Our Payroll Integration Guide

This guide includes general instructions for the use of Employee Navigator's Payroll Integration product both for the client and for our partners. It is intended for use in conjunction with the Payroll provider-specific Appendix to this document. Both documents should be carefully reviewed.

What to know before you begin!

Employee Navigator's payroll Integration allows you to share specific employee demographic andrecurring deduction data with your payroll system and will allow your payroll system to share employee demographics with Employee Navigator - all in real-time.

Prior to going through the setup pieces of the integration there are a few key points to note:

- **Employee Navigator support during this integration**
    - Our Payroll Analyst team is here to help provide an overview of the integration steps and to guide you through the process to a Live status.
        - We cannot map nor sync employee data on your behalf.

    - Broker licensees and HR admins are responsible for the review and management of the data below:
        - Mapping the deduction and/or employer contribution memo codes from payroll and adding the proper transmission settings to each plan
        - Reconciling differences in employee demographic data such as, but not limited to, Hire Date, Termination Date, Compensation, and Address.
        - Reconciling differences in employee or employer cost data

- **Unsupported benefit deductions**
    - Currently, we do not support the following deductions to be synced with Payroll. Any changes to these deductions or contributions must be manually managed within the Payroll system:
        - Commuter, Transit or Parking Benefits
        - 401(k) plans
        - Universal Plan types within Employee Navigator

- **Deduction Codes**

    - Deduction codes must be unique per each Benefit Type for EmployeeNavigator to transmit the separate per pay amounts for each plan.

    - You cannot lump different benefit types into a single code.

        - *Ex.* Accident, Cancer and Critical Illness cannot have one code that combines all amounts – they must have one code per benefit type.

Setup Checklist Overview

Part One *(Average completion rate = < 1 day)*

❑ HR and Broker schedule initial review call with EN Analyst to walk through the Audit process together

❑ Ensure payroll group(s) are set up in EN

    ❑ Confirm all employees are assigned to their appropriate payroll group

❑ Ensure each payroll group has a payroll calendar configured for each payroll group

    ❑ Pay dates must *exactly* match pay dates in Payroll System

❑ Mark 'Payroll group' as required in Settings → HRIS Field Tracking → Profile

❑ Map your payroll deduction codes into EN

❑ **If using Paychex or Paylocity:**

    ❑ Go to Payroll tab in EN → Demographic Audit → Start API Import

    ❑ Go to Payroll tab in EN → Deduction Audit → Start API Import

❑ **If using any other partner:** Download the required Demographic and Deduction reports from the Payroll system per your Vendor's Appendix and import them into EN.

Part Two *(Average completion rate = 10 days)*

❑ HR resolves discrepancies in the Demographic Audit

❑ HR **and** Broker resolve discrepancies in the Deduction Audit

❑ EN Analyst contacts Payroll partner to change API status from 'Audit Mode' to 'Live'

What can I expect this process to look like and what is the purpose?

- **Watch our video:** <u>Our Integration Overview and Welcome Video can be found here</u>

- **The purpose of the Audit process for your integration is three-fold:**

1) To connect all employees with their appropriate Payroll IDs.
   a. These IDs allow us to know exactly who to exchange data for in real-time.

Integrations

Partner	Group	Identifier	Status	Demographics	Deductions	Primary	
Vendor name	All Employees	1559	Active	✔	✔	✔	Manage

2) To map your deduction and/or employer contribution codes:
   a. These are the "keys" to payroll that allow EN to insert deductions automatically.

3) To ensure that both systems have matching demographic and deduction data for the fields and plan types that we exchange.
   a. This will let us know that when your group is turned "Live", both systems are starting from a fresh slate.
   b. Future changes will constantly keep the systems in sync.