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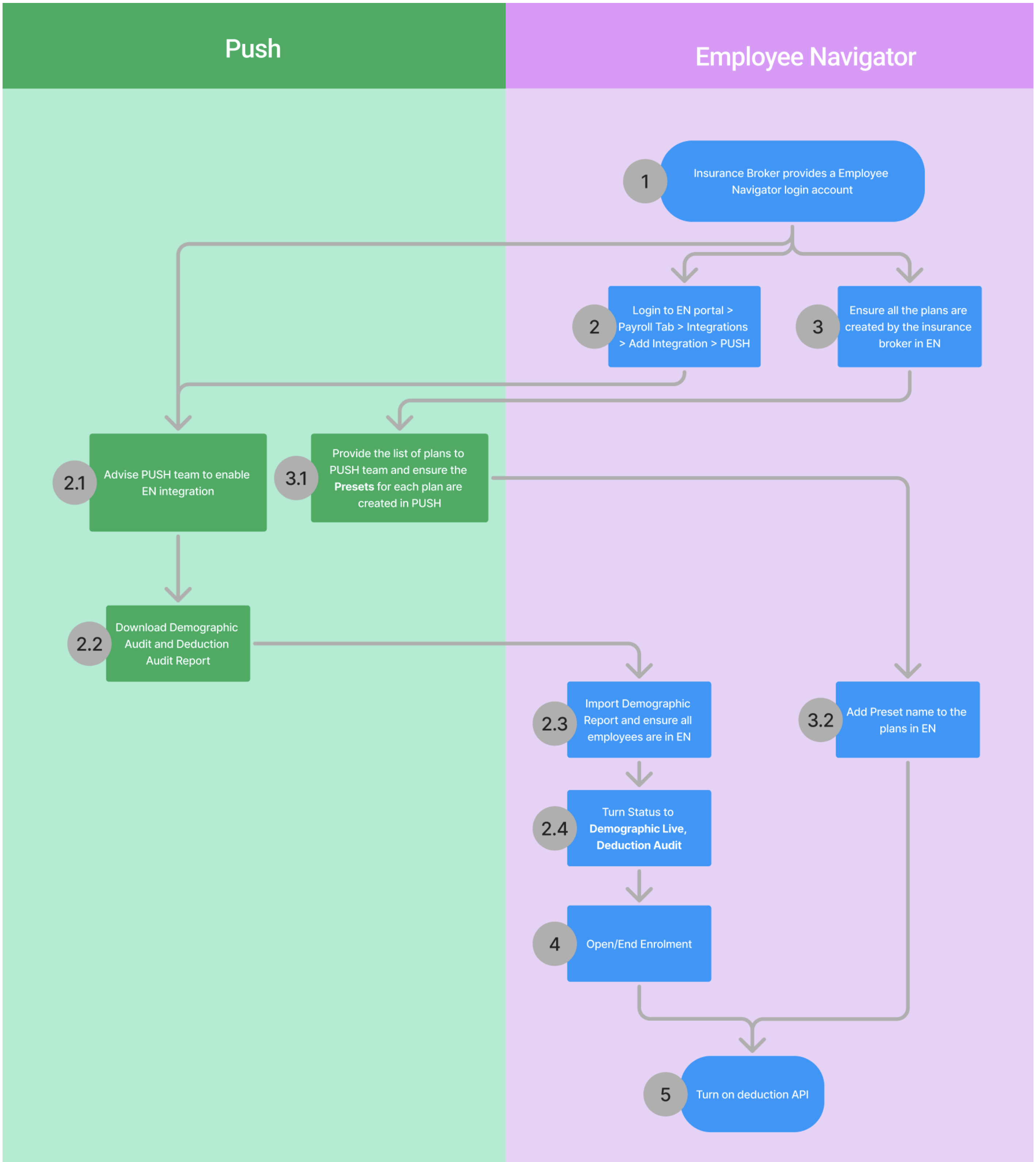
Implementation Guide – Integrated Payroll

# Section 1, Guide for New EN Customer



## Step 1: Employee Navigator Account

- Everything starts with your insurance broker providing you with an employee navigator(EN) Account. Usually, the business owner and the HR administrator who manages employee benefits will need to have access to the EN system.
- Your broker will provide you with an EN support contact to support you throughout the integration process. Alternatively, you can reach out to payroll@employeenavigator.com for assistance.

## Step 2: Setup PUSH as the payroll provider in EN

- Add PUSH as your payroll provider in the payroll module in EN.
- Steps 2 and 3 can be worked on in parallel

## Step 2.1: Enable EN in PUSH

- Contact PUSH support at support@pushoperations.com to enable EN integration in PUSH.
- If you have one EN account handle benefits for multiple PUSH companies, refer to the FAQ section #3 for more details

## Step 2.2: Download the Demographic Audit Reports in PUSH

Go to the PUSH report module, under the Employee Navigator report section, and download the Demographic Audit Report audit reports. If you are new to PUSH, ensure all Employees are created in PUSH before doing so.

## Step 2.3: Import Employee Data into EN

Contact EN support. They will guide you through importing the Demographic Audit report you downloaded in Step 2.2

## Step 2.4: Turn on Employee Sync

- Once all the employee information is imported and mapped in EN, EN support will enable **Employee Sync**. This will ensure that changes to employee information made in EN or PUSH are synced to the other system. (Note: Some fields will not sync. See the **Data Exchanged** section below for details.)

## Step  3: Create and Configure Plans in EN

- Work with your broker to set all the plans in EN.

## Step 3.1: Ensure all the plans are mapped to a payroll preset in PUSH

- The PUSH team will send you a form to collect your plans in EN. Please complete it with your broker's assistance.
    - The form includes default presets in PUSH to help you map your plans to existing options.
    - If you need multiple plans of the same type, you can copy the preset as needed.
    - If a required preset is missing, use the **Note** section to provide details such as: Preset name, Plan type, Taxable or not or any other relevant details. Once submitted, we'll create the preset in PUSH.

## Step 3.2: Ensure all the plans are mapped to a payroll preset in PUSH

- Map the PUSH preset code to the plans in EN
- EN support can help you with this process.

## Step 4: Open and End Enrollment

- Since all the employees and plans are in EN now, it's time for open enrollment so that the employees can choose the plans they want.
- Your broker and EN support can help you with this process.

## Step 5: Turn on Deduction Sync

- Once enrollment ends, you can advise EN support to turn on the deduction sync. Once it's on, EN will send all plan selections as recurring deductions to PUSH. Depending on how many plans have been selected by the employees, the initial sync may take up to a few hours.
- You can verify that the plans have been synced to PUSH by logging into PUSH and then going to the **Payroll Tab > Earnings/Deductions (left)> All Earnings/Deductions (bottom right)** to see if all the deductions show up with the right amount and frequency.

# Section 2, Guide for Existing EN Customer

## Step 1. Enable EN in PUSH and Sync Employees

- Follow Steps 2.1 to 2.4 in the Section 1 above.

## Step 2: Map out plans with PUSH deduction presets

- The PUSH team will send you a form to collect your plans in EN. Please map out the existing PUSH presets and plans in EN.
- Send the file to PUSH support so that PUSH support will create any missing preset from PUSH.
- The goal for this step is to ensure all Plans in EN have a preset in PUSH.

## Step 3: Map PUSH preset to Plans in EN

- Ensure all the plans in EN are mapped to the right deduction preset in PUSH, especially for those new presets created in Step 2

## Step 4: Import Deduction Data into EN

- Download the Deduction Audit report in the same place as the Demographic report.
- Contact EN support, who will guide you through importing the deduction audit report and making sure employee enrollments are correctly mapped to the recurring deductions in PUSH.

## Step 5: Turn on Deduction Sync

- Turn on the deduction sync. Because all employee enrollments are mapped to deductions in PUSH, only new enrollments will be sent to PUSH after the sync is turned on.
- You can verify that the plans have been synced to PUSH by logging into PUSH and then going to the **Payroll Tab > Earnings/Deductions (left)> All Earnings/Deductions (bottom right)** to see if all the deductions show up with the right amount and frequency.

# Section 3. Data Exchanged

Employee creation must be completed in Push and will sync to Employee Navigator once compensation data has been added for the new employee.
Important to note that the employer portion of deductions is NOT exchanged between Employee Navigator and Push, this will need to be added into payroll manually.

**Demographics**

| **Push to EN** | **EN -> Push** | **Bi-directional** |
|---|---|---|
| • Payroll Company ID<br>• Employee Identifier<br>• SSN<br>• Hire Date<br>• Compensation data | | • Employee Name<br>• DOB<br>• Address fields<br>• Email<br>• Phone Number |

**Deductions**
Payroll deduction data flows from Employee Navigator to Push.

| **Exchanged** | **Not Current Exchanged** |
|---|---|
| • Deduction amount<br>• Deduction start date<br>• Deduction end date | • Employer Portion |

# Section 4. FAQ

1. **How do I control employee eligibility?**
   Eligibility is controlled in EN. It can be turned on based on an employee attribute, such as hourly vs. salary or position (Syncing position is not currently supported, but this will be added soon).
2. **Can I turn on EN before enrollment ends?**
   Technically yes. However, your employees may make changes to their plan selection. So, turning on deduction sync after enrollment ends is advised.
3. **One EN account with multiple PUSH companies (Multi-EIN setup)**
   EN and PUSH support this setup by changing your company in EN to a multi-EIN account. Then every PUSH company will be mapped to an EIN sub-account. Please contact EN support for more information.
4. **What if my broker doesn't support EN?**
   The EN sales team can talk to your broker and explain the benefits of automating benefit deductions with payroll software. Please contact the PUSH support team, and an EN sales representative in your region will contact you or your broker directly.