Service Overview

At Workforce Go, your support journey doesn't end with implementation. As you transition to support teams, we want to provide a clear picture of the scope of our services and how we can help. We assist with a wide range of problems, from clarifying things you may not have mastered during implementation to troubleshooting current issues you might experience while using Workforce Go. This Service Overview Document outlines our Workforce Go support structure, making it easy for you to get the help you need when you need it.

Our support structure has three tiers: Single Point of Contact, Escalation, and Extended Support. Below, find detailed explanations of each tier, including what services fall into each category and who to contact for assistance.

Tier 1: Single Point of Contact (Ongoing/Basic Support)

WHO They Are:

Your first point of contact for support is your ***Account Specialist Representative (ASR)***, the designated representative assigned to you. Upon completion of implementation, your ASR is introduced through a transition call with the team lead. The ASR reviews the Help Center, ticket system, contacts, and any other relevant information with a designated person on your team, in a second call.

WHERE You Can Find Them:

To contact your ASR, use the Client Portal to submit a request or inquiry via the Help Center. After the ASR responds, you will have the option to either set up a call or communicate via email.

WHAT They Do:

Your ASR assists with anything that falls under the category of Basic Support. They prioritize understanding your business model and project objectives to ensure our services and future recommendations align with your strategies. Your ASR also attempts to correct errors or resolve operational issues in Workforce Go Products and Services. When questions arise, your ASR always initiates the troubleshooting process, bringing together additional team resources and setting expectations around how those resources will help resolve your issue.

WHEN You Can Expect to Hear Back:

For a non-urgent inquiry, ASR response time is two hours within our business hours, 8:30 - 5:30 pm CST. If you are processing payroll and designate your ticket as Priority 1, an ASR will respond within one hour. Workforce Go aims to resolve an issue within eight business hours.

WHY You Might Contact Them:

The Basic Support that is included (but not limited to) in your Workforce Go subscription includes:

- Troubleshooting guidance (including 30 minutes of screen sharing)
- Suggesting How To's, My Learning, and additional training
- Maintenance of existing services
- Holiday payroll schedule adjustments
- Guidance on supplemental payrolls
- Guidance on voided checks
- Check processing
- Prenote/Live check validation
- Stop payment process
- ACH reject processing
- Payroll schedule reminders (as needed)
- Assistance with ACA Processing
- Set up earning codes/deduction codes / non-custom codes
- Set up vendors
- Add/change bank account
- Shipping questions
- Workforce Go client access issues
- Security questions and guidance

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Tier 2: Escalation

WHO They Are:

Your second point of contact for support is one of the various roles that help our team of designated ASRs. Depending on the specifics of your request or issue, an ***Account Relationship Manager, Product Specialist Representative, G/L Implementation Consultant, or Tax Support Specialist*** will help with resolution.

WHAT They Do:

Account Relationship Manager: Your Account Relationship Manager builds and maintains the relationship between Workforce Go and your CSuite and Administrators. They help facilitate high-level conversations, advise you on what is working well and what could be improved, assist with sales of new modules, services, and hardware for you once live with Workforce Go, and help you through annual renewals. Account Relationship Managers also work with internal managers and their teams to help correct outstanding issues.

Tax Support Specialist: Your Tax Support Specialist works with clients to understand taxation requirements and processes to ensure accurate compliance.

Product Support Specialist: Your Product Support Specialist ensures you understand how Workforce Go serves you. They break down the more intricate and complicated issues, concepts, and processes and explain them in a way that is easy to understand, assist with product questions, test and optimize new features, and are an internal point of reference for all product-related inquiries.

G/L Implementation Consultant: Your G/L Implementation Consultant initially helps to build out General Ledger data integration from Workforce Go to your Accounting ERP application. They provide ongoing escalated support when you experience issues with integration-related tasks.

WHERE You Can Find Them:

After you submit an inquiry via the Help Center, your ASR might escalate your request to Tier II. The Tier II Product Support Specialist reviews the escalation request and recommends solutions to resolve the inquiry (which may involve engaging the Account Relationship Manager, G/L Implementation Consultant, or Tax Support Specialist). If the Product Support Specialist cannot resolve the issue with the help of other Tier II roles, they engage with the Engineering Team to review product behavior.

WHEN You Can Expect to Hear Back:

When a ticket is escalated to Tier II, it is assigned to a Product Support Specialist within an hour. Tier II tickets are resolved within 24 hours (three business days) unless there is an issue with the software solution. These events are escalated to the Engineering Team for review, and you are notified of the work-around and extended time frame required for resolution.

WHY You Might Contact Them:

You will never contact Tier II support directly, as your ASR escalates your requests to Tier II if needed. When a request escalates to Tier II, your ASR will provide necessary details about the the appropriate Tier II support person who will be contacting you to assist with resolution.

Tier 3: Extended Support

WHO They Are:

Your last point of contact for support is your ***Product Experience (PX) Team***, a designated support team assigned to you for issues outside the scope of an ASR's capabilities. An individual from the PX team is a ***Product Experience Specialist.***

WHERE You Can Find Them:

After you submit an inquiry via the Help Center, your ASR might decide the request is outside the scope of basic support. In this case, an Account Relationship Manager is brought in, along with a PX Team, to resolve the issue.

WHAT They Do:

Your PX Team assists with answering questions and fixing issues ***beyond the scope of basic support***. Your PX Team is your last level of support and often works in tandem with Account Relationship managers on escalated issues. If an organization anticipates needing extended support, our team provides an estimate of work necessary for those needs. We only charge for the actual time required to complete the request.

WHEN You Can Expect to Hear Back:

For any work performed by the PX Team, you will be notified directly via email of a Statement of Work to review and sign. The Statement of Work reflects the estimated time to complete the tasks required for the extended support. In most cases, a Statement of Work is drafted, but in its absence (or for lack of need due to the minimal time or effort required), the PX Team will notify you verbally and via email of expected turnaround times to correct an issue or complete services.

WHY You Might Contact Them:

The Extended Support that is included (but not limited to) in your Workforce Go subscription includes:

- Originating bank changes
- Accruals/New time off codes
- All new profiles/policies
- All new products
- New benefit plans
- New open enrollment
- ACA set up
- Worksite reports setup (if a new cost center is required)
- Custom report creation
- Custom forms
- New workflows
- Pay calc
- Pay preps
- Pay period frequent changes
- New EIN
- Rate tables
- G/L Integration
- Amended tax returns
- Recruitment
- Performance management
- Dashboard layouts/library
- Scheduler
- Work schedules

Beyond the Tiers: Self-Service and Client Success

Outside our hefty support system, there are additional resources available to you. You can improve your client experience and knowledge with our Help Center's How To's, My Learning with Workforce Go, and the range of Training Webinars included in your Client Portal. Additionally, a Client Success Representative will help you maximize the value and support level for the Workforce Go solution. A Client Success Representative often serves as your advocate throughout the client lifecycle, conducts period business reviews, reviews client concerns, and suggests the best products for their needs. A Client Success Representative works with other tiers in the Workforce Go support system to improve all aspects of your client experience.

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Daily Payroll Processing

Every business day, the Client Services team's priority is to ensure that payrolls across our client base are timely for distribution and that payments are processed as scheduled. We understand the importance of employees being paid on time with the corresponding tax and vendor payments processed efficiently.

We've designed our 2:00 P.M. Central Time submission deadline and the daily payroll process by working backward from the financial institution and tax authorities' deadlines. We allow the required time for internal control tasks such as processing finalized payrolls, payroll taxes, and financial institution files, and ensuring that everything remains balanced for all our clients.

On some occasions, clients may experience challenges in submitting their payrolls by the 2:00 P.M. Central Time deadline included in our agreement(s). While we work very hard to accommodate these exceptions, late submissions put additional urgency and risk to the activities required to meet the financial institution and tax authorities' deadlines.

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