com/motm/splash2018/index.aspx>

REGISTRATION RATES for ADP Meeting of the Minds 2018
Book early and save money!

Full Conference Early Bird Attendee Rates by January 5, 2018

- Early Individual Registration: \$1749
- Early Small Group Registration (2-4 attendees from the same organization): \$1699
- Early Large Group Registration (5 or more attendees from the same organization): \$1649

Full Conference Regular Attendee Rates beginning January 6, 2018

- Regular Individual Registration: \$1849
- Small Group Registration (2-4 attendees from the same organization): \$1799
- Large Group Registration (5 or more attendees from the same organization): \$1749

Special Note: Registration opens in mid-November. Register early for discounted rates. Secure your spot in the most popular ADP MOTM education sessions – they fill up quickly!



Any Questions...





Thank you

for your continued business with ADP!