



Year-End Preparation and Requirements for GTM Clients



Agenda

- Action Steps and Deadlines
- Holding Your Account Open
- Bonus Process
- Employee Verification
- 3rd Party Sick Pay and NYS Paid Family Leave
- 2021 Thresholds
- Reports
- Going Paperless



Action Steps and Deadlines

Action

- Complete Year-End online form
- Submit 2020 Year-End bonus runs or void/manual checks
- Update employee data
- Verify and report 3rd party sick pay

Deadline

December 14

December 28

December 28

January 4, 2021

Year-End Memo

EMO Company: CPA DEMO Status: Active

My Account Manager
Katy Pratt
Katy@gtm.com

My Sales Representative
Michael Maddalone
Senior Business Sales Manager
518.881.0225
michael@etm.com

CALENDAR

< **DECEMBER 2020** >

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

- Payroll Due
- Pay Date
- Run Date - Off Cycle Run

ANNOUNCEMENTS

- 🗨 GTM's Main Office is located Clifton Park, NY 12065 P: 518-836-2502
- 🗨 **NEW!** In anticipation of prep End tax season, please take "Employee W-2 Verification" "Client Reports" to confirm to been made to your employe information.

NEXT SCHEDULED PAYROLL

Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Process
Monthly	Monthly	01/25/2021	01/29/2021	01/01/2021	01/31/2021	01	Regular Payroll	View

Holding Your Account Open

Items that classify as adjustments for holding open your account:

- 2020 1099 Reporting
- Group Term Life Insurance
- Taxable Fringe Benefits
- 2020 Year-End Bonus Runs
- 2020 Void/Manual Check

Accounts will be held open until January 8, 2021.

Bonus Process Template in isolved

Search the menu

- EMPLOYEE MANAGEMENT
- EMPLOYEE SELF SERVICE
- CLIENT MANAGEMENT
- PAYROLL PROCESSING
- Payroll Entry >
- Payroll Entry Setup <
- Time Entry Templates
- Time Entry Options
- Process Payroll
- Close Pay Period
- Preview Payroll
- Payroll Run History
- Client Run Schedule
- COBRA >
- REPORTING
- SYSTEM MANAGEMENT
- SECURITY
- PRODUCTION UTILITIES
- CONVERSION MANAGEMENT
- CUSTOMER SERVICE

Time Entry Templates

Template Description	Default Sort Field Reference	Employees Per Page
Regular		
January 30		100
commish		
COVID-19		100

+ Add New
✎ Edit
🗑 Delete
🔄 Refresh
💾 Save
↺ Cancel

Client Time Entry Template
Earnings & Memo Calcs
Deductions
Tax Categories

Time Entry Template

* Template Description:

Default Sort Field 1:

Default Sort Field 2:

Default Sort Field 3:

Employees Per Page:

Show Override Workers Comp:

Bonus Process Template in isolved

Search the menu

- EMPLOYEE MANAGEMENT
- EMPLOYEE SELF SERVICE
- CLIENT MANAGEMENT
- PAYROLL PROCESSING**
- Payroll Entry >
- Payroll Entry Setup <
- Time Entry Templates
- Time Entry Options
- Process Payroll
- Close Pay Period
- Preview Payroll
- Payroll Run History
- Client Run Schedule
- COBRA >
- REPORTING
- SYSTEM MANAGEMENT
- SECURITY
- PRODUCTION UTILITIES
- CONVERSION MANAGEMENT
- CUSTOMER SERVICE

Time Entry Templates

Template Description	Default Sort Field Reference	Employees Per Page
Regular		
January 30		100
commish		
COVID-19		100

+ Add New
✎ Edit
🗑 Delete
🔄 Refresh
💾 Save
↶ Cancel

Client Time Entry Template
Earnings & Memo Calcs
Deductions
Tax Categories

Earnings / Memo Calcs

Title	Display Order	Show Hours	Show Dollars
<input checked="" type="checkbox"/> Salary	<input type="text" value="1"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Overtime	<input type="text" value="2"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Regular	<input type="text" value="3"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Earnings paid b	<input type="text" value="4"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> COVID-19 Family	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> COVID-19 FMLA	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> COVID-19 FMLA	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> COVID-19 Sick	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Bonus Process Template in isolved

Search the menu

- EMPLOYEE MANAGEMENT
- EMPLOYEE SELF SERVICE
- CLIENT MANAGEMENT
- PAYROLL PROCESSING**
- Payroll Entry >
- Payroll Entry Setup <
- Time Entry Templates
- Time Entry Options
- Process Payroll
- Close Pay Period
- Preview Payroll
- Payroll Run History
- Client Run Schedule
- COBRA >
- REPORTING
- SYSTEM MANAGEMENT
- SECURITY
- PRODUCTION UTILITIES
- CONVERSION MANAGEMENT
- CUSTOMER SERVICE

Time Entry Templates

Template Description	Default Sort Field Reference	Employees Per Page
Regular		
January 30		100
commish		
COVID-19		100

+ Add New
✎ Edit
🗑 Delete
🔄 Refresh
💾 Save
↺ Cancel

Client Time Entry Template
Earnings & Memo Calcs
Deductions
Tax Categories

Deductions

Title	Display Order
<input checked="" type="checkbox"/> 401K	<input type="text" value="1"/>
<input checked="" type="checkbox"/> Aflac Post-Tax	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Aflac Pre-Tax	<input type="text" value="3"/>
<input checked="" type="checkbox"/> Dental	<input type="text" value="4"/>
<input type="checkbox"/> Medical	<input type="text"/>
<input type="checkbox"/> Vision	<input type="text"/>

Bonus Process Template in isolved

Search the menu

- EMPLOYEE MANAGEMENT
- EMPLOYEE SELF SERVICE
- CLIENT MANAGEMENT
- PAYROLL PROCESSING**
- Payroll Entry >
- Payroll Entry Setup <
- Time Entry Templates
- Time Entry Options
- Process Payroll
- Close Pay Period
- Preview Payroll
- Payroll Run History
- Client Run Schedule
- COBRA >
- REPORTING
- SYSTEM MANAGEMENT
- SECURITY
- PRODUCTION UTILITIES
- CONVERSION MANAGEMENT
- CUSTOMER SERVICE

Time Entry Templates

Template Description	Default Sort Field Reference	Employees Per Page
Regular		
January 30		100
commish		
COVID-19		100

+ Add New
✎ Edit
🗑 Delete
🔄 Refresh
💾 Save
↺ Cancel

Client Time Entry Template
Earnings & Memo Calcs
Deductions
Tax Categories

Tax Categories

Title	Display Order
<input type="checkbox"/> City Employer Tax	<input type="text"/>
<input type="checkbox"/> City W/H	<input type="text"/>
<input type="checkbox"/> County 1 Employee	<input type="text"/>
<input type="checkbox"/> County 1 Employer	<input type="text"/>
<input type="checkbox"/> County Employer Tax	<input type="text"/>
<input type="checkbox"/> County Special 1 Employee	<input type="text"/>
<input type="checkbox"/> County Special 1 Employer	<input type="text"/>
<input type="checkbox"/> County Special 2 Employee	<input type="text"/>
<input type="checkbox"/> County Special 2 Employer	<input type="text"/>

Employee Verification

- Perform an audit of employee data related to SSN, name and mailing address
- Make any updates by 12/28/20
- The name must be exactly as it appears on the employee's Social Security card
- Employee W-2 Verification report



Employee W-2 Verification Report

Katy Pratt ▾

Client: 0123456 - DEMO, Inc

Search the menu

- EMPLOYEE MANAGEMENT
- EMPLOYEE SELF SERVICE
- CLIENT MANAGEMENT
- PAYROLL PROCESSING
- REPORTING
- Report Archive
- Report Writer
- Reports On-Demand
- Quarterly Reports On-Demand
- Client Reports
- My Reports ▾
- SYSTEM MANAGEMENT
- SECURITY
- BROKER WORKBENCH
- PRODUCTION UTILITIES

Client Reports

Report Category: ▾

Search:

Output Name	Report Type
Employee W2 Local Wage Listing Report	By Payroll Run
Employee W2 Preview	By Payroll Run
Employee W2 Preview	As Of Date
Employee W2 Verification	By Payroll Run
Year End W2/1099 Employee List	By Payroll Run
Year End W2/1099 Employee List	As Of Date
Year End W2/1099 Employee List	By Payroll Run
Year End W2/1099 Employee List	As Of Date

Once your report request has been submitted you can do any of the following: Run another report, go to My reports, or exit this screen to perform other tasks. The report will be available in My Reports Queue for 72 h

Employee W2 Verification

This report displays the employee name, address, SSN, retirement plan indicator, birth date, term date, W2 type, and payroll status.

Filtering

Company: ▾

Pay Group: ▾

Payroll: ▾

Sorting

Sort Field 1: ▾

Sort Field 2: ▾

Sort Field 3: ▾

Scheduled Sort: None

Employee W-2 Verification Report

Client ID: 0123456 - DEMO, Inc
Pay Group: Weekly
Check Date: 8/28/2020
Run Date: 8/27/2020 Run Number: 26

EMPLOYEE W2 VERIFICATION

DEMO, Inc
 DBA: GTM Demo 2

Period Begin Date: 8/17/2020
Period End Date: 8/23/2020
Pay Period: 4
Payroll Type: Regular Payroll

Employees Receiving a 2020 W-2

Location	Employee Name	Emp #	Social	Retirement	Birthdate	Term Date	Pay Type	PR Status	Employee Address
			Security #	Plan					
01	Daffy Duck	25	660-89-4444	NO			Hourly	Active	55 Lark Street ALBANY, NY 12205
03	Jasmine Jenkins	6	154-78-9450	YES	7/1/1985		Hourly	Active	1 Tollhouse Lane Ballston Spa, NY 12020
03	Jessica Jenkins	1	107-55-2015	YES	4/18/1982		Salary	Active	152 Maple Lane Ballston Spa, NY 12020
02	Daniel Phillips	4	856-14-7945	YES	2/1/1980		Hourly	Active	5 Sycaway Court NEW YORK, NY 10022
02	Ryan Quinn	5	220-14-7413	YES	1/1/2001		Hourly	Active	62 Drucker Lane ALBANY, NY 12206
01	Roxanne Ray	2	022-31-6521	YES	2/6/1980		Hourly	Active	205 Fila Point Drive MANHATTAN, NY 10002
03	Paul Wagner	3	522-10-7845	YES	12/1/1996		Hourly	Active	52 Highline Drive MECHANICVILLE, NY 12118

Total Number of Employees = 7

Updating Employee Info

EMPLOYEE MANAGEMENT

- Employee Summary
- New Hire Wizard
- Quick Hire
- Quick Hire - Time Only
- Copy Employee
- Employee Maintenance <
- General
- Federal Reporting Data
- Employer I-9 Verification
- WOTC Certification

EMPLOYEE SELF SERVICE

CLIENT MANAGEMENT

PAYROLL PROCESSING

REPORTING

SYSTEM MANAGEMENT

SECURITY

PRODUCTION UTILITIES

CONVERSION MANAGEMENT

CUSTOMER SERVICE

Save
Cancel
Terminate

* First Name:

Preferred Name:

Middle Name:

* Last Name:

Prefix:

Suffix:

* Status:

* Rehire Date:

Original Hire Date:

Adjusted Service Date:

* Employee Number:

Timeclock ID:

Include In Next New Hire Report

Self-Service Email:

Enable Self-Service Access

If email address is not currently active the email address will be blocked and the EE will not receive the activation link.

Self-Service Account Locked

Last Activity Date:

Last Login Date:

Employee Address

* Address:

* Zip Code:

Hit Enter Key in zip code field to retrieve city list.

* City:

* State:

Current Status (as of today)

Status: **Active**

Employment Category: **Full Time**

Tax Location

* Residence Location:

* Work Location:

School District:

Reciprocity Rule:

Electronic Consent

Electronic Consent Date:

Consent Withdrawn:

YE Delivery Consent Date:

YE Consent Withdrawn:

Personal Information

SSN:

ID Type:

Please select ID Type to update SSN

Update SSN:

Marital Status:

Contact Information

Home Phone:

Mobile Phone:

Work Phone:

3rd Party Sick Pay

- Call your Disability carrier to request this information ASAP
- Keep your account open with GTM so we do not process your tax returns until this has been received by us and processed
- Deadline to report to GTM is 1/4/21

NY Paid Family Leave

- If you have an employee that received NY Paid Family Leave benefits in 2020, benefits should be reported by the State Insurance Fund on Form 1099-G and by all other payers on Form 1099-MISC
- Contact your insurance carrier to confirm that they will be providing the 1099-MISC

2021 Thresholds and Updates

- Time Off Balances
- Employee Deductions
- Form W-4 Exempt Status
- 2021 State Unemployment Tax Rates
- New York State Minimum Wage
- NYS Paid Family Leave Rate
- Social Security Wage Base
- Qualified Retirement Plan Limits



Quarterly Reports

Search the menu

EMPLOYEE MANAGEMENT

EMPLOYEE SELF SERVICE

CLIENT MANAGEMENT

PAYROLL PROCESSING

REPORTING

Report Archive

Report Writer

Reports On-Demand

Quarterly Reports On-Demand

Client Reports

My Reports

My Reports Queue

Date Range Reports

Check Print Back

Quarterly Reports On-Demand

Year	Quarter	Link
2020	3	Download File
2020	2	Download File
2020	1	Download File
2019	4	Download File

Year-End Report Archive

Search the menu

EMPLOYEE MANAGEMENT

EMPLOYEE SELF SERVICE

CLIENT MANAGEMENT

PAYROLL PROCESSING

REPORTING

Quarterly Reports On-Demand

Client Reports

My Reports

My Reports Queue

Date Range Reports

Check Print Back

Continuous Reports Archive

Year End Report Archive

Year End Reports On Demand

Reports to CD

SYSTEM MANAGEMENT

SECURITY

PRODUCTION UTILITIES

Year End Report Archive

Year:

Output Item	Batch #	Status	Print Date	Output Type
1099-NEC Copy 1 NY		GENERATED		1099-NEC Copy 1 NY
1099 Delivery		GENERATED		1099 Delivery
1099 Packing List		GENERATED		1099 Packing List
1099 Wrap Instructions		GENERATED		1099 Wrap Instructions
1096-NEC Employer		GENERATED		1096-NEC Employer
1099-NEC		GENERATED		1099-NEC
1099-NEC Pressure Seal		GENERATED		1099-NEC Pressure Seal
1099-NEC Copy A		GENERATED		1099-NEC Copy A
1099-NEC Copy C Emplo...		GENERATED		1099-NEC Copy C Emplo...
W-2 Reconciliation Sum...		GENERATED		W-2 Reconciliation Sum...
W2 Copy 1 NY		GENERATED		W2 Copy 1 NY
W-3 Transmittal		GENERATED		W-3 Transmittal
W-2 Pressure Seal		GENERATED		W-2 Pressure Seal
W-2 Copy D Employer		GENERATED		W-2 Copy D Employer
W2 Delivery		GENERATED		W2 Delivery
W-2 Packing List		GENERATED		W-2 Packing List
W-2 Wrap Instructions		GENERATED		W-2 Wrap Instructions

[Refresh](#)

1099-NEC Copy 1 NY

Generate Begin:

Generate End:

Going Paperless

- Payroll information online through our employee self-service portal
- Employees can view pay stubs and W-2s 24/7 from any device
- Direct deposit reports online - more reliable, convenient, and secure than sending it through the postal service - and no delivery fees



Employee Self Service

< 3 of 11 >
☰
🔍


Robert (Bob) A Newhart
Employee#: 3009 Status: Active

Pay Group: Weekly
Hire Date: 7/8/2020

Salary: 1200.00
Work Location: Halfmoon, ...

Division: 1
Job: 2

Welcome back Bob



MY PROFILE

Bob A Newhart

Manager


Length of Service: 4 Months

Anniversary: 7/8/2020

NOTIFICATIONS

Important Company Messages

MY P



MY PAY

👁️
👁️
<
9/25/2020
8/14/2020
>

Check Number	V475149	V424529
Gross Pay	\$1,200.00	\$1,200.00
Net Pay	\$958.21	\$958.21
Direct Deposit	\$958.21	\$958.21

MY P

12/10/2020

© 2020 GTM Payroll Services Inc.

20

Employee Self Service

- Search the menu
- EMPLOYEE MANAGEMENT
 - EMPLOYEE SELF SERVICE**
 - Documents
 - Company Assets
 - Awards
 - Pay History
 - W2/ACA/1099 Forms**
 - WOTC Questionnaire
 - Employee Contacts
 - Employee I-9
 - Prior Employment
 - Training
 - ...
 - CLIENT MANAGEMENT
 - PAYROLL PROCESSING
 - REPORTING
 - CUSTOM MANAGEMENT

W2/ACA/1099 Forms

[+ Add a New Document](#)

↕ Tax Year	↕ Document Description	↕ Document Type	↕ Document Name	View Document
2019	W-2/1099	YE Tax Form	2019 W-2.1099.pdf	View Document

Action Steps and Deadlines

Action

- Complete Year-End online form
- Submit 2020 Year-End bonus runs or void/manual checks
- Update employee data
- Verify and report 3rd party sick pay

Deadline

December 14

December 28

December 28

January 4, 2021

Questions?



Thank You!