EN Payroll Integration Guide - ADP RUN

This guide includes general instructions for the use of Employee Navigator's Payroll Integration product both for the client and for our partners. This document should be carefully reviewed.

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Section 1 – What to know before you begin!

Employee Navigator's payroll Integration allows you to share specific employee demographic and recurring deduction data with your ADP system, and will ADP to share employee demographics with Employee Navigator, all in real-time.

Prior to going through the setup pieces of the integration, there are a few key points to note:

Employee changes made in ADP RUN

ADP RUN does not send EN changes in real-time. Changes made in ADP RUN will be pulled into EN each night for you, and changes made in EN *will* send to ADP in real-time.

Unsupported benefit deductions

Currently, we do not support the following deductions to be synced with Payroll. Any changes to these deductions or contributions must be **manually managed** within the Payroll system:

- Recurring Earnings/Employer Contributions
- Commuter, Transit or Parking Benefits
- 401(k) plans
- Universal Plan types within Employee Navigator

Deduction Codes

- Deduction codes must be unique per each Benefit Type in order for EmployeeNavigator to transmit the separate per pay amounts for each plan.
  - You cannot lump different benefit types into a single code.
    - *Ex.* Accident, Cancer and Critical Illness cannot have one code that combines all amounts – they must have one code per benefit type.

New Hires who are added to Payroll once the group is Live

When a new hire is entered into the payroll system, the process for finding andcompleting them is as follows:

1. New Hire is entered into Payroll and feeds over to Employee Navigator the next day.
2. From the group's Homepage in EN, click 'Complete employees missing HR requiredfields' and find the newly hired employee.
3. Click 'Complete Hire' and add the employee's Payroll Group, Class and any other fields you wish to populate.
   - Payroll Group and Class fields are not exchanged within the integration
4. Click to send out the Welcome Email if the specific employee is eligible to enroll in benefits.

ADP: What to confirm before integrating

- **Do you have employees who will transfer from one company code to another within ADP?**
  - o If so, please follow this exact process to transfer them within the ADP system and prevent an inadvertent termination date from being sent to EN:
    1. Hire/Transfer the employee to their new company code in ADP
    2. Set this new record as their 'Primary' position in ADP

    3. Terminate the employee in their original company.

1.1 Setup Checklist Overview

Part One *(Average completion rate = < 1 day)*

- ❑ HR and Broker schedule initial review call with EN Analyst to walk through the Audit process together

- ❑ Set-up payroll group(s) in EN

    - ❑ Confirm all employees are assigned to their appropriate payroll group

- ❑ Set-up payroll calendar in EN for each payroll group

    - ❑ Pay dates must *exactly* match pay dates in Payroll System

- ❑ Add payroll deduction codes into EN by running your 'Deduction Listing report within the Payroll tab in Employee Navigator

    - ❑ HR must create new, unique codes for any that currently have multiple benefit types consolidated into one code.

- ❑ Mark 'Payroll group' as required in Settings → HRIS Field Tracking → Profile

- ❑ Go to the Payroll tab in EN → Demographic Audit→ Start New API Import

Part Two *(Average completion rate = <5 days)**

- ❑ [HR resolves discrepancies in the Demographic Audit](#)

- ❑ [HR **and** Broker resolve discrepancies in the Deduction Audit](#)

- ❑ EN Analyst changes your API status from 'Audit Mode' to 'Live'

Exchanged Fields

Demographic Data elements exchanged with ADP RUN

ADP RUN Field Name	Employee Navigator Field Name	Direction of Exchange
Associate OID	Payroll Id	From ADP to EN only
[Tax ID Type]	SSN	From ADP to EN only
First Name	First Name	Bi-directional
Middle Name	Middle Name	Bi-directional
Last Name	Last Name	Bi-directional
Address Line 1	Address 1	Bi-directional
Address Line 2	Address 2	Bi-directional
Address Line 3	Address 3	Bi-directional
City	City	Bi-directional
State	State	Bi-directional
Zip	Zip	Bi-directional
Country	Country	Bi-directional
Home Phone	Home Phone	Bi-directional
Birth Date	DOB	Bi-directional
Gender	Sex	Bi-directional
Hire Date or Rehire Date (most recent hire date is exchanged)	Hire Date	From ADP to EN only
Termination Date	Termination Date	From ADP to EN only
Regular Pay Rate	Pay basis	From ADP to EN only
Annual Salary	Annual base salary	From ADP to EN only
Hourly rate	Hourly rate	From ADP to EN only
Personal Email	Personal Email	Bi-directional
Work Email	Work Email	Bi-directional

Deduction Data elements exchanged with ADP RUN system
Deductions are from **EN to ADP only**, as we are the system of record for capturing enrollment data and transmitting the deductions over to ADP. Since ADP RUN does not have deduction effective dates, EN will pend all future-dated changes in our system to send on the exact coverage effective date. This will ensure they are inserted into the proper pay period.

We will send the:
- Deduction code mapped into the employee's payroll group for the benefit
- Deduction per pay amount*

1.2 Frequently Asked Questions

Demographic audit

Q: How do I complete this as quickly as possible?
A: We would strongly advise to block out time immediately following your initial review call with the EN team to complete this audit. The quicker this gets done, the quicker you go Live and don't have to make manual changes in two systems any longer.

Q: When should I use Annual Benefit salary?
A: This field should only be used when a value *other than* the employee's salary amount fromPayroll needs to be used to drive benefit calculations.

> *Ex:* Commissioned employees with no true salary value in payroll at all, or key employees who receive a salary + bonus, and the bonus value needs to be used forbenefits calculations as well.

Q: Do I need to sync my terminated employee's?
A: You do not "*need"* to. We mainly want to ensure your Active employees have matching data: however, if you prefer to sync your terminated employees, it will not affect the integration if you decide to do so. **Do not** block your terminated employees.

Deduction audit

Q: I have employees who must receive post-tax deductions, how do I configure this?
A:

1. If they *are not* 2% shareholders: Create a new payroll group with the same frequency → Add the post-tax deduction codes to this group and any other pre-tax deductions for plans that must be withheld pre-tax for all → Adjust each applicable employee's payroll group to the new one.
2. If they *are* 2% shareholders: Go to their Profile → Employment → Statutory Class → Choose'2% Shareholder' and Save. This will allow EN to apply only the post-tax deduction codes you've mapped into your payroll group(s) for this employee.

Ongoing Management

Q: I have multiple companies in ADP; how do I properly transfer an employee in payroll and avoid having them terminate in EN?
A: Follow the exact instructions in our Transferring an ADP employee between company codes article.