

Overview:

This appendix provides information that is for ApexHCM integration with Employee Navigator. It is intended to help customers understand what reports are available and to also provide field names that are mapped between ApexHCM and Employee Navigator.

Steps to Configure ApexHCM –

1. Apex Customers must have the Employee Navigator Integration Enabled and be in Audit Mode. There is an Employee Navigator side to this and an ApexHCM side to activation at the Service Bureau and Company/Employer level.
2. Global configuration of deductions must be configured and mapped (Deduction ID must Match Deduction Code)
 - a. In order for Employee Navigator and Apex to transmit deduction-related data for an employee record, the Deduction Code on the Payroll screen in Employee Navigator must match the Deduction ID in Apex. In addition, for the deduction to be handled correctly in Employee Navigator when the deduction information is transmitted to Apex, keep the following notes in mind:
 - b. Employee Navigator defaults to sending pre-tax codes to Apex if they are entered in the payroll code setup and, in addition:
 - i. If pre-tax and post-tax codes are entered for a plan, then Employee Navigator will send the pre-tax code to Apex.
 - ii. If ONLY a post-tax code is entered, then Employee Navigator will send the post-tax code.
 - iii. If ONLY a pre-tax code is entered, then Employee Navigator will send the pre-tax code.
 - iv. If an employee is marked as an S Corp shareholder in Employee Navigator (Profile>Employment>Statutory Class), and both pre-tax and post-tax codes are entered, then Employee Navigator will send the post-tax code for the S Corp shareholder.
 - c. In the deduction setup in Apex, it is also important to remember that the Employee Navigator integration is designed to work only with certain types of deductions as described below.
 - i. SUPPORTED
 - Fixed Amount deductions
 - Apex Deduction Type = Deduction
 - ii. NOT SUPPORTED
 - Percentage-based deductions (these will show up as zero dollar amounts in EN)
 - Apex Deduction Type = Garnishment, Advance, Reimbursement, or Taxable Fringe Benefit
3. Employees are setup in Apex – and need to have these fields configured
 - a. SSN (if the SSN is set to Not on File, an exception will occur in the integration)

- b. All Employees must have their pay frequency defined (these will match up to EN Pay Groups and EN organizes their deductions by the pay frequency/pay group, so a deduction may belong to a Pay Group for BiWeekly and a Pay Group for Weekly.
- c. Check all inactive employees to make sure that the separation date field has a value. This value is optional in ApexHCM, but is required in Employee Navigator. It is suggested to use the report writer to see the last check date for separated employees and use that date, if you don't have the date. The reason that these employees are relevant to the integration is in the case of rehires in the future.
- d. Employee ID - **IMPORTANT**: In Employee Navigator, the Payroll ID is expected to be a unique and static number. In Apex, the Employee ID that corresponds to the Employee Navigator Payroll ID is editable. However, once an employee is synched from Apex to Employee Navigator, THE APEX EMPLOYEE ID SHOULD NOT BE CHANGED. If the Employee ID is changed, it is very likely that the employee record in Employee Navigator will become corrupt and/or inaccessible.

Notes –

The integration supports new hires coming from Apex or Employee Navigator. If they come in from Employee Navigator, they will come through to Apex as 'Setup Required,' since there are key pieces of information that need to be configured for payroll. This includes the hire date – that needs to be intentionally entered into Apex, due to the payroll impact of that value.

The integration will not support Terminations coming from Employee Navigator, due to the variability of Termination scenarios and payroll, plus deactivations that occur in Apex. This status change is important to handle in Apex.

Standard Reports from ApexHCM – Employer on the GO

There are 3 reports in ApexHCM that are used as part of the audit process. These reports can be found under Employer on Demand> Report Wizard> File Extracts> Report Category – Employee Navigator –

- Deduction Code Report
- Employee Deduction Report includes employees with Apex Employee Statuses listed below. The other statuses (Deceased, Inactive, Layoff, Suspended, Terminated are not going to show on this report/extract):
 - Active
 - FMLA
 - Leave
 - Retired
 - SetupRequired
 - Temporary
- Employee Demographic Report

These generate a csv file that can be opened as an excel spreadsheet once you save it. These are used in Employee Navigator for the Employee Discrepancy Audit and Deduction Discrepancy Audit.

Flow of Data between ApexHCM and Employee Navigator

The table below shows the fields exchanged between Employee Navigator and ApexHCM, including Screen References from both systems, plus specific information on the mapping.

Employee Navigator Fieldname in UI	Employee Navigator Field Location	Exchange Direction	Apex (EOG) Fieldname in UI	Apex (EOG) Field Location
CompanyId	Not displayed (combination of Apex SBO_Company Id)	Apex to EN Only	Company Id	Company > Information
Payroll ID	Employee Profile (Employment)	Apex to EN Only and is EN’s PK – Do not change, once is it sent to EN	Employee Id	Employees > General
SSN	Employee Profile (Profile)	Apex to EN Only* <i>*Exception: If a new employee is added in Employee Navigator that is the only time a SSN can go from EN to Apex. After that, the field is locked in EN and updates only go from Apex to EN.</i>	SSN	Employees > General
First name	Employee Profile (Profile)	Bi-directional	First Name	Employees > General
Middle name	Employee Profile (Profile)	Bi-directional	Middle Name	Employees > General
Last name	Employee Profile (Profile)	Bi-directional	Last Name	Employees > General
Suffix	Employee Profile (Profile)	Apex to EN Only, but there will be a fix June2018 to be Bi-Directional	Suffix	Employees > General
Job title	Employee Profile (Profile)	Apex to EN Only	Job Title	Employees > Pay Info
Employment status	Employee Profile (Employment)	Apex to EN Only	Status	Employees > General

Appendix – ApexHCM Payroll Employee Navigator Integration User’s Guide

Employee Navigator Fieldname in UI	Employee Navigator Field Location	Exchange Direction	Apex (EOG) Fieldname in UI	Apex (EOG) Field Location
Hire date	Employee Profile (Employment)	Apex to EN Only (may say Bi-directional on EN Website, but only flows from Apex to EN) – coming from New Hires in EN, the employee will come through as setup required and the client needs to intentionally set this date for payroll	Hire Date	Employees > General
Is full-time	Employee Profile (Employment)	Apex to EN Only (says Bi-directional on EN Website) The “Is full-time” field in EmpNav is set to “Yes” only if the Apex Position Class is set to “Full Time.” If the Position Class field has any of the other three values, the “Is full-time” field is set to “No.” If the Position Class field is set to “Seasonal,” it has NO EFFECT on the actual “Seasonal” flag on the ACA screen in Employee Navigator. So, users are going to have to maintain seasonal employee settings manually between the two applications.	Position Class	Employees > General
Termination date	Employee Profile (Employment)	Apex to EN Only (Termination from EN to Apex has been disabled, due to the payroll impact of this date)	Separation Date	Employees > General

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Employee Navigator Fieldname in UI	Employee Navigator Field Location	Exchange Direction	Apex (EOG) Fieldname in UI	Apex (EOG) Field Location
Termination reason*	Employee Profile (Employment)	Apex to EN Only *Only populated in EN. When Apex employee status changes to “Terminated,” the updated status and separation date are sent to EN as Termination Date and the “Termination reason” field in EN defaults to “Voluntary Termination (18 months)”	N/A	N/A
DOB	Employee Profile (Personal)	Bi-directional	Birth Date	Employees > General
Gender	Employee Profile (Personal)	Bi-directional	Gender	Employees > General
Pay basis	Employee Profile (Compensation)	Apex to EN Only	Pay Type* See Table below for the fields and values populated	Employees > Pay Info
Hourly rate	Employee Profile (Compensation)	Apex to EN Only	Pay Rate	Employees > Pay Info
Address 1	Employee Profile (Address & Contact)	Bi-directional	Address 1	Employees > Contact
Address 2	Employee Profile (Address & Contact)	Bi-directional	Address 2	Employees > Contact
City	Employee Profile (Address & Contact)	Bi-directional	City	Employees > Contact
State	Employee Profile (Address & Contact)	Bi-directional	State	Employees > Contact
Zip	Employee Profile (Address & Contact)	Bi-directional	Zip	Employees > Contact

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Employee Navigator Fieldname in UI	Employee Navigator Field Location	Exchange Direction	Apex (EOG) Fieldname in UI	Apex (EOG) Field Location
County	Employee Profile (Address & Contact)	EN to Apex Only	County	Employees > Contact
Country	Employee Profile (Address & Contact)	Bi-directional *There is an issue in EN where it may blank out Apex	Country	Employees > Contact
Home Phone Number	Employee Profile (Address & Contact)	Bi-directional	Primary Phone Number	Employees > Contact
Primary Email	Employee Profile (Address & Contact)	Bi-directional	Work Email	Employees > Contact
Deduction Code	Manage Enrollments or Update Benefits	EN to Apex Only	Name* *Deduction ID in EOD	Employees > Deductions/Accruals
Amount	Manage Enrollments or Update Benefits	EN to Apex Only	Dollar	Employees > Deductions/Accruals
Effective Date	Manage Enrollments or Update Benefits	EN to Apex Only	Start Date (Effective date field in Apex will be blank)	Employees > Deductions/Accruals
Change Date	Manage Enrollments or Update Benefits	EN to Apex Only	N/A* *May correlate to Last Mod Date in EOD	N/A
End Date	Manage Enrollments or Update Benefits	EN to Apex Only	End Date	Employees > Deductions/Accruals
Marital Status		Not Exchanged		Marital Status

*Additional Details on Fields and Values

*Apex Payroll Type	Info Apex sends to Employee Navigator
Salary	<ul style="list-style-type: none"> • Set AnnualBaseSalary to calculated amount derived from Apex BasePayRate • Set BaseHourlyRate to null • Set WorkerTaxStatus to “W2” • Set CompensationBasisValue to Salary
Hourly	<ul style="list-style-type: none"> • Set AnnualBaseSalary to calculated amount derived from Apex BasePayRate • Set BaseHourlyRate to match Apex BasePayRate • Set WorkerTaxStatus to “W2” • Set CompensationBasisValue to Hourly
Contract	<ul style="list-style-type: none"> • Set AnnualBaseSalary to match Apex BasePayRate • Set BaseHourlyRate to null • Set WorkerTaxStatus to “1099” • Set CompensationBasisValue to Salary
All others	<ul style="list-style-type: none"> • Set AnnualBaseSalary to match Apex BasePayRate • Set BaseHourlyRate to null • Set WorkerTaxStatus to “W2” • Set CompensationBasisValue to Salary