


PEDDLING YOUR PAYROLL DEPARTMENT TO INTEGRITY AND RESPECT!



Presented by:
Ron Moser, CPP
Payroll/Employee Benefits Consultant—Taxing Matters
Member of the American Payroll Association Speakers Bureau

Where's the button?


Just push the damn button!



JUST PUSH THE BUTTON!

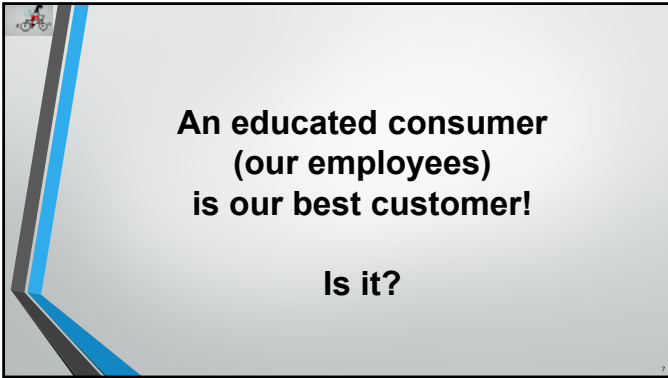
- So where do we belong? Are we HR or accounting?
- What is our Corporate culture?
 - This will have the greatest impact on where we are in the corporate structure.
 - Get to know your culture
 - Learn to adapt
 - Then - Make it work for you! And get the attention you deserve!

Nothing needs to be verified, the system calculates everything!



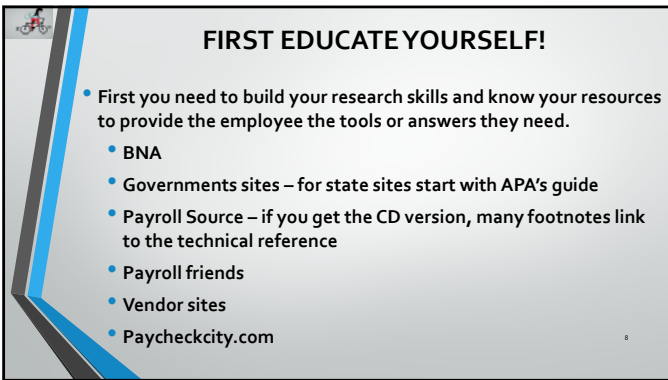
JUST PUSH THE BUTTON!

- Getting them to understand the complexities
- Compliance issues.
- Balancing federal labor law, state labor law, IRS regulations, state tax law regulations, federal and state unemployment and garnishments.
- Then throw in a union contract or two!
Go ahead! I dare you!



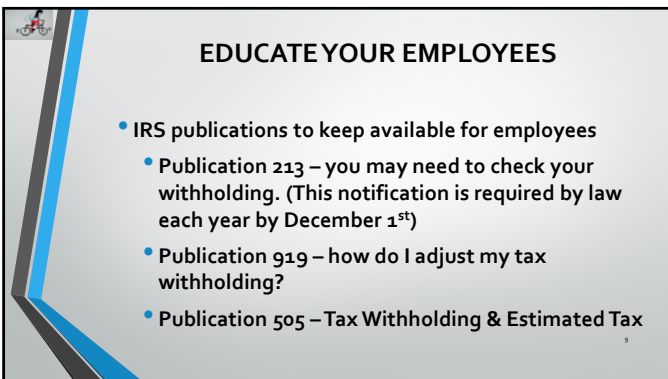
**An educated consumer
(our employees)
is our best customer!**

Is it?



FIRST EDUCATE YOURSELF!


- First you need to build your research skills and know your resources to provide the employee the tools or answers they need.
 - BNA
 - Governments sites – for state sites start with APA's guide
 - Payroll Source – if you get the CD version, many footnotes link to the technical reference
 - Payroll friends
 - Vendor sites
 - Paycheckcity.com



EDUCATE YOUR EMPLOYEES

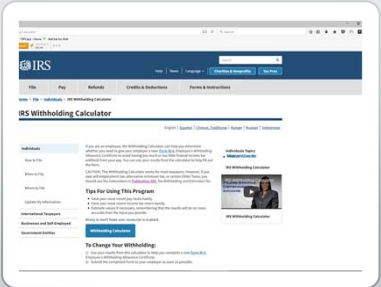
- IRS publications to keep available for employees
 - Publication 213 – you may need to check your withholding. (This notification is required by law each year by December 1st)
 - Publication 919 – how do I adjust my tax withholding?
 - Publication 505 – Tax Withholding & Estimated Tax

EDUCATE YOUR EMPLOYEES



7

EDUCATE YOUR EMPLOYEES



<https://www.irs.gov/individuals/irs-withholding-calculator>

11

“My husband’s paystub shows you are withholding single zero. I know that’s wrong because I’m married to him.”

14

EDUCATE YOUR EMPLOYEES!

- Publication 15 –
 - Tax tables and percentage method tables
 - Supplemental wage explanation (page 18)
 - Have an application like Paycheck City available or employee self service app
 - SSA-5 Application for Social Security Card

33


EDUCATE YOUR EMPLOYEES!

- Fringe benefits
- De Minimis
- Supplemental wages
- W-2 questions
- W-4 questions

34

EDUCATE YOUR EMPLOYEES!


- W-2 explanation memo



35

EDUCATE YOUR EMPLOYEES!


- Payroll Calendar



45

EDUCATE YOUR EMPLOYEES!

- Payroll Alerts
- Department Communications



47

WHAT'S THE BEST WAY?

- To provide training or information to your employees?
 - Trainings via WebEx?
 - Printed information?
 - By email?
 - On a website?
 - Posters around the office?


48

KNOW YOUR SYSTEM!

- Can you test the withholding calculation longhand?
- Can you do the state income tax calculations longhand (Oregon is a doozy)
- Do you have company stock? Who's the best person to answer those ?'s (may not be payroll!)
- Anything else unique about your system?

19

Payroll has a crystal ball!!!



Really they do!!

20

Payroll managers are magicians!

21


Slide 21

RM5 New slide of the wizard of oz behind curtain if possible.

Ronald Moser, 08/25/16

THE FEARS OF PAYROLL!!!


- The fear of looking stupid
- The fear of not understanding what you are saying to them
- The fear that it was their fault and not payroll's
- The fear that they can't pay their bills
- The fear of change!



22

THE FEARS OF PAYROLL!!!

Direct deposit!
And OMG!
Not Pay cards!



23

DISPELLING THE FEARS!

- Communicate, communicate, communicate
- Form partnerships
 - Human resources
 - Accounts payable
 - Third-party vendors
 - Accounting
 - Benefits
- IRS, Federal and state labor - contacts

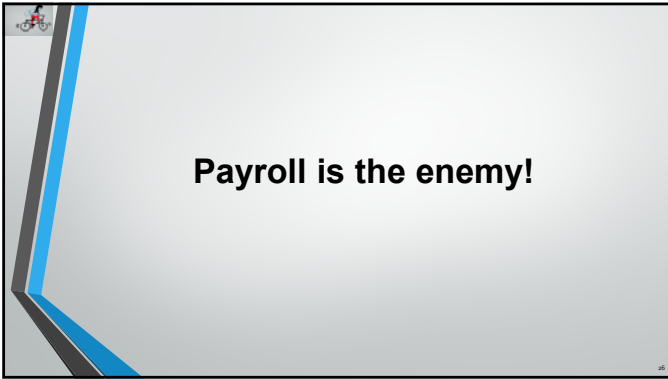
24



DISPELLING THE FEARS!

- Schedule regular meetings
 - Year-end
 - Budget planning
 - Regulation changes
 - Audits
 - Business continuity planning

25



Payroll is the enemy!


26



Communicate, communicate, Communicate, communicate


- Be courteous & responsive
- Provide personal attention
- Reliable
- An educated staff
- Show empathy – be understanding

27





Communication – In Person

- Focus on the problem
- Ask questions
- Step into their shoes
- Watch and listen for feedback
- Never say never
- Avoid conflict
- Listen!



Communication - Phone

- Give them time to vent
- Answer your phone whenever possible
- Voice mail – respond quickly
- Avoid "phone tag" – set aside time for caller
- Think confidential
- Not a screening process!

Garnishment? What Garnishment?

Communication - Written

- Notify employee as soon as possible
- Be positive
- Don't assert blame
- Let employee know you are going to work with them for a solution
- Don't assume employee understands payroll
- Involve employee – what is the employee solution?

Communication - Written

- Keep sentences short and to the point
- Avoid slang words and acronyms (FLSA, DOL, etc.)
- Follow-up!

Payroll is just no fun!






Market your payroll department

- Create your payroll department mission statement
- Send out news letters
- Create incentives
- Open house
- Celebrate National Payroll Week
- Flyers
- Website

34



Educate yourself!

35

Thank You for Attending!

Indiana Statewide Payroll Conference 2017
Peddling Your Way To Compliance