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## The Next Generation Is Here For 2016

In 2015 PenSoft introduced the next generation of PenSoft Payroll as a limited release to a select group of customers. All customers will receive the next generation in 2016.

This is a very exciting time for PenSoft. The limited release provided PenSoft the opportunity to work closely with customers to determine what worked well and where there was need for additional improvement. As with any release, there were initially a few bumps in the road but customers have expressed satisfaction with the functionality and improvement in layout.

In addition to payroll and tax administration, the new software includes workforce management, benefits and performance management, applicant tracking, time management, expanded reporting capabilities and more.

Here is a quick glance of the highlights and features of the next generation of PenSoft Payroll:

### Company

- **Simplified System, Company, and Personnel Setup.** Any function is a button click away.

- **Clone a company.** Set up a new company with many of the same settings as an existing company.
- **Assign deductions multiple ways.** Select from every payday, 1st, 2nd, 3rd, 4th, or last scheduled payday of the month.

### Calendar

- **Add company specific events** to the calendar, including scheduled payrolls, tax report due dates, birthdays, anniversaries, or evaluations.

### Personnel

- View applicants, employees, and 1099 recipients in **one consolidated location.**
- **Automatically track** personnel from application to hiring to termination.
- **View detailed pay history** of personnel with the organized dated list of current and past income rates and amounts.

### Payroll

- **Payroll schedule wizard** provides the ability to setup a customizable pay date schedule. Holidays and weekends can be flagged for easy modifications.
- **More than 500** customizable taxes and deductions for each company.
- **Temporarily suspend** leave accrual and/or direct deposit for bonuses or off-cycle payrolls.
- **Import payroll data** from a compatible xml file following xml schema.

See 2016, page 4

# 2016

PenSoft Payroll  
ships December 14, 2015 via  
UPS Next Day Air Saver

# 2015

Tax forms  
ship November 16, 2015 via  
UPS Ground

In observance of  
Independence Day,  
PenSoft will be closed  
Friday, July 3rd.

In observance of Labor  
Day, PenSoft will  
be closed Monday,  
September 7th.



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## Easy Renewal Ordering!

- 1 **Online.** Place your renewal order online at [www.pensoft.com/customers/renewal.aspx](http://www.pensoft.com/customers/renewal.aspx) using a credit card.
- 2 **Renewal Notice.** Mail your renewal with check or credit card payment. Fax with credit card payment to 757-873-1733.
- 3 **Phone.** Call 888-PENSOFT (888-736-7638) to place your order with a credit card.

### Tax Forms

Order your 2015 tax forms using the order form on the back of your renewal. **Need help determining the best forms?** Call us! 888-PENSOFT (888-736-7638).



Leroy Newman  
President & CEO

## President's Corner

### PenSoft Payroll - The Next Generation

The next generation of PenSoft Payroll is here! Packed full of new features and capabilities, it is the result of listening to our customers' needs and includes many requested items. After several years in development and a limited release in 2015 it is now ready for general release as our 2016 PenSoft Payroll product. Comments from the limited release customers have been very positive.

From a customer:

*I like being able to schedule my work periods and pay dates for the year. I can then set up monthly deductions like insurance premiums by choosing to include them only on the 1st payday of the month. That is a real help to me with my weekly payroll.*

Here is a sample of the new features:

- Assign deductions every payday, 1st, 2nd, 3rd, 4th or last payday of the month

- Add events to a calendar
- Track employees from application to hiring to termination.
- Increased number of deductions
- Temporarily suspend deductions for special payroll runs
- Add "Void After" or "Non-Negotiable" to checks
- Unlimited number of user-defined reports
- Automatically check for updates online

Download the 2015 product demo to get an advanced peek at the new product in preparation for using it in 2016 at [www.pensoft.com/freestuff/trialsoftware.aspx](http://www.pensoft.com/freestuff/trialsoftware.aspx)

### Employees

Heidi Heretick, Director of Sales and Administration, completed 15 years of superb service with PenSoft. Soon after receiving her Bachelor Degree from Christopher Newport University Heidi was hired as a marketing and administrative assistant. She excelled in her tasks and professionally grew through persistence and dedication.

Her accomplishments and capabilities resulted in additional responsibilities. In 2004 when the administrative staff was split off as a separate department, Heidi was the logical choice to be its Director where she continues to excel. She leads her team through myriad projects, tasks and deadlines keeping all in balance and completed on time. Thanks Heidi for 15 years of excellence and congratulations!

Edie McAllister, Administrative Assistant, completed 5 years of outstanding service with PenSoft. Edie came to PenSoft with several years of administrative experience. This experience has proved to be instrumental in her ability to learn and understand the vast spectrum of administrative functions she works with on a daily basis. These tasks span from order taking to quality control on documents to discussions about software registration with customers. She is instrumental to the Department's smooth operation. Thanks Edie for 5 years of dedicated service!

### Valued Customers,

In mid-February PenSoft had network problems. The most common customer experience was a slow-down while accessing our web-facing applications, particularly PenSoft TimeOnline. I asked for this opportunity to explain what went wrong and our actions to correct the problem.

We suffered a permanent failure in the storage system for our database server and immediately began troubleshooting the problem. We fix problems as quickly as possible, but in this case the diagnosis was very difficult. We determined the problem was beyond simple repair.

We have an excellent backup strategy here at PenSoft, and we keep our "mission-critical" systems available as clones at an off-site disaster recover (DR) data center. We requested our DR vendor make the off-site database servers available, and configured our network to allow access to them. We were up and running again - with no lost data - in hours.

While all our database-driven applications were working, a few customers had speed issues when accessing data (from the DR database servers). We traced this problem to a configuration network problem when connecting our office and the DR site.

Customers could still access their data and many didn't notice any

problem at all. Still, we are working with our disaster recovery vendor to identify and resolve this networking issue in the event we have to fail over to our cloned DR machines in the future.

Internally the failed storage system had already been slated for replacement, so we ordered the new equipment right away. Then it snowed (and snowed and snowed and snowed). Weather put delivery of the new components and building the new system a week behind schedule.

The new storage system at PenSoft is in place and fully operational. It's faster, more fault-tolerant, more redundant, and more reliable. We also took the opportunity to reconfigure how we store our data, making the servers more fault-tolerant. We're better; faster; stronger.

We have the best customers! Many of you called to let us know something was wrong, but once we explained the situation you rolled with it. The amount of trust you place in us is significant, and not lost on anyone here at PenSoft. I called you "Valued Customers" above, and that's sincere. Thank you for the opportunity to continue to serve you.

Sincerely,

Paul MacDonald  
Director, Information Systems  
Peninsula Software of Virginia, Inc.

Organizations are always looking for solutions to streamline their day to day operations, especially mission critical processes needed for continuity in the event of disaster. PenSoft customers have been steadily migrating to the “cloud” as a storage solution, but not all cloud products offer the same level of service for securing payroll data.

Many of PenSoft’s customers are using the backup utility in PenSoft Payroll to make a copy of their payroll data and then storing the backup off site in the cloud as part of their disaster recovery plan. While we applaud our customers for securing a backup of their payroll data, it is important to understand the difference between cloud storage and a cloud backup service.

### Cloud Storage vs Cloud Backup Solutions

Cloud storage is where data is stored, managed, and backed up remotely. Essentially it is a virtual file cabinet made available to users over the internet. A few of the more common storage solutions include: Dropbox, Amazon Cloud Drive, Apple iCloud and Google Drive. Several of these providers offer limited drive space at no cost making their services attractive. Installing the app on your PC provides easy access to storing a backup of your PenSoft Payroll data in the cloud.

Cloud backup solutions is a managed service which can include customized services and products based on the business’ needs. This virtual information technology team is responsible for handling the backup process for the organization. The

service provider manages the configuration, implementation, monitoring, and reporting and in the event of a disaster the recovery process for the customer.

Cloud technology has definitely changed the landscape of how organizations do business today. It has opened the door for organizations of all sizes to have access to advanced infrastructure and hardware at an affordable price with scalability to handle growth.

When selecting the solution or service for your organization, it is important to know exactly what it is you are subscribing to regardless of the cost. PenSoft strongly recommends customers evaluate the options and contract of services when migrating their backup data storage to the cloud.

### No Cost Webinar

PenSoft understands it takes time to identify and learn how to use every feature in PenSoft Payroll. Join us Thursday June 18 at 1pm Eastern time for a discussion on backing up PenSoft Payroll data to a Microsoft OneDrive account.

There is no charge for the 60 minute webinar but register early; seating is limited to the first 50 attendees. Register today! <https://attendee.gotowebinar.com/register/6125786463651662850>

## Q&A

**Q.** I have an employee whose wages have reached \$200,000 and is subject to the additional Medicare tax. Is there a report available to assist in showing the wages calculated at the additional Medicare rate of 0.9%

**A.** The Medicare Summary Report breaks out the wages under and above the \$200,000 threshold for Medicare. It also includes the amount of taxes withheld. To generate the report:

- Click Reports on the toolbar.
- Click Tax Reports.
- Click Auxiliary Reports.
- Highlight Medicare Summary Report.
- Click OK.

*Have a question you would like to see answered in our newsletter?*

E-mail it to [info@pensoft.com](mailto:info@pensoft.com) and if we use it you earn a \$10 rewards coupon!

**Q.** I created an income and leave type titled Paid Time Off (PTO). After processing a payroll using the income type, the leave balance of PTO did not change. Why?

**A.** The user defined income PTO has to be linked to the PTO leave type for it to be updated. To automatically update leave balances:

- Click Setup on the menu.
- Select Company.
- Click Income List.
- Highlight the user-defined income PTO.
- Click Modify.
- In the “This income automatically updates the balance of” drop down box select Paid Time Off.
- Click OK.

*Note:* Changes will not affect previously entered payroll records. To correct records, manually update the leave used by modifying each payroll record and entering the leave used.

- **Include reference data** in both alpha and numeric characters on check memo fields and plain paper summaries. Great for EFTPS payments, garnishments, or child support payments.

## Checks

- Customizable check printing with the ability to include “**Void After**” to **MICR checks** in the Check Editor.
- **Generate “Non Negotiable”** checks for payments of zero or negative value.

## Reports

- Expanded reporting capability with an **unlimited number of user-definable reports**. Companies can setup unlimited custom reports specific to their reporting needs.
- **Expanded data options**. Include year-to-date data in the pay date details report in addition to company paid taxes and deductions.

## Utilities

- **Backup multiple companies** or individual company in a single backup file.
- **Backup log will automatically be generated** with each data backup. It will list each selected company and the result of the backup.
- **Restore individual or multiple companies** from multiple companies’ backup.
- **Automatically check for updates online**. Ensure you are working with the most recent software version

## Check It Out TODAY!

Download a trial of 2015 PenSoft Payroll to experience firsthand the upgrades and streamlined structure of the next generation in preparation for 2016. Or register for our Sneak Peek webinar!

## Sneak Peek

Join us Thursday June 11 at 1pm Eastern time for a sneak peek into the next generation of PenSoft Payroll.

We are hosting a no-cost webinar exclusively for current customers to get a sneak peek at the next generation of PenSoft Payroll. Come check out the latest and greatest features, including the integration of employee management capabilities!

Registration is limited! Register TODAY! <https://attendee.gotowebinar.com/register/4634439678066815745>

Can't attend? Additional dates will be scheduled and/or a recording will be available online!

## Don't Miss Out!

### Upcoming Great Things Offered By PenSoft

Did you see the upcoming webinars we mentioned in the newsletter?

#### Don't Miss Out!

Learn more about backing up your data from PenSoft Payroll to a Microsoft OneDrive account.

Thursday, June 18 at 1pm Eastern time

Sign up at <https://attendee.gotowebinar.com/register/6125786463651662850>

Space is limited to 50 attendees.

Get a sneak peek at the next generation of PenSoft Payroll!

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Space is limited - sign up TODAY!

Find out first! Keep an eye on our blog! We post upcoming webinars there!

[www.pensoftblog.com](http://www.pensoftblog.com)

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