

AMERICAN PAYROLL ASSOCIATION

# PAYROLL LEADERS CONFERENCE

Next-generation training  
through **FOUR** transformational  
certificate programs

**NOVEMBER 4-6, 2019**  
**MESA/PHOENIX, AZ**

Sheraton Mesa Hotel  
at Wrigleyville West

 Payroll OMG – Optimization,  
Management & Growth

 Managing Vendor Partnerships

 Advanced Payroll Concepts

 Advanced Global Payroll Management  
Certificate Program

AMERICAN  
**PAYROLL**  
ASSOCIATION

[www.americanpayroll.org/PLC](http://www.americanpayroll.org/PLC)

Sponsored by

dailypay

Develop new leadership competencies and a fresh perspective to lead people in an increasingly dynamic world.

## Keynote Speakers

**Opening General Session | Trends in 'Next Generation' Payroll Technology**

**Pete A. Tiliakos**, *Principal Analyst, HR Technology & Services, NelsonHall*

For many organizations, payroll transformation has become a priority and critical element of broader digital HR transformation initiatives. Recent technology advancements have quickly made their way to payroll and continue to have a profound impact on what has long been a highly complex, often manual, yet critical process. Join us for an overview of the emerging technologies impacting payroll today and how these will evolve in the future.

**FOS: Personal Development/1.0 RCH/0.1 CEU/1.0 CPE credit**

**Closing General Session | Influencing: A Critical Leadership Skill**

**Lori Brown, CPP**, *Finance Director, Payroll Operations, Hanger, Inc.*

Good leaders know how to influence others effectively. Influence is a critical tool that leaders must have to create alignment and build commitment across diverse groups. Learn the skills needed to influence others in the workplace and identify if you are under the positive influence of others now.

**FOS: Personal Development/1.0 RCH/0.1 CEU/1.0 CPE credit**



### Conference Sponsor

DailyPay is the leading provider of a daily pay benefit – a benefit offered through employers that allow employees to receive instant access to their earned wages across a wide range of industries. Our platform works with your payroll and TMS systems, so there is no change to your payroll process or timing of funds. With DailyPay, employees can pay bills on time and avoid late fees, helping them to reach their financial goals. Companies have reported that DailyPay increases employee engagement and retention and helps to support recruitment.

### Payroll OMG – Optimization, Management & Growth

Reduce cost, eliminate waste, and create a highly effective workforce.

### Managing Vendor Partnerships

Build long-term vendor relationships for long-term success.

### Advanced Payroll Concepts

Increase your ROI with advanced payroll concepts.

### Advanced Global Payroll Management Certificate Program

Develop a diverse, successful global payroll team and delivery model.

# Agenda

## MONDAY, NOVEMBER 4

- 7:30 a.m. – 8:30 a.m. Registration  
Continental Breakfast
- 8:30 a.m. – 9:45 a.m. Opening General Session  
Trends in 'Next Generation'  
Payroll Technology
- 9:45 a.m. – 10:00 a.m. Break
- 10:00 a.m. – 12:00 p.m. Session 1
- 12:00 p.m. – 1:15 p.m. Networking Lunch
- 1:15 p.m. – 3:15 p.m. Session 2
- 3:15 p.m. – 3:30 p.m. Refreshment Break
- 3:30 p.m. – 5:00 p.m. Session 3

## TUESDAY, NOVEMBER 5

- 8:00 a.m. – 8:30 a.m. Continental Breakfast
- 8:30 a.m. – 10:30 a.m. Session 4
- 10:30 a.m. – 10:45 a.m. Break
- 10:45 a.m. – 12:15 p.m. Session 5
- 12:15 p.m. – 1:45 p.m. Prism Award Luncheon
- 1:45 p.m. – 3:15 p.m. Session 6
- 3:15 p.m. – 3:45 p.m. Refreshment Break
- 3:45 p.m. – 5:00 p.m. Closing General Session  
Influencing: A Critical  
Leadership Skill  
Door Prizes
- 5:00 p.m. – 6:00 p.m. Networking Happy Hour

## WEDNESDAY, NOVEMBER 6

- 8:00 a.m. – 8:30 a.m. Continental Breakfast
- 8:30 a.m. – 10:00 a.m. Session 7
- 10:00 a.m. – 10:15 a.m. Break
- 10:15 a.m. – 11:15 a.m. Session 8

Payroll Leadership Conference participants earn up to 15 Recertification Credit Hours (RCH), 1.5 Continuing Education Credits (CEU), or 15 Continuing Professional Education (CPE) credits. See individual Certificate Programs for Field of Study (FOS).



# Payroll OMG – Optimization, Management & Growth

Payroll OMG can help you reduce expenses by looking at all processes and how departments are connected. Payroll OMG will help professionals at every level in every department understand that if the paycheck were a product line, it would rank as one of the largest products at most organizations. Learn how to produce a perfect paycheck, reduce cost, eliminate waste, and create a highly effective workforce.

FOS: Management Services = 14

## Program Objectives

- Identify lean tools that will help support lean projects
- Discuss lean history, methodology, and benefits
- Highlight business processes and key concepts in process improvement
- Demonstrate the value of the payroll department to other departments and how it affects the organization's bottom line

## Program Outline

### Delivery of the Perfect Paycheck

- Payroll errors
- Payroll cost

### What Is Lean and What Are the Benefits?

- Competitive positioning
- What is lean?
- Lean tools

### Identifying and Defining the Business Process

- The need for change
- Improving a process

### Role of Payroll Within the Organization

- Placing value on the workforce
- Role of a payroll department
- Empowering the payroll team
- Making the team strong

### Automation of Payroll Process

- Production disruptions
- Understanding the data
- Cost of producing a paycheck
- Benefits of automation
- Managing complex and multiple pay rules
- Balancing labor and demand

# Managing Vendor Partnerships

Encourage long-term partnerships with your vendors using the knowledge learned from in-depth discussions on building the proper team, relationship management, contract negotiations, vendor scorecards, service level agreements, advisory boards, and much more!

**FOS: Business Management and Organization = 14**

## Program Objectives

- Identify the goals of the relationship between the vendor and the organization
- Determine key performance indicators and the components required in a service level agreement
- Understand the requirements and contingencies of implementation
- Establish ongoing management reports and support structure post implementation

## Program Outline

### Creating a Team

- Relationship management
  - HRIS and payroll evaluation
- Pre-implementation planning
  - Executive summary and recommendation
  - SWOT analysis
  - Vendor/supplier performance scorecard

### Vendor Management

- Service level agreements
  - Internal payroll service level agreement
  - Internal employer shared services service level agreement
  - Service level agreement template
- Performance level contracts
- Contract management

### Implementation

- Implementation
  - Plan to phase out legacy system
  - Data cleansing and extraction
- Client advisory boards
- Request for enhancements
  - Critical business issues to be addressed
  - Security requirements

### Maintaining the Partnership

- Management reports
- Support management
  - Governance structure
  - Operational governance
- After go live
  - Develop processes, performance, and operational metrics
  - Escalation procedures

# Advanced Payroll Concepts

The Advanced Payroll Concepts program teaches ways to increase your return on investment (ROI) with advanced payroll training while ensuring your ability to prepare Forms W-2c and 941-X. It also includes discussion of the white collar exemption rules, complex benefits issues, an expatriate taxation overview, unemployment insurance, payroll systems, payroll auditing, and leadership concepts.

FOS: Taxes = 8.0, Business Law = 3.5, Communication = 1.5

## Program Objectives

- Learn FLSA employee classification and minimum weekly salary
- Identify fringe benefit taxation and reporting requirements
- Examine Family and Medical Leave Act time-off management from the payroll perspective
- Discuss Affordable Care Act reporting requirements

## Program Outline

### The Exempt Employee

- The FLSA and white collar exemptions
- Salary requirements of exempt employees
- Complex FLSA issues

### Family and Medical Leave Act

- Eligible employees and covered employees
- FMLA and benefits continuation

### Expatriates, Resident and Nonresident Aliens

- Expatriate taxation
- Resident and nonresident alien overview

### Federal Tax Reporting Correction/Adjustments

- Correcting wage and tax statements
- Reporting interest-free overpayments or underpayments
- Reconciling wages and taxes
- Reporting special wage payments
- Electronic filing

### Complex Benefits

- General tax treatment of benefits
- Business travel expenses
- Stock options
- Nonqualified deferred compensation plans
- Health and welfare plans

- Affordable health insurance and large employers
- Miscellaneous benefits

### Special Payroll Topics

- The holder in due course rule
- Escheatment of unclaimed wages
- Identity theft
- Withholding on pensions and annuities

### Payroll Systems

- Developing a process, procedures, and policies manual
- Interfaced vs. integrated systems
- Implementing and maintaining a payroll system

### Departmental Operations

- Internal controls
- Recordkeeping
- Enforcement, penalties, compliance, and confidentiality

### Leading a Payroll Department

- Overview of basic management skills
- The importance of leadership
- Leadership and management concepts and theories

# Advanced Global Payroll Management Certificate Program

This certificate program will dive deep into the comprehensive approach to the global payroll delivery model, the role culture plays, and the development of global teams and career opportunities. This program will give you, the global payroll leader, the tools and skills to construct a world-class global payroll organization.

**FOS: Business Management and Organization = 14**

## Program Objectives

- Formulate a global strategy and governance model that will drive standardized processes
- Build a framework that will support controls and ensure compliance across the globe
- Develop and nurture a diverse remote global payroll team
- Establish a business partnership where global payroll supports the company's business objectives

## Program Outline

### Strategy and Governance

- Develop a strong governance model
- Examine considerations for developing an effective roadmap
- Illustrate the various payroll delivery models
- Identify the importance of standardizing processes, policies, and data privacy

### Compliance and Control

- Identify the control and compliance needs of your organization
- Review how to identify and assess risks
- Design meaningful controls to support global management
- Establish local compliance while having a global view

### Leadership Management Across the Global Objectives

- Manage a remote staff throughout the world
- Learn the importance of cultural differences
- Discuss effective methods of communication
- Build an effective team to think and perform globally

### Being an Effective Global Business Partner

- Discover the importance of a successful business partnership
- Discuss how payroll can help the business be more effective
- Educate the business on how non-cash items can impact an employee's pay
- Explore how effective partnerships can lead to career development for payroll staff

## Prism Awards

### Showcase Your Outstanding Department

Organizations that have demonstrated improved business practices, shared services, and overall processes throughout the year will receive a Payroll or Shared Services Prism Award. Achieving such an award helps departments **garner organization and industry-wide recognition** and validates an organization's worth to company officials.

The **Payroll Prism Awards** will be presented to innovative departments that exhibit best practices in four categories: Technology, Management, Processes, or Overall Best Practices.

The **Shared Services Prism Award** will be given to one payroll or AP department that has demonstrated excellence in shared services.



## Conference Details

### Hotel Accommodations

Sheraton Mesa Hotel at Wrigleyville West  
860 N. Riverview  
Mesa (Phoenix), AZ 85201  
Reservations: (480) 664-1221  
Mention reference code: **American Payroll Association**

APA has reserved a block of guest rooms at the Sheraton Mesa Hotel at Wrigleyville West at the rate of \$139 single occupancy plus room taxes. The special rates are offered three days pre- and post-conference dates based on room type availability and are available until October 14, 2019. Room reservations and hotel arrangements at the Sheraton Mesa Hotel are the responsibility of the individual. Reservations can be made directly with the Sheraton Mesa Hotel at Wrigleyville West by calling (480) 664-1221 or calling Marriott Reservations at (888) 236-2427. When calling in, attendees should request the group rate for American Payroll Association. After October 14, 2019, reservations will be accepted on a space-available basis and may be at the hotel's prevailing rate. All reservations must be guaranteed by a valid major credit card, which will need to be supplied at the time of the reservation. Any guaranteed reservation not canceled 48 hours prior to arrival will be subject to one night room and tax cancellation fee. Check in time is 3:00 p.m.; check out time is 12:00 p.m.

### Dietary Requests and Special Services

Dietary Requests made within two weeks from the event start date cannot be guaranteed. By requesting a dietary meal and indicating the meal functions you will be attending, you confirm that you will be eating your dietary meal purchased by APA on your behalf. There is no additional charge for the dietary meal(s) unless you elect not

to eat it, fail to pick up the dietary meal, or eat a regular attendee meal in its place. In any of these instances, you will be invoiced \$50 for each dietary meal that you ordered. Dietary requests will be limited and will not be honored on-site. If you require special services, please call Customer Service at (210) 224-6406, M-F, 8 a.m. – 6 p.m. CT, at least 21 days in advance of the event.



### Credit for Recertification and Continuing Education:

The APA is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors, through its website: [www.NASBARegistry.org](http://www.NASBARegistry.org). The American Payroll Association's CPE sponsor identification number with NASBA is 103152. Payroll Leaders Conference participants earn up to 15 RCHs, 1.5 CEUs, or 15 CPE credits. No prerequisites or advance preparation required. Course level: Overview. Delivery method: Group-live. See individual descriptions for Field of Study (FOS).

**CPE Complaint Resolution Policy:** The APA will make every effort to resolve complaints regarding NASBA compliance within a reasonable amount of time and in a confidential manner. A formal complaint must be submitted in writing and must set forth a statement of the facts and the specific remedy sought. Submit CPE complaints to: American Payroll Association, Attn: Certification, 660 North Main Avenue, Suite 100, San Antonio, TX 78205-1217. Certification: (210) 226-4600.

# 2019 Payroll Leaders Conference | Registration Form

Register online: [www.americanpayroll.org/PLC](http://www.americanpayroll.org/PLC)

## 1 Registration

### I would like to:

#### Register for ONE of the following Certificate Programs:

- Payroll OMG – Optimization, Management & Growth (19PAYLD1)
- Managing Vendor Partnerships (19PAYLD2)
- Advanced Payroll Concepts (19PAYLD3)
- Advanced Global Payroll Management Certificate Program (19PAYLD4)

I am an APA MEMBER. ID# \_\_\_\_\_ .....\$1,025

I am a COLLEAGUE of an APA Member (at the same street address) .....\$1,180

Colleague's ID #: \_\_\_\_\_

Member's Name: \_\_\_\_\_

Member's ID #: \_\_\_\_\_

I would like to join APA now AND register at the member rate ..... \$1,314

**Join now and save \$310 on course registration!**

Class Registration Fee at Member Rate .....\$1,025  
Annual Membership Dues\*.....\$254  
One-Time Enrollment Fee.....\$35

**TOTAL ..... \$1,314**

I am not an APA Member or Colleague. ID# (if known) \_\_\_\_\_ \$1,335

## 2 Registrant Information (please print)

### Registrant's Primary Address

Name: Ms.  Mr.  \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_

State/Province: \_\_\_\_\_ Country: \_\_\_\_\_

Zip + 4-Digit/Postal Code: \_\_\_\_\_ + \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

(Area/Country Code)

(Area/Country Code)

Email: \_\_\_\_\_

(For official APA communications, registration confirmations, *Payroll Currenty*, and PAYTECH-Digital)

Please indicate if you are:  CPA  PA (For NASBA reporting purposes)

**Special Dietary Request:**  Vegetarian  Gluten-free  Kosher

Vegan  Peanut Allergy  Dairy Allergy  Shellfish Allergy

Special dietary requests received after October 21 cannot be guaranteed.

### Needed for new member enrollment

Birth date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

### All Attendees Please Complete This Section.

In case of emergency contact:

Name: \_\_\_\_\_

Relation to Attendee: \_\_\_\_\_

Preferred Phone: \_\_\_\_\_

## 3 Payment Information

Payment in U.S. dollars must accompany registration form.  
Currency Converter: [www.xe.com](http://www.xe.com)

### Three Enrollment Options:

Online  Fax  Mail  
[www.americanpayroll.org/PLC](http://www.americanpayroll.org/PLC) (210) 224-6038 To address below

#### I authorize the API Fund for Payroll Education, Inc. to CHARGE my:

American Express  Discover  MasterCard  Visa

**Card is:** (check one)  Corporate  Personal

Card #: \_\_\_\_\_

Exp. Date: \_\_\_\_\_ CVV Code: \_\_\_\_\_

**Name on Credit Card:** \_\_\_\_\_

**Signature of Cardholder:** \_\_\_\_\_

Purchase Order #: \_\_\_\_\_ (for government agencies/universities only)

Make CHECK payable and mail to:

### API Fund for Payroll Education, Inc.

c/o American Payroll Association  
660 North Main Avenue, Suite 100  
San Antonio, TX 78205-1217

Phone: (210) 224-6406 • M-F, 8 a.m.–6 p.m. CT

Email: [apa@americanpayroll.org](mailto:apa@americanpayroll.org) • Visit: [www.americanpayroll.org](http://www.americanpayroll.org)

I agree to the policies found at [bit.ly/APA-policies](http://bit.ly/APA-policies).

### Have you ever:

Purchased something from the APA?  Yes  No

Had a membership with the APA?  Yes  No

If yes, what name was it under? \_\_\_\_\_

What was the company name? \_\_\_\_\_

**For all program information, visit:** [www.americanpayroll.org/PLC](http://www.americanpayroll.org/PLC)

\*Dues are subject to change without notice and are nonrefundable. Membership is on an individual basis; corporate memberships are not available. An enrollment fee of \$35 is charged to all new members. 100% of APA membership dues are deductible as an ordinary business expense.

Last updated: 08/22/2019

EMT: 9V

FOR OFFICE USE ONLY:

Date: \_\_\_\_\_ Order #: \_\_\_\_\_ Batch #: \_\_\_\_\_

Group #: \_\_\_\_\_ Check #: \_\_\_\_\_ C/P: \_\_\_\_\_ Total: \$ \_\_\_\_\_