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PenSoft offers several payroll processing and employee management systems geared toward use directly by small and mid-sized businesses as well as a version tailored to the needs of professionals managing the payrolls of several employers. The Accounting Edition includes all of the features found in the vendor's comprehensive payroll systems, including benefits management, unlimited deductions, job costing, departmental management, consolidated reporting and timesheet management. It also offers client management functions for invoicing, batch processing, global settings and firm management tools. For this review, the Accounting Edition fits our "Wholesale Payroll Professional" model, offering support for large client and employee bases that may be dispersed over several states, with tools for the professional firm to control all aspects of processing and managing all compliance reporting and payment functions.

BASIC SYSTEM FUNCTIONS

PenSoft opens into a work environment that offers traditional pull-down menus across the top of the screen for general system functions, such as file management, program setup, activities, reports, utilities and Help, while the core payroll processing and management functions of the program are available via text/button links for company functions, employee management, payroll processing, deposits, checkwriting, reporting, export and data backups. During company and employee setup, the system offers tabbed interfaces with some guidance for ensuring that at least basic data is entered, along with the ability to use companies or employees as templates and to make global changes across all employees and companies.

Employee information screens offer departmental and project-based assignments for

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functions. Otherwise, the system provides good multi-client management functions, including invoicing with client letter templates and the ability to process payrolls for any number of employers with any number of employees. PenSoft Payroll can also support any number of concurrent users, with tools for preventing data overwrite.

The Accounting Edition includes payroll tax tables and forms preparation for federal and all states, including new hire reports, but it does not provide compliance for municipalities with payroll tax reporting requirements. It does, however, provide tools for distributing income for employees with multiple state taxation. Integrated direct deposit and pay-to-debit card is available as an add-on through partnership with Intercept EFT. The program does not offer batch processing of payrolls across multiple employer entities, but some multi-client management functions are available via overview screens and batch reporting functions. 4.25

REPORTING & MONITORING

Due date tracking and calendaring functions are limited and do not offer multi-client views of pending activities, and there are no tools for alerts or reminders. The program includes preparation for all quarterly wage and employment reporting for federal and all states, with the ability to print signature-ready fileable forms. Or an add-on service allows users to electronically file the 940 series to the IRS through PenSoft. The program does not have built-in utilities for e-filing to states or remitting EFT payments to taxing entities. A broad array of managerial reports include wage, departmental, job costing, GL, deductions, liabilities and other options, with limited customization options through the built-in report writer, but no output for common formats. Employee management screens provide very detailed overviews, with the ability to set defaults, access reports and quickly move to individual histories and withholding data. 3.75

INTEGRATION/IMPORT & EXPORT

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HELP/SUPPORT

Assistive features in the program include a traditional Help utility, with many work screens offering Help buttons that go directly to information related to the active process (such as running payroll). It also offers links to online resources. PenSoft's support website includes an online knowledgebase, downloadable tax forms, calculators and an online user forum. Program and rate table updates are available for download or by CD on a quarterly basis, with no automatic download utility offered. Unlimited online, email and phone-based live support is included in pricing. 4.25

CLIENT SELF-SERVICE FEATURES

Although PenSoft Payroll Accounting Edition is a locally installed, on-premise program, options are available for web-based collaboration with clients. This includes the add-on Remote Client utility, which lets users extend some program functions to clients, such as the ability to edit employee time and leave information. The TimeOnline add-on provides similar functions to client employees, providing a web-based time and attendance tracking system that routes data into the payroll program. Both of these systems are for data entry, with no options for sharing reports or pay stubs. Despite its limited functionality in this area, PenSoft Payroll Accounting Edition did not receiving a rating in this section because this category was identified as an attribute for web-based SaaS products for the purposes of this review. N/A

SUMMARY & PRICING

PenSoft Payroll Accounting Edition has strong multi-employer processing functions that are designed for firms managing virtually any number of clients and large employee bases, along with personnel and benefits management capabilities and some remote client access options. Pricing for the full professional system, which can

be used to manage any number of employers and employees and any number of

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