



HR. Payroll. Benefits.

With the right connections,
the possibilities are endless.

Accountant Resource Guide



At ADP®, we're all about connections — connecting accounting professionals like you to the right resources and opportunities to support your firm's objectives through:

- Best-in-class payroll and HR technology
- Support in finding and growing new revenue streams
- Valuable insights, training and resources to help you get closer to your business goals

In the pages that follow, you'll find information on some of the outstanding products and services ADP can offer you and your clients — from affordable retirement solutions to insurance services¹, benefits administration and more.

When you connect with ADP, you'll gain everything you need to help drive your own growth and profitability — and everything your clients need to help them grow and protect theirs.

Sincerely,

A handwritten signature in blue ink that reads "John Ayala". The signature is fluid and cursive, with the first name "John" being larger and more prominent than the last name "Ayala".

John Ayala
President, Small Business Services

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Accountant Resources and Support

The world-class service you — and your clients — deserve

ADP connects you with the right support to take service and customer satisfaction to new levels. When you have questions, you need quick, accurate answers to keep you moving forward. That's why we provide:

- Dedicated Accountant HelpDesk support team staffed by tenured, certified payroll and HR service associates
- Hotline and direct email address for quick response to client questions and best-practice information
- Accountant Portal for anytime, anywhere electronic access to your clients' data and reports
- General Ledger Interface to export data directly into QuickBooks®, Xero™ or Creative Solutions, as well as CSV export file format
- Extended hours during tax season

HAVE A QUESTION OR NEED SOME SUPPORT?

Reach out to our **Accountant HelpDesk** today

ONLINE:

ADP.com/cpahelp

BY PHONE:

1-844-ADP-4CPA (844-237-4272) 8AM to 7PM local time



ADP Payroll

Turning payroll into profit

As their trusted advisor, your clients turn to you for their payroll, tax filing and even human resources needs. You can leverage ADP's comprehensive payroll solution to help deepen and strengthen these relationships, help grow your revenue and increase client retention, turning payroll into a potentially high-margin service for your firm.

Run your business better: RUN Powered by ADP® Payroll for Partners

Help your clients run their business more efficiently and effectively by processing payroll for your clients with ADP's proven payroll solution. **RUN Powered by ADP® Payroll for Partners** requires no upfront technology investment, and comes with simple pricing, dedicated service and custom marketing materials and support.

Plus, when you work with ADP, you get an "all-access pass" to insights, resources and professional development opportunities to help you succeed in running your payroll service and growing your practice.

RUN Powered by ADP®: Cloud-based. Powerful. Secure.

- Cloud-based solution with a mobile-friendly user interface and wizard so your clients can process anytime, anywhere
- Integration with robust features such as time and labor management solutions, retirement plans and workers' compensation premium payment program²
- Access to view and analyze current payroll activity from home, the office or on the road
- Instant previews of payroll liability and cash required before payroll is finalized, so there are no costly surprises
- Secure off-site hosting of your clients' payroll databases so you can process payroll from anywhere

It's a simple, intuitive and secure online payroll processing platform built especially for small businesses, for whom every hour — and every dollar — counts.

HR Solutions for Your Clients

The complete package — ADP Complete Payroll and HR Plus

Help your clients better manage their cash, people and risk with ADP Complete Payroll and HR Plus. This comprehensive package offers tools, resources and support to help small business owners stay in compliance, keep up with HR best practices and create a climate of high performers.

Better people management starts here

ADP Complete Payroll and HR Plus features the tools, resources and support your clients need to make the most of their biggest asset: their people. Here's just a sampling:

- **HR HelpDesk** — Phone and email access to a dedicated support team of HR professionals
- **Employee Handbook Wizard** — Create a comprehensive employee handbook based on federal employment law in just 15 minutes
- **Background Checks** — Up to five single-county criminal background checks per year

- **Advanced HR Toolkits** — Step-by-step guidance to help complete and document complex HR tasks
- **HR Forms & Documents** — A library of thousands of best-practice documents, checklists, forms, job descriptions and policies

Help clients improve compliance, reduce risk and manage cash

Connect your clients to ADP Complete Payroll and HR Plus for solutions that help them stay in control and out of trouble, including:

- Flexible payroll input options, including eTimecard®
- Employee payment options — ADPCheck™, full-service direct deposit or ALINE Card by ADP®
- Online Health Care Reform resources
- Calculating, depositing, filing and reconciling of payroll taxes
- New hire reporting
- State unemployment insurance management, and more

Retirement Services

Retiring with confidence — the ADP way

Are your clients worried about the cost of a retirement plan — for themselves and their employees? ADP's solutions simplify the process of becoming "retirement ready" while providing high-value benefits that help attract and retain top talent.

- **Simple IRA** — Helps your clients maximize their savings while keeping administrative effort and expense to a minimum
- **ADP ACCESS® 401(k)** — A comprehensive retirement plan solution that blends innovative technology, smart tools that simplify administrative tasks and a wide range of investment options, enabling plan administrators and other plan fiduciaries to meet fiduciary obligations and choose from non-proprietary investment selections



ADP — Reinforcing client relationships

The behind-the-scenes relationship between you and your clients plays an important role in the ultimate success of your business. To support your efforts, you need a provider that will showcase your role in the plan's success — and you can trust ADP Retirement Services to do just that. We offer retirement solutions that:

- Provide a tax-deferred solution for your clients and their employees
- May enable your clients to deduct contributions as a business expense
- Minimize the repetitive administrative tasks of managing a plan

Reducing plan administration risk — the SMART way

ADP offers an enhanced integration solution to help your clients streamline plan administrative tasks and reduce their exposure to compliance-related fines and other potential liabilities. SMARTSyncSM supports improved compliance by automatically reconciling plan data between ADP payroll and recordkeeping systems, eliminating manual entry and oversight as well as automating plan money movement and investment of participant contributions.²

Insurance Services

ADP Insurance Services: For a healthier bottom line

Through our affiliate, Automatic Data Processing Insurance Agency, Inc., we are uniquely positioned to offer you and your clients the convenience of a one stop shopping experience for business insurance.³

Property & Casualty

The right coverage can help small business owners minimize financial risks and protect their assets in the event of loss, theft, injury or negligence:

- Workers' Compensation
- Business Owner's Policy (BOP)
- Commercial Auto
- Umbrella Policy

Health & Benefits

Through our carrier partners, ADPIA provides access to a wide range of group health insurance plans, connecting your clients with the right carrier and providing guidance and support from licensed insurance professionals:⁴

- Medical
- Dental
- Vision
- Short- and Long-term Disability
- Life insurance



Convenience, meet simplicity — ADP's Pay-by-Pay Premium Payment Program for Workers' Compensation⁵

ADP payroll clients may be eligible for ADP's Pay-by-Pay Premium Payment Program for Workers' Compensation. This unique program spreads workers' compensation premium payments over each payroll cycle to help improve cash flow. And by basing premiums on actual payroll data and carrier rates rather than estimates, Pay-by-Pay reduces the risk of over or underpayment as well as year-end audit surprises.

Time & Labor Solutions

ADP's ezLaborManager® — Accurate, reliable and accessible time & labor management

For small business owners, labor can be their biggest asset — and their largest expense. By integrating time & attendance with payroll, ADP's ezLaborManager can help improve the speed, accuracy and convenience of time collection, payroll and payroll-related HR functions while helping to manage overtime expenses and reduce unnecessary costs.

Increase the efficiency and accuracy of payroll preparation

No need to fill out timesheets or punch messy timecards. Instead, employees enter time and attendance information in the manner that best fits the organization — whether that's a biometric timeclock or a simple electronic timesheet. ADP's ezLaborManager helps managers reduce payroll prep time, better manage overtime labor costs and proactively address attendance issues.

Help avoid costly compliance violations

ADP ezLaborManager stores time and attendance data in easy-to-access electronic form, putting the information necessary for federal wage and hour compliance at users' fingertips.

Control labor costs

Automating time and labor management can play a role in achieving substantial savings for your clients, because it can help:

- Improve accuracy by eliminating manual and re-keying errors
- Enhance visibility and decision-making
- Ensure consistent application of company pay policies
- Reduce routine HR and payroll inquiries, freeing managers to focus on more strategic initiatives

ADP® Payments

Get paid on time, more of the time

Did you know that 80% of small businesses say their cash flow is impacted by late payments — and 40% report late payments each month?⁶ ADP® Payments for Small Business Powered by PaySimple® simplifies the billing and collections process with automation and multiple payment options to help improve cash flow.

- **Recurring billing** — “Set and forget” feature allows recurring payments to be automated
- **Electronic invoicing** – Cuts invoicing time from hours to minutes and eliminates the cost of printing and mailing invoices
- **Mobile payments** – Allows business owners to manage their business from anywhere and set up recurring payments with a mobile application
- **Customized communications** — Templates, from payment receipts to invoice reminders, can be customized to fit individual business needs
- **Data entry saver** – Exchanges information with other business management and accounting applications, such as QuickBooks®, to help save time and reduce errors

Best of all, ADP Payments enables sophisticated features like electronic check processing, direct debit and credit card processing at competitive rates.

By automating the entire billing and collections process — invoicing, receipts, record keeping, reporting and deposits — your clients can spend less time on paperwork and more time on growth strategies.



ADP TotalSource: Success, simplified

Taxes. Payroll. Benefits. Health Care Reform. Workers' Compensation. Compliance. When your clients get them right, their business runs more smoothly. But get them wrong, and clients can face penalties, dissatisfied employees and even litigation.

ADP TotalSource just might be the answer. This PEO model offers a co-employment relationship in which clients retain control over managing employees, while ADP manages day-to-day HR management and benefits administration, including:

- Managing HR service responsibilities such as payroll, benefits and workers' compensation
- Assisting with many common employer risks
- Offering health plans
- Providing IT infrastructure for HR management

ADP TotalSource includes both the technical infrastructure to support your clients' growth and one-on-one advice and guidance from experts regarding workplace issues. From recruitment and selection to risk management and safety, ADP TotalSource ensures that a business is covered.

Accelerating the path to success

By integrating all major HR management and employee benefits functions into a single-source solution, ADP TotalSource can help generate real savings, increased efficiency and greater peace of mind for your valued clients.

ADP CPE Offerings and Course Catalog*

Staying on top of your game

Through webinars and on-site group seminars, ADP's CPE programs provide professional continuing education opportunities on timely and critical topics that can help you fulfill your annual certification requirements.

We're constantly looking for ways to help our referral partners increase their productivity, profitability, client retention and professional knowledge. We now offer nearly 30 free CPE courses, designed to assist you in meeting the needs of your clients, practice and professional development.

New courses this year include:

- Apportioning State Income: The More Things Change
- Contributions, Deductions and Funding Qualified Plans
- Detecting and Preventing Financial Fraud

ADP CPE: Group-Live Seminars

1. Candidate Screening
2. Health Care Reform Update – Impact of the Affordable Care Act: What Does It Mean to You and Your Clients?
3. Intro to Selling Skills
4. Managing and Motivating Generation Y
5. Payroll 101
6. Professional Employer Organization Overview
7. Professional Presentation Skills
8. The Road to Retirement Plan Success for Small Business
9. State Unemployment Insurance: The Only Controllable Employer Tax
10. Strategic HR and Its Impact on Thriving in this Economy
11. Understanding Body Language
12. Workers' Compensation
13. Hire to Retire – The Winds of Change

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Self-study video seminar CPE programs from SmartPros (v.0811):

1. Apportioning State Income: The More Things Change
2. Changes in Employee Benefits: From DOMA to FSA Plans
3. Contributions, Deductions and Funding Qualified Plans
4. Controllers Panel Discussion: Key Accounting and Auditing Issues
5. Detecting and Preventing Financial Fraud
6. Fair Value: Yesterday, Today and Tomorrow
7. How Will the Changes in Compilation Standards Affect You?
8. Little GAAP: On the Threshold of Simplified Accounting
9. Making the Transition to COSO's Updated Integrated Framework
10. More M&A = More Due Diligence
11. Net Investment Income Tax: Understanding the Final Regs
12. New Guidance on Revenue Recognition: Now Arriving
13. Planning Your 2014 Audits, Reviews and Compilations
14. Repairs vs. Improvements: Final IRS Regulations
15. What It Means to "Hold Yourself Out" as an Accountant



Helping You Make Valuable Connections



Thank you for reviewing the ADP Accountant Resource Guide, and the solutions available to help your clients streamline their HR, insurance, invoicing and more — while you grow your practice.

In the next few pages, you'll find exclusive partner offers for a variety of complementary products and services for CPAs. We hope you'll take advantage of them.

For more information on working with ADP to expand your service offerings and create valuable new revenue opportunities, visit **[ADP.com/accountant](https://www.adp.com/accountant)** or call **1-855-408-3751**.

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Sources & Notes

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5. ADP's Pay-by-Pay is a payroll enhancement feature of ADP's payroll processing services.
6. The PaySimple-sponsored survey respondents of small business owners and employees, October 2011.





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