

## SDS Touch Base Tuesday Agenda

May 11, 2021

Presenter: Carla w/ Guest Delta

### 1. Enhancements and News:

- ✓ Reports Added/Updated:
  - Detail Gross Pay by Employee/w Description-User was prompted to select a date range but the report did not utilize it in the record selection process
  - Transaction Balance Report-added the Notes field to print with the detail of transactions
  - TRS Gemini Employee Review-Review Employee Setup for TRS Gemini Reporting
- ✓ Customize Employee Portal View to include additional fields

### 2. Trending Topics:

- ✓ Journal Entry-Transfer of Funds – Entering a Balanced Entry
- ✓ Timing Codes vs Payout Categories
- ✓ Difference between opening and activating a payroll verses creating payroll dates
- ✓ Michigan REP
  - Setup for REP Reporting-Screens and Views
  - What field is used to include employees in REP?
  - Reading the Field Layout in the Help Documentation
  - Upcoming Free Webinar Recording for Michigan REP Report

### 3. Looking forward:

- ✓ **User Boot Camp**-May 20- [Click Here to Register Today](#)
- ✓ **Touch Base Tuesday**-June 8- [Click Here to Register Today](#)
- ✓ **Annual Conferences (REGISTER TODAY, EVENT PACKAGE SAVE 20%)**
  - June 3<sup>rd</sup> – Kick Off Conference
  - September 9<sup>th</sup> – Joint Annual Conference – Day One (Includes All States)
  - September 10<sup>th</sup> – State Specific Annual Conference – Day Two (Time slots for each state to cover state reporting)
  - October 7<sup>th</sup> – SDS Reporting Conference
  - November 18<sup>th</sup> – Masterclass
  - REGISTER = [Click Here to Register Today](#)
- ✓ **Vendor Conferences We're Attending**
  - May 19 - 21, 2021 - 68th Annual Colorado ASBO, Westminster, CO – In person
  - June 9 - 11, 2021 - 70th Annual Illinois ASBO conference Schaumburg, IL – In person
  - November 19-21, 2021 - IASB-IASA-IASBO Joint Annual Conference Chicago, IL