

General Policies

Prices and product availability are subject to change without notice. All specials and promotions are limited by availability.

Payment: Payment in U.S. dollars must be received with any order. PayrollOrg does not process orders without payment, nor sell products on a trial basis.

Payment includes total amount of product plus shipping and handling and tax (if applicable). Products will not be shipped until entire payment amount due is received.

Nonsufficient Funds Fee: The fee for returned checks is \$35 and is subject to change at any time.

Processing and Shipping: Please allow 14-21 days from the time you place your order for processing and shipping. Delivery times are not guaranteed, and the actual delivery time will depend on product availability.

Credits on Account (COA): COA are applicable only to PayrollOrg products and events and are valid for one year from the date of issue.

Tax-Exempt: Educational institutions and other not-for-profit entities are not charged sales taxes on goods purchased if a tax exemption form is filed with PayrollOrg. Tax exemption forms must be on file with PayrollOrg before purchasing goods.

Campaign Codes: They can be used during the promotion period stipulated in the communication source. These codes must be redeemed at the time of purchase or must accompany order and payment; only one campaign code per order. If you experience issues when using the code, please contact Customer Service immediately. Orders placed on the webstore without the code will not qualify for discounts after the order has been placed.

Events Policies

Event: A Class, Webinar, Webinar on Demand, Conference, Virtual Class (presented in segments over a period of time using an online training center), Virtual Conference, Webinar Series, or Boot Camp (a series of virtual classes held over a period of time).

Registration Fees: Events must be paid in full at least five business days in advance of the start date. Mailed payments must be in U.S. dollars.

Confirmation of Registration: You will receive email confirmation of your registration to include class date and location, if available.

If the location is not on the confirmation, check the website. If you have not received confirmation of your registration one week prior to your event, please call PayrollOrg at the number listed at the bottom of the page to confirm your registration. Events are subject to change or cancellation at any time.

Access Limited to Registrant: By registering for an online Event (e.g., Webinar, Webinar On Demand, Virtual Class) you agree not to share your access to the event. If PayrollOrg determines that you have violated this policy, PayrollOrg may cancel your access, retain any payments made by you, report you to law enforcement authorities, and ban you from future PayrollOrg events. Subject to certain limitations, PayrollOrg may allow registrants to transfer to another Event or to replace the registered individual with a different attendee (see Event Registration Changes).

Special Services: If you have a disability or require special services, please contact PayrollOrg at least 14 days in advance of the event.

Special meals are ordered for those who select them when purchasing the event on the webstore or have indicated them on the registration form sent to PayrollOrg. Dietary requests made within two weeks from event start date cannot be guaranteed nor be honored on-site.

Same-Day Registrants: Participants registering on the day of the in-person program may enroll 15 minutes after all preregistered participants have signed in. If there are insufficient class materials for same-day registrants, the materials will be mailed at the earliest possible date following the event.

Please be aware, some classes are subject to participant limits and only pre-registered participants will be allowed into the classes.

Event Cancellation: Events are subject to cancellation at any time, including due to low attendance. PayrollOrg reserves the right to limit enrollment to ensure that published objectives are achieved.

Travel Arrangements/Hotel Accommodations: Attendees are responsible for their own travel arrangements to and from events. Room reservations, hotel charges, and parking fees are the responsibility of the attendee.

Travel Insurance: Events are subject to change or cancellation at any time. PayrollOrg recommends that you consider purchasing travel insurance as PayrollOrg does not reimburse for air or other travel expenses incurred if an event is changed or canceled.

Locations: Specific locations will be listed on the PayrollOrg website, [Payroll.org](https://www.payroll.org).

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Schedules: Please refer to the schedule located on our website, Payroll.org.

Photography and Contact Information Release: By registering for a PayrollOrg event, you are granting full permission to PayrollOrg to use, reuse, reproduce, publish, or republish any photographs, motion pictures, recordings, or any other record of your participation in this event, in any medium now known or hereafter developed, alone or in conjunction with other material, without restriction as to changes or alterations, as well as to use your name, voice, likeness, and/or other indicia of identity, for editorial, educational, promotional, advertising, and commercial purposes, including without limitation in connection with the solicitation of contributions and the furtherance of the corporate objectives of PayrollOrg. In addition, by attending or speaking at PayrollOrg's events, you are granting PayrollOrg permission to make your contact information available to the event sponsor(s) who may choose to market their products and services to you via email, fax, telephone, mail, or other means.

Attendee Code of Conduct: By registering for a PayrollOrg event, you agree to this code of conduct which outlines the expectations of participant behavior and the consequences for failure to adhere to the code of conduct.

Attendees are expected to be respectful and supportive of each other and to conduct themselves in a manner in keeping with the character and purpose of the event. In addition, attendees are expected to comply with PayrollOrg's Health and Safety Policies (outlined in the following "Attendee Liability and Waiver of Claims" section of these Event Policies).

Attendees who act and/or speak in an intimidating, harassing, abusive, discriminatory, derogatory, or demeaning manner are acting in violation of this code of conduct.

Attendees who witnesses a violation of the code of conduct should contact a PayrollOrg staff member immediately. If the incident involves a dangerous situation, attendees should first move to a safe location and then report the incident to local authorities (e.g., hotel security) and then to PayrollOrg staff.

Attendees who are asked to stop unacceptable behavior must do so immediately. PayrollOrg reserves the right to take any action deemed necessary and appropriate, including immediate removal from the event without warning or refund, in response to any violation of the code of conduct, and PayrollOrg reserves the right to prohibit attendance

at any future event, virtually or in person, based on their noncompliance with this code of conduct.

Attendee Liability and Waiver of Claims: Attendee assumes all risks and accepts sole responsibility for any injury (including, but not limited to, personal injury, disability, and death), illness, damage, loss, claim, liability, or expense, of any kind, that attendee may experience or incur in connection with attending the Event. Attendee hereby releases, covenants not to sue, discharges, and holds harmless PayrollOrg, its employees, agents, and representatives, of and from any such claims, including all liabilities, claims, actions, damages, costs, or expenses of any kind arising out of or relating thereto.

Specifically relating to the global COVID-19 pandemic, attendee acknowledges the highly contagious nature of COVID-19 and voluntarily assumes the risk of exposure or infection by attending the Event, and that such exposure or infection may result in personal injury, illness, disability, and/or death to attendee. Attendee understands that the risk of becoming exposed to or infected by COVID-19 at the Event may result from the actions, omissions, or negligence of others who may attend the event or their families, colleagues, or others with whom they may have contact. Accordingly, attendee understands and agrees that this release includes any claims based on the actions, omissions, or negligence of PayrollOrg, its employees, agents, and representatives, whether a COVID-19 infection occurs before, during, or after participation in the Event.

In addition to all other rules and regulations relating to the attendee's attendance at the Event, attendee agrees to comply with all COVID-related procedures that may be implemented by PayrollOrg and the Event venue, including, but not limited to, providing proof of full COVID-19 vaccination or negative COVID-19 test, mask-wearing and social distancing requirements, and restrictions on certain activities that carry higher COVID-19 related risk, in order to protect as much as possible the health and safety of all Event attendees.

As of January 2023, PayrollOrg no longer has a COVID-19 vaccination or negative test requirement for in-person events. These requirements (or others, such as social distancing and masking) may be reinstated based on CDC guidance or federal, state, or local government requirements.

For information about our current Health and Safety Policies and requirements, please visit Payroll.org/health-and-safety.

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Event Registration Changes

A **transfer** is a request to change the location, date, or delivery method of your event. A **substitution** is a request to replace the registered individual with a different attendee.

Transfers/Substitutions

In-Person Events: A \$55 administrative fee will be assessed for each transfer and/or substitution. Some restrictions may apply. Each transfer and/or substitution will require completion of a [Transfer/Substitution Form](#) and will be assessed the fee. The substitute may also be charged the difference in price if the substitute's member status is different from that of the original registrant. Fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org.

A transfer fee will apply if the incorrect location or date is selected by the customer. Please verify that you select the correct location and date to avoid transfer fees.

Webinars and Webinars On Demand: A \$55 administrative fee will be assessed for each transfer and/or substitution. Transfers or substitutions will not be honored the day of the program, after the program begins, or if the program license has been activated. No exceptions.

Each transfer and/or substitution will require completion of a [Transfer/Substitution Form](#) and will be assessed the fee. The substitute may also be charged the difference in price if the substitute's member status is different from that of the original registrant. Fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org.

A transfer fee will apply if the incorrect date was selected by the customer. Please verify that you select the correct date to avoid transfer fees.

Cancellations/Refunds

Refunds that are approved will be made in the original form of payment. Neither refunds nor COA will be given for no-shows. No exceptions.

Refunds on taxes for tax-exempt entities will not be honored after the purchase if the tax exemption form has not been filed with PayrollOrg.

In-Person Events: Written requests received at least seven business days prior – full refund; four to six business days prior – refund less a \$50 service charge; fewer than four business days prior – a credit will be issued less a \$100 service charge.

Credits are applicable only to future PayrollOrg educational programs and are valid for one year from the date of issue. Cancellations/Refunds will not be honored the day of the program, after the program begins, or if the program license has been activated. Neither refunds nor COA will be given for no-shows. No exceptions.

Webinars and Webinars On Demand: Cancellation/Refunds will not be honored the day of the program, after the program begins, or if the program license has been activated. Neither refunds nor COA will be given for no-shows. No exceptions. Refunds on taxes for tax-exempt entities will not be honored after the purchase if the tax exemption form has not been filed with the PayrollOrg.

Boot Camps: Cancellations/Refunds will not be honored the day of the program, after the program begins, or if the program license has been activated. Neither refunds nor COA will be given for no-shows. No exceptions. If the third-party license has been activated, the refund will be less a \$500 cancellation fee.

Virtual Class Series: Cancellations/Refunds will not be honored the day of the program, or if the program license has been activated. Neither refunds nor COA will be given for no-shows. No exceptions.

Virtual Conferences: You may substitute another colleague. Each substitution will require completion of a [Transfer/Substitution Form](#) and will be assessed a \$55 administrative fee. The substitute may also be charged the difference in price if the substitute's member status is different from that of the original registrant. Fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org.

Transfers or substitutions will not be honored the day of the program, after the program begins, or if the program license has been activated.

Written requests received at least a month prior – full refund; four to six business days prior – credit less a \$50 service charge; fewer than four business days prior – credit less a \$100 service charge. COA are applicable only to future PayrollOrg educational programs and are good for one year from issue date. No exceptions.

Cancellations/Refunds will not be honored the day of the program, after the program begins, or if the program license has been activated. Neither refunds nor COA will be given for no-shows. No exceptions.

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Payroll Congress: PayrollOrg cannot honor cancellations or refunds for Payroll Congress registrations. However, you may substitute another member or colleague.

Each substitution will require completion of a substitution form and will be assessed a \$55 administrative fee. The substitute may also be charged the difference in price if the substitute's member status is different from that of the original registrant. Fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org.

If you are unable to attend and cannot find a substitute, notify us in writing one month prior to the event, and you will be issued a credit to your PayrollOrg account for another PayrollOrg sponsored meeting less a \$150 cancellation fee. This credit is good for one year from date of issue; no exceptions will be made to this policy. Program format and delivery method subject to change.

Special Services

If you require special services, please call Customer Service at +1 210 224 6406, M-F, 7 a.m. – 5 p.m. CT, at least 14 days in advance of your event.

Learning Center Classes Cancellations and Refunds Policies

Las Vegas Learning Center Classes are under the jurisdiction of the Nevada Commission on Postsecondary Education, 2800 East St. Louise Avenue, Las Vegas, NV 89104 USA.

As such, registrations have different requirements.

(1) Refund computations will be based on the course time expressed in clock hours. (2) The effective date of termination for refund purposes will be the earliest of the following: (a) the last date of attendance; or (b) the date of receipt of written notice from the student. (3) If tuition and fees are collected in advance, \$150 shall be retained by the API Fund for Payroll Education, Inc./Payroll Learning Center. (4) If the student fails to enter the course, withdraws, or the course is discontinued at any time before completion, the student will be refunded the pro rata portion of tuition, fees, and other charges that the number of class hours remaining in the course after the effective date of termination bears to the total number of class hours in the course. (5) A full refund of all tuition and fees is due in each of the following cases: (a) if an enrollee is not accepted by the school; (b) if the course of instruction is discontinued by the school and this prevents the student from completing the course; or (c) if the student's enrollment was procured as a result of any misrepresentation in advertising or promotional materials of the school, or misrepresentations by the owner or representative of

the school. (6) Refunds will be totally consummated within 15 days after the effective date of termination.

Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds hereof. Recovery hereunder by the debtor shall not exceed the amounts paid by the debtor hereunder.

Students with unresolved problems with the Las Vegas Learning Center may contact the Nevada Commission on Postsecondary Education.

Refund Policy for Students Called to Active Military Service:

A student of the school who withdraws from the school as a result of the student being called to active duty in a military service of the United States or the Texas National Guard may elect one of the following options for each program in which the student is enrolled: (1) if tuition and fees are collected in advance of the withdrawal, a pro rata refund of any tuition, fees, or other charges paid by the student for the program and a cancellation of any unpaid tuition, fees, or other charges owed by the student for the portion of the program the student does not complete following withdrawal; (2) a grade of incomplete with the designation "withdrawn-military" for the courses in the program, other than courses for which the student has previously received a grade on the student's transcript, and the right to re-enroll in the program, or a substantially equivalent program if that program is no longer available, not later than the first anniversary of the date the student is discharged from active military duty without payment of additional tuition, fees, or other charges for the program other than any previously unpaid balance of the original tuition, fees, and charges for books for the program; or (3) the assignment of an appropriate final grade or credit for the courses in the program, but only if the instructor or instructors of the program determine that the student has: (a) satisfactorily completed at least 90 percent of the required coursework for the program; and "demonstrated" sufficient mastery of the program material to receive credit for completing the program.

Merchandise Policies

Merchandise is printed on demand, therefore refunds and exchanges cannot be honored.

Fulfillment

Please allow 14-21 business days from the time you place your order for printing and shipping of merchandise. Delivery times are not guaranteed, and the actual delivery

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time will depend on product availability. All PayrollOrg merchandise is printed on-demand when ordered, which may cause some delays. Expedited shipping is discouraged because of production and fulfillment times.

Claims

Any claims for misprinted/damaged/defective item(s) must be submitted to PayrollOrg within three weeks after the product has been received.

For packages lost in transit, all claims must be reported to PayrollOrg no later than three weeks after the estimated delivery date. If you provide an address and it is deemed insufficient by the courier, the shipment will be returned to the distributor.

The recipient will be liable for reshipment costs once the updated address is confirmed.

If the recipient's shipping address has changed, PayrollOrg will not be able to change the shipping address after the item has printed and shipped.

Certification

Earning Education Credits: Recertification Credit Hours (RCHs) and Continuing Education Units (CEUs) are available for conferences, classes, webinars, webinars on demand, virtual classes, and virtual conferences based on participation.

Continuing Professional Education (CPE) credits for Certified Public Accountants (CPAs) are available for live conferences, classes, webinars, and virtual classes based on participation as required by the National Association of State Boards of Accountancy (NASBA). CPE credits are not available for webinars on demand.

Education Credits are only available to the person who has registered and paid for the event and has met participation requirements.

CPE Complaint Resolution Policy

PayrollOrg will make every effort to resolve complaints regarding NASBA compliance within a reasonable amount of time and in a confidential manner. A formal complaint must be submitted in writing and must set forth a statement of the facts and the specific remedy sought. Submit CPE complaints to: PayrollOrg, Attn: Certification, 660 North Main Avenue, Suite 100, San Antonio, TX 78205-1217 USA. Certification: +1 210 226 4600.

Certification Testing Policies

Absence/Lateness Policy: Candidates unable to attend a scheduled examination may be excused for one of the following reasons: illness (yours, or that of an immediate family member), death in the immediate family, disabling traffic accident, court appearance or jury duty, military duty, or a weather emergency.

Candidates must submit written verification and supporting documentation for excused absences to Pearson VUE **within 14 calendar days** of the original examination date. If candidates are otherwise absent from or late to an examination and have not provided proper notice (see Change/Cancel Policy), candidates will forfeit the **entire examination fee**. Written verification and supporting documentation can be sent by email to pearsonvuecustomerservice@pearson.com, fax to +1 952 516 5557, or U.S. Mail:

**Pearson VUE/Certification Examination for
Payroll Professionals
Attn: Event Program Coordinator
5601 Green Valley Dr.
Bloomington, MN 55437 USA**

Change/Cancel Policy

Do NOT contact Pearson VUE's local testing center. All candidates must telephone Pearson VUE or go to www.PearsonVUE.com/payo at least 96 hours before the scheduled examination date to change or cancel a reservation. Changed reservations with proper notice may be transferred to a new reservation (within the current testing window for the Northern Americas region). **Candidates will forfeit the entire examination fee and be considered a no-show if the change or cancel request is received less than 96 hours from the exam reservation date and time.**

Candidates who cancel an exam at least 96 hours and up to 30 days before their exam reservation will incur a nonrefundable cancellation fee of \$50, paid to Pearson VUE. Cancellations that occur more than 30 calendar days prior to an exam reservation are not subject to additional fees. Please note that there is no fee to change a reservation during this same period.

The Pearson VUE chat option on the Pearson VUE website cannot be used to reschedule or cancel an exam.

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Refunds

Fill out the [Exam Refund/Credit Form](#) and email to Certification@Payroll.org. If the exam had been scheduled and then canceled, be sure to provide the receipt showing the paid fee to Pearson Vue.

Refunds that are approved will be made in the original form of payment. Please allow 4-6 weeks for refunds by check.

Retaking the Exam

Northern Americas Region: Candidates may retake the Fundamental Payroll Certification (FPC) or Certified Payroll Professional (CPP) Examination as often as necessary, but only once in each testing window at a Pearson VUE testing center. For example, those who fail an examination in Spring must wait until Fall to retake. To retake the examination, you must pay for a new exam at [Payroll.org/education-certification/certification/overview](https://payroll.org/education-certification/certification/overview) before making a new exam reservation.

Candidates have the option to obtain additional training at the Payroll Learning Center by completing Payroll 101: Foundations of Payroll Certificate Program or Payroll 201: Payroll Administration Certificate Program and then retake the exam before the next testing window. To register for this course and retake the exam, visit the PayrollOrg website, [Payroll.org](https://payroll.org). Candidates who have failed the FPC or CPP examination at the Payroll Learning Center are eligible to retake the examination at a Pearson Vue Testing Center during the current or a future testing window. A candidate may only take the FPC or CPP exam twice during an exam year.

EMEA, APAC, Southern Americas, and Military:

Candidates may retake the FPC or CPP Examination six months following the date of the most recent exam date. This restriction is in place to allow candidates ample time to pursue additional study/training in preparation to retake the examination. To retake the examination you must pay for a new exam at [Payroll.org/educationcertification/certification/overview](https://payroll.org/educationcertification/certification/overview) before making a new exam reservation, in addition to meeting all eligibility requirements.

Publication, ebook, and Subscription

Policies

Publications are PayrollOrg's printed books. eBooks are PayrollOrg's PDF-based publications. Subscriptions are one year of access to an electronic product, among other PayrollOrg products shown here on the PayrollOrg Bookshelf, <https://bookshelf.payroll.org>.

Payroll Source Plus subscriptions that are renewed before the expiration date receive a 15% discount (does not apply to multi-user subscriptions or Holmes products). No exceptions.

Subscription Multi-User Licenses: All activation codes are good for one year from date of purchase. The code MUST be redeemed within 15 days of purchase for a full year of access. Once licenses are purchased, they cannot be refunded.

Bookshelf Terms and Conditions of Use: Subscriptions to PayrollOrg Bookshelf products are subject to Terms and Conditions of Use. Under these terms, any unauthorized or prohibited use, which includes sharing a subscription, may subject the offender to civil liability and criminal prosecution under applicable laws.

Processing and Shipping

Please allow 14 to 21 days from the time you place your order for processing and shipping of PayrollOrg publications. Delivery times are not guaranteed and the actual delivery time will depend on product availability.

Should you order a product in advance of the production date, you may submit a written request for a full refund, provided PayrollOrg has not already shipped the product.

Please note: Orders are processed on the next business day regardless of the shipping method selected. Expedited shipping is discouraged because of production and fulfillment times.

Cancellations/Refunds

Approved refunds will be made in the original form of payment.

Refunds on taxes for tax-exempt entities will not be honored after the purchase if the tax exemption form has not been filed with PayrollOrg.

Printed Publications: PayrollOrg will accept the return of current edition unopened products in saleable condition. Authorization for returns must be obtained prior to returning any item by calling PayrollOrg Customer Service. Return shipment must be at your own expense. Refunds equal to the cost of the product less a \$30 administrative fee will be issued upon receipt of the returned item(s) in saleable condition. Refunds on taxes for tax-exempt entities will not be honored after the purchase if the tax exemption form has not been filed with PayrollOrg.

eBook Products: Cancellations or refunds will not be honored once the eBook instructions have been sent to the customer or if the license has been activated. Refunds on taxes for tax-

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exempt entities will not be honored after the purchase if the tax exemption form has not been filed with PayrollOrg.

Subscription Products: Cancellations or refunds will not be honored. Refunds on taxes for tax-exempt entities will not be honored after the purchase if the tax exemption form has not been filed with PayrollOrg.

Subscription Multi-User Licenses: Each user must activate their subscription within 15 days of purchase. All codes not redeemed within 15 days will only be processed for the time left from the date of purchase.

Substitutions/Transfer

A \$55 administrative fee will be assessed for each transfer and/or substitution for PayrollOrg printed publications, eBook products, and subscription products. Each transfer and/or substitution will require completion of a [Transfer/Substitution Form](#) and will be assessed the fee. The substitute may also be charged the difference in price if the substitute's member status is different from that of the original registrant. Fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org. A transfer fee will apply if the incorrect title or year of the publication, eBook, or subscription was selected by the customer.

Printed publications: A substitution/transfer can only occur before the publication has been shipped. Authorization for substitutions/transfers must be obtained by calling PayrollOrg Customer Service. After the authorization has been received, fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org

eBook products: A substitution/transfer may only occur before the eBook instructions have been sent to the customer and/or before the license has been activated. No exceptions.

Subscription products: A substitution/transfer may occur before the subscription instructions have been delivered and/or before the license has been activated. No exceptions.

If a substitution is requested after the subscription period has begun, only the remaining balance of the subscription will be available to the substitute. No exceptions.

Membership Dues/Enrollment Fee Policies

Membership in PayrollOrg is annual and is per individual. Corporate memberships do not exist at this time. Go to

[Payroll.org](#) to see the current cost. There is a one-time enrollment fee of \$35. If your membership lapses over 90 days, you will incur the reinstatement fee of \$35.

Membership officially begins when payment is processed. Dues are subject to change at any time.

Substitutions

If a substitution is requested after the period has begun, only the remaining balance of the membership will be available to the substitute. PayrollOrg Customer Service must be contacted and substitution must be approved. Fill out the [Transfer/Substitution Form](#) and email to CustomerService@Payroll.org.

Cancellations/Refunds

Refunds will not be issued for canceled memberships.

Copyright, Trademark, and Other Intellectual Property Protection

PayrollOrg's publications, eBooks, and subscription products, and their entire contents (including, but not limited to, the text, photographs, information, software, graphics, images, sound, and animation), are owned or licensed by PayrollOrg and are protected by domestic and international copyright, trademark, patent, and other intellectual property laws. No portion may be reproduced in any format without prior permission of the American Payroll Institute, Inc. More information about our subscription product policies can be found in the [Terms and Conditions of Use](#). Any unauthorized or prohibited use may subject the offender to civil liability and criminal prosecution under applicable laws.

Customers are expected to report suspected violations. No person who reports a suspected violation, who acts in good faith, will suffer adverse consequences for making the report. Reports may be made by email to: IP@Payroll.org. All reports will be promptly investigated, and appropriate corrective action will be taken if warranted by the investigation. Corrective actions may include the cancellation of a customer's subscription to PayrollOrg Bookshelf, without a refund.

Notice

All trademarks, service marks, and trade names are proprietary to PayrollOrg or other respective owners that have granted PayrollOrg the right and license to use their marks.

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