

EN Payroll Integration Guide - ADP Workforce Now & ADP Workforce Now Next Generation



*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:**

* + **Benefits that manage deduction codes \*(see page 4)\***
  + Any deduction codes currently managed by benefits in ADP will need to have the benefits removed from managing them to allow EN to update deductions within the integration.

**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 Employee Navigator 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 and completing them is as follows:

1. New Hire is entered into Payroll and feeds over to Employee Navigator.
2. From the group’s Homepage in EN, click ‘Complete employees missing HR required fields’ 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.

o Payroll Group and Class fields are not exchanged within the integration

1. 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 Benefit Plans in ADP?**
  + If so, please notify your EN Analyst immediately.
  + Any deduction codes that correspond with benefits the group plans to exchange within the integration will need to have the benefits unlinked from managing them in ADP.  *Having the code set as editable is the only way that EN will be able to successfully insert deductions into ADP.*
* **This will be the final step in your process.** 
  + Once your analyst indicates you are at this stage, you will need to contact ADP support and state, “I am in need of an ADP WorkForce Now Benefits Advisor to suspend benefit plans that are linked to my deduction codes. This will allow Employee Navigator to exchange deductions with payroll as expected.”
* **Do you have employees who will transfer from one company code to another within ADP?**
  + 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



* + 1. 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
      * 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 à Demographic Audità Start New API Import

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

* [HR resolves discrepancies in the Demographic Audit](https://employeenavigator.zendesk.com/hc/en-us/articles/360040781651-Payroll-Completing-your-Demographic-Audit-Video-included-)
* [HR **and** Broker resolve discrepancies in the Deduction Audit](https://employeenavigator.zendesk.com/hc/en-us/articles/360040363752-Payroll-Completing-your-Deduction-Audit)
* EN Analyst contacts Payroll partner to change API status from ‘Audit Mode’ to ‘Live

**Exchanged Fields**

**Demographic Data elements exchanged with Workforce Now**

|  |  |  |
| --- | --- | --- |
| **ADP WorkForce Now Field Name** | **Employee Navigator Field** | **Direction of Exchange** |
|  | **Name** |  |
| Associate OID | Payroll Identifier (Profile 🡪 Apps page in EN) | 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 for Insurance coverage | Sex | Bi-directional |
|  |  |  |
| Hire Date or Rehire Date (most | Hire Date | From ADP to EN only |
| recent hire date is exchanged) |  |  |
| Termination Date | Termination Date | From ADP to EN only |
|  |  |  |
| Regular Pay Effective | Salary effective 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 for WFN Next Generation  From ADP to EN only for WFN |
|  |  |  |
| Work Email | Work Email | Bi-directional for WFN Next Generation  From ADP to EN only for WFN |

**Deduction Data elements exchanged with Workforce Now**

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.

We will send the:

* Deduction code mapped into the employee’s payroll group for the benefit
* Deduction Start Date, which will equal the Effective date of the enrollment in EN
* 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 from Payroll 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 for benefits 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 à 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 à 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?**

Shape**A:** Follow the exact instructions in our [Transferring an ADP employee between company codes article.](https://employeenavigator.zendesk.com/hc/en-us/articles/360033319872-Payroll-Transferring-an-employee-between-companies#h_01GM90A4ESJ024KJGN2PPQ1RVS)