

**TALX Client Forum 2012**  
**Overall Forum Session Schedule-At-A-Glance**

<b>Tuesday, April 24, 2012</b>				
8:30 – 9:45 am	<b>Opening Session with Dann Adams and Keynote Speaker Susan Ershler</b> <i>Reaching New Heights</i>			
10:00 – 11:00 am Breakout Session #1	Form I-9 and E-Verify Compliance  <i>Managing the Risk</i>	Show Me the Money! Analytics in Action (also available Wed. at 3:00)  <i>Leading the Way</i>	Unemployment: Strategies to Help You Win Your Claim  <i>Getting it Done</i>	WOTC Best Practices – Perspectives from a State Coordinator  <i>Learning from the Best</i>
11:15 am – 12:15 pm Breakout Session #2	The Future is Now – Electronic Child Support Garnishments  <i>Getting it Done</i>	Information Security: Safeguarding Your Employees’ Data  <i>Leading the Way</i>	UI Integrity – DOL Strategies for Reducing Improper Unemployment Payments  <i>Managing the Risk</i>	Implementing and Managing Tax Credit Programs in Your Company – A Roundtable Discussion  <i>Learning from the Best</i>
2:00 – 3:15 pm	<b>General Session</b> <i>I-9 Compliance – Answers From Those Who Make, Enforce, and Interpret the Rules</i>			
3:30 – 4:30 pm Breakout Session #3	What To Do Before You Receive a Notice of Inspection from ICE  <i>Managing the Risk</i>	Developing Leadership Agility: A Business Imperative  <i>Leading the Way</i>	Unemployment and Workers’ Compensation (UWC) Update  <i>Managing the Risk</i>	Unemployment Taxes – The Latest Trends and What You Can Do to Prepare  <i>Leading the Way</i>
<b>Wednesday, April 25, 2012</b>				
8:30 – 9:45 am	<b>Opening Session with Rick Smith and Keynote Speaker David Bach</b> <i>Planning for the Future</i>			
10:00 – 11:00 am Breakout Session #4	Electronic Garnishment Processing  <i>Learning from the Best</i>	Building A High Performance Team Using The Team Scorecard  <i>Leading the Way</i>	See What Really Happens: Attend a Mock Unemployment Hearing  <i>Getting it Done</i>	Mergers and Acquisitions: A Strategic Approach to Employment Taxes  <i>Leading the Way</i>
11:15 am – 12:15 pm Breakout Session #5	Paperless Pay – Pay Your Employees Without Checks  <i>Getting it Done</i>	How to Be Compliant with the New York and California Wage Theft Prevention Acts  <i>Managing the Risk</i>	A Call to Action – The Movement Behind the UI Integrity Act  <i>Getting it Done</i>	Facing Facebook – Legal Challenges with Social Media  <i>Leading the Way</i>
1:30 – 2:45 pm	<b>General Session</b> <i>Workforce Analytics – Transforming Data Into Vital Answers</i>			
3:00 – 4:00 pm Breakout Session #6	Electronic W-2s: Improve Service and Reduce Costs	Show Me the Money! Analytics in Action (also	Reemployment Strategies to Reduce Unemployment	Ins and Outs of Paperless New Hires

	Getting it Done	available Tues. at 10:00) Leading the Way	Costs Learning from the Best	Getting it Done
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## Session Descriptions

Tuesday, April 24, 2012	
<p><b>8:30 – 9:45 am</b></p> <p><b>Opening Session with Dann Adams and Keynote Speaker Susan Ershler</b></p> <p><i>Reaching New Heights</i></p> <p>Dann Adams, TALX president, will open the Forum with a welcome and an overview of the TALX business, including the official launch of TALX Workforce Analytics. He will explain how Workforce Analytics can provide the human capital metrics you need to drive your business. He will then introduce Susan Ershler, who will speak about her life’s journeys, including sharing with others her secrets for success, determination, and achieving seemingly impossible goals. Along with her many professional accomplishments, she and her husband were the first couple to climb all of the Seven Summits of the world together.</p>	
Breakout Session Title	Session Description
<p><b>Breakout Session #1</b></p> <p><b>10:00 – 11:00 am</b></p>	
<p><b>Form I-9 and E-Verify Compliance</b> Speaker: Dave Fowler <i>Managing the Risk</i></p>	<p>How to comply with fluid Form I-9 and E-Verify requirements, including remote I-9s, receipts, changing agents, photo matching, and more.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Legislative updates affecting the industry</li> <li>• E-Verify updates including Self Check, USCIS I-9 Central, and the RIDE program</li> <li>• Burdens on employers including retention, photo matching and manually closing cases</li> </ul>
<p><b>Show Me The Money! Analytics in Action (also available Wed. at 3:00)</b> Speaker: Kristin Wilkinson <i>Leading the Way</i></p>	<p>In this interactive demonstration, you will learn first-hand how to generate and measure significant ROI from workforce metrics derived from data you already entrust to TALX. You’ll walk away with renewed excitement about your organization’s ability to quickly and effectively implement a scalable workforce analytics practice that maximizes revenue while reducing costs.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Reduce costs associated with undesirable turnover</li> <li>• Measure and maintain I-9 compliance</li> </ul>

	<ul style="list-style-type: none"> <li>• Understand and remediate separations that drive up unemployment costs</li> </ul>
<p><b>Unemployment: Strategies to Help You Win Your Claim</b>  Speaker: Bob Austin  Getting it Done</p>	<p>It's never too early to prepare to win an unemployment claim. This session will offer insights into things to consider - even prior to hiring an employee. We will present common separation issues and case studies, and will also discuss the trends for 2012.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• UI Integrity and how all employers are affected</li> <li>• The devil is in the discharge details</li> <li>• The differences between quits and discharges</li> </ul>
<p><b>WOTC Best Practices – Perspectives from a State Coordinator</b>  Speakers: Ezrie Yellin, Megan Rogers  Learning from the Best</p>	<p>One of the elements of a successful WOTC tax credit capture program is knowledge of, and compliance with, the best practice requirements of the state workforce agencies. This session with Megan Rogers of the Missouri Department of Economic Development will cover the basics of the WOTC program, and offer valuable insights into how you can optimize your company's participation in WOTC through specific guidelines pertaining to form submission, state information request responses, and providing target group backup information.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Steps employers must take when applying for credits</li> <li>• How the states process the forms when they are received</li> <li>• Best practices to ensure that you have the best chance for approval of your credits</li> </ul>
<p><b>Breakout Session #2</b>  <b>11:15 am – 12:15 pm</b></p>	
<p><b>The Future is Now – Electronic Child Support Garnishments</b>  Speakers: Tom Werner, Bill Stuart  Getting it Done</p>	<p>Get your arms around child support garnishment compliance, eliminating paper, and filtering garnishments that are not for your employees. Bill Stuart from the eIWO (Electronic Income Withholding Order) portal will also discuss its history and the benefits to employers who use it.</p> <p>Key points:</p> <ul style="list-style-type: none"> <li>• The eIWO process and how it works</li> <li>• How to register and get started</li> <li>• How TALX can help streamline your garnishment process</li> </ul>
<p><b>Information Security: Safeguarding Your Employees' Data</b>  Speaker: Tony Spinelli, Michael Gustavison  Leading the Way</p>	<p>This session will discuss cyber attacks, hacktivism and methods used in these attacks, and provide leading practices available to secure data and your organization from the evolving cyber threat environment.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Expanding sophistication of threats and the underground economics</li> <li>• Security strategies and the importance of enforcement</li> <li>• Layered defense in depth and best practices for data security</li> </ul>
<p><b>UI Integrity – DOL Strategies</b></p>	<p>UI Integrity – reducing improper Unemployment Insurance (UI) payments – is a top priority for the U.S. Department of</p>

<p><b>for Reducing Improper Unemployment Payments</b>  Speaker: Lori Roberts  <b>Managing the Risk</b></p>	<p>Labor (USDOL) and state UI agencies. Maintaining unemployment program integrity is everyone’s responsibility; not only the feds and states, but workers and employers too. This session will highlight how the USDOL and states are working in collaboration to address the UI improper payment rate. Also, hear about the new and controversial “UI Integrity – Prohibition on Noncharging Due to Employer Fault” law.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Discover the root causes of UI overpayments and which are most prevalent</li> <li>• Understand the many steps the DOL is taking to address overpayments</li> <li>• Hear what UI integrity really means to your company and how you can be affected</li> </ul>
<p><b>Implementing and Managing Tax Credit Programs in Your Company – A Roundtable Discussion</b>  Speakers: Ezrie Yellin, Nicholas Stallard, John Stanfield, Cynthia Williams, Melissa Ackerman  <b>Learning from the Best</b></p>	<p>Join us for a lively roundtable discussion on the best practices being utilized today by some of the most successful TALX Tax Credit and Incentives clients. This session will offer actionable tips and information regarding the internal management of tax credit programs including how to enhance credit capture, ensure proper applicant screening, increase compliance, motivate hiring managers, track success, and more. Participants include The Reserves Network, Husqvarna, Frisch’s, and Meijer.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Hear firsthand how other companies maximize their tax credit opportunities</li> <li>• Discover strategies to maximize screening compliance</li> <li>• How to make screening part of your company’s hiring culture</li> </ul>
<p><b>2:00 – 3:15 pm</b></p> <p><b>General Session: I-9 Compliance – Answers From Those Who Make, Enforce, and Interpret the Rules</b></p> <p>This is a special opportunity to hear from USCIS (Yvette LaGonterie), ICE (Jeff Othic), and OSC (Ronald Lee), the three divisions of the federal government responsible for Form I-9 and E-Verify. USCIS is part of the Department of Homeland Security (DHS) and is responsible for the management of Form I-9 and E-Verify. Immigration and Customs Enforcement (ICE) is also part of DHS and is responsible for the enforcement of immigration laws that include Form I-9. The Office of Special Counsel (OSC) is part of the Department of Justice and has the responsibility of responding to claims of discriminatory practices related to Form I-9 and E-Verify. After the presentations there will be an interactive Q&amp;A session which will also include a prominent immigration lawyer and a TALX I-9 expert. Participants will leave this session with an understanding of the roles each of these government divisions has as well as insights into how to review their own hiring procedures to maintain compliance.</p>	
<p><b>Breakout Session #3</b></p> <p><b>3:30 – 4:30 pm</b></p>	
<p><b>What To Do Before You Receive a Notice of Inspection from ICE</b>  Speakers: Dave Fowler, Jeff Othic, Amy Peck  <b>Managing the Risk</b></p>	<p>In this session you will hear from an ICE Special Agent as well as a prominent immigration attorney about what your organization should do to be prepared for an ICE Form I-9 audit. The immigration attorney’s point of view will not necessarily be the same as what you will hear from ICE. You will also learn about the ICE IMAGE program, its benefits, and the requirements for participation. Participants will have an understanding of what actions they need to take to reduce their risk and be properly prepared.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Top compliance activities you should be doing now</li> </ul>

	<ul style="list-style-type: none"> <li>• IMAGE best practices</li> <li>• Audit process and penalties</li> </ul>
<p><b>Developing Leadership Agility: A Business Imperative</b>  Speaker: Dr. Nick Horney  <i>Leading the Way</i></p>	<p>Whether it's in economic conditions, customer expectations, core technologies, business regulations or more, change requires agile leaders who can anticipate it, adapt to it and use it to their competitive advantage. Learn how the research-based Agile Model® serves as the basis for leadership agility assessment and development from Dr. Nick Horney from Agility Consulting. Discover your Leadership Agility through an abbreviated version of the Leadership Agility Profile 360™ hosted on the <i>pan</i> assessment platform.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• How to measure the strengths and developmental needs of your team</li> <li>• Identify key factors contributing to leadership agility</li> <li>• How to access a variety of assessments through the <i>pan</i> assessment platform</li> </ul>
<p><b>Unemployment and Workers' Compensation (UWC) Update</b>  Speaker: Doug Holmes  <i>Managing the Risk</i></p>	<p>The Unemployment Insurance (UI) Program has been strained, but continues to play a vital role in recovery efforts. Doug Holmes will present the national UI outlook covering important issues such as the benefit extension programs, the health of UI trust funds, U.S. Department of Labor initiatives regarding the unemployment insurance program, emerging trends, and what employers might expect throughout 2012 and into 2013.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• The role of UWC as the "voice of business"</li> <li>• Snapshot of current unemployment statistics and legislation</li> <li>• Outlook for employers</li> </ul>
<p><b>Unemployment Taxes – The Latest Trends and What You Can Do to Prepare</b>  Speakers: Steve Carter, Mike Mohr  <i>Leading the Way</i></p>	<p>There are growing signs that the Great Recession is ending and the recovery is underway. While this is good news, the impact of the Great Recession on the unemployment system will result in cost increases for employers for years to come. In this session, we will help you understand how federal and state unemployment taxes will affect your bottom line in the next 3-5 years.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Federal Title XII loans – how do FUTA credit reductions and Title XII loan interest impact your company's budget?</li> <li>• Federal and state legislative summary – pending and enacted in 2012, and what to expect from future legislative efforts</li> <li>• Unemployment tax concepts to assist in planning and forecasting – tools you can use to reduce UI taxes now!</li> </ul>

Wednesday, April 25, 2012

8:30 – 9:45 am

**Opening Session with Rick Smith and Keynote Speaker David Bach**  
*Planning for the Future*

Rick Smith, Chairman and CEO of Equifax (TALX's parent company), will give an overview of Equifax and review how workforce solutions deployed by TALX can help drive the economy, as well as offer his perspective on the economic outlook for the rest of 2012 and beyond. He will then introduce David Bach who will discuss financial advice from both an individual perspective as well as how employers can help their employees make wise financial

decisions. He has more than 7 million books in print, and has been a regular contributor to *The Oprah Winfrey Show* and *The Today Show*.

Breakout Session Title	Session Description
<b>Breakout Session #4</b> <b>10:00 – 11:00 am</b>	
<b>Electronic Garnishment Processing</b> Speakers: Tom Werner, Jason Bunch, Steve Luebke <i>Learning from the Best</i>	Jason Bunch and Steve Luebke from AT&T will discuss how AT&T moved to a largely paperless garnishment management system, including internal planning steps taken, working with a registered agent, moving to the eIWO portal, and changes in the acceptance of paper garnishment orders. They will also discuss the resources they required and the success of the new system. Key Points: <ul style="list-style-type: none"> <li>• Getting the organization on board</li> <li>• Using a phased approach</li> <li>• How to decide: was it worth it?</li> </ul>
<b>Building A High Performance Team Using The Team Scorecard</b> Speaker: Dr. Ann Beatty <i>Leading the Way</i>	Dr. Ann Beatty from Psychological Associates will discuss the value of team evaluations and the Team Scorecard, a process that gives teams insight into how they are performing and the planning tools necessary to help them improve. It emphasizes real-life issues that affect the team and teaches how teams can improve accountability, raise the level of candor, and produce next steps to foster continuous improvement. Key Points: <ul style="list-style-type: none"> <li>• Increase team synergy to produce better decision making, execution, and outcomes</li> <li>• Receive clear steps for continuing your team’s improvement plan</li> <li>• Learn how to access a variety of assessments through the <i>pan</i> assessment platform</li> </ul>
<b>See What Really Happens: Attend a Mock Unemployment Hearing</b> Speaker: Doug Johnson <i>Getting it Done</i>	In this interactive session, the audience will witness the recreation of an unemployment appeal hearing. See firsthand how the evidence and testimony are presented, as well as the direct and cross examination of witnesses. This entertaining session will also delve into the roles of the key participants in a hearing including the Administrative Law Judge, the employer representative and employer witnesses, and of course the claimant. Key Points: <ul style="list-style-type: none"> <li>• What to expect in a hearing</li> <li>• Understanding the perspective of all participants</li> <li>• How to prepare to present your best case</li> </ul>
<b>Mergers and Acquisitions: A Strategic Approach to Employment Taxes</b> Speakers: Robert Lawter, Thomas Towson, Matt White	Planning associated with mergers, acquisitions, and internal reorganizations (M&A) begins during the early stages of an anticipated transaction. Using an interactive case study approach, this session will analyze variables and factors that come into play when designing an “employment tax efficient” structure and the financial implications planning alternatives can have on an M&A transaction. Key Points:

<p>Leading the Way</p>	<ul style="list-style-type: none"> <li>• Planning in the post-SUTA dumping environment</li> <li>• Impact of transaction structure on financial outcomes</li> <li>• Internal and external factors influencing SUI tax rates</li> <li>• Opportunities and risks involved with M&amp;A activities</li> </ul>
<p><b>Breakout Session #5</b> <b>11:15 am – 12:15 pm</b></p>	
<p><b>Paperless Pay – Pay Your Employees Without Checks</b> Speaker: Andy Scholl Getting it Done</p>	<p>This presentation will focus on the advantages to employers of using a paperless pay system. Included will be an overview of the strategic steps necessary for employers to move away from paper-based processes, as well as a discussion of common obstacles and how to overcome them. There will also be a discussion of compliance and legislative efforts impacting paperless pay today as well as the growing use of pay cards. The session will also include an overview of best industry practices to facilitate the outsourcing of paperless pay systems.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>▪ Understand what is involved in going paperless</li> <li>▪ Be armed with what you need to “wow” your leaders</li> <li>▪ How to take the first step</li> </ul>
<p><b>How to Be Compliant with the New York and California Wage Theft Prevention Acts</b> Speaker: Gordon Middleton Managing the Risk</p>	<p>Are you steering clear of the risks of failing to comply with new wage theft prevention notification requirements? Following moves by New York and California, more states are looking to impose these requirements on employers, and each state has varying regulations. In this session, you will learn the latest on legislative and regulatory activity as well as best practices to incorporate tracking, compliance monitoring, and notifications into your hiring and employment management.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Learn about the various notice templates and what information to collect</li> <li>• Understand the requirements for accommodating the employee’s primary language</li> <li>• Overview of retention requirements and an electronic process</li> </ul>
<p><b>A Call to Action – The Movement Behind the UI Integrity Act</b> Speaker: Michele Heckmann Getting it Done</p>	<p>We’ve all seen the almost daily news reports of UI fraud and misuse. The UI Integrity Act was developed to try and address those who fraudulently exploit the unemployment system. However in order to make long lasting changes to the system, consistency also needs to be applied to the thoughts and actions to address improper payments. This session will take a deeper look at the efforts being made by the US DOL and the State Workforce Agencies to apply consistency in their practices to make incremental changes to “business as usual”. Learn what some of the changes being made are and how they may have an impact on you as an employer.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Discover how technology is being used to move from detection to prevention</li> <li>• Benefits and risks to your business as states take a hard look at every part of the UI process</li> <li>• Learn how our system enhancements will help you embrace the call to action to address integrity issues</li> </ul>

<p><b>Facing Facebook – Legal Challenges with Social Media</b>  Speaker: Chad Richter  Leading the Way</p>	<p>Chad Richter from Jackson Lewis will analyze the practical use and impact of social networking in the workplace, highlighting opportunities and challenges for employers. He will share what every employer needs to know in the electronic age and will review steps you can take in addressing the myriad of legal issues relating to electronic media. Topics include the common risks of Internet searches, how you can use information from these sites in making employment decisions, and emerging trends and cases.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Risks from how your employees use social media</li> <li>• Employer risks when using social media for recruiting</li> <li>• How to develop an effective social media policy</li> </ul>
<p><b>1:30 – 2:45 pm</b></p> <p><b>General Session – Workforce Analytics – Transforming Data Into Vital Answers</b></p> <p>Most companies are awash in a sea of workforce data, but very few can leverage that information to identify root causes and take action. Join us to learn from Mike Psenka and RJ Milnor from eThORITY about how to design a methodology that ensures you track only the most important metrics, and discover 16 key performance indicators critical to improving your organization's operations, recruiting, retention, and compliance. Participants will leave the session understanding how to transform their workforce data into powerful insights that increase revenue and reduce costs.</p>	
<p><b>Breakout Session #6</b></p> <p><b>3:00 – 4:00 pm</b></p>	
<p><b>Electronic W-2s: Improve Service and Reduce Costs</b>  Speaker: Erin Critchell  Getting it Done</p>	<p>This session will focus on best practices for employers in the W-2 servicing world, including updates on the latest compliance information and legislative efforts impacting W-2s today. The session will also include ideas for better facilitation of employee consent for electronic W-2s, as well as statistical information on electronic adoption rates.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Review of IRS requirements</li> <li>• Electronic adoption rates</li> <li>• How to develop a paperless strategy</li> </ul>
<p><b>Show Me The Money! Analytics in Action (also available Tues. at 10:00)</b>  Speaker: Kristin Wilkinson  Leading the Way</p>	<p>In this interactive demonstration, you will learn first-hand how to generate and measure significant ROI from workforce metrics derived from data you already entrust to TALX. You'll walk away with renewed excitement about your organization's ability to quickly and effectively implement a scalable workforce analytics practice that maximizes revenue while reducing costs.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Reduce costs associated with undesirable turnover</li> <li>• Measure and maintain I-9 compliance</li> <li>• Understand and remediate separations that drive up unemployment costs</li> </ul>
<p><b>Reemployment Strategies to Reduce Unemployment Costs</b></p>	<p>From improved community and workforce relations to direct unemployment savings and all points in between, a consistent reemployment strategy can provide truly outstanding results. Listen in as representatives from the University of Texas System and the County of Yakima discuss their reemployment programs and the results they have</p>

<p>Speakers: Tammy Mullin, Bob Carson, Judith Kendall <b>Learning from the Best</b></p>	<p>experienced. Key Points:</p> <ul style="list-style-type: none"> <li>• Using Reemployment as a Risk Management Tool – what types of risks are covered?</li> <li>• What coverage do state programs have and what part should employers play?</li> <li>• Managing outcomes – best practices straight from the source</li> </ul>
<p><b>Ins and Outs of Paperless New Hires</b> Speaker: Gordon Middleton <b>Getting it Done</b></p>	<p>Paper processes can lead to inconsistencies in hiring practices, exposing your company to risks like lost productivity, misplaced documents, incomplete forms, missed deadlines, and even harsh judgments. Electronic new hire packets can be standalone solutions to address the highest areas of concern in your new hire process, or can be integrated with more complex talent management solutions.</p> <p>Key Points:</p> <ul style="list-style-type: none"> <li>• Learn the benefits of using an electronic process to manage your new hire packets</li> <li>• How to ensure compliance with corporate and government requirements</li> <li>• Incorporating I-9, WOTC, W-4 (state and federal), wage theft notices, direct deposits, and more</li> </ul>