

*Spring*

# HR & COMPLIANCE SUMMIT

MAY 7, 2026



*Your Irreplaceable Payroll & HR Partner*



# Spring HR&COMPLIANCE SUMMIT

## In Your Program

### YOUR EVENT HUB



#### What's Included

- Complete Agenda
- Speaker information
- Roundtable details
- Sponsor information
- CTR information
- Submit your questions
- Share your feedback

*Slides will be posted after the session and emailed to attendees.*

**Have a question or need something? See a CTR staff member!**

# **Compliance & Legislative Updates 2026**

## **Part I: What's Changing Now**

### **-Part I**



**Please welcome Speaker, Anne Lavelle!**

# SCOTUS-Cases to Watch

- **St. Mary Catholic Parish v. Roy (cert just granted):**

- Issue: Which trumps – religious or LGBTQ rights?
- Issue: Is a facially neutral policy acceptable?
- Issue: What is WV doing in a CO case?

- **Richards v. Eli Lilly:**

- Issue: What is the “similarly situated” employee standard under the FLSA?
- Lenient vs. Strong likelihood (and everything in between)

- **WV vs. BPJ/ACLU and Little v. Hecox:**

- Issue: Transgender prohibitions in sports.

# Other Cases to Watch

- **Camp v. Home Depot (California Supreme Court):**
  - Issue: FLSA and time rounding
  - Time keeping system can keep time to the minute; but HD rounds...
- **Mobley v. Workday (N.D. of California):**
  - Issue: Can an AI Vendor be held directly liable for algorithmic bias that results in discriminatory hiring practices.
    - IT Professional – ADEA, race and disability (bots writing rejection letters)
    - Agent status
    - Class action certified
    - Trickle down liability for employers
- **Fuentes v. Empire Nissan, Inc., (California Supreme Court):**
  - Issue: Small type/blurry arbitration agreement
    - 900 words crammed into 3 inches of space; 5 minutes to review

# I-9 Penalty Adjustments

- Not a surprise but concerning news for employers – somewhat silent news....
- Knowingly hiring an unauthorized workers now carries a fine of up to \$28,619 per violation (repeat violator); first-time offender: \$716 – \$5,724.
- The following errors, once correctable, are now **immediately fineable**
- **No more 10 business day grace period – changed from “technical” to “substantive” errors**
- **Fines have increased from \$288 to \$2,861 per violation**
  - Missing employee date of birth (Section 1)
  - Missing USCIS/alien number (when required)
  - Missing date next to employee signature (Section 1)
  - Missing work authorization expiration date (Section 1, Box 4)
  - Incomplete Spanish-language Form I-9 use outside Puerto Rico
  - Missing employer/rep name or title (Section 2)
  - Incomplete document info in Section 2 (**even if a copy is kept**)
  - Missing first day of employment (Section 2 certification)
  - Incomplete preparer/translator info (Supplement A)
  - Failure to check remote verification box or use remote verification without E-Verify enrollment
  - Electronic I-9 system deficiencies (audit trails, e-signatures, security)

# Paid Leave Expansion

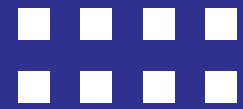
- If you have employees in Colorado, Delaware, Maine, Minnesota, Rhode Island, Washington
  - Changes to length and types of permissible leave
    - Colorado up to 24 weeks of paid leave for NICU infants
    - Minnesota up to 20 weeks paid leave.
- Good reminder:
  - Make sure you are compliant with Allegheny County Paid Sick Leave and Pittsburgh Paid Sick Days Act.
  - As of 1/126 PPSDA
    - Went up to 72 hours of leave for employers with 15 or more employees; 48 hours for under 15 employees
    - Now accrues at 1 hour leave per every 30 worked.

# Other Issues to watch for

- Will Pennsylvania raise the minimum wage?
- Thresholds to watch for...4, 15, 20, 50, 100
- BYOD...

# • Live Benchmarking Session

## Pulse Check: Real Talk, Real Data



*Guest Facilitator from  
PROMARK:*



**Vince Consoli**  
COO

# Live Benchmarking



**In Your Program**

**OR send a text**



**Send @26SUMMIT  
to (855) 910-9662**

# Working Smarter with AI



**Please welcome Speaker, Mike Reynolds**



# WORKING SMARTER WITH AI

A forward-focused session on how leaders  
are practically applying AI in the workplace



**Mike Reynolds**

CEO, LATO AI

# THE MISSING LAYER

Where AI Lives



Human Input

AI LAYER

Human Review

Output



Systems • Decisions • Actions • Software Ecosystem

# HOW AI IS DRIVING REAL BUSINESS IMPACT

What We Will  
Cover Today  
(Agenda)

How Companies Successfully Adopt AI

Real Use Cases Driving Measurable Efficiency

Where AI Is Delivering Real ROI

Adoption Frameworks That Actually Work

Common Pitfalls in AI Adoption

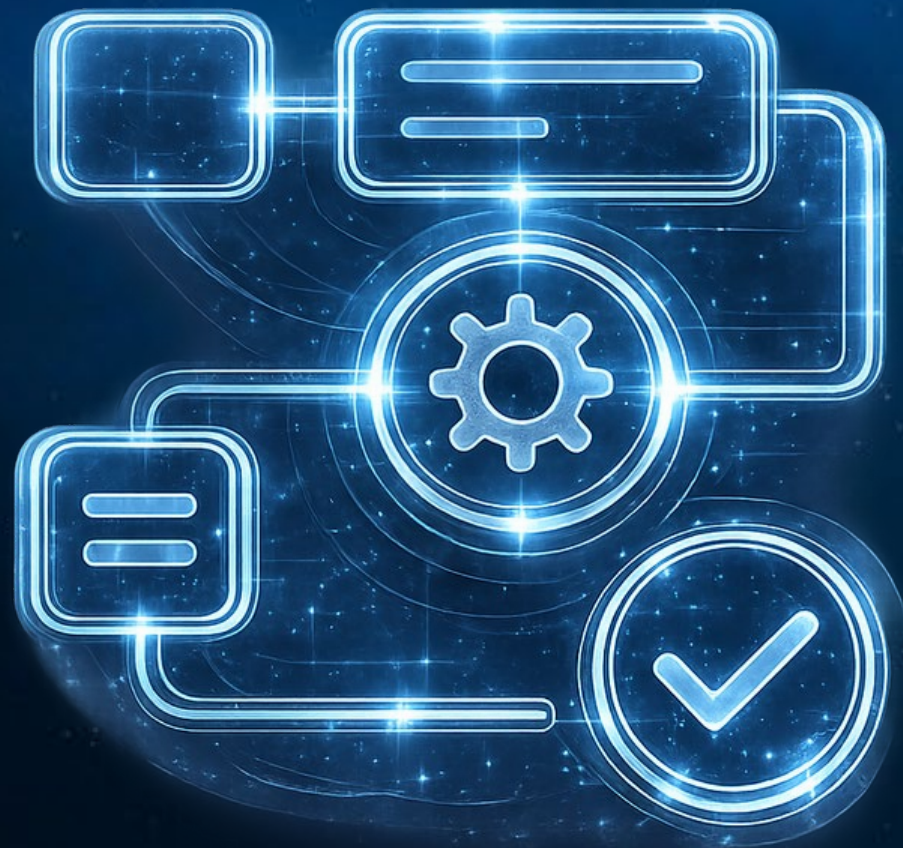
Preparing Teams for Responsible AI Use

# HOW COMPANIES SUCCESSFULLY ADOPT AI

## Conversation Becomes Architecture

A deep look at:

Your Business • Your systems • Your processes • Your people



### Key Piece: The Architecture Workflow

- Identify where AI creates the most value
- Understand how data flows across systems
- Define which actions can be automated
- How to integrate AI into daily operations
- Keep the right level of human oversight
- Build around operational reality

# CASE STUDY

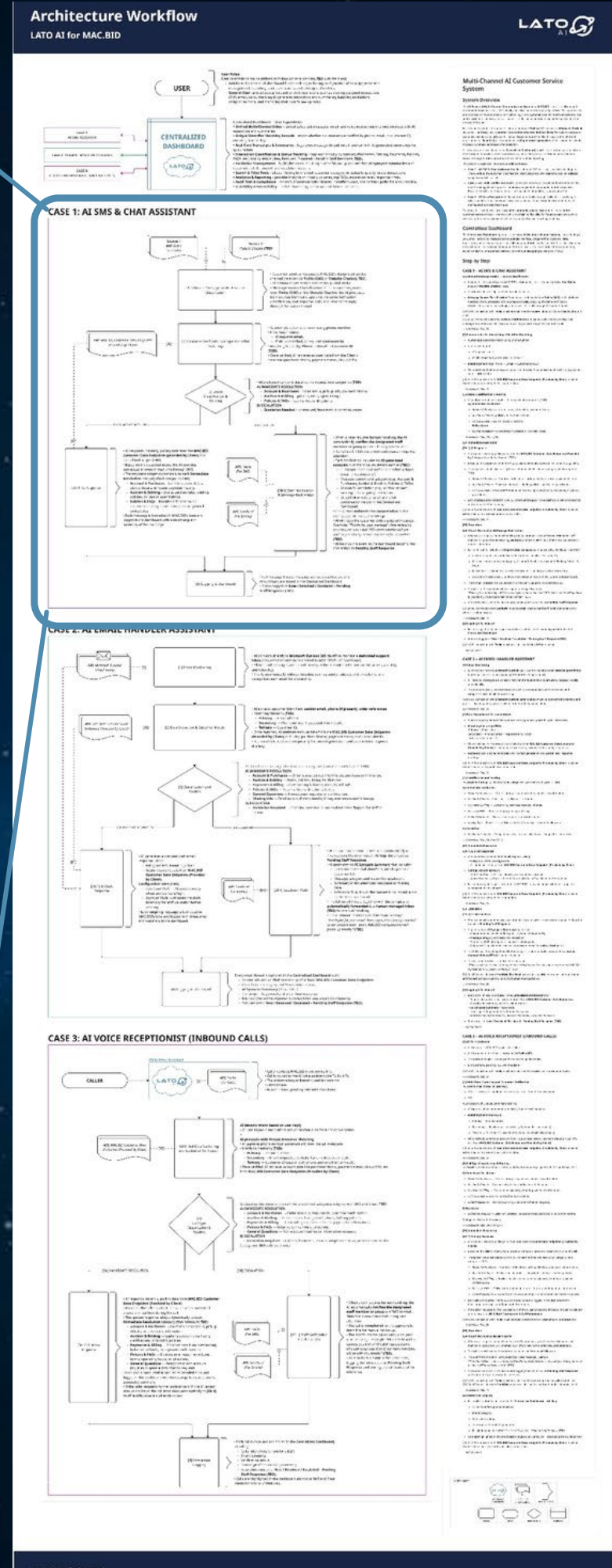
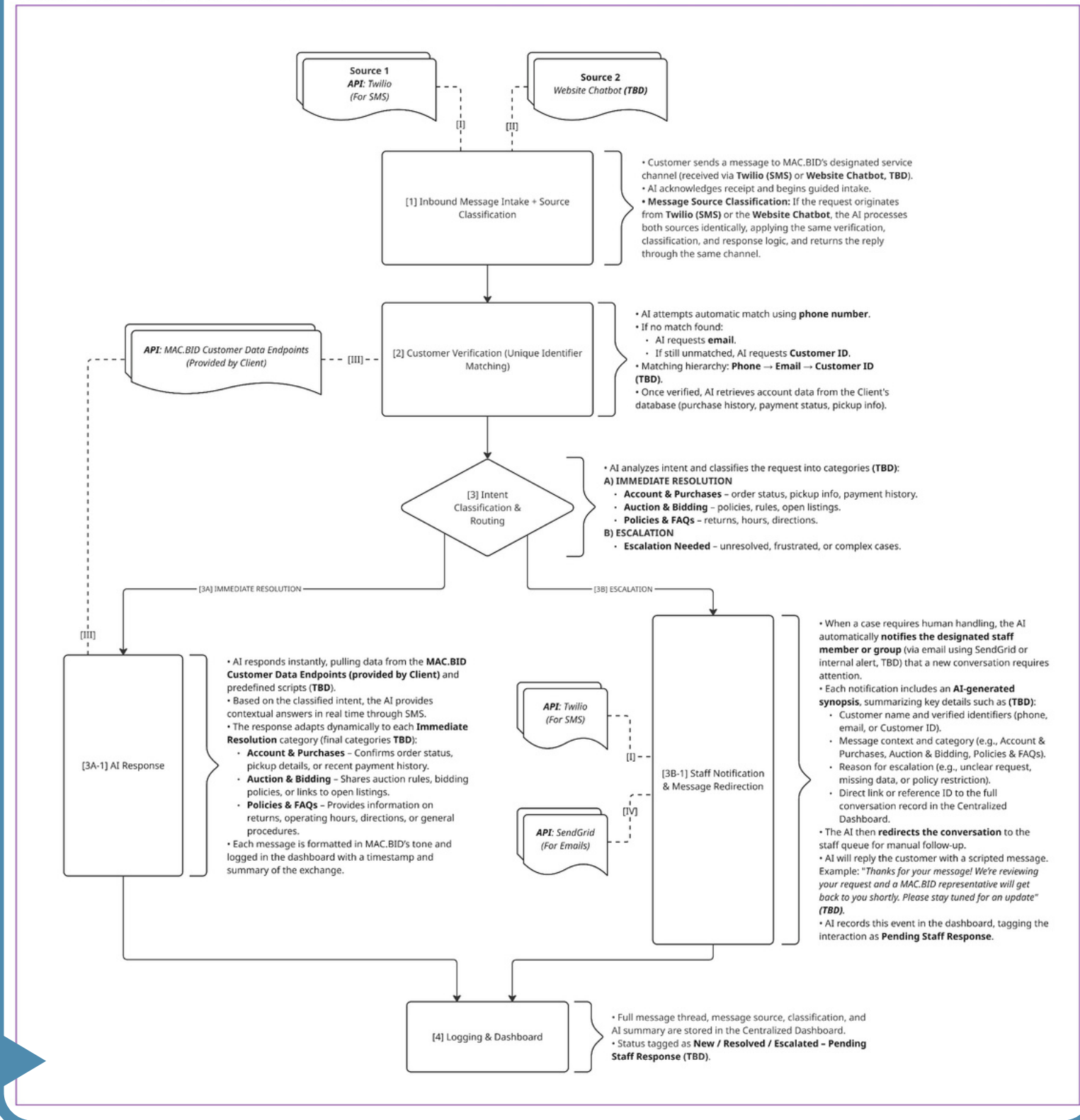
## MAC.BID

### AI-Powered Communications: Voice + SMS + Emails

- Multi-channel intake
- Intent detection
- Workflow routing
- Automated chasing
- Exception escalation
- Traceable

## Architecture Workflow

### CASE 1: AI SMS & CHAT ASSISTANT



# CASE STUDY

## MAC.BID

### Admin Panel

- Human-in-the-loop
- Metrics
- Operational
- Message Logs
- Exception-driven
- Oversight
- Integrations management

MAC.BID - Communicat...  
Search apps and model...  
Navigation  
Dashboard  
Ai\_Assistent  
Escalations  
Message logs  
Email threads  
Customers  
Channel Settings  
Knowledge Base

Site administration  
Day Week Month  
Period Metrics  
New SMS Users: 63  
New Email Users: 214  
Total SMS: 687  
Total Email: 1943  
Interactions: 2 847  
New: 420  
Solved: 2 196  
Escalations: 231  
AI Resolved: 2 384  
Channel distribution  
SMS — 24.1%  
Chat — 7.6%  
Email — 68.3%  
Recent Interactions  
TWILIO · 07:32  
+13059995694  
no I don't need them now please talk with me  
ESC · escalated  
TWILIO · 07:32  
+13059995694  
hello  
ESC · escalated  
EMAIL · 07:31  
uristchmel@gmail.com  
email troubles I don't receive any emails from you.  
— · resolved

Ai\_Assistent Message logs

Created at	Source link	From field link	Category fmt	Status badge	AI summary link
Feb. 06, 2026, 12:55 AM	Email	alex@latoai.com	—	Resolved	Hello Alex, Thank you for reaching out. Once we submit a refund on our side, t...
Feb. 06, 2026, 12:50 AM	Twilio	+13059995694	POLICIES_FAQS	Resolved	Most refunds arrive within 7-14 days after MAC.BID submits them, depending on yo...
Feb. 06, 2026, 12:50 AM	Twilio	+13059995694	POLICIES_FAQS	Resolved	MAC.BID uses these condition codes: Like New, Open Box, Damaged, Partial, and La...
Feb. 06, 2026, 12:47 AM	Twilio	+13059995694	GENERAL	Resolved	We sell a wide variety of liquidation items: electronics, home goods, furniture,...
Feb. 06, 2026, 12:47 AM	Twilio	+13059995694	GENERAL	Resolved	Hi there! How can I help you today with MAC.BID— bidding, orders, or pickups?
Jan. 28, 2026, 09:28 AM	Twilio	+13059785346	GENERAL	Resolved	Understood, we'll stop calling this number. It may take a short time for all sys...
Jan. 28, 2026, 09:13 AM	Twilio	+13059785346	GENERAL	Resolved	You're already texting MAC.BID support. How can I help you today?
Jan. 27, 2026, 11:11 PM	Twilio	+13059995694	GENERAL	Resolved	Hey! This is MAC.BID support—how can I help you today?
Jan. 08, 2026, 06:42 PM	Twilio	+17868733381	GENERAL	Resolved	Ya estás conectado con MAC.BID. Para ayuda con subastas, compras o recogidos, re...
Jan. 07, 2026, 11:38 AM	Twilio	+16452233314	GENERAL	Resolved	¡Listo! Ya estás suscrito a los mensajes de MAC.BID. Responde con cualquier preg...
Jan. 07, 2026, 11:01 AM	Twilio	+16452233314	GENERAL	Resolved	Ya estás conectado con MAC.BID. Para ayuda con subastas, compras o retiros, resp...
Jan. 05, 2026, 11:01 AM	Email	alex@latoai.com	—	Resolved	Hello Alex, Thank you for reaching out to us. To look up

By source  
All  
Twilio  
WebChat  
Email  
By status  
All  
escalated  
pending  
resolved  
waiting  
By category  
All  
ACCOUNT\_PURCHASES  
ASK\_EMAIL  
ASK\_ORDER  
AUCTION\_BIDDING  
C3  
ESC  
ESCALATION\_REQUIRED  
GENERAL  
GENERAL\_QUESTION  
MISSING\_INFO

Ai\_Assistent Escalations

Created at	Message Log	Assigned To	Reason
Dec. 30, 2025, 10:52 AM	twilio:+14129793580	—	Customer pro...
Dec. 17, 2025, 03:02 AM	email:uristchmel@gmail.com	—	Order cancell...
Dec. 16, 2025, 09:44 PM	email:uristchmel@gmail.com	—	Billing addres...
Dec. 16, 2025, 12:43 PM	twilio:+14073415184	—	Low confident...
Dec. 16, 2025, 12:40 PM	twilio:+14073414121	—	Low confident...
Dec. 16, 2025, 12:35 PM	email:uristchmel@gmail.com	—	Customer pro...
Dec. 16, 2025, 09:48 AM	twilio:+14073414121	—	Low confident...
Dec. 16, 2025, 09:46 AM	twilio:+14073415184	—	Low confident...

# CASE STUDY

## L&L VENTURES

### AI-Powered Invoice & Vendor Operations

- AI-driven invoice intake and validation
- Vendor and COI compliance tracking
- Automated approval and payment workflows

The dashboard provides a comprehensive overview of vendor management. It features a sidebar with navigation options: Dashboard, Vendors, Invoice Management, COI Verification, Payment Scheduling, Reports, and AI Analytics. The main content area includes a 'Welcome back!' message and a 'Generate Report' / 'View Analytics' button. Key metrics are displayed in four cards: Total Invoices (158, with 10 pending and 148 approved), COI Status (15, with 5 non-compliant and 10 expiring), Payments (145, with 38 pending lien and 2 blocked), and Alerts (0 items requiring attention). Below these are sections for 'Recent Activity' (listing invoice amounts and dates) and 'Upcoming Tasks' (listing review and processing tasks with due dates). A 'Quick Actions' bar at the bottom offers buttons for Review Invoices, Upload COI, Process Payments, and Generate Report.

The AI Usage Analytics page allows users to monitor GPT and Azure AI service usage, costs, and performance. It features a sidebar with navigation options: Dashboard, Vendors, Invoice Management, COI Verification, Payment Scheduling, Reports, and AI Analytics. The main content area includes a 'Monitor GPT and Azure AI service usage, costs, and performance' message. Key metrics are displayed in four cards: Total API Calls (928), Total Cost (USD) (\$39.32), Total Tokens (2.864.517), and Success Rate (95.8%). Below these are filters for AI Provider (All Providers), Operation Type (Invoice Parsing), and Status (All Statuses). The main section is a table of AI Usage Logs with columns for Timestamp, Provider, Operation, Model, Status, Response Time, Tokens, Cost, Success, and Actions. The table shows a list of successful invoice parsing operations using OpenAI GPT-5.2. A 'Rows per page' selector is at the bottom right.

Timestamp	Provider	Operation	Model	Status	Response Time	Tokens	Cost	Success	Actions
22/4/2026, 14:15:46	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	4.92s	5306	\$0.0562	Yes	
22/4/2026, 14:15:40	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	7.45s	9030	\$0.0979	Yes	
22/4/2026, 14:15:30	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	2.75s	1744	\$0.0191	Yes	
22/4/2026, 13:30:20	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	4.06s	5321	\$0.0567	Yes	
22/4/2026, 12:00:26	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	5.87s	5507	\$0.0623	Yes	
22/4/2026, 10:15:35	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	5.18s	5307	\$0.0563	Yes	
22/4/2026, 10:00:56	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	5.02s	5410	\$0.0594	Yes	
22/4/2026, 10:00:47	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	5.35s	8847	\$0.0925	Yes	
22/4/2026, 10:00:38	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	6.15s	5489	\$0.0617	Yes	
22/4/2026, 9:31:24	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	4.33s	8261	\$0.0853	Yes	
22/4/2026, 3:00:20	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.94s	8842	\$0.0923	Yes	
22/4/2026, 2:15:34	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	5.57s	8931	\$0.0950	Yes	
21/4/2026, 16:00:19	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.83s	5361	\$0.0579	Yes	
21/4/2026, 15:15:46	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.49s	5329	\$0.0569	Yes	
21/4/2026, 15:15:42	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	2.04s	2013	\$0.0224	Yes	
21/4/2026, 15:15:40	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	1.87s	1909	\$0.0214	Yes	
21/4/2026, 15:15:37	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	2.35s	4582	\$0.0474	Yes	
21/4/2026, 15:15:35	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.12s	3142	\$0.0332	Yes	
21/4/2026, 15:15:31	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	2.51s	2079	\$0.0225	Yes	
21/4/2026, 13:15:33	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	2.79s	5296	\$0.0559	Yes	
21/4/2026, 13:01:26	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.33s	5311	\$0.0564	Yes	
21/4/2026, 13:01:20	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.95s	5329	\$0.0569	Yes	
21/4/2026, 13:01:12	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	4.70s	5371	\$0.0582	Yes	
21/4/2026, 13:01:05	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.21s	5298	\$0.0560	Yes	
21/4/2026, 13:00:59	OpenAI GPT	Invoice Parsing	gpt-5.2	Success	3.62s	5301	\$0.0561	Yes	

The AI Log Details modal provides a detailed view of a specific AI operation. It includes a 'Basic Information' section with fields for Timestamp (22/4/2026, 16:27), Provider (OpenAI GPT), Model (gpt-5.2), Document Type (Email), and Operation (Email Invoice Validation). The Status is shown as 'Success'. A 'Performance Metrics' section displays Response Time (2.30s), Cost (\$0.0318), Prompt Tokens (2955), Response Tokens (74), and Total Tokens (3029). An 'Extraction Results' section shows Extraction Success (Yes) and Confidence Score (90.0%). A list of 'Extracted Fields' (is\_invoice, confidence, reason) is at the bottom. A 'Close' button is in the bottom right corner.

# CASE STUDY

## L&L VENTURES

- Email-based invoice intake and parsing
- AI validation and duplicate detection
- Structured invoice data extraction
- Exception handling and manual review routing

**Vendors Management**  
Manage vendors and contractors

View Procure Companies | Sync Vendors | Add Vendor

Total Vendors: 1446 | Active: 1446 | Verified: 1339 | With Invoices: 543

Search by company name, email, phone...

Company Name	Email	Phone	Location	Net Terms	Status	Verified	Invoices	Actions
100 [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
10 [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
180 [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
1 C [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
1 C [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
3 B [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
3 D [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
43r [REDACTED]	office@concrete43.com	(412) 821-7793	Pittsburgh, PA	Net 30	Active	No	0	👁️ 📄 🗑️
#47 [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
4 Te [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
7- E [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
84 [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
A1 C [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️
AA [REDACTED]	—	—	—	Net 30	Active	No	0	👁️ 📄 🗑️

**Invoice Management**  
Manage vendor invoices, approvals, and workflow.

Columns | Export | Manual Entry

Total Invoices: 258 | Pending Approval: 4 | Approved: 25 | Total Value (filtered): \$1,799,632.97

Search invoices, vendors, projects... | Date range | Status: All

Invoice #	Vendor	Project Name	Project Address	Amount	Date	Due Date	Category	Status	Action
None	[REDACTED] Gusto	—	—	\$47,790.00	21/4/2026	6/5/2026	Construction-related	Manual Review	👁️ 📄
None	[REDACTED] Gusto	—	—	[REDACTED]	21/4/2026	6/5/2026	Other	Duplicate	👁️ 📄
9920	[REDACTED] Gusto	—	—	\$7,250.00	21/4/2026	6/5/2026	Other	New	👁️ 📄
B83840-0	[REDACTED] Gusto	—	—	\$3,445.00	21/4/2026	21/5/2026	Other	New	👁️ 📄

**Invoice Review**  
None

**Invoice Preview**

McM [REDACTED] [REDACTED] Date: 21/4/2026

Invoice #None

Project Name

Line Items: No line items provided.

**Total Amount: \$276.36**

**Invoice File**

Interim Lien Waiver #3.pdf

View Full Email

**Activity**

Invoice #None created 22/4/2026, 14:15:30

**Invoice Details**

Vendor: McM [REDACTED] Gusto | Amount: \$269.870

Invoice Income Datetime: 22/4/2026, 14:07:35 | Invoice Date: 21/4/2026

Due Date: 6/5/2026 | Net Terms: Net 30

Project Name

Project Address

**Status**

Invoice Status: Duplicate

Lien Release Status: Not Required

COI Status: Missing

Added to Gusto: Net added

**Comments**

No comments yet.

Optional comments...

Reject | Approve | Cancel | Reject Invoice

# CASE STUDY

## L&L VENTURES

- Real-time invoice and payment visibility
- Vendor and compliance management
- Payment scheduling and batch processing
- AI usage tracking and performance metrics
- Automated reporting and analytics

### Payment Scheduling

Retrieve the payment queue from the backend and filter it (status, priority, date, ordering). [Export Report](#) [+ Create Batch \(0\)](#)

Ready for Payment 41	Pending Lien Release 12	Scheduled 16	Total Ready \$6,951,236
-------------------------	----------------------------	-----------------	----------------------------

#### Recent Payment Batches

Weekly Payments - Apr 16, 2026 payments • \$27.58	2026-04-16	<a href="#">View Details</a>
Weekly Payments - Apr 09, 2026 payments • \$88.25	2026-04-09	<a href="#">View Details</a>
Weekly Payments - Apr 02, 2026 payments • \$53.12	2026-04-02	<a href="#">View Details</a>
Weekly Payments - Mar 26, 2026 payments • \$27.87	2026-03-26	<a href="#">View Details</a>
Weekly Payments - Mar 19, 2026 payments • \$48.14	2026-03-19	<a href="#">View Details</a>
Weekly Payments - Mar 12, 2026 payments • \$325.5	2026-03-12	<a href="#">View Details</a>
Weekly Payments - Mar 05, 2026 payments • \$157.21	2026-03-05	<a href="#">View Details</a>

### Reports

Generate and manage comprehensive reports for invoices, COI compliance, and payments. [Schedule Report](#) [Custom Report](#)

<b>Invoice Metrics</b> Total Invoices: 158 Total Value: \$799,632.97 Avg Processing Time: 1.2 days Approval Rate: 96.1%	<b>COI Metrics</b> Compliant Vendors: 29 Total Vendors: 1446 Expiring COIs: 3 Compliance Rate: 89.3%	<b>Payment Metrics</b> Total Payments: 1614 Total Paid: \$7,236,252 Avg Payment Time: 6.1 days On-Time Rate: 86%
---	--	--

[Generate New Report](#)  
Last 30 Days | All Reports

<b>Invoice Summary Report</b> Comprehensive overview of invoice processing, approvals, and status breakdown <a href="#">Generate Report</a>	<b>COI Compliance Report</b> Vendor compliance status, expiring certificates, and exception tracking <a href="#">Generate Report</a>
<b>Payment Analysis Report</b> Payment processing metrics, batch summaries, and timing analysis <a href="#">Generate Report</a>	<b>Vendor Performance Report</b> Vendor compliance scores, payment history, and performance metrics <a href="#">Generate Report</a>

#### Recent Reports

Vendor Performance Report - December 2025 Generated: 18.12.2025 • 2.13 KB • PDF
Payment Analysis Report - December 2025 Generated: 18.12.2025 • 2.21 KB • PDF
COI Compliance Report - December 2025 Generated: 18.12.2025 • 2.43 KB • PDF
Payment Analysis Report - December 2025 Generated: 18.12.2025 • 2.21 KB • PDF
COI Compliance Report - December 2025 Generated: 18.12.2025 • 2.43 KB • PDF
Invoice Summary Report - December 2025 Generated: 18.12.2025 • 2.21 KB • PDF
COI Compliance Report - December 2025 Generated: 18.12.2025 • 2.43 KB • PDF
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Invoice Summary Report - December 2025 Generated: 18.12.2025 • 2.21 KB • PDF

# WHERE AI IS DELIVERING REAL ROI

Operational impact leaders can actually measure

- Faster intake and workflow activation
- Lower manual processing volume
- More consistent decision support
- Better responsiveness without adding headcount
- Greater visibility into operations and outcomes



Real ROI comes from better execution, not just lower cost

# ADOPTION FRAMEWORKS

How Successful Companies Implement AI

AI success comes from structured execution

01

**Identify**

High-impact, repeatable workflows

02

**Map**

Data, systems, and decision points

03

**Automate**

Execution where consistency matters

04

**Control**

Human oversight where needed

05

**Optimize**

Continuously improve with feedback

# COMMON PITFALLS IN AI ADOPTION

## Why AI initiatives Break Down

- Starting with tools instead of workflows
- Treating AI as a tool instead of a system
- Lack of integration across core systems
- Isolated implementations across departments
- No clear ownership or accountability
- Over-automation without human review
- No feedback loop to improve outcomes
- No internal adoption plan for the team using it



AI does not fail because of the technology.  
It fails because of how it is implemented.

# REALLOCATE YOUR A-PLAYERS

AI absorbs the repetitive.

Your best people focus on impact.



Let AI Handle the C & D Work.

So your A & B players can operate at their highest level.

Repetitive tasks → Automated

Decision fatigue → Reduced

High-value talent → Elevated

More Output. Same Team.

# PREPARING TEAMS FOR RESPONSIBLE AI USE

The Human Side of Adoption



Define where AI supports and where humans lead

Keep human-in-the-loop for critical decisions

Train teams on workflows, not just tools

Start with high-impact, repeatable use cases

Build confidence through early wins

Create visibility into how AI is making decisions

Responsible AI adoption is an operational shift, not just a technical one.




**LATO**  
AI



**YOUR BUSINESS.  
SUPERCHARGED WITH AI.**

Reach our AI Smart Receptionist

 **+1 (412) 347-6663**

Or email us at

 **support@latoai.com**



**LATO AI**



**LATOAI.com**



**@LATOAI.Automation**

**Before we break for  
lunch...**



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**BLACK BOTTLE IT™**

# Treasury Management

## Dedicated Relationship Banking

Interested in learning more?

Contact Jim Hendricks

c: 412-354-9659

e: [Jhendricks@tscbank.com](mailto:Jhendricks@tscbank.com)



TriState Capital Bank is a Pennsylvania chartered bank.

# Set and forget the company 401(k) plan.

- 15-minute plan setup
- Live, U.S.-based support
- Payroll syncs automatically with CTR

**401GO**

Get started:





# PROMARK

A Career Partners International Firm



**got people?**

***Then you likely have challenges...***

***Promark Can Help!***

**[www.promarkcpi.com](http://www.promarkcpi.com)**

**[connect@promarkcpi.com](mailto:connect@promarkcpi.com)**

**412-404-0477**



## Earned Wage Access (EWA+)

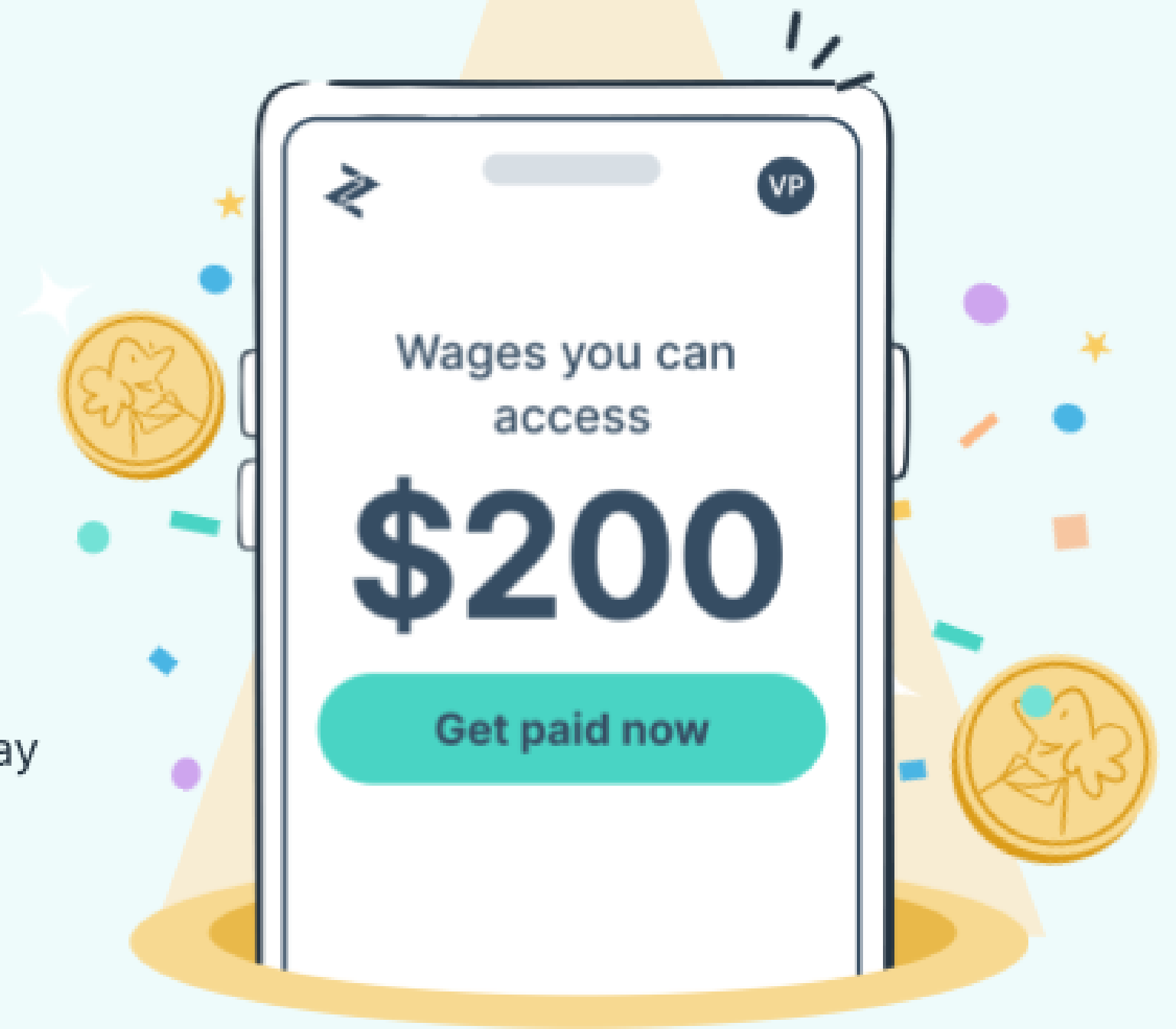
Reduce turnover and support evolving employee needs

### Features

- **Quick set up:** Seamlessly integrated with CTR
- **Free for CTR clients:** No-cost alternative to loans/advances
- **Flexible payout options:** Debit, bank, gift card, Venmo, Zelle
- **For all employees:** Salary, hourly, and 1099
- **Customer care:** Help from real people at each step of the way



Connect with  
Matt to get  
started



★ One app for every employee ★



**From Hire to Retire...**  
**Your Irreplaceable Partner**





**Dedicated Service**  
**Tenured Experts**  
**Connected Technology**



# The CTR Distinction

Payroll | HR



*\*comparably.com*





# **Let's Talk HR, Payroll, and What's Next**

**What We're Talking About Today:**

Leave management and compliance

HR services and support

AI Technology

Payroll questions or challenges

Anything you've been meaning to take a look at

***STOP BY THE CTR TABLE or SEE ANY CTR STAFF!***



## Our Solutions

### Technology:

- Payroll
- Time & Attendance
- Scheduling
- Mobile App
- Applicant Tracking
- Paperless Onboarding
- Benefits Administration & Online Open Enrollment
- Learning Management
- Expense Management
- Performance Management
- Social Engagement Platform
- Compensation Management
- Predictive People Analytics using AI
- ACA Tracking & Reporting
- Carrier Connections
- HR Tracking
- Employee & Manager Portal

### Services:

- Payroll Assistant (Managed Payroll)
- HR Services
- Leave Management Services
- Talent Acquisition Services
- Tax Filing
- New Hire Reporting
- Garnishment Processing
- ACH Scan Utility
- Cobra Administration
- General Ledger Interface
- Work Opportunity Tax Credit
- 360 401k Interface
- API Capabilities
- Payroll Debit Cards
- Early Income Access
- Employment & Income Verification
- Compliance Webinars
- HR Support Center
- Employee Benefit Insurance

***And more!***

## The Solution

# isolved Always on HR

Transform your employee experience by:

**Simplifying access to information** via a simple chatbot in the flow of work

Empowering employee self-service with the tools to **quickly find answers** to their critical HR questions  
provide a centralized HR knowledge base within People Cloud or Microsoft Teams

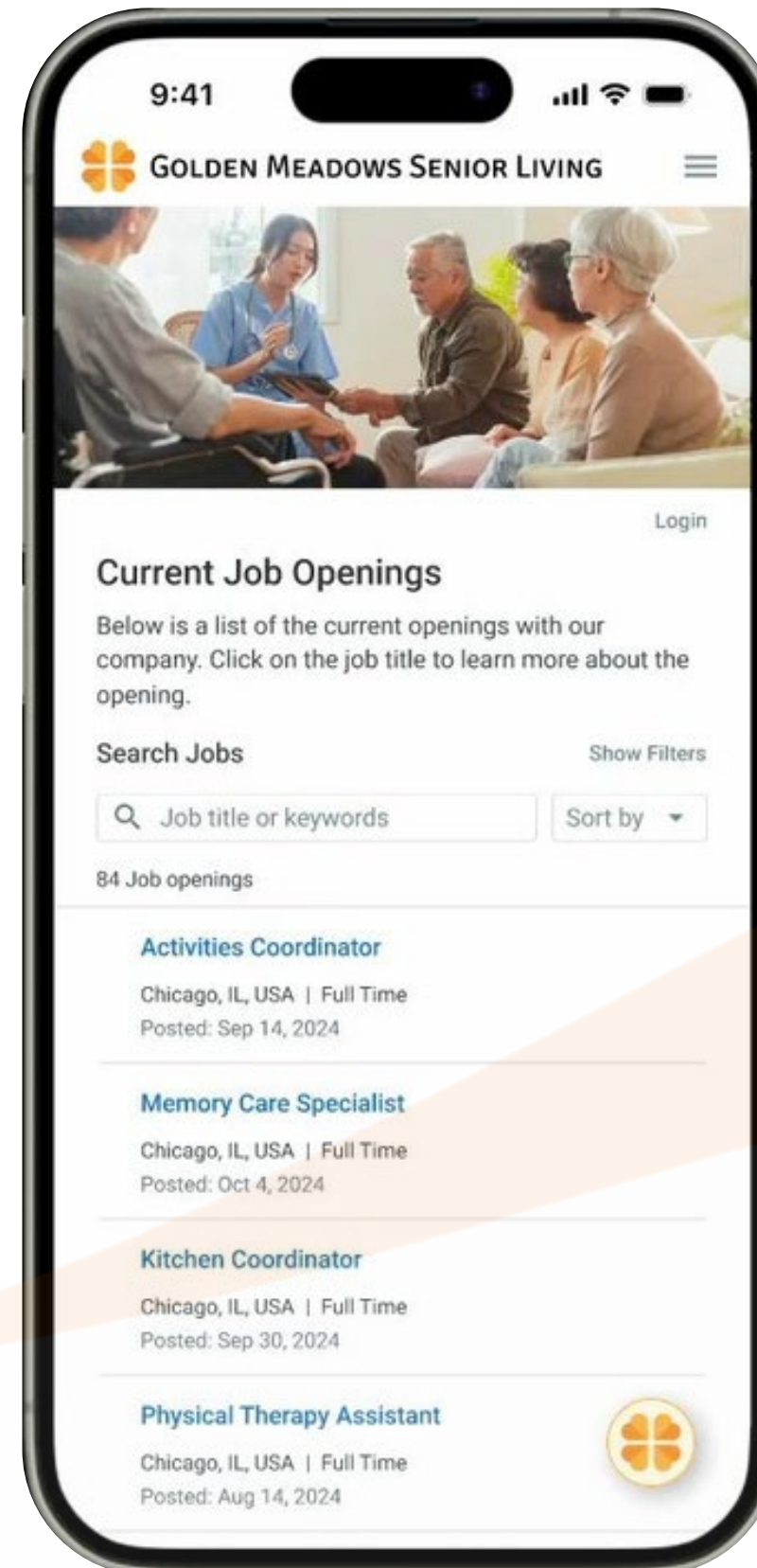
Streamlining HR inquiries by **reducing time spent** answering repetitive questions

**Leverage in-product contextual help** to save time and stay on task



# Meet Sam, Your New Candidate Recruiting Agent

**Deliver a faster, smarter hiring experience** with a **24x7** recruiter that offers candidates:



**Automated self-service**

**Qualification screening**

**Instant interview scheduling**

# AI-Enabled Chat

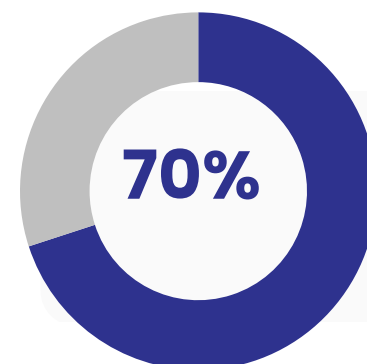
Intelligent connection. Instant support.

## Benefits

- Real-time support without disrupting workflow
- Reduced user frustration and smoother experience
- Faster issue resolution and higher productivity
- Context-aware assistance for accurate answers
- Increased adoption and user confidence
- Scales to handle high support volumes
- Direct insights into user needs and pain points
- Stronger competitive differentiation through modern support

## Early Results

- A high percentage of chats are resolved within minutes via Sam, our AI agent
- Our team has also been hyper-responsive to live chats, with human responses averaging under 1 minute and average resolution under 18 minutes.
- Our current aggregate CSAT is 4.1 out of 5.



"70% of customers prefer chat support for convenience and speed"  
-Salesforce State of Service Report

# SAM

Meet Sam-  
instant answers,  
anytime!

Backed  
by live  
support.

Where do I find my  
quarterly reports?

How can I add a new hire?

How can I access my employee  
W2 or ACA forms?

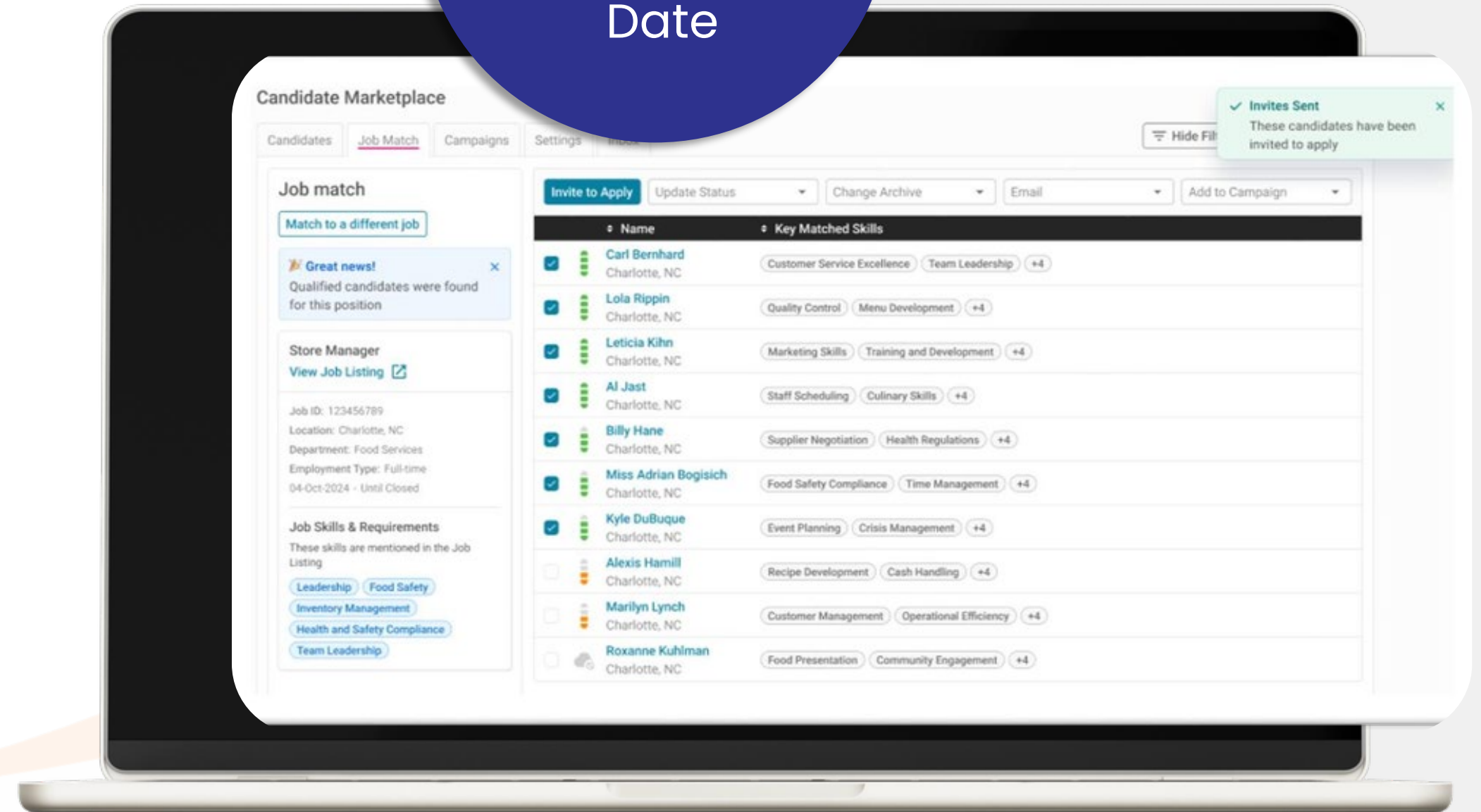
# Candidate Marketplace Expansion

Enables matching across isolved's database of candidates, enabling a broader pool to be matched with job listings, increasing the chances of finding the best candidates quickly and efficiently.

Fill roles faster with top candidates automatically surfaced when a new job opens

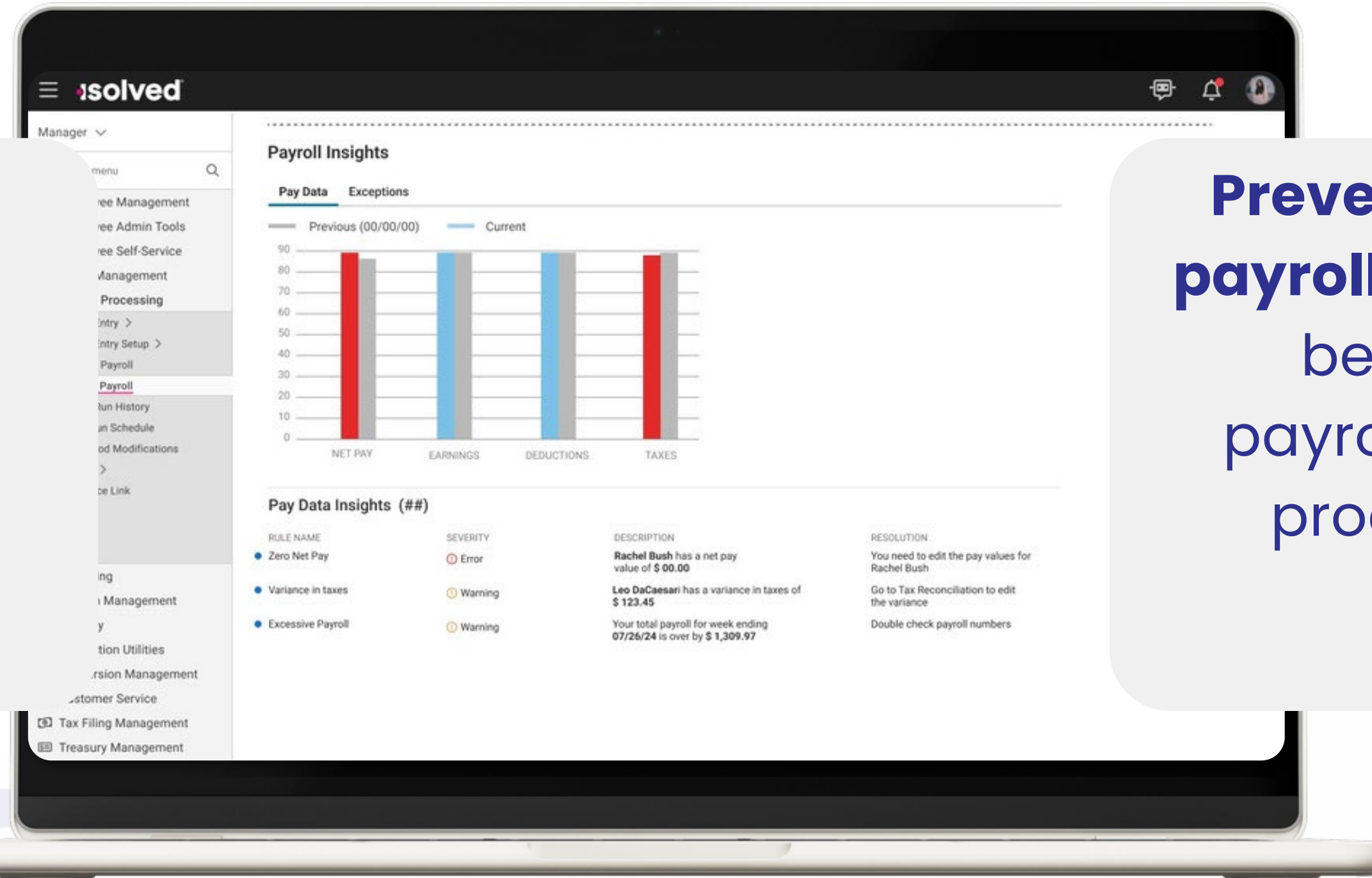
Employers can proactively reach qualified applicants, inviting top candidates to apply—driving stronger hiring results

31M+  
Candidate  
Match  
Scores to  
Date



# Perfect Payroll™ : Insights

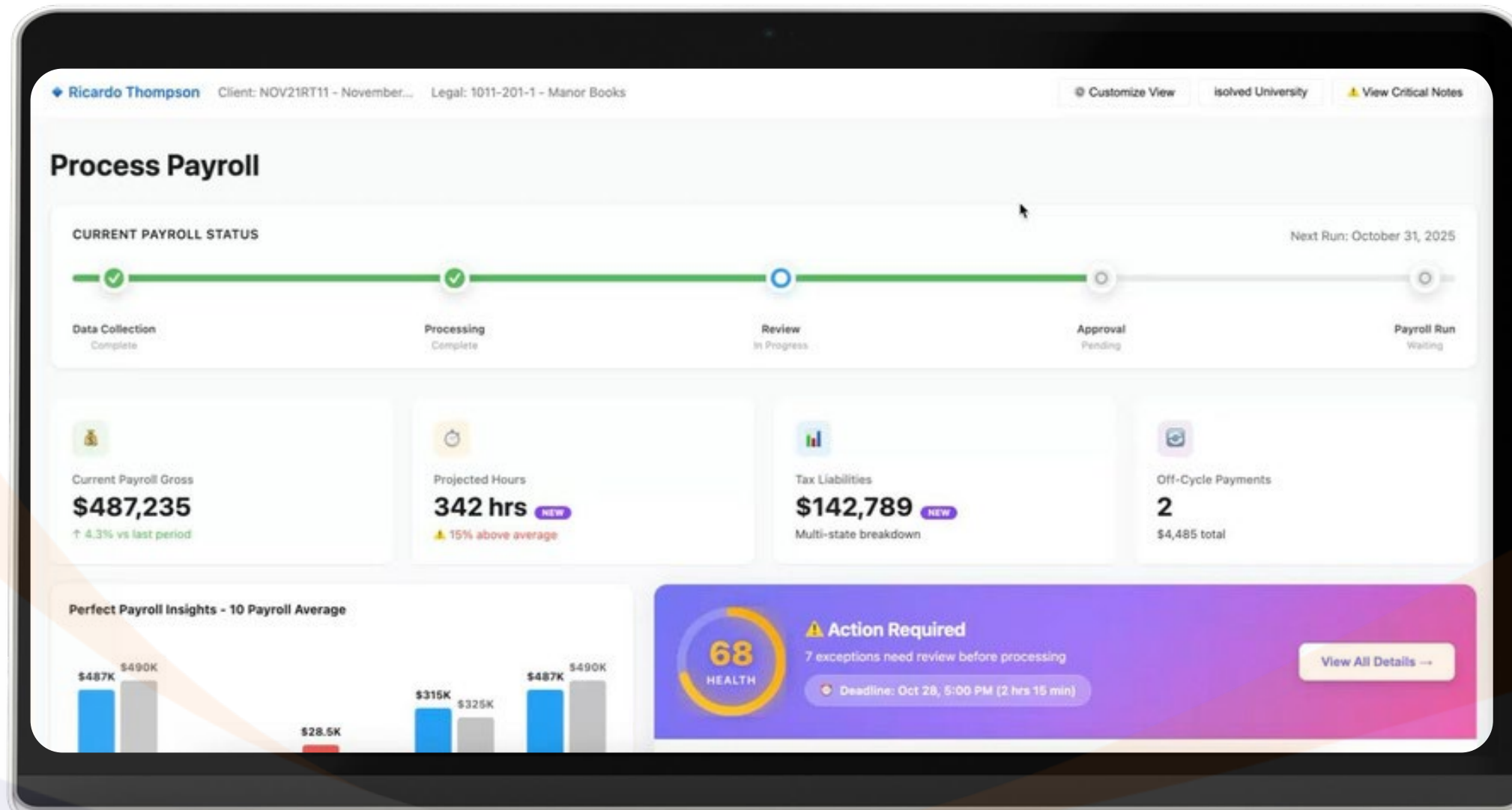
**Identify anomalies** between the current payroll and a normal payroll



**Prevent costly payroll mistakes** before a payroll is ever processed

# Perfect Payroll™ : Assist

Launching in Q3!



- Detects compliance risks and **autonomously updates records** (e.g., minimum wage changes, tax updates) if approved
- Automates employee classification (W2 vs. 1099) and **ensures compliance** in multi-state payroll

# Reimagined Benefits

AI Powered Benefit Guidance

With Better Benefits™, isolved provides a personalized experience to employees while streamlining benefits admin for employers

- Greater employee well-being
- Increased participation in benefit & financial wellness programs
- Year-round engagement
- Reduced complexity in benefit admin
- Maximized financial result for employers



# Enhanced Surveys

Launching in Q4!

Empowering smarter decision-making with a simplified survey creation process. Save hours, collect better insights, and elevate your engagement strategies.

- **Dynamic Questions:** Create personalized survey paths with conditional logic.
- **AI-Assisted Survey Creation:** Generate professional surveys by simply describing your goals
- **Template Library:** Access pre-built templates for common use cases (e.g., feedback, engagement).
- **Improved Analytics:** Gain deeper insights with advanced reporting and visualizations.



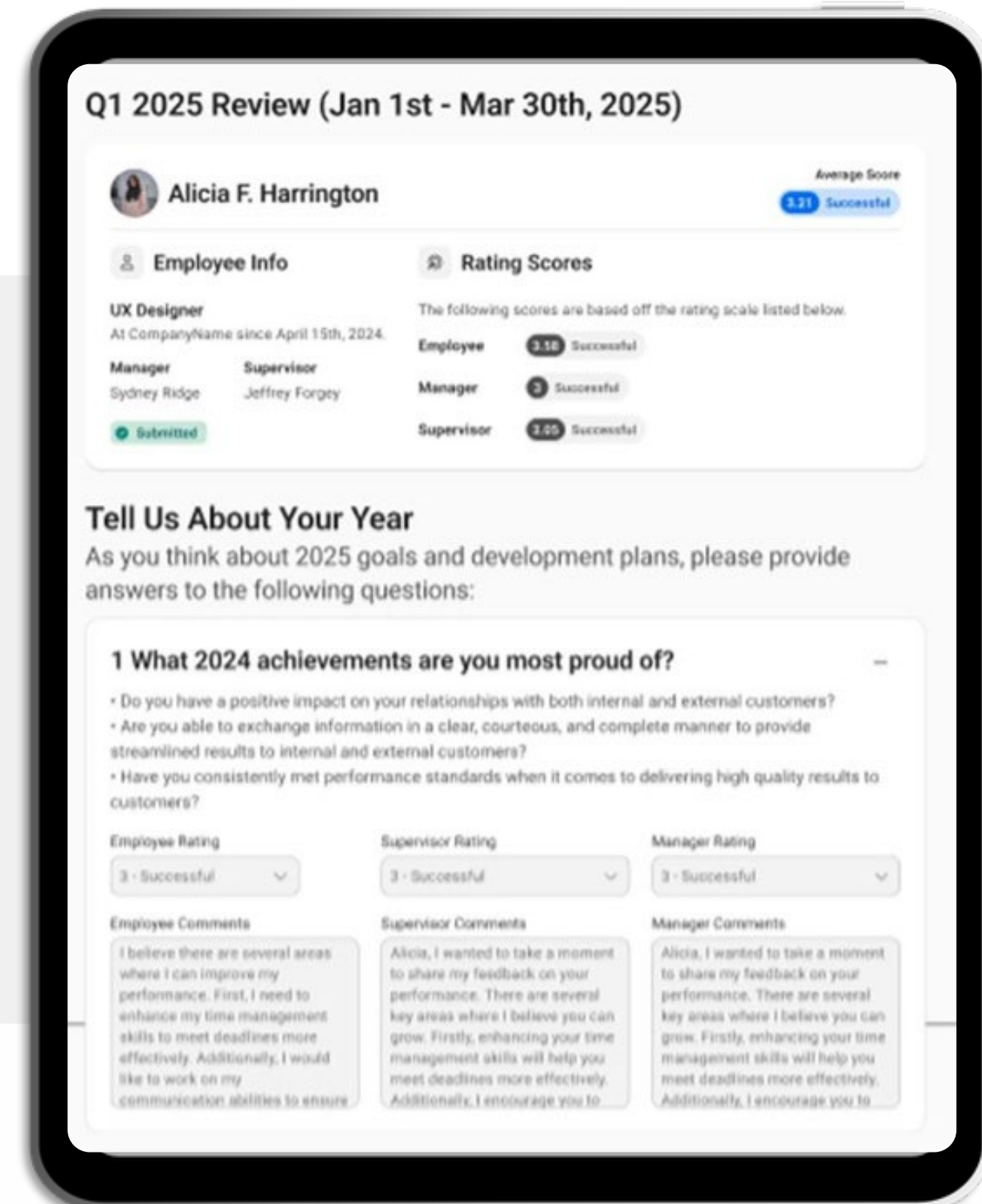
# AI-Driven Performance Management

Smarter Performance Management that scales with your organization, and grows more intelligent over time

## Perform Lite + Perform Next Generation

Modern, mobile-first performance reviews built for simplicity

- AI Writing Assistant for Employees
- Performance Evaluation AI-Assistant for Managers



# isolved Learn & Grow: Content Library

The new isolved Learn & Grow Content Library offers access to more than 90,000 courses, in addition to the latest AI-based search and chatbot features to help users find what they need when they need it, quickly and easily.

We also provide access to more than 100 pre-curated playlists out of the box to start engaging employees from day one.

The screenshot displays the isolved Learn & Grow Content Library interface. At the top, the 'isolved' logo is visible on the left, and navigation options like 'Explore More Content' and 'More Options' are on the right. A search bar contains the text 'Product Management'. Below the search bar, a light blue banner indicates 'AI suggests exploring these topics and skills' and lists several related topics: Market Research, Agile Methodologies, User Experience Design, Data Analysis, Roadmap Planning, Stakeholder Management, Product Lifecycle Management, Competitive Analysis, Cross-Functional Collaboration, and Product Marketing. Below this banner, there are buttons for 'Open chat' and 'Generate a playlist'. The main content area shows 'Items 374' and 'Playlists 8'. A filter bar includes 'Duration', 'Provider', 'Level', 'Type', and 'Region' dropdowns, along with an 'Add filter' button. Below the filter bar, there are '374 items' and a 'Bulk select' button. A course card is visible, titled 'Product Management Crash Course and Trello Fundamentals' by Packt, with a description: 'Learn all about product management and Trello essentials to kick-start your career in management'. The course is 'Interactive - 3 hrs 13 mins' and has a rating of '4.4 (16)'. On the right side, a 'Chat' window is open, displaying a message: 'trends, customer needs, and competitor products to inform product decisions.' followed by a list of skills: 'User Experience (UX) Design: Gaining insights into creating user-friendly product designs and understanding user behavior.', 'Agile Methodologies: Mastering agile frameworks like Scrum or Kanban to manage product development efficiently.', and 'Stakeholder Management: Developing skills to effectively communicate and manage expectations with various stakeholders.' Below the chat window, there are 'More skills' and 'Click on a skill for recommendations:' buttons, with a list of skills: 'Product Strategy', 'Market Research', 'User Experience (UX) Design', 'Agile Methodologies', and 'Stakeholder Management'. At the bottom of the chat window, there is a 'Type here...' input field and a send button.

If you're a current client, this is a great time to make sure you're getting everything that's available to you.

And if you're exploring options...  
We're happy to show you what this could look like in your organization.

# **Compliance & Legislative Updates 2026**

## **Part II: Compliance, OBBBA Recap & What's Next**



**Please welcome back Speaker, Anne Lavelle!**

# AI and the FLSA

No, I did not get the acronyms mixed up and put two together that don't go together.

Two impacts:

## 1. Writing job descriptions.

- Compliance with “duties test” under FLSA
- Compliance with actual job duties
- Pay ranges/transparency

## 1. Writing reviews, discipline, termination, etc. documents; writing other documents such as e-mails, analysis, reports, etc.

- Almost all of the white-collar exemptions under the FLSA (executive, administrative, professional) require a “duties” test.
- Almost all of the “duties” tests require “sufficient” independent judgment and discretion.
- If AI can write it, is there sufficient independent judgment and discretion?
- Review and approval of the AI document is a key component
- Will it win the day?

# Unique AI Issues

Shadow AI (this concept applies more broadly to any software employees opt to use).

- Employees using without employer knowledge or inconsistent with policy.
  - Risk of how it's being used
  - Risk of licensing violations

Employees using it offensively:

- AI to gather data for upcoming lawsuit/charge/claim/whistleblower/etc.
- AI as a weapon – yes, my brother is now a war story....

# Mainstream AI Issues

Without clear guardrails, that creates risk around:

- confidentiality
  - employer information going out the wrong door
  - “write an employee review on Employee Smith”
  - “write a proposal for Client XYZ showcasing employer technology”
- discrimination
- documentation quality
- privacy
- infringement/ownership/copyright
- decision-making accountability
  - especially with government/agency/court filings.

# Existing Employment Laws Still Apply

Using AI does not replace employer responsibility.

When AI influences employment decisions, employers still need to comply with:

- ADA
- ADEA
- State anti-discrimination laws
- Privacy and biometric laws
  - Have you looked at biometric laws and their possible application to your website?
- Recordkeeping and documentation obligations

# Disability Discrimination & Accommodation Risk

AI tools can create ADA concerns when they:

- rely on speech patterns or facial expressions
- score candidates based on timed tests
- disadvantage people with visual, hearing, cognitive, or neurological disabilities
- do not allow reasonable accommodation or alternative assessment methods

# AI, Adverse Impact and Hiring Risk

A tool can create legal exposure even if it appears neutral.

## Key employer questions:

- Does this tool screen out certain groups at a higher rate?
- Is the process job related?
- Is it consistent with business necessity?
- Has the tool been tested for adverse impact?
- Can we explain how the tool influences decisions?
- Does our EPLI (or any insurance) cover this use (what if caused by agent)?

# AI Regulation is Expanding



- **New York City Local Law 144**

Bias audit, public posting, and notice requirements for certain automated employment decision tools.

- **Colorado AI Act**

Requires reasonable care to protect against algorithmic discrimination in certain high-risk AI systems. State sources show the law was enacted with an effective date framework beginning in 2026, and later commentary indicates implementation timing has shifted to June 30, 2026.

- **Illinois Artificial Intelligence Video Interview Act**

Requires notice, explanation, and consent before certain AI analysis of applicant video interviews for Illinois-based roles.

- **Maryland facial recognition law**

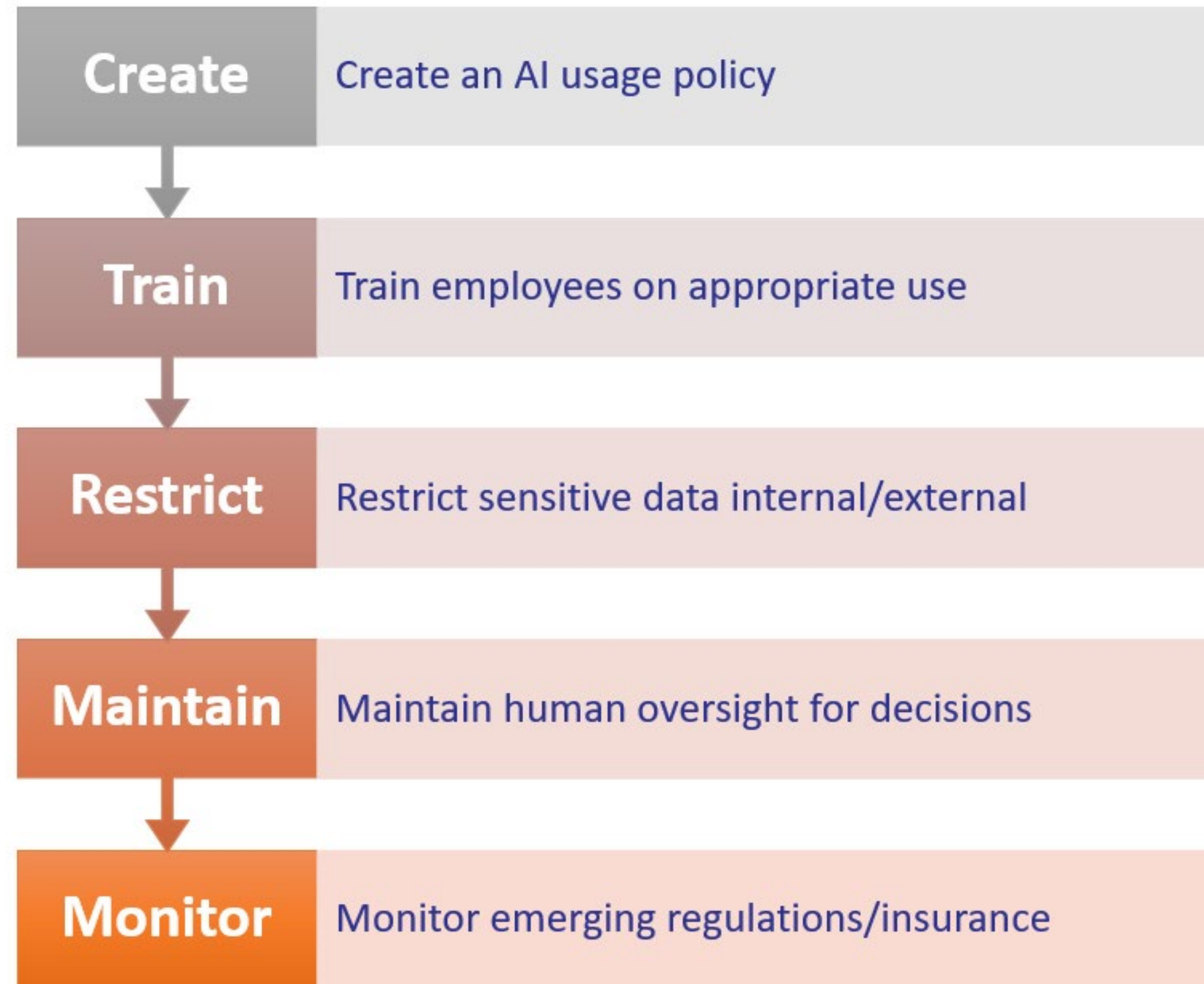
Restricts use of certain facial recognition services in applicant interviews without consent.

- **California AI employment regulations**

California approved regulations in 2025 clarifying how existing anti-discrimination laws apply to AI and automated decision systems in employment decisions



# Practical Steps Employers Can Take



# OBBBA Recap

- 2025 was a “good faith” estimate with leeway; this year is much more exacting.
  - Wages are down to the penny – so should this be.
  - The burden of proof (accuracy) is on the employer.
- Concerns we are seeing:
  - State OT premiums
  - Shift premiums
  - CBA provisions
  - Job premiums
  - All of those have one thing in common – they are usually not FLSA OT
- Are you a “simple” employer? Can you just take 1/3 of overtime?

# Putting it all together (even stuff we didn't cover)



**Example:** Joe works for Pennsylvania Traveling Repair Employees R Us. He is a remote worker whose home is in San Francisco, California. Although there is a company office in San Jose, CA, the majority of his work is done via e-mail or phone from his home office. Joe is a nonexempt hourly employee. He makes \$10 hour. But if he handles more than 5 service calls a day, he gets an extra \$10/day. On occasion, he travels to client sites to repair specialized equipment or to the home office in Pittsburgh (when the NFL draft is not in town). Here's how his month broke down:

- **Week 1:** He spent the week in his home office handling the usual problems, Monday through Friday, 8 hours/day, 5 days a week. He has a ½ hour lunch but he usually works through it, because he's a good 10-year employee and he likes getting the extra \$10. On Tuesday and Thursday he handled more than five calls.
- **Week 2:** Just his luck, it's snowing in Pittsburgh in April, so he had to spend the week there. Flew out Sunday coming back Saturday. The company meetings were boring, and he caught a cold because all he packed were tanks, shorts and sandals. Luckily, the meetings are always done early, and the company enjoys routine happy hours. Unluckily, he did slip and fall on slush (from the snow – not a drink) in Yinzers R Us Pub because his sandals did not have good traction. There goes his back – who knows if he'll be able to surf when he goes back to California on Saturday. At least his manager, Bob, bought him the next drink after the fall – it was the least he could do since this was all his manager's idea anyway. Plus this is Joe's 6th week long trip – this year alone – to the 'Burgh – all when it's freezing – he's had enough.



# Putting it all together (even stuff we didn't cover)



- **Week 3:** His week was going good, but just his luck, on Thursday, the company's biggest client in Los Angeles, has an equipment crisis. No more propping his feet up on his desk in his home office in San Francisco – he's off to LA with strict instructions from Manager Bob to do whatever it takes to get the job done ASAP. Make the client happy!!! The LA company should go back to using an abacus – they destroyed the high-tech equipment – it will require a major overhaul. Can you believe the client had 16 machines plugged into one outlet? They said Bob recommended it... On Thursday, he works 16 hours; on Friday he works another 16 hours. Finally, it's fixed – they just have to test it on Saturday. The testing does not go as planned and he works 12 hours on Saturday and 8 hours on Sunday. What a week! Crawling under that equipment is killing his back. His mind is fried from the LA client nonsense – and what was Bob thinking advising the client to have an electrical octopus!! His anxiety with that project was through the roof!
- **Week 4:** He took Monday off – he has PTO!! He worked Tuesday for 12 hours to catch up on the missed work from Monday. Wednesday and Thursday are typical days. He tried to take a ½ day on Friday morning and go surfing but between his nerves and his back that was a bust. WILL HE EVER BE ABLE TO SURF AGAIN?? He came back to his home office to work Friday afternoon only to find out Bob is an unhappy camper and has been trying to reach him. The client in LA is having issues again. Bob tells Joe to hop in his car and drive “south young man immediately.” Joe refuses citing his back issue and frayed nerves. Says he might be able to go on Saturday. Bob is a compassionate manager, so first he asks for a doctor's note – in triplicate – excusing Joe from work. When Joe balks at that, Bob fires Joe on the spot.



**Joe is now an unhappy camper and wants to know what claims he has against his former employer.**

# Roundtable Discussions

# Roundtable Discussions: 2 Segments

## Segment: Compliance & Risk Management

- Where does your organization feel most exposed right now?
- What compliance process feels manual, inconsistent, or risky?
- If an audit or investigation happened tomorrow, what would concern you most?

## Segment: Workplace & Culture Strategy

- What is putting the most pressure on your workforce right now?
- Where do managers struggle most?
- What initiative has actually improved morale, retention, or accountability?

### IDENTIFY:

One area where your organization feels most exposed

One challenge your workforce is dealing with right now

And if you have it, one question for the panel.

# Roundtable Insights & Expert Q&A Panel

**Thank you for attending!**

**Don't forget: please take a minute & complete our quick feedback survey!**