Heartland

Employee Navigator: Client User Guide

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Heartland Payroll and Employee Navigator Integration

Heartland Payroll has partnered with Employee Navigator to offer a bi-directional integration to exchange demographic, compensation, and benefits information between the two systems.

Updates to specific employee demographics can be made in either Employee Navigator or Heartland Payroll and will reflect in the corresponding system in real-time. Additionally, changes to employee benefits in Employee Navigator will be updated in Heartland Payroll in real-time.

Using this integration will significantly reduce the manual entry in both systems, which will save you time while improving accuracy and reducing errors.

Getting Started

Work with your Broker to set up Employee Navigator

To enable the Heartland / Employee Navigator integration, you must first ensure that your broker is licensed with Employee Navigator. Once that has been confirmed, work with your broker to set up your EN account.

Our Heartland Integrations Team will send a welcome email with instructions on enabling the Heartland integration in the Marketplace within Employee Navigator if it has not already been done.

Two criteria must be met in addition to those mentioned above:

- You must be at least 30 days outside of your open enrollment period, and
- You must have processed at least two payrolls within Heartland

Expectations

Employee Navigator, and Heartland will partner with you and your broker to ensure the setup on your account is timely and most importantly, accurate.

Employee Navigator will be handling the bulk of your setup and will take the lead in facilitating the movement of your account through each phase.

Setup times will vary and are dependent on completing the two audits on the following page. You, the client, can reduce this time by keeping in constant communication and providing timely responses to any questions directed towards you.

Run reports in Heartland Payroll for audit process in Employee Navigator

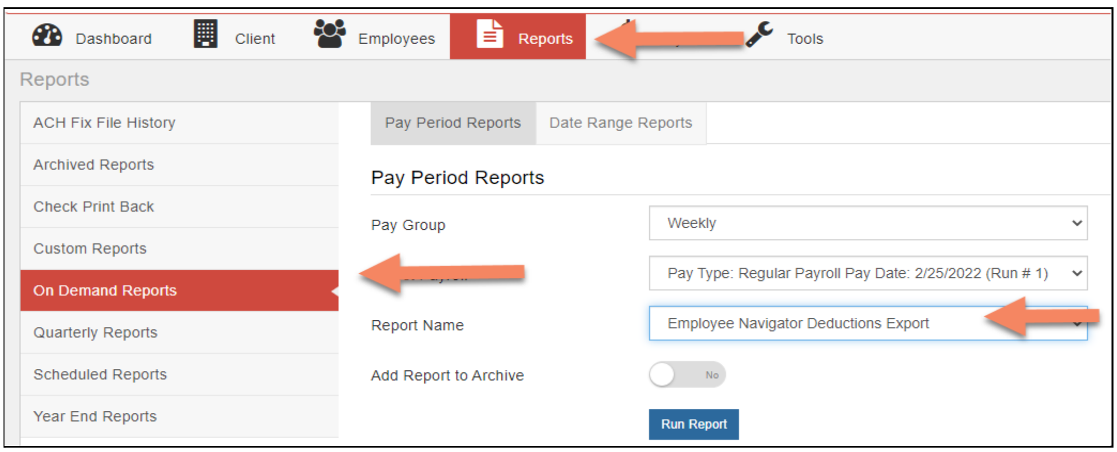
Once you have satisfied the setup criteria; you will begin the audit process in Employee Navigator.

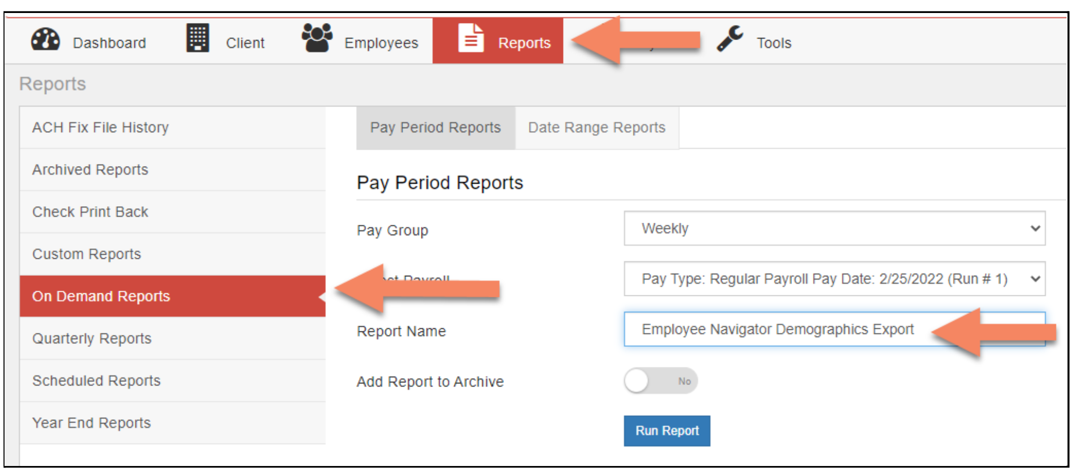
There are two audit reports that you will pull from Heartland:

- Demographic Import Audit
- Deduction Import Audit

To generate the reports, log into your Heartland Payroll account and follow these steps for each paygroup:

- Click on the Reports tab at the top of your screen
- Select On-Demand Reports from the menu on the left
- Select Demographic Audit Report from the drop-down menu
- Click “Run Report”





Follow the same steps for the Deduction Import.

(continued)

Audit Process and Data Exchange between Heartland and Employee Navigator

Once you have downloaded these reports, work with your broker and your contact at Employee Navigator to start the audit process within your Employee Navigator account. Heartland will then transition your account in Employee Navigator to "Audit Mode." There will be a live limited demographic feed during this process that will allow you to choose which data is the most up-to-date for each employee, and both systems will be updated automatically.

Once the audit has been completed, your Employee Navigator contact will engage Heartland, and we will change your account status to "live." Your Heartland Integration Specialist will connect with you to set up a brief call to go over key details that will ensure the success of your integration.

Data Exchange and Maintenance

One of the most beneficial features of the Heartland and Employee Navigator integration is that specific data can be changed in either system, which will update the other system in real-time.

In addition, certain data fields can only be exchanged in a one-way feed, meaning if you do not enter the data in the correct system, it will not update the other. To enjoy the benefits of this integration and reduce potential errors, it is important to understand how data flows, your responsibilities, and what steps need to be taken first to see results.

Here is a list of client responsibilities and a breakdown of the information exchanged and the direction in which it flows.

First Steps / Maintenance	One Way Data Feed		Bi-Directional Data Feed
Client Responsibility in Setup and Maintenance	Heartland To Employee Navigator	Employee Navigator to Heartland	Heartland To/From Employee Navigator
• Provide Heartland team with a list of benefits in EN • Request deduction codes from Heartland to set up EN • Download Employee Demographic Audit from Heartland • Download Deduction Import Audit from Heartland • Use EN's audit tool to reconcile data between systems. • Reach out to Heartland any time you add new benefits	• SSN • Payroll ID • Annual Base Salary • Base Hourly Rate • Pay Effective Date • Pay Basis • Hire Date • Termination Date	• Benefit Deduction Amount • Benefit Start Date • Benefit End Date	• First Name • Last Name • Middle Name • Date of Birth • Address Line 1 • Address Line 2 • City • State • Zip • Work Email • Personal Email • Phone

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Client Responsibilities / Ongoing Maintenance

Setting Up Benefits in Employee Navigator

Before your integration is completed, your Heartland Integration Specialist will have already provided benefit codes to you and/or your broker to enter into Employee Navigator. It is essential to ensure that you enter these codes in as provided, as this is what our system will use to identify the correct benefit type for your employees and ensure proper mapping.

Adding New Benefits

Once you have been set up, you must notify your Heartland Payroll Specialist any time you add a new benefit to Employee Navigator. New benefits need to be added to your payroll account first for the integration to recognize and map them. If you do not notify the Payroll Specialist, the benefit will not be mapped, which will result in errors and potential missed benefits.

Missing benefits / Makeup benefits

If for any reason your employee is missing a benefit deduction, or they did not have an accurate amount taken from their pay, work with your Payroll Specialist to set up a separate payroll benefit deduction for this purpose. The integration does not identify if an employee misses a benefit deduction or has a different amount withheld from their paycheck due to keying errors during setup.

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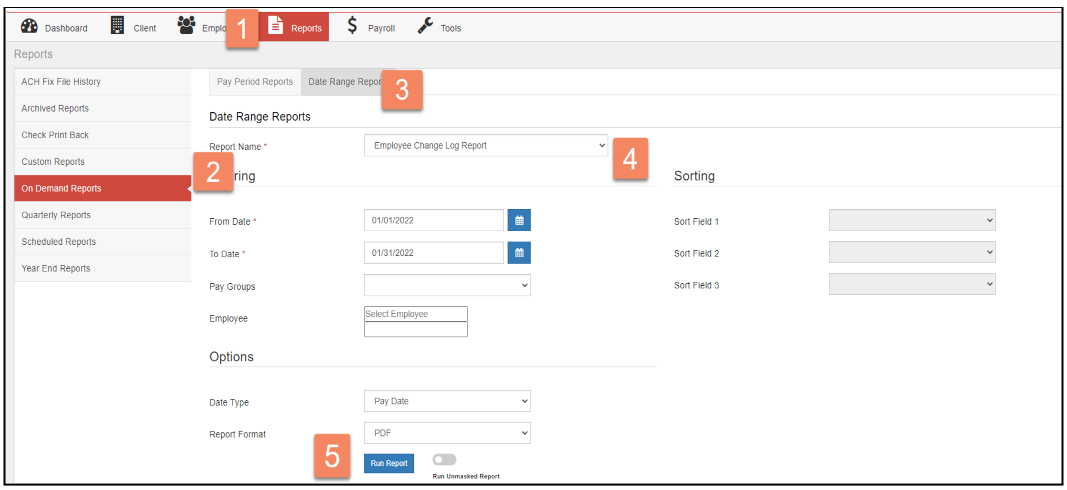
Reviewing Payroll Reports / Audit Payroll Accounts

It is important to always preview your payroll and review payroll reports every time you process payroll to ensure accuracy. You can review changes made to your employees' profiles in Heartland by viewing your Employee Change Log.

- Log in to your Heartland Payroll account
- Click on the Reports Tab at the top of your screen
- Click on OnDemand Reports
- Select Date Range Reports
- From the drop-down menu, select Employee Change Log Report
- Put in a start and stop date
- Run Report



Once you generate this report, you will be able to see the date that a change was made, for which employee the change was made, and what the old value was and what the new value is. You will also see who made the change. Any changes made due to the integration between Employee Navigator and Heartland will have the username, EaseGetHiredAPI.

Client ID: GHEN01 - GHEN01 **EMPLOYEE AUDIT CHANGE REPORT** **Begin Date:** 1/1/2022 **End Date:** 1/31/2022

Empl #	Name	Change Date	Field	Old Value	New Value	User
Freeman III, Morgan Paul						
001	Freeman III, Morgan Paul	1/26/2022 3:38:27 PM	Person: Address1	2250 Woodridge Lane	70 Daly Street	Ease.Get Hired User 1

You can run a report for ALL employees or review changes for certain employees by clicking on the Employee box and selecting the employee from the dropdown list.

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One Way Data Feeds

Heartland → Employee Navigator

Heartland is the System of Record for all new-hire information, terminations, and compensation. This means that you will create the employee profile in Heartland first, process terminations, and update any salary or job title information in Heartland. This data will flow from Heartland to Employee Navigator only.

Employee Navigator → Heartland

Once the integration is completed, Employee Navigator is the System of Record for all benefit-specific data. This includes the benefit amount, the benefits start date, and the benefits end date. This means that any changes made to employee benefits need to be done in Employee Navigator first. This data will flow from Employee Navigator to Heartland only.

Bi-Directional Data Feed

Heartland ↔ Employee Navigator

Exclusive to the Employee Navigator and Heartland Integration, is the bi-directional data feed with specific employee demographic fields including: first name, last name, middle name, date of birth, address, city, state, zip, work email, personal emails and phone number,

This means that your employees can log in to either system and update their information one time in either place, and the corresponding system will receive the update in real-time.

See the next page for a comprehensive chart of corresponding data fields and the direction of the data exchange.

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Corresponding Data Fields Between Heartland and Employee Navigator

Heartland Data Field	Employee Navigator Data Field	Direction of Data Exchange
First Name	First name	Heartland ↔ Employee Navigator
Middle Name	Middle name	Heartland ↔ Employee Navigator
Last Name	Last name	Heartland ↔ Employee Navigator
Birth Date	DOB	Heartland ↔ Employee Navigator
Address Line 1	Address 1	Heartland ↔ Employee Navigator
Address Line 2	Address 2	Heartland ↔ Employee Navigator
City	City	Heartland ↔ Employee Navigator
State	State/Territory	Heartland ↔ Employee Navigator
Zip	Zip Code	Heartland ↔ Employee Navigator
Work Email	Work Email	Heartland ↔ Employee Navigator
Personal Email	Personal Email	Heartland ↔ Employee Navigator
Mobile Phone	Phone	Heartland ↔ Employee Navigator
SSN	Social security number	Heartland → Employee Navigator Only
Payroll ID	Payroll ID	Heartland → Employee Navigator Only
Annual Salary	Annual Base Salary	Heartland → Employee Navigator Only
Base Hourly Rate	Hourly rate	Heartland → Employee Navigator Only
Effective Date	Salary Effective Date	Heartland → Employee Navigator Only
Pay Type	Pay Basis	Heartland → Employee Navigator Only
Hire Date	Hire date	Heartland → Employee Navigator Only
Termination Date	Termination date	Heartland → Employee Navigator Only
Amount	Employee Cost Per Pay	Employee Navigator → Heartland Only
Start Date	Enrollment Start Date	Employee Navigator → Heartland Only
Benefit End Date	Enrollment End Date	Employee Navigator → Heartland Only

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FAQ

I just hired a new employee, I do not see them in Heartland. What should I do?

New hires need to be first added in Heartland. Once your integration is completed, Heartland will send all new hire information to Employee Navigator. New Hires will show in the 'Employee's missing HR required fields' section on your 'Homepage' in Employee Navigator under 'Things to do'. Click 'Complete Hire' and assign the proper Payroll Group and Benefit Class for these new hires. If applicable, be sure to send the employee the registration/login information email to enroll in benefits.

I terminated an employee - what happens next?

As with new hires, terminations need to be completed within Heartland first. Navigate to your payroll account and terminate the employee first. The termination date will then be sent to Employee Navigator.

We just added a new benefit to Employee Navigator - why is it not showing up in Heartland?

Remember, before you add a new benefit to Employee Navigator, you need to first ensure that the benefit is set up in Heartland. Please contact your Payroll Specialist at Heartland and they will add the new benefit to your payroll account and provide you with the benefit code to enter into Employee Navigator.

What happens if deductions are under OR overwithheld for any reason?

This needs to be completed in Heartland since Employee Navigator does not track missed or duplicated deductions from payroll nor does Employee Navigator send over missed deduction amounts or overpayment amounts.

Please contact your Heartland Payroll Specialist to set up a new deduction to withhold additional funds OR to compensate your employee if they had funds overwithheld from their paycheck.

Employee Navigator and Heartland Employee Self Service

- If you use Heartland Hire to onboard new employees, the email address that you use to send your new hire their onboarding documents will be used as their work email address.
  - This data field is exchanged during the initial data that is sent from Heartland to Employee Navigator to create the new employee profile.
  - Once the profile is created, this information can be updated in either system.
- The work email in Heartland is also the email address that is associated with the Employee Self Service account.
  - If you have this service enabled, and an employee logs in to Employee Navigator and updates their work email address, this WILL impact their self service account credentials.
  - In addition, this could cause some concerns with MFA (Multi Factor Identification).

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Support & Questions

Employee Navigator Questions

For Employee Navigator related questions, please contact their team at Payroll@Employeenavigator.com

Heartland Payroll Questions

For any needs related to Heartland Payroll system, please contact your Heartland team:

Payroll account questions: contact your Specialist via email or by calling 877-729-2968

Employee Navigator Integration questions: email our HCM team at benefits.productsupport@e-hps.com