

**AsureCloud eNav**  
**Implementation Guide**



**Disclaimer**

Asure Software and Asure Software Logos are registered trademarks.

Third-Party trademarks: All trademarks mentioned in the document are property of their respected owners.

The information contained herein constitutes proprietary and confidential information of Asure Software. It must not be copied, transmitted, or distributed in any form or by any means, electronic, mechanical or other, including photocopy, recording, or any information storage and retrieval system, without the expressed written permission of Asure Software.

To report any errors, or to suggest improvements to this documentation, please contact the Asure Time & Attendance Support Team via our Support Portal, online at <http://www.asuresoftware.com/support>.

# Chapter Contents

- OVERVIEW..... 4**
- DATA FLOWS..... 4**
  - New Hires, Terminations, and Re-hires ..... 4
  - Employee Data Fields ..... 4
  - Benefit Deduction Data ..... 5
- IMPLEMENTING INTEGRATION ..... 5**
  - 1. Payroll and HR ..... 6
  - 2. Reports..... 6
    - Running Reports in Payroll & Tax ..... 7
  - 3. Enable Employee Navigator Integration in AsureCloud ..... 9
  - 4. Employee Navigator Setup ..... 10
    - ENav Employee Demographic Report ..... 10
    - ENav Company Deduction Codes Report..... 10
    - ENav Employee Deduction Report ..... 10
  - 5. Audit ..... 10

## Overview

Employee Navigator is a third-party benefits management solution. Employee Navigator partners with insurance brokers to provide benefits management to the broker's client base. For the broker, integration between Asure and Employee Navigator eliminates the need to maintain employee and deduction information manually in both systems.

The purpose of this document is to provide information you need to implement the connection between Employee Navigator and Asure platforms.

## Data Flows

There are the integration data flows between Employee Navigator and Asure.

- 1 Employee updates are entered in either system, and the updates sync to the other. AsureCloud is the system of record for employee demographic data.
- 2 Employee benefit elections are entered only in Employee Navigator and sync to AsureCloud. Employee Navigator is the system of record for employee benefit elections

## New Hires, Terminations, and Re-hires

New hires, Terminations, and Re-hires must be done on the AsureCloud side. When you add an employee in AsureCloud, the new record syncs to Employee Navigator as usual.

When an employee is terminated in AsureCloud, the termination syncs to Employee Navigator and the employee is terminated with the same termination date as AsureCloud.

When a re-hire occurs in AsureCloud, this information syncs to Employee Navigator and the employee is rehired in Employee Navigator

If a new hire/termination of an employee/rehiring of a terminated employee is not initiated from AsureCloud and is done in Employee Navigator, AsureCloud will not be aware of these new changes or information. The two systems will become out of sync.

## Employee Data Fields

When updating an employee, the following data fields will be transmitted from one system to another. However, some of these fields only sync from AsureCloud to Employee Navigator.

| Payroll Field | AHR Field   | EN Field               | Direction      |
|---------------|-------------|------------------------|----------------|
| EE_Num        | Employee ID | Payroll ID             | Asure TO eNav  |
| SSN           | SSN         | Social security number | Asure TO eNav  |
| First Name    | First Name  | First name             | Bi-directional |
| MI            | Middle Name | Middle name            | Bi-directional |
| Last Name     | Last Name   | Last name              | Bi-directional |
| Date of Birth | Birthdate   | DOB                    | Bi-directional |

| Payroll Field        | AHR Field        | EN Field              | Direction      |
|----------------------|------------------|-----------------------|----------------|
| Current Hire Date    | Hire Date        | Hire date             | Asure TO eNav  |
| Current Term Date    | Termination Date | Termination Date      | Asure TO eNav  |
| Begin Effective Date | Effective Date   | Salary effective date | Asure TO eNav  |
| Pay Frequency        | Pay Frequency    | Pay basis             | Asure TO eNav  |
| Annualized Salary    | N/A              | Annual base salary    | Asure TO eNav  |
| Rate Amount          | Rate             | Hourly rate           | Asure TO eNav  |
| Address 1            | Address Line 1   | Address 1             | Bi-directional |
| Address 2            | Address Line 2   | Address 2             | Bi-directional |
| City                 | City             | City                  | Bi-directional |
| State                | State            | State/Territory       | Bi-directional |
| Zip Code             | Zip Code         | Zip code              | Bi-directional |
| E-mail               | Email            | Work Email            | Bi-directional |
| Primary Phone        | Cell Phone       | Home Phone            | Bi-directional |

## Benefit Deduction Data

Employee Navigator owns employee benefit elections. New elections or changes to current elections are sent to AsureCloud. This is a one-directional synchronization. These deductions are Scheduled E/Ds in AsureCloud.

Although the Scheduled E/Ds page is not blocked in AsureCloud, users are advised to refrain from making changes to the Employee Navigator-managed Scheduled E/D records as these changes should come from Employee Navigator to ensure integrity of data on both systems.

**NOTE:** Employee Navigator does not include the employer contributions in the integrations. If the client wishes to manage these, they must be manually managed in Asure Payroll as a Schedule ED (memo) code.

Employee Navigator can provide a report.

Important Notice: Open Enrollment Period. New Employee Navigator Integrations have a required "Black Out Period". New Employee Navigator integrations are black out 30 days prior to Open Enrollment begin date through 30 Days following Open Enrollment End date.

## Implementing Integration

This section details implementation steps for Employee Navigator integration with AsureCloud. Some of these steps are not required to occur in the order provided here, but they all must be completed before live data is exchanged.

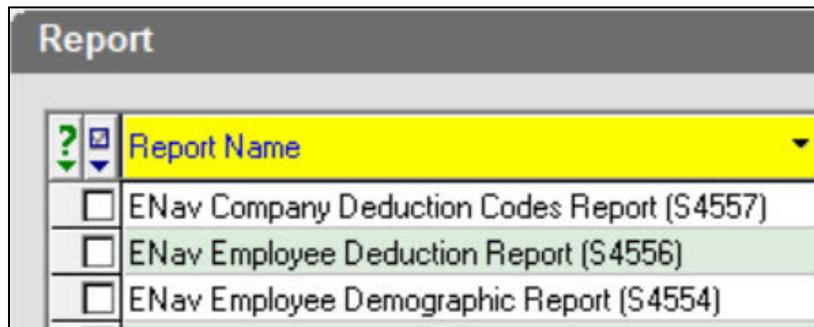
# 1. Payroll and HR

Before we can begin integration with Employee Navigator, the company must be fully implemented on AsureCloud. The company should have completed at least two payroll runs. For AsureCloud implementation, please click [here](#).

## 2. Reports

An initial data load from Asure to Employee Navigator is necessary to establish a baseline of data before integration can be turned on.

There are three reports that are required for the setup of the company in Employee Navigator.



- eNav Company Deduction Codes Report (S4557)
- eNav Employee Deduction Report (S4556)
- eNav Employee Demographic Report (S4554)

These reports must be set up as Bureau level, Company Default Reports first before setting them up at the company level. You need only to set the reports up at the Bureau level once. Subsequently, you only need to apply the reports to the company that integrates with Employee Navigator.

These reports can be run by the Client Admin or the broker from the Client's AHR application. When running the reports, you will be asked to provide the Tenant ID. This can be provided by contacting Asure Support. Please note that this Tenant ID is the same for all companies in an instance of Payroll & Tax. Save this Tenant ID for future implementations. - Employee Navigator integration for the same instance of Payroll & Tax.

**NOTE:** Importing these reports into Employee Navigator is not covered in this document as the content is owned by Employee Navigator.

# Running Reports in Payroll & Tax

- 1 Select Reports > Defined Reports.

| Report Name                                   | Report # |
|---|----------|
| ENav - EE Demographic Report (S4554)          | 4554     |
| ENav - Employee Deduction Report (S4556)      | 4556     |
| ENav - Company Deduction Codes Report (S4557) | 4557     |

1 - 3 of 3 Items

CLIENT PDDEMO - PD Demo EE Navigator COMPANY PDDEMO - PD Demo EE Navigator

- 2 Select a client and company from the dropdown.

CLIENT PDDEMO - PD Demo EE Navigator COMPANY PDDEMO - PD Demo EE Navigator

- 3 Select Reports > Defined Reports.

| Report Name                                   | Report # |
|---|----------|
| ENav - EE Demographic Report (S4554)          | 4554     |
| ENav - Employee Deduction Report (S4556)      | 4556     |
| ENav - Company Deduction Codes Report (S4557) | 4557     |

1 - 3 of 3 Items

- 4 Select the report you want to run from the list and click Configure Report.

The screenshot shows the 'Reports' page with a sidebar on the left containing 'DEFINED REPORTS', 'PUBLISHED REPORTS', and 'AD HOC REPORTS'. The main area has a search bar and an 'EXPORT LIST TO EXCEL' button. A table lists three reports:

| Report Name                                   | Report # |
|---|----------|
| ENav - EE Demographic Report (S4554)          | 4554     |
| ENav - Employee Deduction Report (S4556)      | 4556     |
| ENav - Company Deduction Codes Report (S4557) | 4557     |

Below the table, it says '1 - 3 of 3 items'. To the right, the title 'ENav - EE Demographic Report' is displayed, along with the text 'Choose options for this report' and a 'CONFIGURE REPORT' button with a right-pointing arrow.

- 5 Select Excel or CSV in the Output Type field and paste the Tenant ID in the text field. You can get the Tenant ID from an Azure Administrator.

The screenshot shows the 'Options for ENav - EE Demographic Report' page. It features a sidebar with 'DEFINED REPORTS', 'PUBLISHED REPORTS', and 'AD HOC REPORTS'. A 'REPORTS LIST' button with a left-pointing arrow is visible. The main area has two tabs: 'Misc Options' and 'Run Report'. Below the tabs, it says 'Additional options available for this report:'. A 'Parameters' section contains an 'Output Type' dropdown menu with 'Excel File' selected and a 'Tenant ID' text input field.

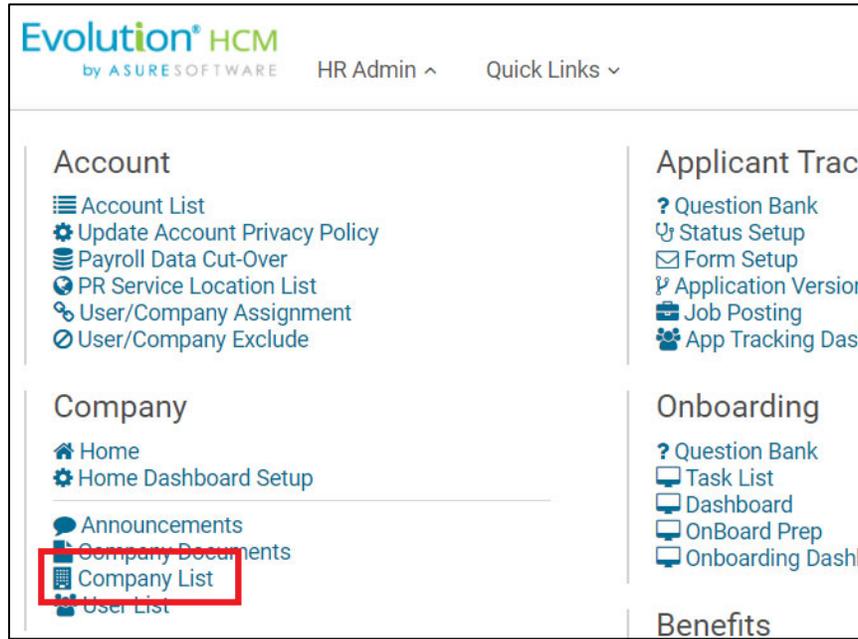
- 6 Click the Run Report Tab. The Report will show in the Task Queue. Click the report. Click download. (In the case of an Excel file, the file will appear as a download with no preview; a CSV value will provide preview of the contents)

The screenshot shows the 'My Task Queue' page. On the left, there is a search bar with 'enav' entered. Below it, a task is listed: 'Run Report' with ID: 694349, 'PDDEMO . ENav - EE Demographic Report #4554', and a status of 'Finished Successfully' with a green checkmark and the time 'Today 11:45 AM'. On the right, there are 'Results' and 'Log' tabs. Below the tabs, the text 'CO# PDDEMO . ENav - EE Demographic Report #4554' is displayed, followed by a 'DOWNLOAD' button with an Excel file icon.

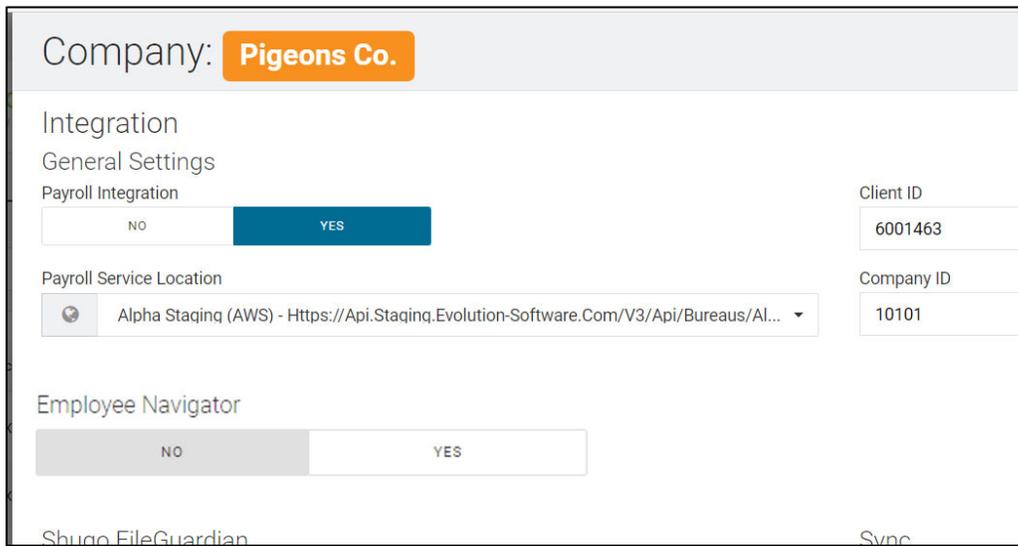
### 3. Enable Employee Navigator Integration in AsureCloud

Employee Integration must be enabled for a client in AsureCloud before the system can begin synchronizing data.

- 1 Log in to AHR and click HR Admin.
- 2 Click Company List.



- 3 Select the Company you want
- 4 On the Company page, scroll down to the Integration section and set the Employee Navigator toggle to Yes.



- 5 Click Save Changes.

## 4. Employee Navigator Setup

You will need to select Asure in the Partner Selection menu as your payroll service of choice. Please refer to Employee Navigator's support page to learn how to set this value.

### ENav Employee Demographic Report

The EE Demographic report exported from AsureCloud includes employee data fields exchanged between Employee Navigator and AsureCloud for all employees. Import this into Employee Navigator. Once import is done, validate the data to ensure that employee details on both systems are in sync.

**NOTE:** Validation of values in Employee Navigator is not covered in this document as the content is owned by Employee Navigator. Please refer to Employee Navigator's support page to learn this.

### ENav Company Deduction Codes Report

Use the ENav Company Deduction Code report to set up the deduction codes in Employee Navigator to ensure that deduction codes on both systems match. If they do not match, the integration will be broken.

**NOTE:** Setting up deduction codes in Employee Navigator is not covered in this document as the content is owned by Employee Navigator. Please refer to Employee Navigator's support page to learn this.

### ENav Employee Deduction Report

If there are current elections available for the employees in Employee Navigator, and these were set up as deductions in AsureCloud, then this report will contain the deduction records. You will need to import this into Employee Navigator and ensure that the records in both systems match.

**NOTE:** Validating employee deductions in Employee Navigator is not covered in this document as the content is owned by Employee Navigator. Please refer to Employee Navigator's support page to learn this.

## 5. Audit

Once the above steps are done, Employee Navigator has a set of guidelines on auditing the integration. Please refer to the Employee Navigator Implementation Guide for more details. Alternatively, contact Employee Navigator's support.