PRIMEPAY ®

Payroll Integration User Guide Appendix for PrimePay Users

2019

Overview & Notes

Online Payroll is the entry point for almost all employee level data: demographic, compensation, hire and term dates. Employee Navigator (EN) will be the source for all benefit recurring payroll deductions that are controlled by human resources (HR).

This quick start chart shows where data comes from and what fields are locked in what system.

General Integrated Data Field Guide

One Way (PrimePay > EN; Locked in EN)	One Way (EN > PrimePay; Locked in PrimePay)	Bi-directional (Can be changed in any system)

• Company ID (Employer Unique ID)
• Payroll ID (Employee Unique ID)
• SSN
 	
• Compensation:
  ○ Compensation Basis (Pay Basis Code)
  ○ Annual Base Salary (Calculated)
  ○ Base Hourly Rate (Pay Rate 1)
  ○ Pay Effective Date (Calculated)
• Hire Date
• Term Date
• Work Email
• Personal Email
	• Payroll Deduction Amount (recurring only)
	• Deduction Effective Date
	• Deduction Expiration Date
		• Name:
		  ○ First Name
		  ○ Middle Name
		  ○ Last Name
		
		• Address:
		  ○ Address Line 1
		  ○ Address Line 2
		  ○ City
		  ○ State
		  ○ ZIP
		
		• Birth Date
		• Gender

NEW EMPLOYEES – PRIMEPAY ONLINE PAYROLL

- Must be entered in payroll first, then additional setup will be required within EN from HR or broker.
- From EN's home page click **Employees Missing HR Required fields**, then **'Complete Hire'** and add the employee's payroll group and class in EN.

BI-DIRECTIONAL FIELDS

- Can be changed in either system regardless of the data source. For example, **Name** comes from payroll, but can be changed in EN.

COMPENSATION – PRIMEPAY ONLINE PAYROLL

- All compensation values must come from payroll, and if entered in EN these values will be ignored through the API since this is a one-way feed from payroll.
- If hourly employees are offered salary-based benefits, such as life and disability, it is a manual process to enter in an annual benefit for the employee in the EN system.
- Commission-only employees can have a $0 amount in Annual Salary. A manual entry in EN Salary Field may be required using prior year salary.

BENEFIT DEDUCTIONS – EMPLOYEE NAVIGATOR

- Benefit deductions come from Employee Navigator (EN).
- Deduction codes come from PrimePay and must be assigned in EN to match the appropriate benefit.
  - One code per plan that includes a single, total amount.
  - Recognizes EE, EE + One, EE + Spouse, EE + Child, EE + Children, EE + Family.
  - Not all deductions in PrimePay will be EN controlled, just benefit specific codes.

- Employer must mark deduction codes as **HR Controlled** at the client level in Online Payroll for it to be updateable by EN.
- Commuter deductions must be manually entered into payroll until EN system revision.
- ER paid benefits should be marked as **never send to payroll**.
  - Deductions for an employer pay-all benefit can be suppressed and not sent to PrimePay.
  - Don't send $0 should be used when ER is paying for EE coverage, but not dependent coverage
- Deductions
  - Future dated deductions for new hires only (if you are not replacing a prior deduction amount with a new deduction amount).
  - Future effective dates need to be placed in EN for HR review/approval for life events, open enrollment, and rehires.
- Pre- & Post Deductions
  - Default to pre-tax at the plan level unless set up to be post tax at the plan level, ex. life, disability.
  - If both pre- and post for one plan, must classify employee as two percent shareholder of an S-corp from the statutory class section of their employment tab in EN to allow their system to look at the post-tax column. PrimePay payroll deduction codes will determine pre- & post deductions.
- Unsupported deductions
  - Recurring Earnings
  - 401(k)
  - Universal plans within EN
  - Commuter Benefits, at this time, set up needs to be done in payroll

**For multiple EINs see the Employee Navigator Payroll User Guide.

Payroll API Broker Steps

COMPLETE THE FOLLOWING STEPS IN EN TO PREPARE FOR PAYROLL API:

1. Employer/broker will establish payroll groups.
2. Set up payroll calendar(s) and attach to each payroll group within EN.
3. Match and map deduction codes (codes come from Online Payroll) in EN by inputting appropriate deduction code for each benefit on each payroll group in the pre-tax code column on the Deduction Codes page.
4. Mark payroll group as required in HRIS.
5. Create benefit classes in EN portal.
6. Employer/broker assigns employees to payroll group and class.
7. Two payrolls need to be run before going online. Once online, and before importing files for the audit process, the PrimePay employer unique ID must be entered to EN to complete the API connection. This value can be found in the header of each Payroll screen and consists of 8 digits followed by 1 character (ex. 11903456A).
8. PrimePay moves group to approved.
9. PrimePay will send the broker a welcome email and notify EN it is time to begin the audit and sync process.

Data Audit & Sync Process

There is an audit and sync process during the implementation to ensure both systems are talking to each other without errors. During the audit process employees should not be added, termed or enrollment changes made in either system. Out-of-sync data must be reviewed by HR and the broker to determine the correct sync action. To begin the process, we send a welcome email to the client which will notify EN you are ready to begin.

SYNC AND AUDIT PROCESS:

1. Service provider user (SPU) establish the EN integration in payroll.
   - PrimePay: Employer Setup > Integrations tab > Add New Integration and select **Employee Navigator**.

2. Employer Admin exports EE demographic data.
   - PrimePay: Employer Setup > Integrations tab > Select **Employee Navigator** > Manage > **Export Demographics.**

3. Employer Admin working with EN will import the EE demographic data into EN.
   - Employee Navigator: Payroll > Integrated Payroll > Employee Discrepancy - start new import follow wizard.

4. Employer Admin identifies and corrects errors.

5. SPU sets the integration to **Active** in payroll. See page 5 for more details on **Active** status.
   - PrimePay: Employer Setup > Integrations tab > Select **Employee Navigator** > Manage > Check **Active** box.

6. Employer Admin flags the payroll deductions to be controlled by EN (HR/Benefits controlled).
   - PrimePay: Employer Setup > Deductions > Mark deductions that are HR/Benefits controlled.

7. Employer Admin exports the deduction data.
   - PrimePay: Employer Setup > Integrations tab > Select **Employee Navigator** > Manage > Click **Export Deductions**

8. Employer Admin working with EN will Import the deduction data into EN.
   - Employee Navigator: Payroll > Integrated Payroll > Deduction Discrepancy Audit

9. Employer Admin notifies PrimePay's Online Payroll team that all discrepancies are resolved.

10. SPU changes API status from **Audit** to **Complete Audit** within EN to go live and an audit complete email is sent.

PAYROLL REPORTS

PrimePay provides the two payroll reports to support Employee Navigator's audit/sync process. These reports must be generated before performing the audit and sync process in Employee Navigator.

To generate the payroll reports, go into **Online Payroll > Employer Setup > Integrations Tab** and select the Employee Navigator **Manage** button to run the reports and create the files.
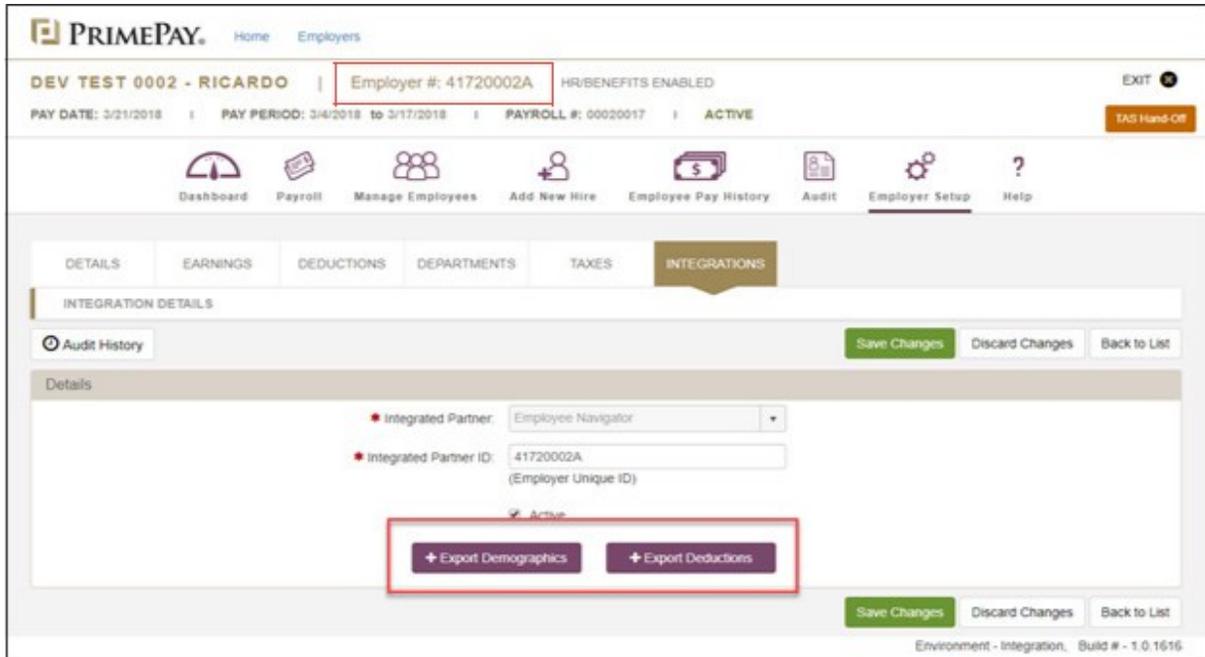
Note: To upload the generated payroll reports, log in to Employee Navigator (see the EN User Guide for specific instructions for the upload and sync process).

DEMOGRAPHIC REPORT

File name is **EN Demographic Export_<date of generation>.xlsx** and includes:

- SSN
- Employee Unique ID
- Last Name
- First Name
- Middle Name
- Gender
- Birth Date
- Pay Basis Code
- Annual Base Salary (calculated)
- Effective Pay Date (calculated)

- Pay Rate 1
- Hire Date
- Termination Date (only populated if employee is terminated)
- Address Line 1
- Address Line 2
- City
- State
- ZIP Code

DEDUCTION REPORT

File name is **EN Deduction Export_<date of generation>.xlsx** and includes:

- SSN
- First Name
- Last Name
- Employee Unique ID
- Deduction Code (only includes EN controlled deductions)
- Amount

COMMON PAYROLL API MESSAGES

If payroll is locked for any reason, such as payroll submitted or is in need of verification to be submitted.

- "Changes can only be made when your payroll status is at START, ACTIVE, or NEXT SCHEDULED"
- "Changes can only be made when your payroll status is at START or ACTIVE"
- "This Change can only be made when your payroll status is at START, ACTIVE or UNDER REVIEW"
- "This Change can only be made when your payroll status is at START, ACTIVE, UNDER REVIEW OR NEXT SCHEDULED."
- "Updates are not allowed while <user> has the current payroll Under Review. Please speak with them if your change is critical to the current payroll prior to it being Accepted or Submitted"
- "Your payroll is being initialized"

ONLINE SUPPORT

PrimePay: https://support.primepay.com/s/contactsupport.

Considerations

- It is recommended that the audit should take place shortly after payroll runs and the audit process completed as soon as possible.
- Decide if the payroll integration status will remain **Active** or **Inactive** while audit process is occurring. Decision should be based on how long the audit will take and whether payroll data must be entered or a payroll run needs to occur during the audit process.
  - **Inactive:** changes can still be made in Online Payroll to fields locked by the integration.
  - **Active:** EN controlled fields are locked in payroll.
- Systems will sync, comparing every data field and produce two audit reports: demographic and deductions. Errors addressed and corrected by both broker and client before client is Active for API.
  - See EN Payroll Integration User Guide to assist with why errors occur.
- If a new payroll client, it is recommended that two payroll runs occur before the API is activated. (The API is _activated_ the minute the client integration is added in step 1. Employee Navigator has read and write access to the data in payroll. The active flag on the integration page controls field locking, EN controlled options, and Employee update notifications sent to EN.)
- Multiple EINs – use Subscriber Groups established within EN to allow you to make multiple payroll connections within one EN company umbrella.
  - Employee Navigator > Company > Settings > Subscriber Groups. Add desired name for group. Assign employees to subscriber groups using the bulk assign tool. See EN Payroll Integration User Guide for more info.

Detailed Integrated Data Field Guide

Field	Data Being Exchanged	Where Data Comes From	Notes
Company ID	Yes	PrimePay	Unique Employer ID
EN Employee ID	No		PrimePay Doesn't Need
Payroll ID	Yes	PrimePay	Unique Employer ID
SSN	Yes	PrimePay	
Name	Yes	PrimePay	Bi-directional
EE DOB	Yes	PrimePay	Bi-directional
Gender	Yes	PrimePay	Bi-directional
Work Email Personal Email	Yes	PrimePay	
Hire Date	Yes	PrimePay	
Termination Date	Yes	PrimePay	
Pay Effective Date	Yes	PrimePay	Not Historical
Compensation Basis*	Yes	PrimePay	
Annual Salary	Yes	PrimePay	
Base Hourly Rate	Yes	PrimePay	
Address	Yes	PrimePay	Bi-directional
Deduction Code	Yes	Employee Navigator	Payroll deduction code for EN group level benefit. Ex: **Med** in EN > **H** in PrimePay
Deduction per Pay	Yes	Employee Navigator	
Enrollment Date	Yes	Employee Navigator	PrimePay Doesn't Need
Deduction Start Date	Yes	Employee Navigator	Deduction should begin on next paycheck.
Enrollment End Date	Yes	Employee Navigator	Only used if coverage is terminated. Changes to coverage level, ex. single to family, no end date required.

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employee NAVIGATOR