

# 2018 VIRTUAL CONGRESS & EXP

## AGENDA



### Wednesday, May 23

All times are Eastern Time

#### 10:00 a.m. — 6:00 p.m.

##### Virtual Congress & Expo Opens

Take some time to familiarize yourself with the environment before the event kicks-off.

##### Visit the Expo

In one convenient place you will find a wide array of world-class vendors with the latest products, technologies, and services you require to improve the efficiency and reduce the costs of your payroll operations. We thank you for visiting and networking with our vendors so they can learn what you need and how to provide it.

##### Collect Badges

Engage in all areas of Virtual Congress and earn as many badges as you can. Follow the Badge Leader Board to see how you and your peers rank throughout the day. Plus join in the Badge Scavenger Hunt. Find the hidden badge survey questions in various areas throughout the environment and be entered to win a free registration to the 37th Annual Congress in Long Beach, CA.

##### Play Payroll Trivia

Visit our game center and test your payroll knowledge. You could win a free registration to the 37th Annual Congress in Long Beach, CA.

#### 11:00 a.m. — 12:00 p.m.

##### Paycards: Generational Trends Shaping the Future of Worker Pay | 1.0 RCH

Sponsored by  Global Cash Card

**George Mavrantzas, VP, Special Projects**

A national study reveals hidden habits, perceptions, and preferences of American workers when it comes to money and pay. Understanding the perceptions and needs related to pay of the youngest members of the workforce is vital to an organization wanting to remain at the forefront of worker trends and being successful in recruiting and retaining top talent.

#### 12:30 p.m. — 2:00 p.m.

##### Make HR a Profit Center - Increase Bottom Line Dollars Using Tax Credits | 1.5 RCHs

**Eric Wade, CPP, Product Manager, Paychex, Inc.**

**Ezrie Yellin, VP, Product and Marketing, HIREtech**

This session will discuss all available federal, state, and local hiring incentives, and how payroll providers can assist their clients identify and capture these valuable opportunities. We'll discuss the federal Work Opportunity Tax Credit (WOTC) and how to identify and screen new hires, claim the credits, and benchmark against key performance indicators.

#### 12:30 p.m. — 2:00 p.m.

##### Moving Payroll to the Cloud - A Necessary Step | 1.5 RCHs

**Gregory Shine, CPP, Sr. Product Solutions Consultant, BSI**

You've determined that the perfect partnership is cloud technology and payroll management processes, but how do you get there from here? How do you ensure that you and your processes stay relevant now and in the future? In this session, we will dive into the advantages of moving into the cloud for payroll, compliance, and other related processes and the steps that can help you get there.

#### 3:00 p.m. — 4:00 p.m.

##### GENERAL SESSION: Embrace Your Awesomeness | 1.0 RCH

**Brad Montgomery, Keynote Speaker**

Knowing that our people are our most valuable asset isn't enough. We need to fully understand how to empower and inspire them. Discover ways to achieve untapped productivity and accuracy while creating and sustaining positivity, optimism, and meaningfulness in others. Focusing on the people side of business not only improves the bottom line, it can be enormously satisfying, inspiring, and sometimes very funny.

# AGENDA

**4:30 p.m. — 6:00 p.m.**

## **Global Awareness for the Payroll Professional | 1.5 RCHs**

**Robert Gerbin, CPP, SPHR, VP, Global Payroll Leader,**  
*Wells Fargo Bank N.A.*

As global organizations grow their international footprint, payroll professionals find themselves engaging in new multicultural environments. Participants will take a journey around the globe and gain valuable insights into global cultural awareness, learn how to build and grow productive cross-cultural teams, and hear real-life examples to leverage on their own cultural awareness journeys.

**4:30 p.m. — 6:00 p.m.**

## **Change Management: Nothing's the Same | 1.5 RCHs**

**Steve Hodgson, CPP, CPLP, Director, Payroll Training,**  
*American Payroll Association*

As the workplace continues to redefine itself, managing change becomes even more complex. In this session, we'll discover why people resist change, learn strategies to align the team with a vision, and discover obstacles that block change. This session will also help us to plan, implement, support, and evaluate all phases of the change process.

## **Thursday, May 24**

**10:00 a.m. — 6:00 p.m.**

### **Virtual Congress & Expo Re-opens**

Visit and interact in all areas of the environment throughout the day.

**11:00 a.m. — 12:30 p.m.**

### **Tax Equalization for Payroll Professionals | 1.5 RCHs**

**Dave Leboff, CPA, President, US Operations, Immedis, Inc.**

Many payroll professionals wince when they hear the words "tax equalization." In truth, the concepts are very straightforward and how tax equalization transactions should appear in payroll is well defined. We'll take the mystery out of tax equalization and quickly educate payroll professionals on how to correctly report the various tax equalization-related transactions payroll creates.

**11:00 a.m. — 12:30 p.m.**

### **Payroll Accounting: Beyond the Basics | 1.5 RCHs**

**Emily L. Lindsay, MSA, CPA, CGMA, Executive-in Residence,**  
*American University, Kogod School of Business*

**Andy Garboden, CPP, Director, Payroll Training,**  
*American Payroll Association*

In this session, we'll discuss the journal entries and payroll's impact on tax liabilities, wages payable, accruals, and tax deposits. We will look at the importance of accurate and timely accounting to avoid penalties, the accuracy of the financial statements, and check reversals or voided checks. Learn about the necessity to account for deductions before sending funds to third-party vendors.

**1:00 p.m. — 2:00 p.m.**

## **GENERAL SESSION: Remarkable Changes: Striving Through Adversity | 1.0 RCH**

Sponsored by  

**Jane Seymour, Keynote Speaker**

Internationally acclaimed actress, humanitarian, author, artist, and entrepreneur, Emmy and Golden Globe Award-winning Jane Seymour will share how she learned to embrace life's challenges and turn them into strengthening tools. Jane will explain the true value in our life transitions, share the three stages of change, empower you to accept life shifts, and teach you how to manage even the toughest personal and professional situations.

**3:00 p.m. — 4:30 p.m.**

### **Deliver Your Project on Time! Tools to Get You From Start to Finish | 1.5 RCHs**

**De Ann Doonan, CPP, Executive Director, Global Payroll, Maxim Integrated Products**

Got a big project coming up, but not sure where to start? Set yourself up for success. Even before the project begins, it's your responsibility to define success, build the project framework, and understand the needs of your business and your customer. Learn how to expand your project management knowledge well beyond the basics.

**3:00 p.m. — 4:30 p.m.**

### **Is This Form W-4 Valid? | 1.5 RCHs**

**Sally Thomson, CPP, Director of Payroll Training, American Payroll Association**

When a new or revised Form W-4 arrives in payroll, what are our responsibilities to ensure the form is valid? Form W-4 is one of the most basic, yet complex, forms used in payroll, yet it can also cause distressing problems for payroll professionals. We'll discuss what makes a W-4 invalid, what to do with incomplete or invalid forms, how electronic W-4 forms make it easier for both employees and employers, and when we become the "W-4 police."

**4:30 p.m. — 6:00 p.m.**

### **Visit All Areas of Virtual Congress & Expo**



#### **Recertification Credit Hours (RCHs)**

CPPs and FPCs: After meeting the viewing sessions time requirements (50 total minutes for a 60 minute session, and 80 total minutes for a 90 minute session), you will have an opportunity to print your certificate confirming your attendance and the award of 1 RCH or 1.5 RCH for each session. Place the certificate(s) in your Recertification File Folder to earn the RCH(s) for recertification.

NOTE: APA will not provide certificate(s) to attendees. Individually awarded RCH certificates can also be found in your Virtual Congress profile console after you participate in each session.