

ELIZABETH HUDSPETH & LORI BOGART

Smarter Payroll Starts Here





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REAL or WISH

- ActivityHD can create a Payroll Run for you automatically.
- ActivityHD can automatically call employees who forgot their timesheets.
- ActivityHD can help manage employee benefit elections and administration.
- ActivityHD knows when you're about to make a payroll mistake and gently takes the mouse away from you.

1

Insurance Management

2

Explain Line Feature

3

Allocation Management

4

Automation Tools



Insurance Management

Q: How many of you have felt overwhelmed with open enrollment and updating insurances?

A: ALL OF YOU!

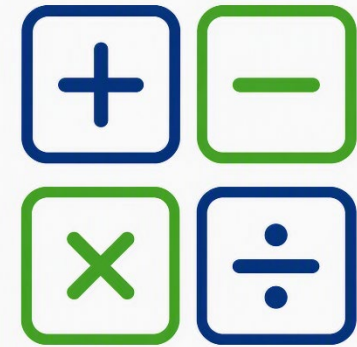
WHERE DO WE START?



PLAN



**EMPLOYEE
COVERAGE**



CALCULATIONS

START WITH THE PLAN



NewReadSaveReportPreviousNext

Insurance Plan for Payroll Demo

Code: Medical2026

Description: BCBS Medical 2026 - 2027

☐ Self-Insured

Type: Medical

Carrier: BCBS

Blue Cross Blue Shield

Policy #: 87988787

Begin: 7/1/2026

End: 6/30/2027

PR Ded Method: Standard Periods, Skip Extra



☒ Employee Covered by all Options

< >

Insurance Types for Payroll Demo		
Options: Personal		
Filters:		
Code	Description	Built-in
Dental	Dental Insurance	Built-in
Life	Life Insurance	Built-in
Medical	Medical Insurance	Built-in
Vision	Vision Insurance	Built-in

Insurance Carriers for Payroll Demo	
Options: Personal	
Filters:	
Code	Description
BCBS	Blue Cross Blue Shield
Superior	Superior
Kaiser	Kaiser
Aetna	Aetna

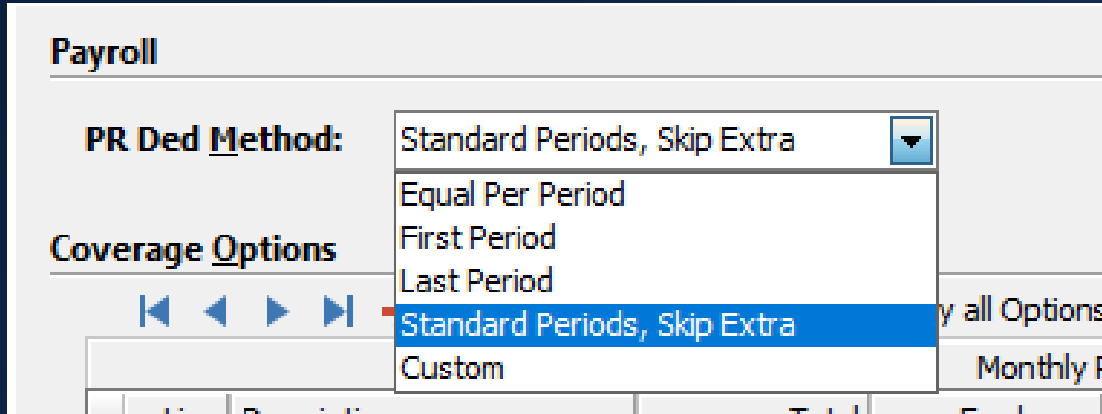
Types

- Built-ins for most common
- Medical, dental & vision
- Life listed but age brackets not supported yet

Carriers

- Define your own

Deduction Method



- Equal amount per period
 - Semi-Monthly has 24 equal payments
 - Bi-Weekly has 26 equal payments
- First check of the period
- Last check of the period
- Standard Periods, Skip Extra
 - Weekly skips the 5th check
 - Bi-Weekly skips the 3rd check
- Custom
 - Custom PRCODE calculations

Coverage Options

- Default list provided for you
- Remove unapplicable options
- Add other options as needed
- Change the wording
 - Example: Two-party vs Spouse

Coverage Options		
	Line	Description
	1	Employee only
	2	Two-party
	3	Employee + child(ren)
	4	Employee + family

Coverage Options						
⏪ ⏩ ⏴ ⏵ + - ✓ ☒ Employee Covered by all Options						
			Monthly Premiums			
	Line	Description	Total	Employee	Employer	COBRA
	1	Employee only	389.72	0.00	389.72	
	2	Two-party	1,291.87	902.15	389.72	
	3	Employee + child(ren)	1,238.95	849.23	389.72	
I	4	Employee + family	1,624.40	1,234.68	389.72	

No more wondering where to enter your premiums and rates!



Total Monthly Premium
Less: Employee Amount

Employer Amount

*** Prevents rounding differences on
the employee amount*

Assign PRCodes to the plan during initial setup

Coverage Options

⏪ ⏴ ⏵ ⏩ + - ✓

☒ Employees

Line	Description	
1	Employee only	
2	Two-party	1
3	Employee + child(ren)	1
I 4	Employee + family	1

PRCodes		
Employee	Employer	COBRA
Ded.I.MedicalEE	Ded.R.Medical	
Ded.I.MedicalEE1	Ded.R.Medical	
Ded.I.MedicalCh	Ded.R.Medical	
Ded.I.MedicalFam	Ded.R.Medical	

PRCodes	
ver	COBRA
Medical	
Medical	
Medical	
Medical	

WHAT ABOUT NEXT PLAN YEAR?

Insurance Plan for Payroll Demo

Code: Medical2026

Description: BCBS Medical 2026 - 2027

☐ Self-Insured

Type: Medical

Carrier: BCBS

Blue Cross Blue Shield

Policy #: 87988787

Begin: 7/1/2026

End: 6/30/2027

Payroll

PR Ded Method: Standard Periods, Skip Extra

Coverage Options

⏪

⏴

⏵

⏩

+

-

✓

☒ Employee Covered by all Options

		Monthly Premiums				PRCodes			
Line	Description	Total	Employee	Employer	COBRA	Employee	Employer	COBRA	Memo
1	Employee only	389.72	0.00	389.72		Ded.I.MedicalEE	Ded.R.Medical		
2	Two-party	1,291.87	902.15	389.72		Ded.I.MedicalEE1	Ded.R.Medical		
3	Employee + child(ren)	1,238.95	849.23	389.72		Ded.I.MedicalCh	Ded.R.Medical		
4	Employee + family	1,624.40	1,234.68	389.72		Ded.I.MedicalFam	Ded.R.Medical		

Eligibility Note

- Copy Last Year's Plan and Update
 - Code
 - Description
 - Effective Dates
 - Rates
 - Policy # if applicable



Employee Insurance Coverage Records



BENEFIT ENROLLMENT FORM

 _____

BENEFIT OPTIONS

☒		Medical Insurance	_____
☒		Dental Insurance	_____
☐		Vision Insurance	_____
☐		Life Insurance	_____

 _____  _____

Signature Date

- Data from benefit enrollment forms
- Coverage options selected
- Has waived option
- Lists covered dependents from employee contacts
- Record qualifying life events
- Override employee monthly premium for special cases
- Supports COBRA enrollment

Employee Insurance Coverage Record



NewReadSavePreviousNext

Insurance Coverage for Payroll Demo

Record #:

600

Employee: 81 ▶ John Michaels

Begins: 7/1/2026 

Description: Medical Ins 2026 - 2027

Ends: 6/30/2027 

Insurance Coverage

Type: Medical ▶ Plan: Medical2026 ▶ BCBS Medical 2026 - 2027

Option: Employee + child(ren) ▼

Total Monthly: 1,238.95

Employee Monthly: 849.23

☐ Waived ☐ COBRA

☐ Self-Insured ☒ Employee Covered

Covered Dependents



Line	Dependent	Relationship	Birth Date	Coverage Begin	Coverage End	Memo
▶ 1	Clara Michaels	Child	4/18/2018			
2	Samuel Michales	Child	7/23/2016			

 **InterActiv**
CONFERENCE

Import new
**Employee Insurance
Coverage Records**
from your open
enrollment platform.



AUTOMATICS... AUTO-MAGICALLY!

Employee for Payroll Demo

Code: 81

Full Name: John Michaels

SSN:

Goes By:

Pronouns:

Automatics: All

⏮️ ⏪ ⏩ ⏭️

⚡️ ✅

☒ Include Historical

Line	PRCode	Description	Begin Date	End Date	Record	Memo
▶ 1	Ded.I.DentalCh	Insurances, Dental EE + C	7/1/2026	6/30/2027	Insurance (599)	
2	Ded.R.DentalCh	Employer Deductions, Der	7/1/2026	6/30/2027	Insurance (599)	
3	Ded.I.MedicalCh	Insurances, Med Child	7/1/2026	6/30/2027	Insurance (600)	
4	Ded.R.Medical	Employer Deductions, Mec	7/1/2026	6/30/2027	Insurance (600)	
5	Ded.I.VisionCh	Insurances, Vision Child	7/1/2026	6/30/2027	Insurance (601)	
6	Ded.R.VisionCh	Employer Deductions, Visi	7/1/2026	6/30/2027	Insurance (601)	
7	Tax.State.CA	State Tax, California	6/2/2021			
8	Tax.State.CAx	State Tax, CA Extra				
9	Tax.State.CASDI	State Tax, CA SDI				

<

>

Employee

Calculations

Disbursement

Positions

Seniority & Leave

Custom

Data Links

Locations

Records

Notes

Edit

Note the Insurance Record references on payroll check lines

Check for Payroll Demo

Batch: InsTest
 Employee: 81 ▶ John Michaels
 Check Date: 8/20/2026 000 12
 ☐ Separation

Entry #: 1 ▲ ▼
 Description:
 Net Pay: 1,312.89
 ☐ Correction

Type: All ◀ ▶ + - ✓

Line	Work Date	PRCode	Description	Source	Rate	Result	Memo	Record
1	8/15/2026	Pay.OT	Overtime	4.75	34.7550	165.09		
2	8/15/2026	Pay.Reg	Regular Hourly	80.00	23.1700	1,853.60		
3	8/15/2026	Ded.I.DentalCh	Insurances, Di	1.00		4.38		Insurance (599)
4	8/15/2026	Ded.R.DentalCh	Employer Ded	1.00		97.99		Insurance (599)
5	8/15/2026	Ded.I.MedicalCh	Insurances, M	1.00		424.62		Insurance (600)
6	8/15/2026	Ded.R.Medical	Employer Ded	1.00		814.33		Insurance (600)
7	8/15/2026	Ded.I.VisionCh	Insurances, Vi	1.00		0.95		Insurance (601)
8	8/15/2026	Ded.R.VisionCh	Employer Ded	1.00		15.62		Insurance (601)

F(4) to open the Insurance Record for review

SIMPLIFIED CALCULATION EXPRESSIONS ANYONE CAN DO!

Segment Item for Payroll Demo

Segment: DedIns Insurance Deducts

Item Code: MedicalEE Description: Medical Ins - Medical EE Only

Parameter Declarations

Line	Name	Description	Data Type	Scale	Date Source	Obsolete	Men
▶						☐	

Available Parameters

Line	Parameter	Description	Data Type	Current Value
▶	1 Type:Ded:403bCatchup	403b Catchup Amt	Number	

Values (Type:Ded:403bCatchup)

Line	Effective Date	Value	Description	Memo
▶				

Source Expression:

1 1

Rate Expression:

1

Result Expression:

1 Insurance.Deduction

That's it. That's the calculation!

COMING
SOON

Coming Soon(ish)

- Insurance reporting
- Life insurance with age brackets
- Self-Serve visibility
- Maybe even open enrollment!

INSURANCE REPORT – HOW ABOUT NOW?

Insurance Analysis

Test (Check Date ending 09/17/2026)

Venue Demo
Dave Powell

Page 1

09/18/2026 09:57:25AM

Employee	Name	Batch-Entry-Line		Check Date	Record #	Record Description	Source	Rate	Result
		Insurance Type	Carrier	Plan		Option			
Type: Dental									
01020	Garrison, Tiffany	DRP-1347-10		05/13/2026	1608	BCBS Dental Emp Only	856.38	40.10	9.25
		Dental	BCBS	Dental insurance		Employee only			
01020	Garrison, Tiffany	DRP-1347-11		05/13/2026	1608	BCBS Dental Emp Only	856.38	40.10	0.00
		Dental	BCBS	Dental insurance		Employee only			
01020	Garrison, Tiffany	DRP-1349-10		06/24/2026	1608	BCBS Dental Emp Only	856.38	40.10	9.25
		Dental	BCBS	Dental insurance		Employee only			
01020	Garrison, Tiffany	DRP-1349-11		06/24/2026	1608	BCBS Dental Emp Only	856.38	40.10	30.85
		Dental	BCBS	Dental insurance		Employee only			
Type: Dental (totals)				Employees: 1		Checks: 2	3,425.52		49.35
Type: Medical									
01020	Garrison, Tiffany	DRP-1347-6		05/13/2026	1606	BCBS Med Opt 1 Emp Only	856.38	171.76	39.64
		Medical	BCBS	Option 1: PPO Copay		Employee only			
01020	Garrison, Tiffany	DRP-1347-7		05/13/2026	1606	BCBS Med Opt 1 Emp Only	856.38	171.76	158.54
		Medical	BCBS	Option 1: PPO Copay		Employee only			
01020	Garrison, Tiffany	DRP-1349-6		06/24/2026	1606	BCBS Med Opt 1 Emp Only	856.38	0.00	39.64
		Medical	BCBS	Option 1: PPO Copay		Employee only			
01020	Garrison, Tiffany	DRP-1349-7		06/24/2026	1606	BCBS Med Opt 1 Emp Only	856.38	171.76	819.11
		Medical	BCBS	Option 1: PPO Copay		Employee only			
Type: Medical (totals)				Employees: 1		Checks: 2	3,425.52		1,056.93

Explain Line Feature

Q: Where did that number come from?

A: Use the new $F(2)$ Explain Line Feature!

Check for Payroll Demo

Batch: Test **Employee:** jabbott ▶ Jane A Abbott **Check Date:** 9/14/2026 ☐ Separation
Entry #: 65 **Description:** Test **Net Pay:** 2,896.99 ☐ Correction

Type:	All	◀	▶	+	-	✓
Line	Work Date	PRCode	Description			
1	9/13/2026	Pay.Salary	Salary Pay	3,541.67		
▶ 2	9/13/2026	Pay.OT	Overtime			
3	9/13/2026	Ded.I.DentalEE1	Insurances, D			
4	9/13/2026	Ded.R.DentalEE1	Employer Ded			
5	9/13/2026	Ded.I.VisionEE	Insurances, Vi			
6	9/13/2026	Ded.R.VisionEE	Employer Ded			
7	9/13/2026	Ded.I.BuyUp1	Insurances, Bu			
8	9/13/2026	Ded.R.Medical	Employer Ded			
9	9/13/2026	Tax.USA	USA W/H	3,476.52		
10	9/13/2026	Tax.MedEE	Medicare EE	3,476.52		
11	9/13/2026	Tax.MedER	Medicare ER	3,476.52		
12	9/13/2026	Tax.SocSecEE	Social Security	3,476.52	6.2000	215.54 941
13	9/13/2026	Tax.SocSecER	Social Security	3,476.52	6.2000	215.54 941

Explain Line

Source Rate

Type:Pay:PeriodWorkHrs = 80.0000
Position = 3,541.6700

Result

Rate = 66.4063
Source = 2.00

OK

Allocation Management

Q: How can I manage allocated wages for an employee who doesn't split their timesheet?

A: Create an allocated expense table!

ALLOCATE PAYROLL EXPENSE TABLE

- Importing time
- Constant % split
- Hourly and salary wa

The screenshot displays the 'Allocate Payroll Exp for Payroll Demo' application. On the left is a sidebar menu with the following items: 'Payroll Demo' (with a signal icon and an upward arrow), 'Administration' (with a wrench icon), '> Authorized Users', 'Change Logs', '> Security', 'Reports', 'v Setup' (with a gear icon), 'Bots', 'Change Logs', 'v Custom Data', 'Allocate Payroll Exp' (highlighted), and 'Bot Usage'. The main area has a header 'Allocate Payroll Exp for Payroll Demo' and an 'Identifier:' field containing 'Ashlei Page'. Below this is a 'Fields' section with a table for allocating expenses.

Fields	
Employee Code:	70
Dept 1:	30
Dept 1 %:	60.00
Dept 2:	11
Dept 2 %:	20.00
Dept 3:	12
Dept 3 %:	20.00

Hourly Timesheet

Time Sheet for Payroll Demo

Employee: 70 ▶ Page, Ashlei jane ☐ Separation

Payroll Run: BW - 2026-08-20 ▶ 8/2/2026 to 8/15/2026 ☐ Correction

Description:

Lines ◀ ▶ + - ✓

Line	Work Date	Source	Rate	Result	Debit Account Description	DeptAttr
▶ 1	8/15/2026	48.00			Maint - Salaries & Wages- Full Time	30
2	8/15/2026	16.00			Maint - Salaries & Wages- Full Time	11
3	8/15/2026	16.00			Maint - Salaries & Wages- Full Time	12
4	8/15/2026	2.40			Admin - Overtime	30
5	8/15/2026	0.80			Admin - Overtime	11
6	8/15/2026	0.80			Admin - Overtime	12

Hourly Payroll Check

Check for Payroll Demo

Batch: AllocTest

Employee: 70

Ashlei Jane Page

Check Date: 8/20/2026

Entry #: 2

Description:

Net Pay: 2,283.

Distributions

Method: By Source



Line	GL Date	Account	Description	DeptAttr	Event	Source	Result
1	8/15/2026	501002-11-A	Admin - Overtime	11		0.80	42.00
2	8/15/2026	501002-12-A	Admin - S & W - Over - Finance -	12		0.80	42.00
▶ 3	8/15/2026	501002-30-A	Admin - S & W - Over - Human Re	30		2.40	126.00

SALARY TIMESHEET

Allocate Payroll Exp for Payroll Demo

Identifier:

Fields:

Time Sheet for Payroll Demo

Employee:

☐ Separation

Payroll Run:

☐ Correction

Description:

Lines ⏮ ⏪ ⏩ ⏭ + - ✓										
Line	Work Date	PRCode	Source	Rate	Result	Debit Account Description	DeptAttr	Event	Memo	
1	8/15/2026	Pay.SalaryDept	32.00			FE - Salaries & Wages	20		split 40 % to Dept 20	
▶ 2	8/15/2026 DEC 12	Stat.Hours	80.00							

Check for Payroll Demo

Batch: AllocTest Employee: 60 Alan Weston Check Date: 8/20/2026
Entry #: 1 Description: Net Pay: 2,590.70

Type: All

Line	Work Date	PRCode	Description	Source	Rate	Result	Memo	Record
1	8/15/2026	Pay.SalaryDept	Salary Dept Sp	32.00	40.8654	1,307.69		
2	8/15/2026	Pay.Salary	Salary Pay	3,269.23	1,307.6900	1,961.54		

Distributions Method: By Source

Line	GL Date	Account	Description	DeptAttr	Event	Source	Result	Debit J
1	8/15/2026	661000-20-A	FE - Salaries & Wages	20		32.00	1,307.69	

Check for Payroll Demo

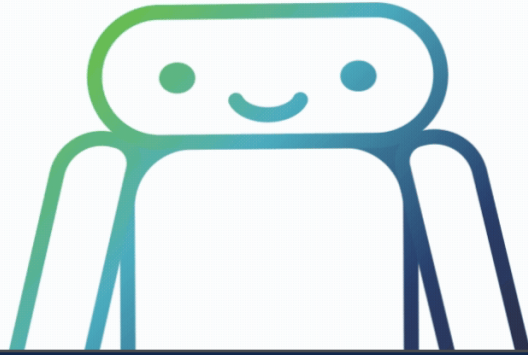
Batch: AllocTest Employee: 60 Alan Weston Check Date: 8/20/2026
Entry #: 1 Description: Net Pay: 2,590.70

Type: All

Line	Work Date	PRCode	Description	Source	Rate	Result	Memo	Record
1	8/15/2026	Pay.SalaryDept	Salary Dept Sp	32.00	40.8654	1,307.69		
2	8/15/2026	Pay.Salary	Salary Pay	3,269.23	1,307.6900	1,961.54		

Distributions Method: By Source

Line	GL Date	Account	Description	DeptAttr	Event	Source	Result	Debit
1	8/15/2026	661000-50-A	FE - Salaries & Wage - Marketing	50		3,269.23	1,961.54	



Automation Tools

Mass Create Payroll Runs

Check Date Options

Answers: Defaults

Payroll Run Type

Select the type of payroll run

Run Type: BW

Pay Period Beginning Dates

Select the beginning dates for the first and second pay period

Begin Date 1: 8/16/2026

Begin Date 2: 8/30/2026

Through Date

Select the date to make payroll runs through

Through Date: 12/31/2026

OK Cancel

Check Date Options

Answers: Defaults

Check Date

Select how the check date is determined. Is the check date on a specific date, day of week, or a set number of days after end date?

Select: Number of days after period end

OK Cancel

Check Date Options

Answers: Defaults

Check Date

Input the number of days after the end date of the pay period to use for the check date

Number of days: 4

OK Cancel

Payroll Run Create Bot

ActivityHD Explorer - Payroll Runs for Payroll Demo - ACW - Elisabeth Hudspeth

Activity System (CustAct2)

- Administration
 - Authorized Users
 - Change Logs
- Security
- Reports
- Setup

Companies

- Payroll Demo
 - Administration
 - General Ledger
 - Bank Reconciliation
 - Accounts Payable
 - Accounts Receivable
 - Fixed Assets
 - Payroll / Human Resources
 - Employees
 - Statuses
 - Attributes
 - Automatics
 - Parameters
 - Parameter Values
 - Disbursement Accounts
 - Disbursement Rules
 - Position Pay Rates
 - Leave Plans
 - Records
 - 1095-Cs
 - ACA
 - Garnishments
 - W-2s
 - W-4s
 - State W-4s
 - I-9s
 - Insurance Coverage
 - Contacts
 - Locations
 - Notes
 - Time Sheets
 - Payroll Runs
 - Leave Plans
 - Checks
 - Government
 - Reports
 - Setup
- Purchasing

Payroll Runs for Payroll Demo

Filters: Lookup: ☐ Include Closed

Run Type	Check D...	Period Begin	Period End	Closed
BW	4/20/2023	4/1/2023	4/15/2023	Closed
BW	8/1/2023	7/16/2023	7/31/2023	
BW	5/31/2024	5/16/2024	5/31/2024	
BW	8/22/2024	8/1/2024	8/15/2024	
BW	2/28/2025	2/12/2025	2/25/2025	
BW	5/31/2025	5/16/2025	5/31/2025	
BW	8/22/2025	8/6/2025	8/19/2025	
BW	9/5/2025	8/20/2025	9/2/2025	
BW	9/19/2025	9/3/2025	9/16/2025	
BW	10/3/2025	9/17/2025		
BW	10/17/2025	10/1/2025		
BW	10/31/2025	10/15/2025		
BW	11/14/2025	10/29/2025		
BW	11/28/2025	11/12/2025		
BW	12/12/2025	11/26/2025		
BW	12/26/2025	12/10/2025		
BW	1/9/2026	12/24/2025		
BW	6/4/2026	5/16/2026		
BW	8/20/2026	8/2/2026		
BW	9/2/2026	8/16/2026	8/29/2026	
BW	9/16/2026	8/30/2026	9/12/2026	
BW	9/30/2026	9/13/2026	9/26/2026	
BW	10/14/2026	9/27/2026	10/10/2026	
BW	10/28/2026	10/11/2026	10/24/2026	
BW	11/11/2026	10/25/2026	11/7/2026	
BW	11/25/2026	11/8/2026	11/21/2026	
BW	12/9/2026	11/22/2026	12/5/2026	
BW	12/23/2026	12/6/2026	12/19/2026	
BW	1/6/2027	12/20/2026	1/2/2027	
SM	5/15/2026	5/1/2026	5/15/2026	
SM	6/4/2026	5/16/2026	5/31/2026	

Assign Automatics to Employees

Bot - "Add Automatic to Employees" for Payroll Demo - ACW - Lori Bogart

Steps
Specify Options
Run Bot
View Results

Answers: Taxes for CA New Hires

Choose one or more PRCodes to be added as Automatics to all selected Employees
If a matching PRCODE with no EndDate is found for an Employee, nothing will be added.

Begin Date:

Automatics: cEE, Tax.SocSecER, Tax.State.CA, Tax.State.CASDI, Tax.SUTA.CA, Tax.USA

Add Remove

- Tax.MedAdd
- Tax.MedEE
- Tax.MedER
- Tax.SocSecEE
- Tax.SocSecER
- Tax.State.CA
- Tax.State.CASDI
- Tax.SUTA.CA
- Tax.USA

<< Back Next >> Finish Cancel

OK Cancel



Thank You!

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