

cicplus⁺

Workday & CIC Plus Partnership

The stories behind delivering value to leading HR, Payroll, & Benefits teams.



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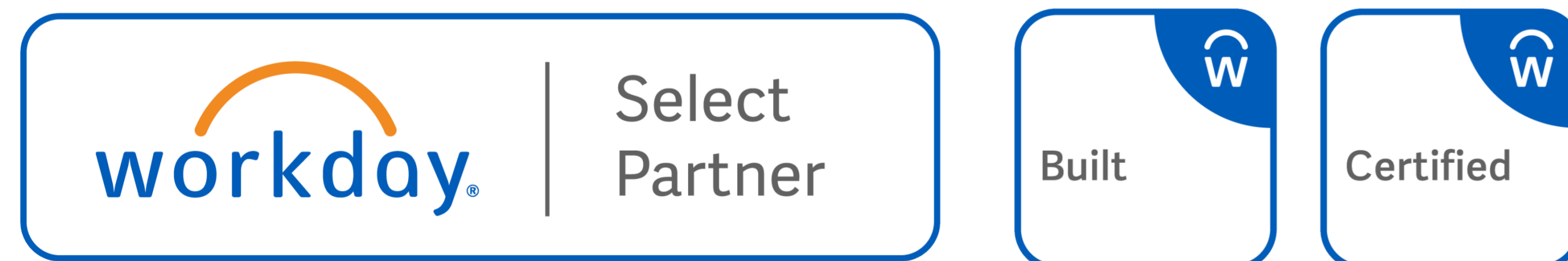
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Workday + CIC Plus

CIC Plus and Workday have been partners since 2013. As an extension of Workday's platform, we provide seamless compliance-related integrations that are essential for organizations to operate at their fullest potential.

Through our partnership, CIC Plus has supported over 300 Workday clients across numerous industries through our Certified integration for Tax Withholding and our Built integration for ACA print and mail fulfillment.



The success of our mutual clients is at the forefront of what drives our partnership with Workday. In the following pages you'll discover how we've been able to:

- Identify client challenges
- Provide compliance solutions that support their Workday platform needs
- Produce key results, driving their HR, Payroll & Benefits teams to success



CIC Plus and Workday service over 300+ mutual clients including...

Burlington



**BON SECOURS
MERCY HEALTH**



H&R BLOCK



NORDSTROM



The Value of Our Partnership

Our Workday solutions are especially valuable for companies who may be experiencing any of the following complexities:

- Onboard new hires remotely
- Have a large and geographically diverse workforce
- Experience high turnover
- Have a growing or changing workforce: M&A, divestitures, seasonal hiring
- Plan on or have recently switched from a legacy HCM system to Workday

CIC Plus adds even greater value to the Workday platform with our ability to address specific & niche compliance needs that, if not addressed, could result in non-compliance down the line and even potential penalties.

The need for a trusted Workday partner with an integrated solution to automate specific aspects of HR, Payroll and Benefits needs all within a single location is where CIC Plus comes in. Our solutions complement Workday's HCM offerings to give our mutual clients a single source solution for the entire employee life-cycle.

Let's look further into how each of these solutions bring value to our mutual Workday clients and how our Workday Certified and Built integrations have produced key results over the past few years.





Workday Certified Integration for Tax Withholding Services



Workday Certified Integration for Tax Withholding Services

Challenges

Any compliance process has its obstacles, and that is certainly true for managing federal, state, and local tax elections. The process can be complicated, depending on where an employee lives and works, leading to payroll inaccuracies and non-compliance if managed incorrectly.

Potential issues can include but are not limited to: employees being provided incorrect forms, they do not know the most current local tax codes, or they did not complete the required fields.

As the Onboarding process continues to evolve, many companies feel the pain and frustration with keeping up with ever changing laws and regulations. Not having a streamlined process can negatively impact the employee experience and limit the Payroll team's resources.



Tax Withholding Challenge



Lowe's needed a Workday technology partner to help manage over 310,000 state and local tax elections annually. To manage this process in-house would have cost their payroll team an abundant amount of resources that could be allocated towards more strategic HR initiatives, while also increasing the risk of completing the process incorrectly.



Workday Certified Integration for Tax Withholding Services

The Solution & Key Results

CIC Plus' Workday Certified integration adds value to Workday by:

- Presenting the correct tax forms through built-in logic that validates lived-in and worked-in addresses, including state reciprocity and military exemption forms while also ensuring the correct completion of forms.
- Auto-applying local income tax to employees who work within a specific locality:
 - Assign PSD Codes in PA
 - Assign School Districts in AR, IA, OH
 - Determine locals in PA, OH, NY, MI, IN, KY, AL, CO, DE, MD, MO, WV, NJ, OR
- Confirming Non-Resident Alien Status

This integration provides bi-directional, real time, single sign-on capabilities that save time and ensure accuracy when capturing an employee's federal, state, and local tax withholding elections.

The ability to drive accurate form completion and eliminate up to 90% of common election errors can significantly reduce the cost, time, and risk associated with maintaining an outdated process.



Tax Withholding Results



LOWE'S[®]

Lowe's saved payroll team an estimated
280 hours per week
capturing local tax withholding for **1,800 locations**.



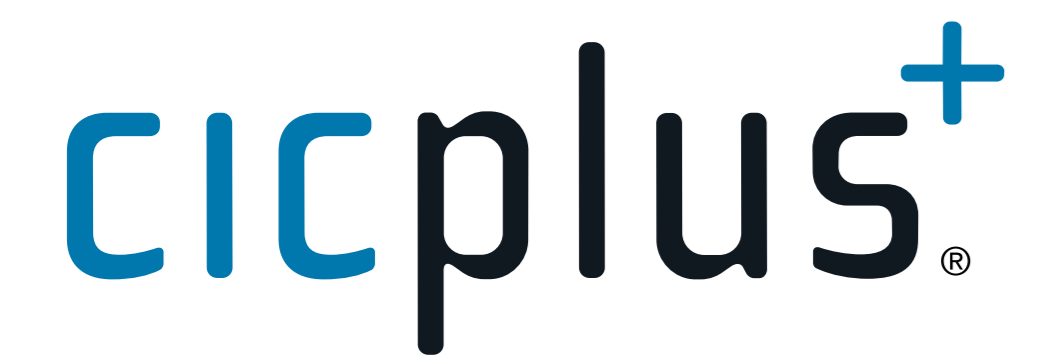
H&R BLOCK

roughly \$50,000 savings by
reallocating resources from manually looking up jurisdictions
and keeping up to date with the latest regulatory changes

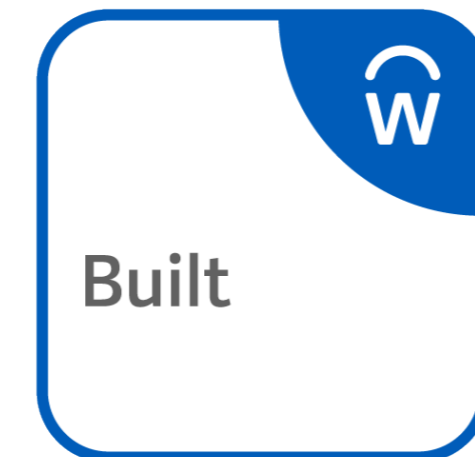


Burlington

over 243,000 tax withholding forms
since 2018 with over **40%** being state and local forms



Workday Built Integration for ACA Reporting



Workday Built Integration for ACA Reporting

Challenges

Companies managing the cumbersome process of printing & mailing ACA statements to their entire employee population in-house can encounter many difficulties. For starters, companies are faced with a tight turnaround time for printing and mailing ACA reports during the already busy year-end season. If delivered late or in an incorrect format, there is a potential to incur costly penalties.

If done in-house, the process can be labor intensive and take away key resources that could be used elsewhere during the hectic year-end season.



ACA Reporting Challenge

BON SECOURS MERCY HEALTH

In 2018, Bon Secours and Mercy Health had merged to form one of the largest health care systems in the nation. With this merging as well as their migration to the Workday platform, Bon Secours Mercy Health would need to distribute 1095's to more than 57,000 employees.

This process, without the help of CIC Plus' Workday Built Integration would have been a massive burden on Bon Secours Mercy Health's Payroll department.



Workday Built Integration for ACA Reporting

The Solution & Key Results

CIC Plus' ACA Print & Mail solution seamlessly integrates with Workday to:

- Handle the print and mailing of employee ACA statements at the click of a button
- Provide a turnkey process that feeds employees ACA data directly to CIC Plus for fulfillment
- Monitor all regulatory changes and proactively update ACA statement specifications as needed
- Support 1095-B and C forms for both electronic or print and mail as well as 1094 preparation and transmission

CIC Plus' Workday Built integration seamlessly manages the print and mail fulfillment of ACA statements at the click of a button. Our API receives employee 1095-C data from Workday into our platform for fulfillment. In addition, we validate forms against IRS business rules to ensure companies remain compliant.

This solution helps companies remain compliant while providing a timely, easy process for employees who do not opt-in for electronic ACA statements.

Confidential - Internal use only



ACA Reporting Results



30,000+ employees across **30 states**
utilize ACA reporting with CIC Plus



over 11,000 ACA forms
processed in 2019



6,426 ACA forms
processed in 2019



Additional Solutions with Workday Clients



Select
Partner

Additional CIC Plus Solutions with Workday Clients

Challenges

In addition to local tax withholding and ACA fulfillment, many of our mutual clients have had other employee life-cycle challenges to address. These challenges include:

- The need to automate the delivery & execution of custom employee forms
- Automation of the I-9 verification process
- Producing and fulfilling year-end tax statements
- Maintaining a legacy system for historical data

Using traditional in-house HCM systems for these requirements can impact the employee experience and place an unnecessary burn on HR and Payroll teams.

On the next few pages, we'll lay out some specific challenges we've been able to help our clients overcome.



Employee Forms Challenge

Burlington

Manually delivering and executing key HR forms is time consuming and leaves room for human error, especially when serving a geographically diverse and mobile workforce. Tracking and monitoring employee travel is a particularly complex process and, when done incorrectly, can lead to non-compliance.

For example, Burlington was manually executing several custom HR forms for over 40,000 employees, including Alternate Travel Withholding, NY Paid Leave and Employee Assistance forms, as these were not digitally available in their HCM system.



I-9 System Management



TOYOTA TSUSHO

Toyota Tsusho uses Workday to automate their HR, **Benefits & Payroll** needs, however they were employing a manual process to execute I-9 verification forms.

Without an automated I-9 verification process, the likelihood of incomplete or inaccurate I-9 forms increases, resulting in potential compliance issues and penalties.



Year End Tax Statement Challenge



Managing the complexities of year-end tax statements is a challenge for employers, especially to those Workday clients that manage their tax filing process in-house.

For example, Cornell University needed a proven Workday partner who could quickly guide them through the year-end tax process—from data preparation to tax statement production and distribution.



Cloud Transition Services



sedgwick

Managing multiple legacy HR and Payroll systems is an additional burden for employers who need access to historical employee tax information.

For example, Sedgwick was faced with the potential of maintaining a legacy system for historical data, which can minimize ROI and cut into the business case of their Workday investment.



The consistency of having one source to manage employee data across the entire life-cycle has been very beneficial for our mutual clients:



CIC Plus' Employee Forms automatically provides all HR forms applicable to employees based on employee address, role, and other identifiers, as well as host over 450 different employee form types.



CIC Plus' I-9 Management System gives employers the capability to complete the entire I-9 process in one system with a certified E-Verify integration, while also providing remote hires physical locations all over the U.S. to complete their I-9 employment verification.



CIC Plus' Year-End Tax Statements simplifies balancing, reconciling, and delivering employees year end tax statements, which ensures all necessary deadlines are met and employees experience a smooth year-end season.



CIC Plus' Cloud Transition Services eliminates the need to manage multiple legacy HR and Payroll systems, storing employee pay and tax information all in one place.



Wrapping Up: Client Call Outs, Special Thank You & Additional Resources



Select
Partner

Client Call Outs

Through the Workday and CIC Plus partnership, we have been able to save our mutual clients time and money by improving the employee onboarding experience. The optimization of the Workday platform through the help of CIC Plus enables companies to reallocate resources back to their core business processes.

"CIC Plus makes onboarding seamless, from integrating with Workday to guiding employees through the process, giving our employees the right experience."

- Magellan Health

"The W-4 forms management system with CIC Plus has helped us streamline our processes, increased compliance with maintaining W-4 documents, and lessened the burden on our payroll department."

- Carnegie Mellon



Thank you Workday!

Together we've been able to help our mutual clients overcome challenges associated with capturing local tax elections, printing, and mailing ACA statements to employees, and so much more.

We look forward to the continued growth of our relationship and our ability to provide best in class services to companies across all industries around the nation.



**Check out more of the resources we have available for you to help
grow our partnership!**

[ACA Print and Mail Integration Datasheet](#)

[Tax Withholding Integration Datasheet](#)

[I-9 Integration Datasheet](#)

[Cloud Transition Services Datasheet](#)