Employee Navigator Benefits Integration

User Guide

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Employee Navigator Benefits Integration

Employee Navigator Benefits Integration is a comprehensive platform for benefits, HR, and compliance management. It is used by thousands of brokers to manage employee benefits, onboarding, ACA compliance and more through an intuitive and centralized system. Employee Navigator will make it possible to share employee, demographic, and compensation data and receive payroll deduction information based on which benefit plans an employee elects via enabled brokers. Employees can access the Employee Navigator Benefits Integration platform to enroll in benefit plans and review their enrollment.

Who are insurance brokers?

Insurance brokers are a licensed intermediary between insurance carriers and businesses. They are experienced in varying types of insurance policies. They help companies find and procure benefit types that best fit their staff's demographic.

Requirements & Limitations

System Prerequisites

- Ready Payroll sub-system must be enabled and actively used. (Customers must be live on payroll or after payroll live)
- Integration must be activated more than 30 days before enrollment year start date.

Special Configurations

- **Block 3rd/5th deductions**: If used, must be configured identically in both systems.
- **Goals**: Must be disabled in Ready when creating deduction codes for Employee Navigator integration.

ACA

If your company is using Employee Navigator Benefits Integration for benefits, you should use its native capabilities to process and file your ACA reports since the benefits information resides there. If you try to use UKG Ready™ ACA Manager to process your ACA filings while also using Employee Navigator Benefits Integration, it will be a completely manual process on the Ready side because your benefits information will no longer reside there.

Ready fields to have configured for your employees

The following fields should be complete in your employee profiles: SSN, first name, last name, gender, DOB, address, phone number, email address, hire date, base and compensation details.

Note that some demographic information will not be exchanged bi-directionally such as hire and termination dates, birthday, job title and compensation. This data will only come from UKG Ready to Employee Navigator and not vice-versa.

Additional Information

See the "Employee Navigator Benefits Integration: FAQs" on page 38 for more information on requirements and other questions.

Employee Navigator Benefits Integration: Limited Release

Limited Release Customer Segments

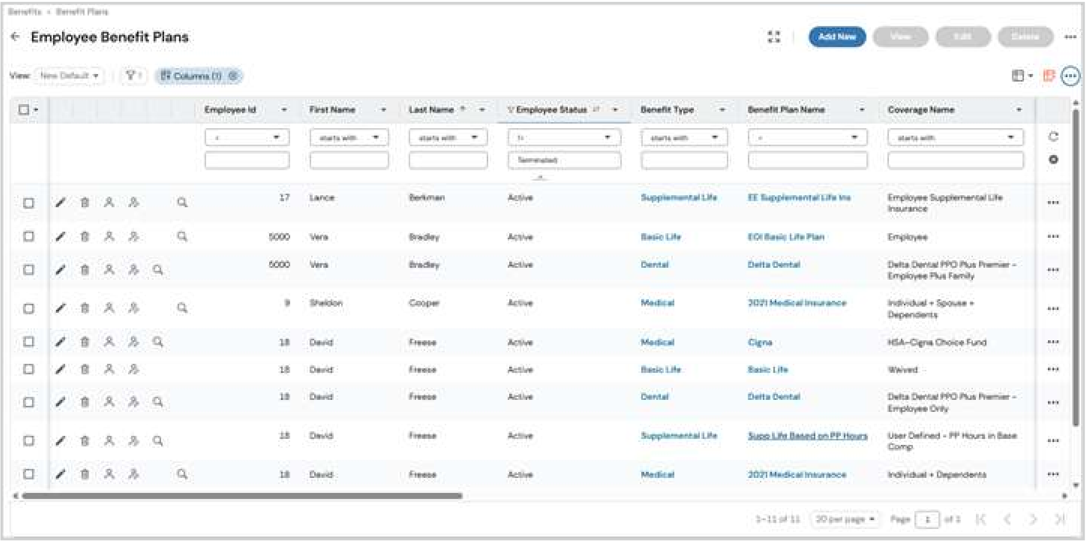
Employee Navigator Benefits Integration is in limited release.

Please check your customer segment and follow the relevant setup instructions to enable integration.

Customer Segment	Readiness	Action Required
Customer Segment 1 Net new customers or those without Ready Benefits enabled	Fully Supported	The solution is ready to use, and customers can easily enable the integration by following the minimal setup and configuration steps outlined below.
Customer Segment 2 Customers with Ready Benefits enabled but benefit plans were never assigned to employees	Partially Supported	Customers will need to complete 1 or 2 additional applicable steps as outlined below to enable the integration. These will be automated for General Availability to make them "Full Ready"
Customer Segment 3 Customers actively using Ready Benefits and with any enrollments	Not Supported	Employee Navigator integration is not currently available for this customer segment. We're actively working on this and will notify as soon as its ready.

Employee Navigator Benefits Integration: Applicable only for Customer Segment 2

Step 1: Navigate to **Team > Benefits > Benefit Plans** to check if you any benefit plans.



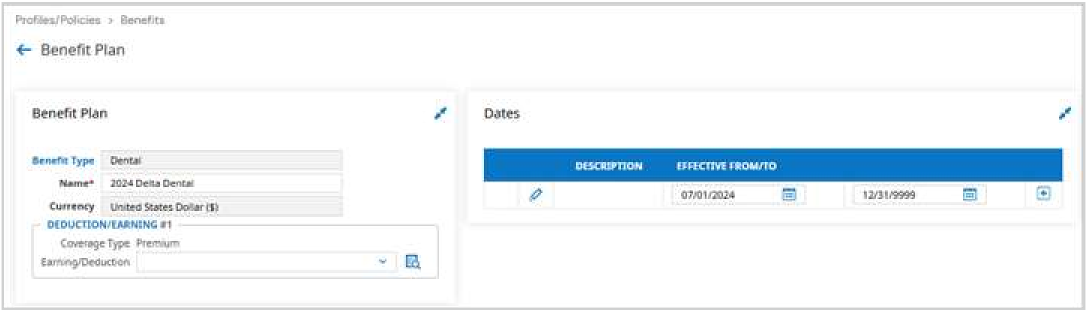
Step 2: Confirm you have **NO** active employee(s) attached to the benefit plan(s).

If yes, then you are actively using Ready Benefits.

- Please refer to Customer Segment 3 instructions in: "Employee Navigator Benefits Integration: Limited Release" on the previous page

If no, follow the steps below to continue.

- Identify and end benefit plans and deductions by navigating to **Profiles/Policies > Benefits > Plans**.
- Identify and select the benefit plan(s) that need to be end-dated due to the transition to Employee Navigator.
- For each plan, select the edit icon next to the selected benefit plan. In the **Effective To** field, enter the desired end-date for the benefit plan.



> **Note:** If there is a deduction code assigned to the benefit plan, the deduction code must be removed by deleting the value in the Earning/Deduction field.

Process to Transition Benefit Plans Deductions to Employee Navigator

Step 1: Export Reports (Segment 3)

Scheduled Deductions Report

1. Navigate to Payroll > Employee Payroll Maintenance > Deductions
2. Select the Scheduled Deductions Report.
3. Ensure the report includes the following fields (if available):

Username	EE Frequency Type	Vendor
Employee Id	ER Frequency Type	Memo Id
EIN Name	EE Amount Calc Method	Arrearage Function
Deduction Code	EE Amount Percent	Max Arrearage Amount Per Payroll Percent
Deduction Name	EE Amount Dollars	Max Arrearage Amount Per Payroll Dollars
Deduction Abbrev	ER Amount Calc Method	Adjustment Amount

Start Date	ER Amount Percent	
End Date	ER Amount Dollars	
Priority Sequence		

Note: Apply any necessary filters to capture only the deductions that are currently active.

4. Export the report in a format that can be easily manipulated (e.g., CSV or Excel).

Benefit Plans Report

1. Navigate to Benefits > Benefit Plans
2. Select the Employee Benefit Plans Report.
3. Ensure this report includes:

Employee ID	Coverage Name
First Name	Coverage Effective From
Last Name	Coverage Effective To
EIN (if applicable)	Deduction Effective From
Employee Status	Deduction Effective To
Benefit Type	Amount EE
Benefit Plan Name	Amount ER
	Any other relevant fields that may assist in identifying plans to be ended.

4. Apply filters to isolate plans that are set to end or need to be transitioned.
5. Export this report in a compatible format (e.g., CSV or Excel).

Step 2: Identify and End Benefit Plans and Deductions (Segments 2 & 3)

1. Navigate to Profiles/Policies > Benefits > Plans.
2. Identify and select the benefit plan(s) that need to be end-dated due to the transition to Employee Navigator.
3. In the Dates widget for each plan, select the edit icon next to the affected benefit plan. In the 'Effective To' field, enter the desired end-date for the benefit plan.

Step 3: Identify and End Benefit Plans and Deductions (Segment 3)

1. Navigate to Benefits > Benefit Plans > Employee Benefit Plans Report.
2. In the report, locate and select the checkbox on the left side of the page for all identified plans that need to be ended due to the transition to Employee Navigator.
3. Once the relevant plans are selected, select Edit and input the end-date in the 'Deduction Effective To' field for each deduction (e.g., Deduction 1, Deduction 2, Deduction 3, etc.) associated with the benefit plan. This action will mark the deductions as end-dated.
4. Similarly, input the end-date in the 'Coverage Effective To' field to conclude the coverage for these plans. Ensure all fields are updated accurately to reflect the transition timeline.

> **Note:** For each plan, enter the end-date as the day before the new plan takes effect (e.g., if the new plan starts on July 1, the end date should be June 30).

Step 4: Prepare for Importing New Deductions (Segment 3)

Download the Import Template

1. Download the Schedule Deduction import template (Under Imports > Overview)

Populate the Import Template

1. Copy the relevant data to create new scheduled deductions from the Scheduled Deductions Report into the import template
2. Make sure to adjust the start dates to reflect the new effective dates for the deductions.
3. Make sure the 'EEFrequencyType' and/or 'ERFrequencyType' fields are populated with the 'EveryScheduledPay' option.
4. Make sure the 'EE Amount Calc Method' and/or 'ER Amount Calc Method' fields are populated with the 'Flat Amount' option.
5. Make sure the corresponding EE/ER Amount Dollars are populated.

Step 5: Import New Deductions (Segment 3)

Access the Import Functionality

1. Navigate to Settings > Imports > Payroll > Employee Scheduled Deductions
2. Upload the populated import template.

3. Test the file to ensure that all data aligns correctly with the system's requirements.

4. Execute the import process.

Employee Navigator Benefits Integration: UKG Ready Customers

Establishing an Employee Navigator Account

No Existing Employee Navigator Account

If you are interested in Employee Navigator and do not have a relationship with a Broker or Employee Navigator, you can reach out to UKG Ready Sales personnel and they will help guide you through the process.

Based on direction from UKG Ready Sales, you can request an Employee Navigator account by reaching out to Employee Navigator (https://www.employeenavigator.com/contact/). This can take around 10-14 days. Once you have an Employee Navigator account, log in to UKG Ready

- HR Admin installs the Employee Navigator Benefits Integration app from Solutions Exchange.
- HR Admin enables security permissions to give employees access to the Employee Navigator menu item.

Existing Employee Navigator Account

If you have an existing relationship with a Broker and with Employee Navigator, you can simply contact the Broker directly and use your existing Employee Navigator account.

- HR Admin installs the Employee Navigator Benefits Integration app from Solutions Exchange.
- HR Admin enables security permission to give employees access to the Employee Navigator menu item.

Adding the Employee Navigator Benefits Connector

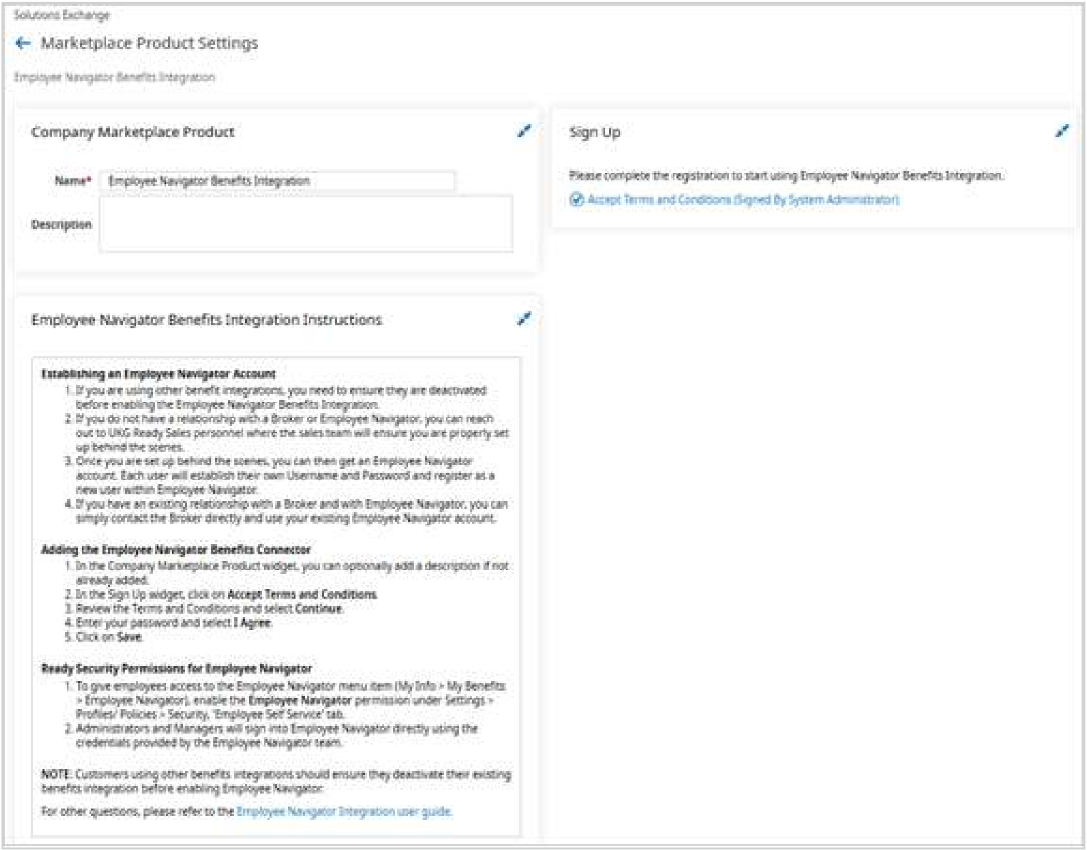
> **Important:** If you are using other benefits integrations, ensure you deactivate the existing benefits integration before enabling Employee Navigator!

To begin the process of adding the connector for Employee Navigator Benefits Integration, navigate to: Settings > Solutions Exchange > Solutions Exchange.

1. Use the search field to locate **Employee Navigator Benefits Integration**.
2. Select **Learn More**.
3. Select **Install**.
4. Read and agree to the terms and conditions. Select **Continue**. Enter your password and select **I Agree**.
5. Optionally select a security profile for the person(s) who will manage the integration. If left blank, the system will default to the security profile assigned to the installer.

6. Select **Finish Install**. It may take several minutes for the installation to complete.

7. You can select **Go to settings** to review your configuration (Description, Terms and Conditions, and Instructions), or select **I'll do it later**. The terms and conditions must be reviewed and signed for the integration to be active.



Company Marketplace Product Widget

This widget will list the Name of the app. You can optionally add a Description if not already added.

Sign Up Widget

This widget will indicate that the terms and conditions have been signed. A check will display next to the link if the terms have been accepted. You can select the link to complete and accept, or review the terms and conditions at any time. If edits have been made to the widgets, select Save.

Employee Navigator Benefits Integration Instructions

This widget contains information to guide you in the process of establishing an Employee Navigator account (if you don't already have one), how to add the Employee Navigator connector, and security permissions you should enable. A hyperlink is available that will open the Employee Navigator Integration User Guide.

Summary Page of Installed Integration

Upon using the back arrow, the system will display the following information in the header.

- **Vendor:** Shows the represented vendor, Employee Navigator.
- **Required Module**: Will show HR or Payroll as the required module. Payroll is required. HR is optional.
- **Status**: Will show Installed or Not installed (if you're exploring with the Learn button and haven't installed yet, 'Not installed' will display).
- **Date installed:** Shows date of installation in your company's date format.
- **System ID**: The system will automatically assign an ID to the connector.
- **Configure button**: Select to view or edit the widgets.
- **Uninstall button**: Select to remove the app from your company.

Ready Security Permissions for Employee Navigator

On the Ready side, the security permission must be enabled for your employees so they can access the Employee Navigator menu item under My Info > My Benefits > Employee Navigator. Employees will sign in via SSO once accessing this page.

- **For Employees**: Enable the **Employee Navigator** permission under the 'Employee Self Service' tab. Security level: Low (gives access to employee self-service menus within Employee Navigator)

> **Note:** Administrators and Managers will sign-in to Employee Navigator directly using the credentials provided by the Employee Navigator team. SSO within Ready is not supported for Admins and Managers.

SSO - Single Sign On for Employee Navigator

SSO is supported for Employee Navigator users. Add the SSO link to your employee's portal by logging into Employee Navigator and searching 'UKG SSO' within the Help icon, or by following the directions found here: https://employeenavigator.com/benefits/Account/Login?idp=ukg

When employees log in to the Ready system and select their Employee Navigator menu item, a tab will open and the user will be able to log in to Employee Navigator using SSO. For more details on how employees sign in to Employee Navigator, see "Employee Navigator Benefits Integration: User Experience" on page 35

More information on SSO

If you need further assistance configuring SSO, please see: Single Sign-On (SSO) with OAuth 2.0 and SAML 2.0 User Guide

What Comes Next

As a Ready Admin, you will need to configure a few items on both the Ready and Employee Navigator side.

UKG Ready

To help guide you through the configuration required on the Ready side, see: "Employee Navigator Benefits Integration: Payroll Deductions" on page 24

Also ensure your employees' security profiles are enabled with the Employee Navigator permission discussed above so they can access the Employee Navigator menu item.

Employee Navigator

To help guide you through the final steps on the Employee Navigator side and complete your integration, see this short video and review the steps on the Employee Navigator help site: Employee Navigator Payroll Integration Video

Uninstalling the Employee Navigator App

If you choose to uninstall the Employee Navigator app from your company, the system will send an API call to the Employee Navigator system and confirm if your subscription is active or inactive. If active, you will be prompted to end your subscription prior to uninstalling.

Employee Navigator Benefits Integration: Payroll Deductions

Supported Deduction Codes

The following Ready deduction codes are supported in Employee Navigator.

Ready Deduction Name	Description
Custom After-Tax Deduction	Custom after-tax deduction which allows for override of the W2 Box Types to address specific situations.
Custom Pre-Tax Deduction	Custom pre-tax deduction which allows for the override of the W2 Box Types and requires taxabililty to be specified for each federal, state, and local tax.
Custom Section 125	This deduction type is just like the Section 125, except that it allows for the override of the W2 Box Types to address specific situations.
FSA Dependent Care	Dependent Care Flexible Spending Account (FSA) allows employees to use pre-tax dollars to pay for eligible expenses related to childcare, disabled spouse, elderly parent, or other dependent who is physically or mentally incapable of self-care.
FSA Medical Expense (Section 125)	Medical Expense Flexible Spending Account (FSA) allows employees to use pre-tax dollars to pay for medical expenses not paid for by insurance, usually deductibles, co-payments, and co-insurance for the employee's health plan.
HSA Post Tax Family	Health Savings Account (HSA) Family contributions made on a post-tax basis with a different maximum statutory annual limit than an Individual contribution.
HSA Post Tax Individual	Health Savings Account (HSA) Individual contributions made on a post-tax basis with a different maximum statutory annual limit than a Family contribution.
HSA Pre Tax Family	Health Savings Account (HSA) Family Contributions from an employer or employee may be made on a pre-tax basis through an employer with a different maximum statutory annual limit than an Individual contribution.
HSA Pre Tax Individual	Health Savings Account (HSA) Individual Contributions from an employer or employee may be made on a pre-tax basis through an employer with a different maximum statutory annual limit than an Family contribution.
Section 125	Section 125 is an IRS-approved plan for employers and employees to change and personalize benefits while controlling plan costs. Employees can use pre-tax dollars to pay for certain benefits, thus reducing their taxable income and taxes. The employer is able to update benefits and, in most cases, reduce employer taxes and workers compensation contributions.
Standard	Used to set up an after-tax deduction that does not have any special taxation applied and allows for specifying the W2 box Types to address specific situations.
Standard Deduction	Used for Deductions with no tax implications.

The Employee Navigator Benefits Integration is available for the following deduction scenarios:

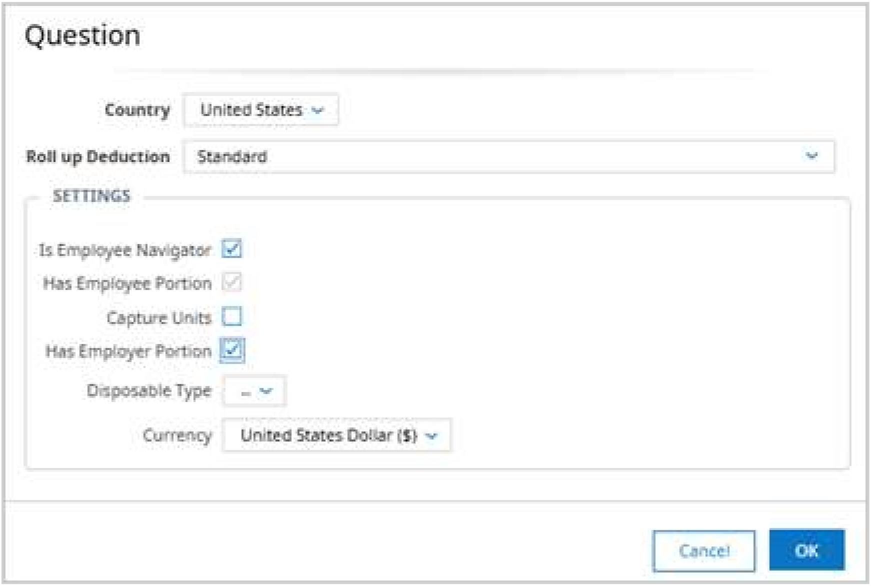
- New customers using UKG Ready & new to Employee Navigator
- Existing UKG Ready customers and existing Employee Navigator customers (using Employee Navigator via manual data export)

Important: Existing Ready customers utilizing Ready Benefits and transitioning to Employee Navigator is not in scope at this time.

Creating New Deduction Codes

Navigate to **Settings > Payroll Setup > Deduction Codes** and select **Add New Deduction Code**.

Select one of the supported roll-up deductions and check the **Is Employee Navigator** checkbox. This will allow the new code to be used in Employee Navigator.



Converting Deduction Codes from UKG Ready to Employee Navigator

When aiming to utilize existing deductions with Employee Navigator is and the integration has been activated within your company, a **Convert To Employee Navigator** button will display on the Deduction Codes maintenance page. This option allows you to convert already created deduction codes so they can be used in Employee Navigator.

Before proceeding with the conversion, ensure that the desired deductions under Payroll Setup > Deduction Codes meet the following criteria:

- Employee Default Amount: Set to "Flat Amount." Apply the same setting to the Employer portion, if applicable.
- Employee Frequency: Leave blank or set to "Every Scheduled Pay." Apply the same setting to the Employer portion, if applicable.

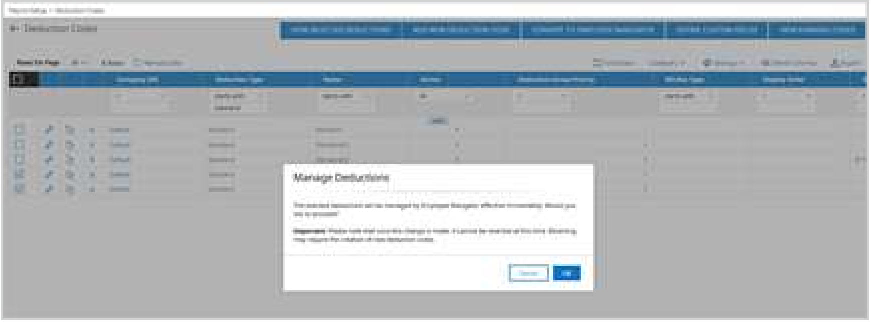
Note: Please note that changing the deduction setting from "Every Pay" to "Every Scheduled Pay" will exclude deductions from off-cycle payrolls, such as bonuses. The "Every Pay" option includes deductions from commission payments, bonus payments, supplemental payrolls, and every scheduled pay period. In contrast, "Every Scheduled Pay" applies only to regular payroll cycles, such as weekly or biweekly schedules.

- Define Eligibility: Leave this field blank
- Benefit Plan Association: Ensure deductions are not part of a benefit plan.

Select one or multiple deduction codes, select the **Convert To Employee Navigator** button, and a Question pop-window displays that allows you to set an 'As of' date. The date will default to today's date, but you can set it for a future date. Past dates are not supported.

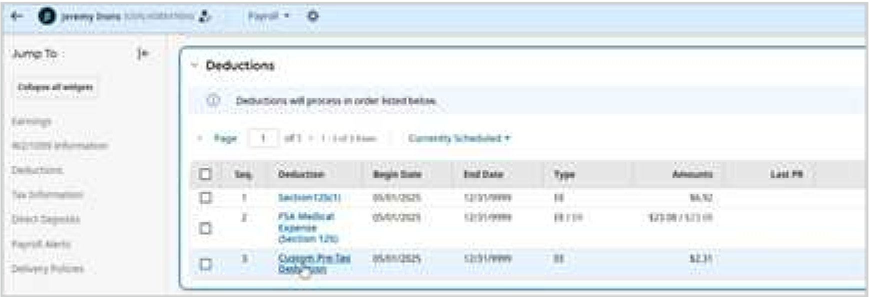
- When converting a deduction code to be managed in Employee Navigator, a pop-up window adds a warning stating that once the code is changed, it cannot be reverted for use in Ready which may require you to create a new deduction on the Ready side.
- When successfully converted, you will get a Success message stating the deduction [name] is now managed by Employee Navigator.

Once the conversion is completed it enables these deductions to receive information from Employee Navigator, but after that any changes made to those converted codes within Ready are not sent to Employee Navigator.



When your employees select a benefit that requires employee deductions within payroll, Employee Navigator will use these codes to push the information from them to you so you can process payroll to include the benefit deduction amount on employee pay statements. Ready is capable of handling the Employer portion of the deduction for the list of supported Employee Navigator deductions.

You can view your employees' deductions in the Deductions widget of their employee profile under Employee Information.



Ready Deduction Codes Report Page for Employee Navigator

On the Deduction Codes report page, two Employee Navigator columns are available to be added. The columns will populate Y or N.

- **Is Employee Navigator:** Y indicates the deduction code has been converted for use with Employee Navigator. N indicates it hasn't.
- **Supports Employee Navigator:** Y indicates the deduction code is compatible with Employee Navigator. N indicates it isn't.

Employee Navigator Help Site for Deduction Codes

For more information on how deduction codes are handled in Employee Navigator, use this link to navigate to their help site: Employee Navigator Deduction Codes Help Site

Ready Payroll Alerts for Employee Navigator Updates

Payroll administrators will receive a payroll alert whenever a change is made by Employee Navigator. The alert notifies you of any new or changed deductions for employees. This allows you to review and confirm they are configured correctly. The alert will generate as the last step in the POST processing (if applicable.)

Payroll alerts can be viewed in the employee's profile under Employee Information. A **Payroll Alerts** widget is available (usually under the Payroll tab). Alerts can be added here and the system generated alerts can be viewed and acknowledged.

- The payroll admin must check the **Require Sign-off** checkbox and save to acknowledge the message and confirm the deduction is configured correctly.
- Once the payroll admin confirms the deduction is configured correctly, payroll processing will proceed as usual.

Payroll Alerts

When a new deduction is pushed by Employee Navigator, the system will automatically add a Payroll Alert to the employee's record as follows:	
Label	System Added A New Employee Navigator Deduction
Alert Text	A new Employee Navigator {deductionCode} deduction has been added. Please verify and/or check Employee Navigator for details.
When a change is made by Employee Navigator, the system will automatically add a Payroll Alert to the employee's record as follows:	
Label	System Modified An Existing Employee Navigator Deduction
Alert Text	An existing Employee Navigator {deductionCode} deduction has been modified. Please verify and/or check Employee Navigator for details.
When the POST request made by Employee Navigator fails, the system will automatically add a Payroll Alert to the employee's record as follows:	
Label	System Failed to Add/Modify a New or Existing Employee Navigator Deduction
Alert Text	Unable to add/modify the information sent by Employee Navigator. Please verify and/or check Employee Navigator for details.

Employee Navigator Benefits Integration: Synching

The following features are part of the synching process between Ready and Employee Navigator Benefits Integration.

- Bi-directional (360) integration: Employee demographic data changes made in Ready is updated real-time in Employee Navigator Benefits Integration and can be maintained in either system. Some fields are one-directional. See: "Employee Navigator Benefits Integration: Data Fields" on page 30 below for details.
- Syncs benefits and payroll data in real-time: Manage your benefit election changes for the employee in Employee Navigator Benefits Integration and automatically sync to payroll.
- Eliminates dual entry and reduces errors: Decreases the workload during benefit open enrollments elections or as life changes are made.
- Event-based, real-time integration ensures a seamless data flow across applications (within 45-60 seconds).
- New hires, terminations, and rehires must be initiated in UKG Ready.
- In Multi-EIN companies, for employees who have profiles in multiple EINs, only the primary EIN account will be synchronized with Employee Navigator.

Employee Payroll Deduction Sync

Employee deductions are managed within Employee Navigator Benefits Integration and then flow to UKG Ready.

- Recurring deductions supported
- Earnings/ Employer contributions not included

May be overridden in UKG Ready

- Example: Retroactive or catch-up contributions for missed pay periods

Base Compensation Sync

Compensation must be managed in UKG Ready.

- Changes flow to Employee Navigator Benefits Integration
- Base Salary & Hourly Rate included

Employee Demographic Sync

Employee demographic data is handled with a bi-directional Employee Sync.

- Employee records can be updated in either system. Some fields are one-directional. See: "Employee Navigator Benefits Integration: Data Fields" on page 30 below for details.
- Employee records are linked by SSN and Payroll ID

Note: Payroll ID is the Employee Navigator term. In the Ready system, this would equal Primary Account ID.

For Multi-EIN companies, to ensure that the correct employee profile in Ready is synched with Employee Navigator, we provide the following guidelines for EIN transfer:

If you are transferring an employee to a new EIN and this will be the only EIN they will be working in, follow the steps below:

1. Hire the employee in the new EIN in Ready.

2. Set the new employee profile to primary from the Switch Primary EIN button on the Employee Profile.

3. Terminate the employee in the old EIN.

Following the steps in this order will ensure that the employee will continue to have an active account in Employee Navigator and their data will continue to synch with the newly created account.

If you are transferring an employee to a new EIN and their profile in the existing EIN will continue to be active, but their profile in the new EIN should be the primary one, make sure that you click on Switch Primary EIN button in the newly created profile.

Employee Navigator Benefits Integration: Data Fields

We exchange bi-directional demographics with Employee Navigator in real-time on a change-only basis. This means that address, phone number, and other demographic updates can be made in either system. As soon as the update is made the change is reflected in the alternate system within 45-60 seconds.

New hires and terminations will happen only in the Ready system. All employees are exchanged including Active, Part-time & benefit ineligible, and Terminated.

For new hire records to successfully sync with Employee Navigator, you need to ensure that certain required fields are updated during hire.

If not already set as required fields, you may want to consider making these fields required during the hiring process (both manual hire and through HR actions.)

- First Name / Legal First Name
- Last Name
- Birthday
- SSN
- An active base compensation record with effective date on or after Hired Date.

Incorrectly entered hire dates can be corrected in Ready. Both future and past hire dates can be used and this will not have any negative impact on the integration.

Demographic - Data Fields Exchanged between Ready & Employee Navigator

Ready Field Name	Employee Navigator Field Name	Direction of Exchange • Bi-Directional • Ready to EN Only • EN to Ready Only	Additional Logic	Employee Navigator Allowed Values
First Name/ Legal First Name	First Name	Bi-Directional	If 'Legal First Name' in Ready is not blank, it will be sent to Employee Navigator with priority over First Name.	
Middle	Middle Name	Bi-Directional		
Last Name	Last Name	Bi-Directional		

Suffix	Suffix	Bi-Directional	If a value different from the Employee Navigator 'allowed values' is entered in Ready, it will be ignored by Employee Navigator.	CPA, CRNP, D.O., DDS, DMD, II, III, IV, JD, Jr., MD, PA-C, PhD, RN, Sr., V, VI
Address 1	Address 1	Bi-Directional	The primary address fields in Ready (Address 1, Address 2, City, State, Zip) will be synched with the Home address fields in Employee Navigator. The mailing address in Ready will not synch with Employee Navigator. If you blank out the fields in Ready, this will not be reflected in Employee Navigator since they do not allow address fields containing data to be blanked out through API in order to ensure they always have a valid address. You can, however, blank out the respective fields in Employee Navigator and the update will synch with Ready. Generally, leaving the Address fields blank is not recommended since this information is required by brokers.	
Address 2	Address 2	Bi-Directional		
City	City	Bi-Directional		
State	State	Bi-Directional		
Zip	ZIP	Bi-Directional		US States only
Work Phone	Work Phone	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow phone fields containing data to be blanked out through API in order to ensure they always have a valid phone number. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Home Phone	Home Phone	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow phone fields containing data to be blanked out through API in order to ensure they always have a	

			valid phone number. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Cell Phone	Mobile Phone	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow phone fields containing data to be blanked out through API in order to ensure they always have a valid phone number. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Personal Email	Personal Email	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow email fields containing data to be blanked out through API in order to ensure they always have a valid email address. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Primary Email	Work Email	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow email fields containing data to be blanked out through API in order to ensure they always have a valid email address. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Gender	Sex	Bi-Directional	This should be gender at birth. Gender values of 'Undefined' and 'Non-Binary' will not be processed by Employee Navigator.	Male, Female
Hired/Re-Hired	Hire Date	Ready to EN Only	If Re-Hired is blank, we will send Hired date	
Terminated	Termination Date	Ready to EN Only		
Birthday	DOB	Ready to EN Only		
Social Security Number	SSN	Ready to EN Only	Records with invalid SSNs will not be processed by Employee Navigator	

Default Job Payroll Job Title	Job Title	Ready to EN Only	For Payroll-only companies, the value from the Payroll Job Title field will be synched with Employee Navigator. For companies that have the HR sub-system enabled, the value from the Default Job Title field will be synched.	
Primary Account ID	Payroll ID	Ready to EN Only		
Effective From	Pay Effective Date	Ready to EN Only	Must be on or after employee's Hired date. When you hire an employee in Ready, a default base compensation record with Effective From date 12/31/1900 is created automatically. In order for employee profiles to synch with Employee Navigator, you need to create a new base compensation record with an effective date on or after Hired date.	
Salary	Annual Base Salary	Ready to EN Only		
Per	Pay Basis	Ready to EN Only	Value 'Hour' in Ready will transfer as 'Hourly' in Employee Navigator. Any other value in Ready will transfer as 'Salary' in Employee Navigator.	Salary, Hourly
Hourly Pay	Hourly Rate	Ready to EN Only		

Demographic - Data Fields NOT Exchanged between Ready & Employee Navigator

Ready Field Name	Additional Logic
Termination Reason	All terminated employees will be given the Termination reason 'Voluntary Termination' in Employee Navigator
Employee Contacts (Dependents)	Those will be handled manually in both systems.
Pay Type	Since this field contains customer-defined values, it cannot be used to synch with Employee Navigator. Instead, we are using the Per field in the Base Compensation widget to synch with Employee Navigator and determine if the employee is salaried or hourly.

Deductions - Data Fields Exchanged between Ready & Employee Navigator

Ready Field Name	**Employee Navigator Field Name**	**Direction of Exchange** • **Bi-Directional** • **Ready to EN Only** • **EN to Ready Only**
Deduction Code (EE Portion)	Deduction Code	EN to Ready Only
Deduction Start Date	Dates	EN to Ready Only
Deduction End Date	Dates	EN to Ready Only
Employee Per Period Cost		EN to Ready Only
Earning Code (ER Portion)	Earning Code	EN to Ready Only
Earning Start Date	Dates	EN to Ready Only
Earning End Date	Dates	EN to Ready Only
Employer Per Period Cost		EN to Ready Only

Deductions - Data Fields NOT Exchanged between Ready & Employee Navigator

Ready Field Name	**Additional Logic**
401K (Retirement)	
Commuter / Transit	

Other - Data Fields NOT Exchanged between Ready & Employee Navigator

Ready Field Name	**Additional Logic**
Class structures	
Payroll groups	
Custom fields	

Employee Navigator Benefits Integration: User Experience

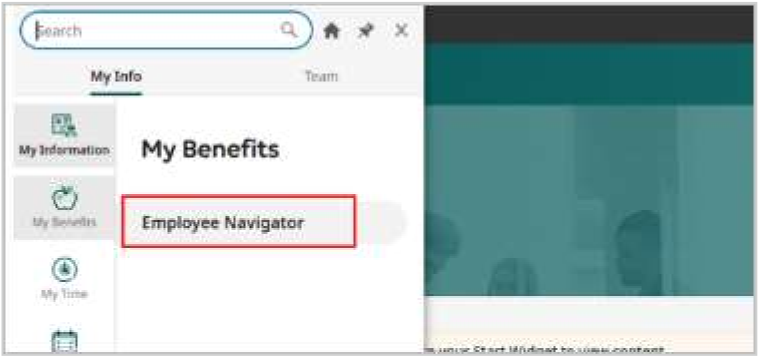
Ready Menus for Employee Navigator

Once security has been enabled for employees, they will have access to Employee Navigator from the following menu item.

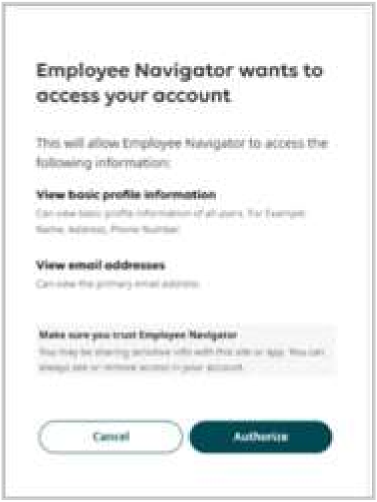
- **Employees**: My Info > My Benefits > Employee Navigator

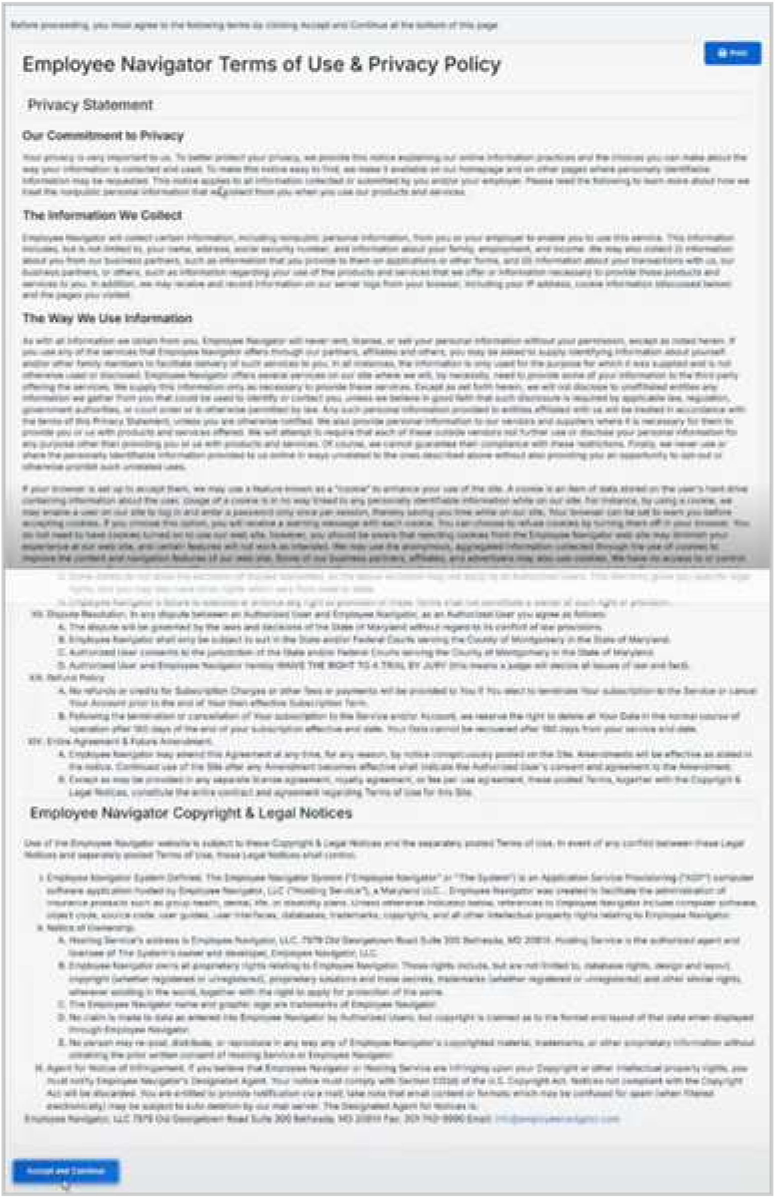
SSO - Single Sign On for Employee Navigator

With SSO enabled, when employees log in to the Ready system and select their Employee Navigator menu item, a tab will open where users will be prompted to authorize Employee Navigator access to their account information.

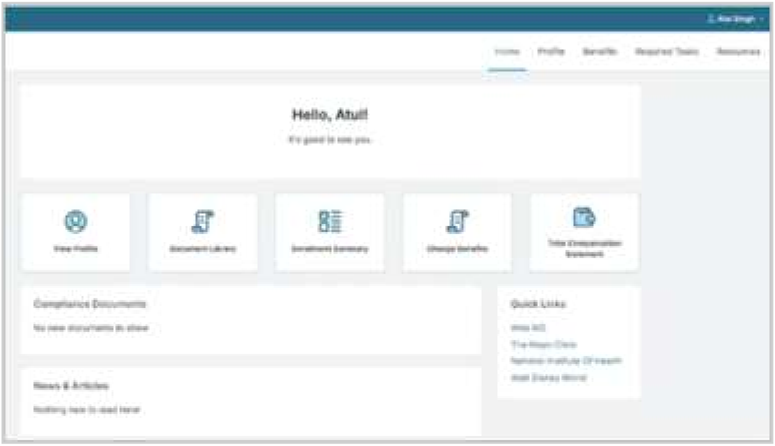


Employees must authorize their account to be used in Employee Navigator. Upon selecting Authorize, the employee will be redirected to the Employee Navigator Terms of Use & Privacy Policy page.





After selecting Accept and Continue, they will be logged into their Employee Navigator account.



Employees have the ability to update their Profile in Employee Navigator. See the "Employee Navigator Benefits Integration: Synching" on page 28 section of this user guide for more information on the fields that are synched bi-directionally, uni-directionally, which fields are supported, and which ones aren't.

Employee Navigator Benefits Integration: FAQs

Employee Navigator - UKG Ready Resellers

I do not have a partnership with Employee Navigator, who should I contact?

UKG Ready Resellers should reach out to their Partner Success team contact to facilitate engagement with Employee Navigator's Sales Team.

Is Employee Navigator Benefits Integration (Admin) product applicable for Direct Customers?

No, this is something that should already be configured for all direct customers.

Do all Partner clients see the Employee Navigator Connector in Solutions Exchange by default?

No, partner clients can see Employee Navigator in Solutions Exchange only after the Partner Admin turns on the Employee Navigator (Admin) product. Additionally, partners will also need to go to "Solutions Exchange Product Settings" page and edit "Employee Navigator Benefits Integration" and then assign a Billing Service and check "Enable for Clients" - then it will be visible to their clients.

Employee Navigator for Ready Customers

Is the Employee Navigator integration available for markets other than US?

The Employee Navigator integration is only available for US Market.

What if a customer has another benefits integration - can they still use Employee Navigator?

Yes, but first they will need to deactivate their existing benefits integration before enabling Employee Navigator.

How can customers cancel if they decide not to use the integration?

They will need to end their participation, i.e. cancel their subscription on Employee Navigator and once completed, they will have to uninstall the app from Solutions Exchange.

How do customers purchase Employee Navigator?

The Employee Navigator platform is exclusively sold by brokers.

Will customers need to purchase UKG Ready Benefits to enable this integration?

No, they do not need to purchase UKG Ready Benefits. Benefits will be managed in Employee Navigator, including benefit plans, employee enrollments and approvals.

If a customer wants to use Employee Navigator, where will they manage Benefits Administration?

When the connector is fully activated, benefits administration and enrollment will happen in Employee Navigator. Employee benefit enrollments and required approvals will be managed within Employee Navigator.

Will customers be able to use UKG Ready ACA Manager if they are using Employee Navigator to manage benefits?

Because benefit enrollment data will be stored in Employee Navigator, use of UKG Ready ACA Manager would become a manual process and therefore customers should use the native ACA filing capabilities of Employee Navigator.

Which modules must be enabled in UKG Ready to use the Employee Navigator Connector?

UKG Ready Payroll is required for use of the Employee Navigator Connector.

What if a customer is not in contact with a broker that uses Employee Navigator?

Use of the UKG Ready Benefits module is the solution recommended by UKG for this scenario.

How can the connector be purchased?

The connector may be purchased directly from the UKG Ready in-app Solutions Exchange.

Does Employee Navigator support benefits outside of the US?

No

Is the connector bi-directional (360)?

Yes, the Employee Navigator connector is a bi-directional, event-based, real-time integration.

Where should customers manage employee demographic information?

UKG Ready is the system of record for demographic information. That said, employees, brokers and managers can still update demographic information in Employee Navigator, and it will be synced with UKG Ready. Note that some demographic information will not be exchanged bi-directionally such as hire and termination dates, birthday, job title and compensation. This data will only come from UKG Ready to Employee Navigator and not vice-versa.

Are there any demographic fields that must be configured as mandatory in Employee Information for this integration to work?

Yes. The following fields must be set as required on the employee profile:

- SSN, first name, last name, gender, DOB, address, phone number, email address, hire date, base and compensation details.

Will it be possible to enable SSO for this integration?

Yes, SSO will be available only for employee accounts to access the Employee Navigator home page and make demographic and employee changes. SSO will not be available for Ready users with 'HR User' (i.e., Admins and Managers). They will need to use their Employee Navigator credentials to log into Employee Navigator both to manage their employee benefits and their own.

If a person who is an 'HR User' in Employee Navigator tries to navigate to Employee Navigator from UKG Ready, an error will be generated stating that they need to use their employee account to login.

If an employee bookmarks the Employee Navigator URL, when they click on the link, they will be prompted to enter their UKG credentials first before being taken back to Employee Navigator. This will be the case when they are not logged into UKG Ready. If they are already logged into UKG Ready in another tab and they then open the Employee Navigator from the bookmark, they will be logged in directly.

A customer wants to set up this integration, but their enrollment period closes in 20 days, can they still proceed?

Integration cannot be started with having only 30 days before the enrollment closes or new policy year starts.

How will employees and administrators access 1095-C forms?

Employees and Administrators can access 1095-C forms via self-service through the Employee Navigator application. The broker manages the overall process.

Do employees have access to their benefits in the Employee Navigator?

Employees will be able to access their benefits in Employee Navigator by selecting the Employee Navigator menu item in Ready and using SSO to log in. Access to the menu item in Ready is controlled by the Employee Navigator security setting. Managers and Admins who need to have access to their employee's data in Employee Navigator will use separate credentials provided by their broker to log into Employee Navigator and manage their employee's data.

If a customer is already using UKG Ready Benefits to manage the employee benefits and wants to switch to Employee Navigator, will they still have access to past benefits data in UKG Ready?

Not in scope at this time.

Do all Direct customers see the Employee Navigator Connector in Solutions Exchange by default?

Yes, all direct customers can see Employee Navigator in Solutions Exchange by default.

Are retirement plans managed in Employee Navigator?

Employee Navigator doesn’t manage retirement plans and the related deductions will not be exchanged.

Miscellaneous

What data fields are supported?

See: "Employee Navigator Benefits Integration: Synching" on page 28 in the Employee Navigator User Guide.

How are changes to deductions handled after a payroll period is closed?

Changes to deduction amounts after a payroll period closes are not permitted.

How is it determined which admin(s) can see which employee(s)?

The broker can configure access control restrictions to certain types or classes of employees if needed.

What should I do if I am not able to access Employee Navigator related menu items?

On the Ready side, Employee Navigator permissions must be enabled for your users. Checking the setting gives your users access and enables the menu item under My Info > My Benefits > Employee Navigator.

- Employees: 'Employee Self Service' tab. Security level: Low

Is dependent information exchanged between Ready and Employee Navigator?

No, this will be manually managed in both systems.

If a customer hires an employee in UKG Ready, but does not see them in Employee Navigator, what could the reason for that be?

Some common reasons for the employee record not to synch with Employee Navigator are:

- Some of the required fields for the integration to work are missing. The following fields are required for the integration to work and need to be updated with valid data: First Name, Last Name, Birthday, SSN, an active base compensation record with effective date on or after Hired Date.
- An invalid SSN was entered in the employee record in Ready. See the criteria for invalid SSNs in ssa.gov

Once we enable the Employee Navigator integration, can we hire an employee in Employee Navigator and have the data flow to Ready?

No, hiring should still be done exclusively in Ready and that data will flow one-directionally to Employee Navigator.

Can I check who made changes to employee information in Employee Navigator?

Yes, Employee Navigator has an audit trail of API transmissions and payloads. Admins also have employee-level and company-level demographic/ deduction change reporting.

Will we have future benefit deduction amounts sent from Employee Navigator so that someone can see what their pay will be with the new enrollments?

Yes

Language Support: Will all languages supported in the Ready platform be available, or is it just English?

Employee Navigator connector is available only in US market. It’s not available internationally or in Canada. So only English will be supported.