UltiPro® – End-to-End Strategic Human Capital Management

With UltiPro, all the functionality you need to manage every aspect of the employee life cycle – from recruitment to retirement – is available in one place, with strategic tools that make a tangible difference to your HR and executive teams. UltiPro delivers "end-to-end" HR and talent management functionality, including recruitment, onboarding, payroll, benefits administration, compensation management, performance management and reviews, talent retention tools, time and attendance, workforce scheduling, rich reporting and analytical decision-making tools, plus a central Web portal that serves as the gateway for your workforce to access company-related activities. The end result is an empowered staff that can access critical information quickly and perform routine business activities more efficiently. Best of all, UltiPro helps your HR team operate on a more strategic level, and that translates into better service for your most important asset – your talented employees.

UltiPro’s Functionality

UltiPro’s Business/Employee Portal

UltiPro’s Web portal keeps everyone in your organization connected. Your gateway to business activities, the UltiPro portal provides essential information for administrators, HR/payroll staff, management team, and employees, and allows your workforce to perform routine business activities from one central location. You save time and reduce your administrative workload because managers can complete common employee administrative tasks, administer benefits, manage staff, and access reporting in real-time. Employees can access their own personal information, get questions answered, and complete routine updates instantly. Plus, sharing important company news and business objectives improves communications to your entire workforce.

Human Resources

UltiPro automatically tracks all HR-related information, including employment history, performance, job and salary information, career development, and health and wellness programs. Plus, UltiPro makes it easy to record key information for government compliance and reporting. You can manage COBRA compliance, HIPAA certificates, OSHA and workers' compensation, FMLA tracking, and EEO compliance; meet the HR requirements of the Canada Labour Code and/or provincial/territorial employment standards legislation; and remain compliant with U.S. and Canadian legislation for protecting sensitive data such as employee social security or social insurance numbers.

Workforce Analytics and Reporting

Authorized managers or HR/payroll staff can quickly run their own reports without requiring the time of central HR/payroll or IT staff. From the UltiPro portal, authorized users can run hundreds of standard HR and payroll reports, including upcoming performance reviews, headcount reports, average salary reports, government compliance reports, general ledger reporting, and other point-in-time HR/payroll reports. What’s more, UltiPro allows you to file signature-ready forms quickly and easily to comply with U.S. and Canadian legislative requirements.

Plus, with UltiPro Business Intelligence, everyone you authorize has immediate access to key workforce metrics through the UltiPro portal. Line managers to executives can pull data across your UltiPro solution – HR, payroll, benefits administration and enrollment, compensation, compliance, year-end, and more – to create, modify, and distribute workforce-related reports and notifications. Custom reports and on-the-fly query tools make it easy for line managers, supervisors, HR/payroll staff, and executives to analyze and share data. Delivered workforce analytics on compensation, turnover, overtime, and more allow strategic evaluation of every aspect of your workforce.

The UltiPro portal connects your entire organization by providing each employee with access to corporate information and self-service.

As your gateway to a wealth of information, the Web portal is highly configurable and offers personalization options to ensure a positive user experience. With UltiPro, your workforce can:

- Launch the portal from multiple Web browsers (Microsoft Internet Explorer and Mozilla Firefox)
- View information and perform tasks in the language of their choice (English, Spanish, or French)
- Set preferences for the order and placement of home-page content
- Access any available page in one click

UltiPro reports provide critical business insight to help you make better decisions.
Recruitment and Staffing

UltiPro Recruitment is the most cost-effective and efficient solution to help your company recruit and hire the most qualified candidates to fill open positions. By automating the entire recruiting and applicant tracking process, UltiPro Recruitment enables your management team, recruiters, and HR staff to track and manage tasks such as posting open jobs, reviewing resumes, screening candidates, scheduling interviews, conducting background checks, and more – right from the UltiPro portal.

Onboarding

UltiPro Onboarding automates and simplifies the process of assimilating a new employee into your organization. When an employee is hired, UltiPro Onboarding helps you manage the logistical details – providing a desk, phone, computer, etc. – that need to be completed before your new employee arrives for the first day of work. Using an online onboarding package that you create, new employees follow a step-by-step guide to walk them through the orientation process including required government and procedural forms (with electronic signatures). By providing a positive onboarding experience, you increase employee satisfaction, boost productivity, and enhance engagement within your company – all while reducing labor costs and saving time for your HR staff.

Performance Management

UltiPro Performance Management helps you track employee competencies, retain top performers, and proactively manage employee performance. With UltiPro Performance Management, you transform tedious, once-a-year performance reviews into an ongoing, competency-driven evaluation process that benefits everyone in your company. You can create employee development plans, assess performance against measurable objectives, effectively plan for future management needs, identify high-performing employees for key positions, and create an environment that maximizes talent and rewards your top performers. In short, UltiPro Performance Management allows you to understand employee competencies, identify and reduce competency gaps, and plan for future workforce needs. The result is better talent retention and better business results for your organization.

Learning Management

UltiPro Learning Management arms you with the tools you need to effectively manage employee learning objectives and company training activities. From initial planning and logistics to course and event evaluation, UltiPro Learning Management facilitates the training registration process, tracks program costs, and records employee training achievements. Employees can view course schedules and descriptions and register online, and managers can approve staff training requests from the Web. It’s integrated with UltiPro Performance Management so that competency-based learning goals set during performance evaluation and coaching plans are linked to upcoming training courses to ensure completion.

Compensation Management

UltiPro helps you retain quality employees because it enables you to better manage compensation and keep increases and incentives in line with employee performance. UltiPro Compensation Management lets you manage a variety of compensation programs more easily, helps you regulate merit increases to stay on budget, and tracks and reports on global compensation. You can report on current and planned compensation to ensure that compensation plans are in line with business objectives.

Salary Planning and Budgeting

UltiPro Salary Planning and Budgeting facilitates salary increase administration by delivering the tools and information your managers need to make effective decisions regarding future compensation for individuals and/or an entire team. Highly configurable, UltiPro Salary Planning and Budgeting makes it easy for you to tie your company’s salary-increase process and business rules into the solution.

Benefits Administration and Enrollment

You can tailor UltiPro to match all of the health, welfare, dental, vision, and other benefits that your organization offers its employees, set up and administer benefit plans, and allow employees to check benefit options and coverage from the UltiPro portal. UltiPro eliminates the need for duplicate rules, duplicate data entry, and reconciliation reporting because it stores details for deductions and benefit plans in one common table. This includes rules for coverage, premium and employer match computations, and eligibility and participation determination.

With UltiPro Benefits Enrollment, you reduce hours of paperwork and decrease costs associated with the enrollment process. Employees can review their benefit choices and make selections on the Web from anywhere. Benefits administrators enjoy easy Web setup and tools to monitor enrollment progress. Plus, UltiPro Benefits Enrollment walks employees through all of the benefit and personal information changes that result from a life event such as getting married, having a baby, or moving.

Payroll Administration and Tax Management

The most flexible, functional payroll engine on the market, UltiPro does it all, handling hundreds of payroll-related computations in U.S. and Canadian dollars with no need for side calculations or expensive programming. For example, complex wage calculations delivered include average pay rates for overtime calculations, shift premiums, garnishments, and levy calculations.

With UltiPro, your central payroll department, remote offices, or multiple divisions can process U.S. and Canadian payroll from start to finish from the UltiPro portal in a few easy steps, including:

- Automatically retrieving time and attendance data for payroll processing
- Calculating pay (including gross-to-net)
- Generating direct deposit files, pay checks, and direct deposit advises for U.S. and Canadian banks
- Issuing off-cycle checks or voiding payments instantly
- Tracking the progress of the payroll online

For fast and efficient processing, UltiPro delivers a Payroll Gateway – one-click access to all of your payroll data. From a single Web page, you can view your payroll calendar and pay dates, select a pay group for payroll processing, check payroll setup, review processing status and payroll results, and access reports. What’s more, you can simplify the payroll process, configuring your own payroll models by bundling a series of payroll steps into one.

UltiPro delivers all U.S. federal, state, local and Canadian federal and provincial/territorial tax updates automatically every quarter as part of the core solution, so you don’t have to pay for or work with a third-party tax service. UltiPro’s comprehensive tax management system helps you handle tax compliance and computations, including multi-state taxing rules and reciprocity, as well as taxation wage accumulation and withholding requirements.

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Time, Attendance, and Scheduling

UltiPro Time and Attendance is a powerful solution designed to meet the time and labor management needs of any organization. Web-based and integrated with UltiPro’s payroll, HR, and benefits functionality, UltiPro Time and Attendance offers:

- **UltiPro Time** – tracks time and attendance against any labor metric and supports a variety of time-capture mechanisms
- **UltiPro Leave Management** – includes all of the functionality required to effectively track and manage employee leave
- **UltiPro Workforce Scheduling** – provides employee scheduling options that organizations in different industries can deploy to drive scheduling decisions and enforce corporate and legislative compliance

Employee Self-Service

UltiPro Employee Self-Service offers important business value by improving employee satisfaction while reducing the administrative workload for HR/payroll staff. Employees have immediate security-protected access to:

- View their paycheck details, benefits summaries, frequently used forms, company information, and more
- Update their personal information such as address, phone number, emergency contacts, skills, and more
- Change their direct deposit accounts
- View federal, state, and local tax withholding information
- Update their dependents and beneficiaries
- Request vacation or paid-time-off
- Make benefit elections (with UltiPro Benefits Enrollment)
- Enroll in training (with UltiPro Learning Management)

Manager Self-Service

As authorized, managers have immediate self-service access to critical employee information, such as salary, key dates, and emergency contacts, with tools that enable them to make smart management choices. From office, hotel, or home, managers can view and update staff information, manage department activities, post job openings, or leverage recruiting and hiring tools. In short, your managers spend more time making effective decisions and less time on HR administration.

UltiPro saves time and reduces administration because it enables anyone you authorize – HR/payroll staff, managers, or remote supervisors – to process work events with no paperwork and no waiting. UltiPro automatically routes changes for approval through pre-defined “workflow processes” for business activities such as:

- Hiring, rehiring, or terminating an employee
- Changing any employee work-related information such as salary, job, organization level, seniority dates, tax information and work/resident locations, and more
- Updating/analyzing employee compensation
- Conducting salary and performance reviews
- Maintaining employee earnings, deductions, and benefits
- Reviewing and approving staff vacation or paid-time-off requests

Convenience Features. UltiPro’s self-service offers convenience feature for your workforce. A “Things I Can Do” area delivers one-click access to all of the tasks that can be completed from the page being displayed. Employee photos can be shown with employee records and in your employee directory to improve workplace security, increase awareness of remote workers, or simply to attach a face to a name. To reduce paper document storage and provide fast access to employee records, managers and HR/payroll staff can attach relevant documents, like performance reviews, certificates, driver’s licenses, and consent forms, to an employee’s file.

Employees can view and print their own pay stubs to complete loan applications or verify their employment.

UltiPro delivers employee information at your fingertips making it easy to manage every aspect of your workforce.

Enterprise Integration Tools

UltiPro delivers unique Enterprise Integration Tools that provide the ability to interface painlessly with third-party applications such as general ledger, your company’s bank, 401(k) and benefit providers, tax filing service, check printing service, unemployment management service, point-of-sale, and more. Scheduling tools allow you to control how and when your data is transferred from one system to another. Monitoring capabilities keep your data secure and ensure successful data exchange.
Unique System Administration Features

UltiPro system administration is a snap because it’s designed for the non-technical user – no programming experience required. System Administration includes:

- **Configuration options** that increase usability and allow you to customize the look and content of the UltiPro portal. Brand the portal, establishing your own company’s image, by inserting your company logo and defining the colors of UltiPro’s Web pages. Create unlimited content, including company communications, forms, documents, links to Web sites and other products, and more, and tailor that content by individual, role, department, company, etc. Individual users can personalize the UltiPro portal by selecting preferences for language (English, Spanish, or French), date format, and placement and order of home-page content.

- **Role-based security** that protects the privacy of your workforce data by defining system access based on an individual’s role within the organization. Employees see only information that is appropriate to their role (or multiple roles).

- **Built-in conditional workflow** that is flexible, easy-to-use, and designed to make business process changes more efficient. You select the level of approvals required (unlimited) for each type of change and designate the approvers – by individual or role. Business processes and approval path(s) are determined at runtime depending on the conditions specified in the data submitted.

- **Flexible business rules** that can be updated by authorized HR/payroll staff and system administrators right from the UltiPro portal, including rules such as your company’s jobs, organization levels, deduction/benefit plans, loan types, paid-time-off plans, and more.

- **A content management tool** to quickly and easily create portal content – including text, links to Web sites and e-mail addresses, files, images, and more. A built-in editor allows content to be formatted easily and automatically translated into HTML for portal display.

Other Optional Features

**Tax Filing**

UltiPro Tax Filing guards your business against filing errors by transferring responsibility for remitting tax files and payments to professionals with years of experience. You save time and enjoy freedom from administration and peace of mind that your payroll taxes are paid and filed accurately, on time, every time. UltiPro Tax Filing:

- Deposits federal, state, and local tax liabilities for over 10,000 tax agencies
- Files all monthly, quarterly, and annual tax returns via paper, e-file, or magnetic media
- Balances quarter-to-date and year-to-date deposits to liabilities to ensure payments are accurate
- Researches and responds to agency inquiries
- Provides tax returns reports prior to due date for your review
- Delivers reconciliation summaries and copies of all filed returns
- Generates and files all amended returns
- Provides new-hire and multi-site reporting to appropriate agencies

**Wage Attachment Disbursement**

For organizations required to process third-party payments on behalf of employees for items such as child support, tax levies, and creditor garnishments, UltiPro Wage Attachment Disbursement enables you to effectively streamline and manage the payment process.

UltiPro Wage Attachment Disbursement utilizes the information entered and calculated in UltiPro. There’s no need to manage payment processing and analyze varying disbursement schedules for multiple jurisdictions. Each payment is made according to the appropriate payment method and reaches its required destination within the designated timeframe.

**Business Continuity Services**

To protect your HR/payroll system in the event of a fire, natural disaster, or other unforeseen incident that could disable your facility, Ultimate Software offers Business Continuity Services to customers that run UltiPro on-premise. If a disaster should occur, your UltiPro data is restored at our world-class hosting facility run by technical experts with years of experience supporting UltiPro. Your system remains in the most experienced hands until you are ready to bring it back onsite at your facility.

**Test Environment Services**

Running critical applications in a test environment is an important component of keeping your business operations running smoothly. For many businesses, however, hardware resources are limited and IT staff time is strained. To assist these customers, Ultimate Software offers Test Environment Services (for both customers that run UltiPro on-premise and those who use the Software-as-a-Service delivery model). Test Environment Services allow you to “rent” a test environment – including all of the hardware, UltiPro software, electrical capacity, and technical support staff – at our data center in order to evaluate the impact of any changes before making them to your live UltiPro system.

**Additional Services**

Ultimate Software offers a number of additional HR and payroll-related services to extend the value of UltiPro, including:

- Pay cards
- Paycheck modeling
- Pre-employment screening services
- Employment verification services
- Unemployment tax management
- Employee assistance, health and wellness, and work-life balance programs

**Award-Winning Customer Service**

One of the key reasons customers select Ultimate Software is to experience the industry’s best customer support from dedicated, long-tenured service professionals who are Certified Payroll Professionals (CPPs). Ultimate is proud of the reputation we have earned in the industry for providing the highest-quality service. Ultimate’s Customer Support:

- Was Service Capability & Performance (SCP) certified by the Service Strategies Corporation for the tenth consecutive year in December 2008
- Won an American Business Award or “Stevie” for Best IT Team in June 2007. The award recognizes IT’s support of the company’s software-as-a-service delivery model and customer satisfaction with the services
- Won a 1st place STAR Award for excellence in customer services from the Service & Support Professionals Association (SSPA) in 2006

When customers call for assistance, they know they have 24-7 access to a team of dedicated service representatives who are experienced in using UltiPro and can rapidly respond to their service requests. Our support team averages 10+ years of industry experience.

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