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Paylocity/Employee Navigator Integration Guide

This guide includes general instructions for the use of Employee Navigator's Payroll Integration product. It is intended for use in conjunction with the Employee Navigator User Guide. Both documents should be carefully reviewed.

Getting Started

There are a few items that will need to be addressed prior to starting the required checklist in your Employee Navigator setup.

- Compensation – NOTE: Employee Navigator requires compensation based on pay type
    - Verify salary employees have an annual salary amount populated in the pay rate screen.
    - Verify hourly employees have a base rate populated in the pay rate screen along with an annual salary.

- City/State/Zip fields - Paylocity validates City/State/Zip fields. Be sure to keep this in mind when going through the demographic discrepancy audit. Paylocity will not accept a zip code that is invalid for a city/state combination.

- Recurring Earnings – (NOTE: Currently not supported)
  If you currently are using recurring earnings in payroll for ERMED, GTL or any other benefits these will need to be done manually for any/all new hires or plan changes.

- Deductions currently NOT supported with this integration:
    - 401(k) Plans
    - Universal Plan types within Employee Navigator
    - Commuter, Transit or Parking Benefits

- Demographics currently NOT supported with this integration:
    - Benefit Class, Departments, Locations
    - Payroll Group
    - Dependent Information

If you need assistance with how to update/change data in Payroll or Web Link please reach out to your dedicated account manager at service@paylocity.com.

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Understanding 'The Flow' of Your Data

Employee Navigator's payroll Integration with Paylocity allows you to share specific employee demographic and recurring deduction data with us in real-time. All new hires, rehires, compensation changes and terminations must be initiated in Paylocity which will then be synchronized to Employee Navigator. The chart below highlights the fields currently being exchanged and in which direction(s) between each platform.

NOTE: Fields cannot be customized

Paylocity Field Name	Employee Navigator Field Name	Direction of Exchange
Employee ID	Payroll ID	Payroll to EN Only
Social Security Number (SSN)	Social Security Number (SSN)	Payroll to EN Only
First Name	First Name	Bi-Directional
Middle Name	Middle Name	Bi-Directional
Last Name	Last Name	Bi-Directional
Address 1	Address 1	Bi-Directional
Address 2	Address 2	Bi-Directional
City	City	Bi-Directional
State	State	Bi-Directional
Zip	Zip	Bi-Directional
Personal Email	Personal Email	Bi-Directional
Work Email	Work Email	Bi-Directional
Home Phone	Home Phone	Bi-Directional
Birthdate	Birthdate (DOB)	Payroll to EN Only
Gender	Sex	Bi-Directional
Hire Date or Rehire Date (most recent hire date is exchanged)	Hire Date	Payroll to EN Only
Termination Date	Termination Date	Payroll to EN Only
Pay Effective Date	Salary Effective Date	Payroll to EN Only
Pay Type	Pay Basis	Payroll to EN Only
Annual Salary	Annual Base Salary	Payroll to EN Only
Base Rate	Hourly Rate	Payroll to EN Only

Deduction Data

All deduction information including amounts, effective dates, change dates and end dates will always be sent from Employee Navigator to Payroll.

NOTE: In current state EN does NOT exchange employer costs (i.e., earnings such as ERMED). All employer earnings must be manually maintained within payroll.

Required Discrepancy Reports/Audits

Before starting the discrepancy process you and your broker partner MUST ensure you have completed all the required setup needed within Employee Navigator. The next step is to confirm that your employee demographics and deductions match between both systems. Employee Navigator has developed a tool that allows you to compare specific values between both systems and if there is a discrepancy, choose which value is correct and automatically update the incorrect system accordingly.

The mandatory audit and synchronization process occurs in two steps: The Employee Discrepancy Audit (demographics) and the Deduction Discrepancy Audit (deductions). Instructions on how to complete each of these steps can be found below.

NOTE: In current state, there is not an option to filter employee types. ALL employees full-time and part-time are exchanged with this integration. It is recommended that any part time ineligible employee be resolved to an ineligible benefit class directly within Employee Navigator.

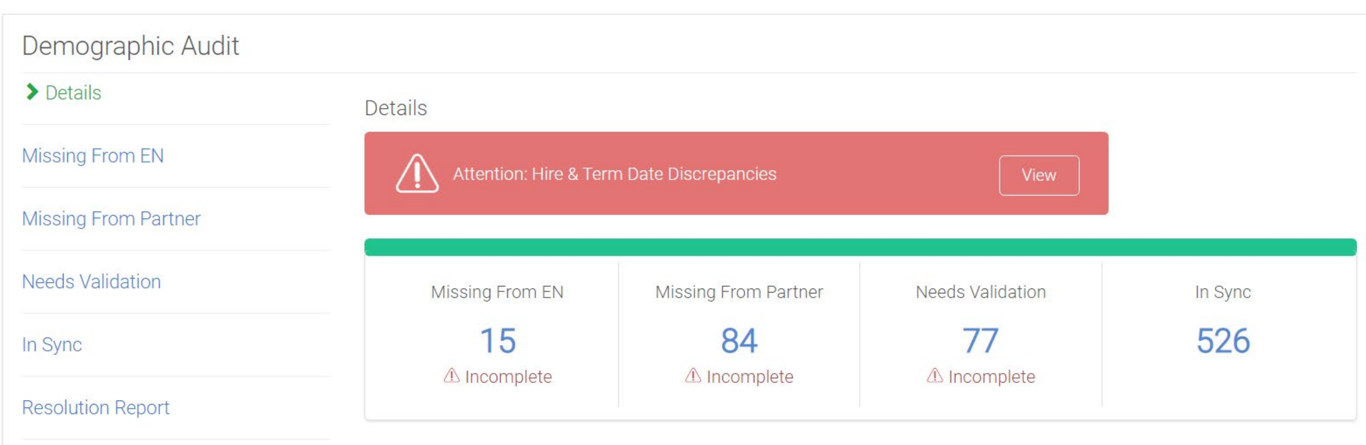
Demographic Audit

The demographic audit will take place directly within your Employee Navigator portal and with the guidance of your assigned Employee Navigator Support Analyst. The following instructions will guide you on how to access the demographic audit and begin the validation process.

1. Within Employee Navigator, click on the Payroll tab --> Demographic Audit (under Integrated Payroll on the left-hand side).

2. Click '+ Start New API Import'.

3. Once the data status reads as 'Complete', click 'View Report' to view the actual Demographic Audit. An example of what it might look like is below:

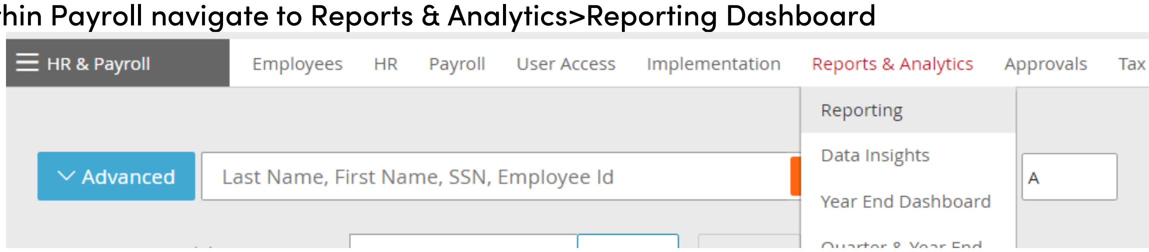


With the assistance of your Broker Partner and your assigned Employee Navigator Support Analyst complete the demographic audit by resolving any/all discrepancies noted. You can find more detailed information about the demographic audit process within Employee Navigator's Help Center at: Help Center > Integrated Payroll > Step 3: Your Demographic Audit.

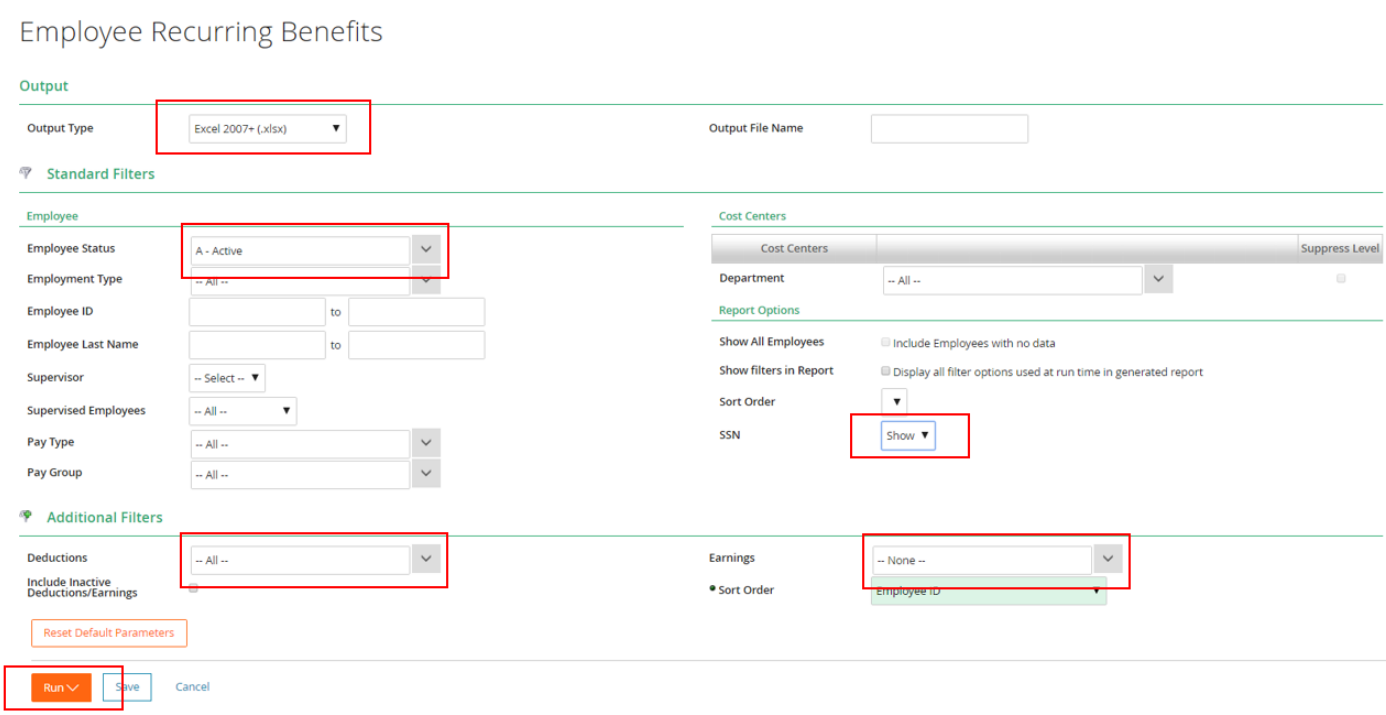
Deduction Audit

The deduction audit will require you to run a report out of payroll to be imported directly into Employee Navigator. The report you will need is the 'Employee Recurring Benefits Report'. This contains all active recurring deductions by employee. The following instructions will guide you on how to access the 'Employee Recurring Benefits Report' and begin the validation process.

1. Within Payroll navigate to Reports & Analytics>Reporting Dashboard



2. Search for 'Employee Recurring Benefits Report' and apply each of the below filters:
   - o Output: Select Excel 2007+(.xlsx)
   - o Employee Status: Select ONLY your active status' such as Active, Leave, Transferred
   - o SSN: Select 'Show'
   - o Deductions: Select 'All'
   - o Earnings: Select 'None'
   - o Click Run/Go to Pickup
   - o Open Report
   - o Save Report to your Desktop



<u>NOTE: All deduction codes must be entered into each payroll group within Employee Navigator prior to gaining access to the Deduction Audit.</u>

3. To import:
    - Within Employee Navigator, click on the Payroll tab --> Deduction Discrepancy Audit (under Integrated Payroll on the left-hand side).
    - Click the 'Go To Deduction Audit' button.
    - Click '+ Start New Import' and follow the steps to import the saved file.
    - Once the report is imported and the status reads as 'Complete', click on 'View Report' to view the discrepancies.

With the assistance of your Broker Partner and your assigned Employee Navigator Support Analyst complete the deduction audit by resolving any/all discrepancies noted. You can find more detailed information about the demographic audit process within Employee Navigator's Help Center at: Help Center > Integrated Payroll > Step 4: Your Deduction Audit.

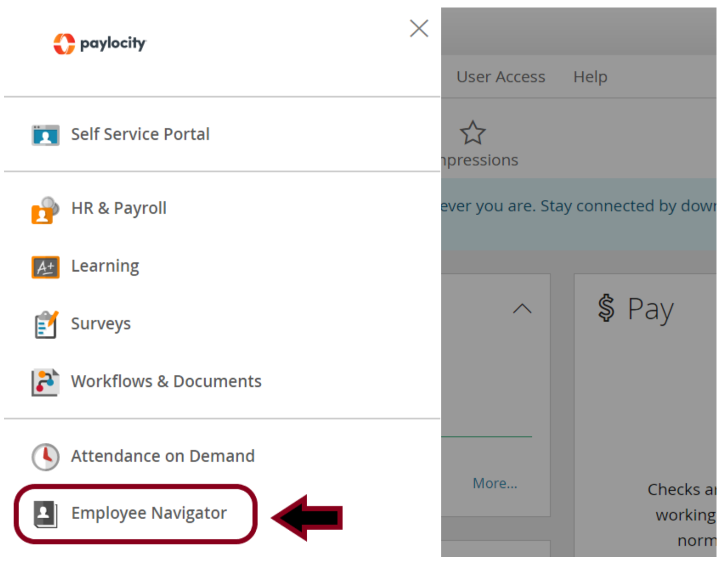
Once you have thoroughly completed both the demographic and deduction synchronization tasks notify Employee Navigator at payroll@employeenavigator.com. Your Employee Navigator Support Analyst will notify us that you are ready to 'go live'. We will confirm via email that we have enabled the API and notifications for moving forward. This step will fully enable your integration and live data will start to sync between both systems.

Appendix

Single Sign On (SSO)

Single Sign-On is an added feature for the Paylocity and Employee Navigator payroll integration. The Single Sign-On (SSO) functionality will allow employees to seamlessly log in to Employee Navigator without a username or password when they access the SSO link within their self-service portal in Paylocity.

To access the SSO link, an employee will navigate to the HR & Payroll menu on the left-hand side of their Paylocity account (Self Service) and click on “Employee Navigator”.



Single Sign On will automatically be enabled upon your integration being placed live. Should you want your organization to be opted- out please email your request to eenavsupport@paylocity.com.

NOTE: HR Admin users within EN will not be able to utilize the SSO functionality at this time. If an HR User does click on the “Employee Navigator” link within self service, they will receive the following message. Please click the link within that message to access EN’s login page.

“For security purposes, your Employee Navigator account does not allow access to Single Sign-on from Paylocity. You can login here using your current Employee Navigator username and password.”

Employee Navigator Transmission Dashboard

The payroll transmission dashboard is a real-time display of all incoming and outgoing changes between Paylocity and Employee Navigator. The dashboard will default to 'Show Failed', 'Show Underway' and 'Show Blocked'. You can select to 'Show Successful' to view all transmissions within a certain date/time range. You can locate it by going to the Payroll tab in Employee Navigator --> 'View Transmissions'

This dashboard should be used regularly to look for any failures that may have occurred during the data exchange to resolve them as quickly as possible ensuring both systems remain in sync. You can also use the dashboard to look for successful updates to ensure that an employee's data was exchanged as expected especially for any new hires or terminations.

Open Enrollment Setup in Employee Navigator

Employee Navigator will require your broker to enter a 'Send Deductions Date' as part of your open enrollment setup.

- What is the significance of this date?
  - This is the exact date that Employee Navigator will transmit all recurring deductions to Payroll for plans set to 'Always Send' or 'Don't Send $0' that have a deduction code mapped in.
  - This job begins ~1:00 AM on the morning of the elected Send Deductions Date.

- Your Send deductions date must fall:
  - After the last *processed* pay cycle of the old plan year.
  - *At least* one day following the chosen OE Closeout Date.
  - Prior to the first *process* date of the new plan year in which newly effective deductions are expected to appear.

Be sure to confirm this date with your broker to ensure that the deductions will fall into the pay period date range of your first desired payroll of the new plan year.

Updating Hire Dates in Payroll

If you have identified incorrect hire dates in Payroll during the discrepancy process, you can update the original hire date by simply clicking on the incorrect date and changing it. To do this in Payroll, navigate to Employees>Employee Payroll File>Select Employee>Work Tab>Employee Status History>Click on the 'Current' Effective Date to change the date.

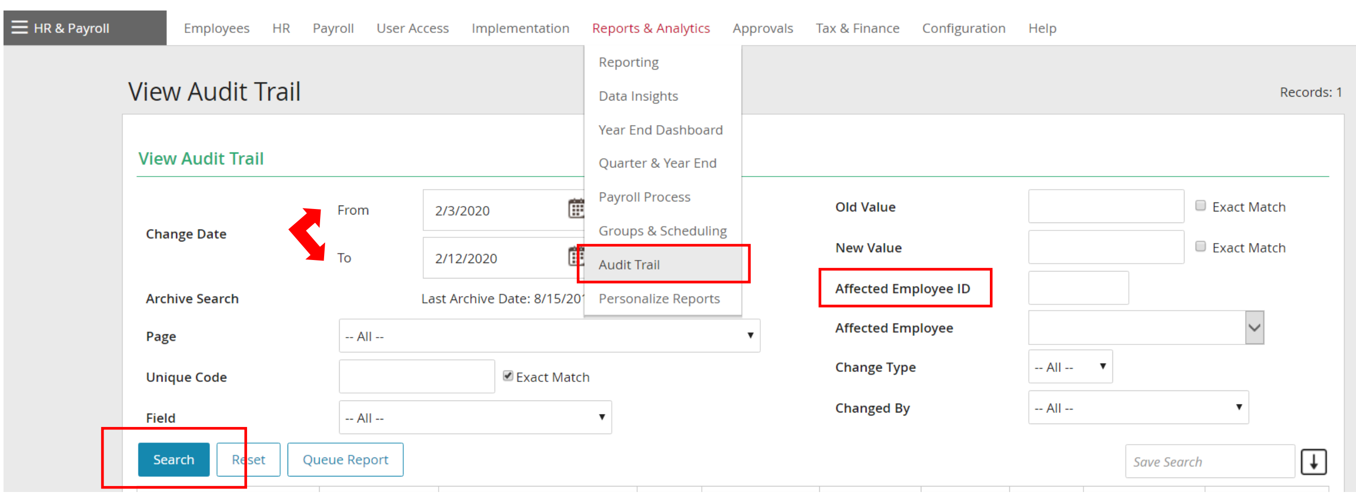
If you need assistance, please reach out to your dedicated account manager at service@paylocity.com.

Audit Trail Reporting

Review your audit trail in payroll on a regular basis to ensure data accuracy. Audit trail reports can be customized to automatically run on your behalf.

You can find this feature in Payroll under Reports & Analytics>Groups & Scheduling.

- o Change Date: Select the date range you would like to search
- o Affected Employee ID: Select this if you would like to narrow your search to one employee
- o Select: 'Search'



Additional Assistance

Email us at eenavsupport@paylocity.com or contact your dedicated account manager.

For Employee Navigator specific questions please contact your Broker Partner.