



WORKLIO

EXTENDED PROFILE



OVERVIEW

The Worklio system connects the PEO and ASO, its client companies, and their worksite employees in a Human Capital Management solution.

All Worklio data is in an enclosed, secure system. The Worklio HR solution is built exclusively for PEOs and ASO.

The system services a range of needs, including; payroll, compensation, benefits management, general HR onboarding, and more.

The system can be customized, and accessed via mobile devices and customer support is accessible to all users.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Worklio
SOFTWARE FEATURES	
ABSENCE MANAGEMENT	✓
BENEFITS ENROLLMENT	✓
COBRA	✓
COMPENSATION	✓
COMPLIANCE	✓
DISCIPLINARY ACTION	✗
EMPLOYEE SELF SERVICE	✓
FMLA	✗
HEALTH & SAFETY	✓
MANAGER SELF SERVICE	✓
ON & OFF BOARDING	✓

PAYROLL	✓
PERFORMANCE MANAGEMENT	✓
RECRUITMENT	✓
REVIEWS	✓
SOCIAL NETWORKING	✗
SUCCESSION MANAGEMENT	✓
TIME & ATTENDANCE	✓
TRAINING & SKILLS	✓
VACATION & SICK LEAVE	✓
WORKFLOW	✓
WORKFORCE ANALYTICS	✓
TRAVEL & EXPENSES	✗
ORGANIZATION SIZE	
ENTERPRISE (1000+ EMPLOYEES)	✓
MEDIUM (251-1000 EMPLOYEES)	✓
SMALL (1-250 EMPLOYEES)	✓
PLATFORM	
CLOUD	✓
INSTALLED	✗
PRODUCT INFO	

MODULAR	✓
MULTI LANGUAGE	✗
MULTI CURRENCY	✗
CUSTOMIZABLE	✓
FURTHER INFORMATION	
IMPLEMENTATION TIMEFRAME	1 - 3 months
PRICING	Monthly or annual subscription



SOFTWARE SCREENSHOTS

The screenshot displays the Shasta Staffing Management dashboard. At the top, the header includes the company name, a search bar, the current time (9:42 am CET), the date (Wednesday, March 1st), and notification icons. A navigation menu on the left lists various functions like Dashboard, Payroll, Billing, and Clients. The main content area shows a personalized greeting for Edward Lanza, a summary of 14 clients and 349 employees, a profile card with an 'EDIT PROFILE' button, a payroll schedule table, and a 'Recent Activity' feed.

SHASTA STAFFING MANAGEMENT

9:42 am (CET)
Wednesday, March 1st

14 clients | 349 employees

Hi Edward,
Spring is officially a few weeks away, but you could start your spring cleaning today. A clean desk will help you cope with the remnants of winter!

Edward Lanza
Administrator
[EDIT PROFILE](#)

ID / Client	Process Date
459 / Evergreen Co...	3/7/2018
458 / Healthtime M...	3/7/2018
457 / Sam's Pizza	3/7/2018
456 / Abe's Lawn a...	3/7/2018
455 / Smith & Jone...	3/7/2018

There are 3 more scheduled payrolls.
[VIEW SCHEDULE](#)

Recent Activity

- Adjusted payroll schedule
Evergreen Country Club
1 hour ago
- Announced next Open Enrollment period
All client companies
2 hours ago
- Completed Onboarding
Stevens, James & Kopp
Yesterday, 4:32 pm
- New item for To Do List
Yesterday, 3:43 pm
Create customer satisfaction survey for our client relations. Send out by the end of the



SMART STAFFING MANAGEMENT

9:42 am EDT Wednesday, March 14

Home Dashboard Attendance Time Off Payroll Benefits Tools Performance Profile

PERSONAL INFORMATION

NAME: Maria Gutierrez
SOCIAL SECURITY NUMBER: [REDACTED]

WORKED HOURS

21%

Worked 7h 45m
Remaining 48h 15m

TIME OFF

CURRENT ENTITLEMENT: 5 Days
ANNUAL ENTITLEMENT: 20 Days
USED: 6 Days / 14 Scheduled
REMAINING: 10 Days

LATEST PAYCHECKS

10086	\$5,467.19
10031	\$5,467.19
10017	\$4,898.42
10778	\$5,467.19
10795	\$2,912.00

VIEW COMPLETE HISTORY

TIME OFF REQUESTS

None

EMPLOYEE RECORDS

None

Employee Onboarding

PROGRESS: Employment Details

Contract Details Completed Employment Details Incomplete Employment Summary Incomplete

30%

GENERAL

Start Date: 1/1/2018
Job Title: Internet Marketing Associate
Request To: Jill McGregor
Work Location: Main Office
Department: Marketing

COMPENSATION

Compensation Type: Salaried
Compensable Hours: 40 Hours / week
Pay Period: Bi-Weekly
Initial Date of First Pay Period: 1/1/2018
Currency: USD
Salary Entry: Annually
Salary - Annually: \$8,000.00
Salary - Bi-Weekly: \$1,538.46

TIME

Worker Type: Non-Exempt
Employment Type: Full-Time

SCHEDULED BUSINESS DAYS

Sun Mon Tue Wed Thu Fri Sat

Eureka Worry
View Profile

EUREKA

9:42 am EDT Wednesday, March 14

Dashboard Home Social Feed Company News Calendar Who's Out

13 employees

Consider scheduling your summer holiday now. Save money and have something to look forward to.

Jill McGregor
Administrator
EDIT PROFILE

Employees

10 members

- Maria Gutierrez 1:27 am
- John Adams 1:16 am
- Jill McGregor 1:16 am
- Lady Swales 7:01 am

Social Feed

Jill McGregor (Admin)
Great! This is a big deal and customer service will go a long way with them. Thank!

Maria Gutierrez (Admin)
It'll have to rest the extra screen, but I can make it happen. There before won't be a problem.

Jill McGregor (Admin)
Hi Maria,
The corporate email that we have...

Reports 4 / 13 completed To Do List Add

Employee Onboarding

PROGRESS: Contract (step 1)

Contract 0 out of 3 steps completed Basic Information 0 out of 3 steps completed Tax and Bank Account 0 out of 3 steps completed Forms 1/1 0 out of 3 steps completed

30%

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