

# PTM Buyer's Guide

## Which PTM Product Is the Right One for Your Business?

We get it. You have options when it comes to selecting a **Payroll Tax Management** solution, and we're here to help with that process. **PTM** has a wide range of products, allowing you to choose one that suits your needs best. Plus, we are well known for helping our clients' transition to our other options as their needs change. We don't try to fit everyone into one box. We provide a solution that wraps around how you run your business.

With **PTM**, every client has a voice, and we are often developing custom program changes as part of our overall service. If you have a unique integration need or specific programming need, let us know.

A **Payroll Tax Management** Buyer's Guide only makes sense to truly assist our clients with understanding where to get started. So here you are. If you still find yourself struggling with which product to select, just give us a call at [\(855\) 591-9863](tel:8555919863) or [Contact Us](#) directly.

	FlexTax® ELS	FlexTax® Hosted	FlexTax®	PayTax® Plus
	Enterprise Level Software	Cloud-based Software	SaaS Solution	Full Service

### General

Compliance for Federal, State, all Locals, and U.S. Territories	✓	✓	✓	✓
Process files from leading payroll software platforms	✓	✓	✓	✓
Complete control over tax processing	✓	✓		
\$50 million Crime Bond Protection			✓	✓
SSAE 16 and financial audits			✓	✓
Automated EFT Enrollment			✓	✓
Dedicated SME during implementation and training	✓	✓	✓	✓
Software and Database maintenance		✓	✓	✓
Automated System Updates		✓	✓	✓
Tax System Compliance Updates	✓	✓	✓	✓

### Daily

Setup and Maintain Clients via File Imports	✓	✓	✓	✓
Manage SUI Rate Exchanges	✓	✓	✓	✓
Work-Flow Dashboards		✓		
User-friendly searches and available customizable Excel reporting	✓	✓	✓	✓
Creates signature-ready POA Packages	✓	✓	✓	✓
Tracks tax notices and amendments	✓	✓	✓	✓
Amendment Filing and Tracking		✓		

# PTM Buyer's Guide continued...

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<b>Daily</b>				
Automatically create ACH impound and payment files	✓	✓		
Create, print, and reconcile checks	✓	✓		
PTM resolves all tax notices and agency communication	✓	✓	✓	✓
Automated client setup		✓	✓	✓
Customizable train-as-you-go implementation	✓	✓	✓	✓
Automatically schedule and Pay taxes	✓	✓	✓	✓
Dedicated Account Representative			✓	✓
Electronic payments tracers and cancelled checks indexed in system	Optional	Optional	✓	✓
Prevent errors and omissions with numerous diagnostic reports			✓	✓
<b>Funding</b>				
Complete control over impound account	✓	✓		
Utilize multiple banks for disbursements and collections	✓	✓	✓	✓
Automated Bank Reconciliation	✓	✓	✓	✓
Prevents duplicate payments and filing	✓	✓	✓	✓
NSF tracking	✓	✓	✓	✓
<b>Quarter and Year-End</b>				
Automates QE, YE and W-2 processing	✓	✓	✓	✓
Save time and increase accuracy with bulk and online filing	✓	✓	✓	✓
Detailed Client QE Packages with easy-to-read forms	✓	✓	✓	✓
Flexible reporting and filing options	✓	✓		
Track and process zero payments and filings	✓	✓	✓	✓

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## Quarter and Year-End

Electronically signed checks and returns	✓	✓	✓	✓
Optimized for bulk and electronic payment and filing	✓	✓	✓	✓
Agency-tested and approved files and returns	✓	✓	✓	✓
Client, Agency and filing data system reports	✓	✓	✓	✓
Quarter End pre-test available	✓	✓	✓	✓
Employer and Employee W-2s	✓	✓	✓	✓
Complete audit performed during QE			✓	✓
QE Audit Automation and tracking		✓		

## Additional Services

Pay and File Wage Attachments	✓	✓	✓	✓
Canadian taxes in addition to U.S.				✓
Advice of Debit Notification			✓	✓
Special Project Handling			✓	✓
Multiple Worksite Reporting	Optional	Optional	✓	✓
ACA Compliance	Optional	Optional	Optional	Optional
1099 s	Optional	Optional	Optional	Optional



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