

# **Employee Navigator Integration**

Note: Changes, including employee creation, made in CyberPay will <u>not</u> flow to Employee Navigator at this time. Only CyberPay Online changes will integrate with Employee Navigator.

# **Enable Integration**

There is some one-time setup required by Employee Navigator (EN) and CyberPay, Inc. before the payroll bureau can begin use.

When this is completed, the payroll bureau can activate the Employee Navigator integration for its clients/companies.

1. Go to the Company tab and click on the desired company code or name.

| ayroll Employees Re  | eports • Cor       | mpany ESS Inform                               | mation       | HR Suppor | t Center     | QuickBooks | Online           |
|--|--------------------|--|--------------|-----------|--------------|------------|------------------|
| Company Search   |                    |  |              |           |              |            |                  |
|  | Keyword            | s  |              |           |              |            |                  |
| Search for Companies that match  | ALL criteria       |  |              |           |              |            |                  |
|  |                    |  |              |           |              |            |                  |
|  | Company Code equal | s  |              |           |              |            | Compan           |
| Search Clear   | Company Code equal | s  |              |           |              |            | Compar           |
| Search Clear   | Company Code equal | s  |              |           |              |            | Compar           |
| Search Clear<br>Company All Companies • 3<br>Actions                       | Company Code equal | v Company                                      | ✓ FEI        | ~         | EmailAddress | ~          | Compar<br>Site C |
| Search Clear<br>Company All Companies • 4<br>Actions<br>Ø Inline Edit Edit | Company Code equal | <ul> <li>Company</li> <li>Company 2</li> </ul> | ~ FEI<br>89- | ~         | EmailAddress | ~          | Compai           |

# 2. Go to the Integrations tab.

| Payroll                  | Employee   | s     | Reports 👻        | Company         | ESS Inf    | ormation     | HR Supp     | oort Center    | QuickBooks Online | Audit Trail |
|--------------------------|------------|-------|------------------|-----------------|------------|--------------|-------------|----------------|-------------------|-------------|
| Compan<br>& Back to list | y: ENT1 -  | ENT1  | - Employee N     | lavigator Te    | st 1       |              |             |                |                   |             |
| Company Info             | ESS Logins | Users | ACA Included Hou | rs ACA Included | Deductions | Integrations | Audit Trail | Communications |                   |             |

- 3. Scroll down to the Employee Navigator Activation section.
  - a. Check the "Activate Employee Navigator" option
  - b. Enter email addresses if users wish to receive email notices from CPO. Separate multiple email addresses with a semi-colon as needed.
  - c. Click the **Save** button.

| Employee Navigator Activation |   |      |
|-------------------------------|---|------|
| Activate Employee Navigator   |   |      |
| Notification E-mail(s)        | employee@adaptasoft.com;  |      |
|                               | Semicolon separated (;) list of e-mail address(es) that should receive notification when a payroll-impacting change | 1    |
|                               | comes in from Employee Navigator.   |      |
|                               |   |      |
|                               |   | Save |



All Bureau level users can access the EN application in CPO. <u>Payroll users must have permission</u> on their user accounts.

- 1. Go to the company's Users tab.
- 2. Click the Edit button for the user that you wish to add EN permission.

| Payroll       | Employees         | Reports 🝷        | Compa         | ny ESS Info         | ormatio                 | n HR Sup          | port Cen                | ter Quic      | kBooks Online |
|---------------|-------------------|------------------|---------------|---------------------|-------------------------|-------------------|-------------------------|---------------|---------------|
| Compan        | y: ENT1 - ENT     | 1 - Employee     | Navigato      | r Test 1            |                         |                   |                         |               |               |
| ∉ Back to lis | t                 | 1                |               |                     |                         |                   |                         |               |               |
| Company Inf   | o ESS Logins Us   | ers ACA Included | Hours ACA I   | Included Deductions | Integra                 | tions Audit Trail | Commun                  | ications      |               |
| Users         | New User          |                  |               |                     |                         |                   |                         |               |               |
| Expo          | rt to CSV         |                  |               |                     |                         |                   |                         |               |               |
|               | Actions           |                  |               | Name                | $\overline{\mathbf{v}}$ | User Name         | $\overline{\mathbf{v}}$ | User Role     | $\odot$       |
| R             | elated Company: E | ENT1-Employee N  | lavigator Tes | t 1                 |                         |                   |                         |               |               |
|               | 🕑 Edit 🛛 🗙 De     | elete Change Pa  | assword       | Edith Jones         |                         | edith1            |                         | Payroll Admir | 1             |

3. Scroll down and check the "Include Employee Navigator" option.

Save

|                            | co15 - Company 15<br>CP03 - Company 3<br>ENT1 - Employee Navigator Test 1 |
|----------------------------|---|
| Include HR                 |   |
| Include ACA                |   |
| Include Employee Navigator |   |
|                            |   |

4. Click the **Save** button.

Bureau users, and payroll users with permission, can access the <u>Employee Navigator application</u>. This consists of four tabs. These will be discussed below.

| APPLICATIONS | Employee Navigator |                         |
|--------------|--------------------|-------------------------|
|              | The second         | CyberPay Online Phoenix |
|              |                    |                         |



#### Audit Process

Employee Navigator offers an audit process that will be used to make sure both systems have the same employees and values (see Employee Navigator documentation for details). This will be done as part of the initial setup process after the company and deductions are setup. Note: <u>Employees should not be</u> added, <u>nor enrollment changes made</u>, until the audit process is completed. CPO offers three files for this process.

These reports can be accessed from the "Discrepancy Audit Reports" tab of the Employee Navigator application.

- The <u>Employee Demographics Discrepancy Audit</u> report is used to ensure that both products have the same employees with the same demographic setup. EN will allow users to add employees to either system as well as make updates during this process. See Employee Navigator documentation for details on this audit process. Note: See the "Annual Base Salary Calculation" section below for explanation of wage calculation.
- The <u>Deduction Codes Report</u> is used to map deductions between CPO and EN. More detail on this can be found in the next section. Be sure to do this mapping before verifying the deduction setup. Note: Not all deductions in CPO will be setup in EN.
- The <u>Employee Deduction Discrepancy Audit</u> report is used to verify that the employees' deduction amounts match. See Employee Navigator documentation for details on this audit process.

| Employee Changes   | Pending Hires   | Pending Terminations         | Discrepancy Audit Reports |
|--|---|------------------------------|---------------------------|
| <ul> <li>Select Company: ENT1</li> <li>Employee Demog</li> <li>Deduction Codes</li> <li>Employee Deduct</li> </ul> | Employee Navigator<br>raphics Discrepano<br>Report<br>ion Discrepancy A | Test 1 v<br>cy Audit<br>udit |                           |

### **Deduction Mapping**

In order to synchronize employee deduction changes between CPO and EN, users must map the deductions. Note: Benefits (Employer Costs) are not currently synchronized.

- 1. After all of the deductions are set up in EN, go to CPO and run the Deduction Codes Report as described above.
- 2. In EN, go to the Payroll tab and click on the first Group Name.

| Home Employees Reports Wall                      | ACA Benefits <b>Payrol</b> Documents S | ettings                 |
|--|--|-------------------------|
| GENERAL 🔻  | Dashboard                              |                         |
| → Dashboard<br>Partner Selection <sup>beta</sup> | Payroll Groups                         | + Add a group           |
| Deduction Code Settings <sup>beta</sup>          | Group Name Pay Frequency               | Pay Date Through Active |
| INTEGRATED PAYROLL                               | Bi-Weekly Bi-Weekly (26 Periods)       | 12/23/2022 Yes          |



3. Next, click on the Deduction Codes link in the menu on the left.

| Adaptasoft Bureau Test Company  |  | <table-cell> Guide 💿</table-cell>                       |
|---|--|---|
| Home Employees Reports Wall   | ACA Benefits <b>Payroll</b> Documents Set                  | ttings  |
| GENERAL V   | Bi-Weekly  |   |
| Dashboard   | Payroll groups provide a way to manage emplo<br>schedules. | oyee pay schedules and the payroll systems used for the |
| REQUIRED <b>T</b>   | Name: Bi-  | Weekly  |
| → Group Definition<br>Calendar  | Pay Frequency: Bi-<br>Active: 🗹 79                         | Weekly (26 Periods)                                     |
| OPTIONS V   | Save   | ancel   |
| Deduction Codes<br>Customize Deduction Dates<br>Advanced Deduction Accruals | _  |   |

- 4. Enter the Deduction Code from the CPO report into the Pre-Tax Code or the Post-Tax Code for the corresponding deduction in EN. Note: the Deduction Codes are the CPO check stub abbreviations.
- 5. Click Save.
- 6. Repeat for other groups as necessary.

| Bi-Weekly                          | $\wedge$     |                  |
|------------------------------------|--------------|------------------|
| Plan                               | Pre-Tax Code | Post-Tax<br>Code |
| 2017 Base Plan- HDHP (1/1/2017)    | Hlth PT      |                  |
| 2017 Basic Dental (1/1/2017)       | Dent PT      |                  |
| 2017 Buy-Up (1/1/2017)             | BuyUp        |                  |
| 2017 Dependent Care FSA (1/1/2017) | DCFSA        |                  |

If the item listed has a \$0 employee cost because it only has employer cost (this would be considered a benefit in CPO), EN can be set to not send updates to CPO.

- 1. Go to the Payroll tab of EN.
- 2. Click the "Deduction Code Settings" in the menu on the left.



| Adaptasoft Bureau Test Company  |                                       |                    |  |  |  |  |
|---|---------------------------------------|--------------------|--|--|--|--|
| Home Employees Reports Wall   | ACA Benefits Payroll                  | Documents Settings |  |  |  |  |
| GENERAL   Dashboard   |                                       |                    |  |  |  |  |
| → Dashboard<br>Partner Selection <sup>beta</sup><br>Deduction Code Settings <sup>beta</sup> | Payroll Groups<br>Group Name Pay Freq | uency Pa           |  |  |  |  |

- 3. Select the first Payroll Group and set the desired behavior for the deduction listed.
- 4. Repeat for all Payroll Groups and deductions.

| Deduction Code Settings (Active Plans) |                 |                 |                  |                  |                |                    |   |
|--|-----------------|-----------------|------------------|------------------|----------------|--------------------|---|
| Payroll Group                          | Bi-Weekly       |                 | T                |                  |                |                    | Show Inactive Plans   |
| Plan                                   |                 | Pre-Tax<br>Code | Post-Tax<br>Code | Employer<br>Code | HSA EE<br>Code | HSA Client<br>Code | Transmission<br>Option  |
| 2017 Base Plan- H                      | IDHP (1/1/2017) | Hlth PT         |                  |                  |                |                    | <ul> <li>Always Send</li> <li>Never Send</li> <li>Don't send \$0</li> </ul> |

When auditing is complete, <u>take the company out of audit mode</u> in Employee Navigator.

### **Employee Demographic Synchronization**

The following employee demographic fields will sync between EN and CPO unless Locked. A locked field is one that cannot be updated in EN after the initial employee creation. Since payroll is the system of record for these fields, changes must be made in CPO.

Note: There is a way to block employees in EN from synchronizing with CPO (see EN documentation).

| Field Name            | Is Subscribed | Locked |
|-----------------------|---------------|--------|
| Address 1             | x             |        |
| Address 2             | x             |        |
| City                  | x             |        |
| State                 | x             |        |
| ZIP                   | x             |        |
| Work or Primary Email | x             |        |
| Home Phone            | x             |        |



| Annual Base Salary (updated if change    |   |   |
|--|---|---|
| made to rate in CPO. Can be              |   |   |
| overridden in CPO)                       | х | х |
| Compensation Basis (Note: This will      |   |   |
| revert to "salary" after the employee is |   |   |
| added to CPO.)                           | х | х |
| DOB                                      | х |   |
| First Name                               | х |   |
| Gender                                   | х |   |
| Hire Date                                | х |   |
| Hourly Rate                              | х | x |
| Is Full-time                             | х |   |
| Last Name                                | х |   |
| Middle Name                              | х |   |
| Pay Effective Date (not used in CPO      |   |   |
| yet)                                     | х | х |
| Payroll ID (This is a unique identifier  |   |   |
| and not the Employee ID that you see     |   |   |
| in CPO)                                  | х |   |
| SSN                                      | х | x |
| Termination Date                         | х |   |
| Timeclock ID                             | х | x |

Allocations (location, department, and division) will be added to this list in the future as they become available from EN.

# New Employees (New Hires)

New employees created in EN will flow to CPO and vice versa. Only the above demographic fields will be exchanged. Additional setup will be required in the other product after a new employee is added. When an employee <u>is added in CPO</u>, go to the "Incomplete Employees" link to finish setup in EN (see EN documentation for more detail).

When an employee is added in Employee Navigator:

- 1. Go to the <u>Pending Hires tab</u> of the Employee Navigator app in CPO.
- 2. Click the "<u>Hire</u>" link for the employee. Note: The employee can also be <u>deleted</u> from the Pending Hire queue if no longer needed.

| Employee Changes Pending Hires Pending Terminations Discrepancy Audit Reports |               |              |         |            |                         |           |                         |            |
|---|---------------|--------------|---------|------------|-------------------------|-----------|-------------------------|------------|
|   |               |              |         |            |                         |           |                         |            |
|   | Actions       | Company Code | $\odot$ | First Name | $\overline{\mathbf{v}}$ | Last Name | $\overline{\mathbf{v}}$ | Hire Date  |
|   | Hire   Delete | ENT1         |         | Delete     |                         | Me        |                         | 07/09/2017 |



# 3. Fill in the required information and click the **Save** button.

| New Employee        | Save                      |
|---------------------|---------------------------|
| Company Information |                           |
| Company             | Employee Navigator Test 1 |
| Employee Template   | <b>•</b>                  |
| Hire Date           | 06/19/2017                |
| Wage                | \$20.0200                 |
| Pay Frequency       | Bi-weekly T               |
|                     |                           |
| Contact Information |                           |
| Auto-Update         | 2                         |

4. After the employee is created, complete the remaining employee setup (such as direct deposit) as need for the employee in the CyberPay Online Phoenix app as usual.

Note: Employees created in CPO that do not have a non-zero wage (all pay types have a \$0 wage), will not be sent to EN.

#### Annual Base Salary Calculation

Pay type calculation for new employees is as follows:

- When an employee is <u>added to EN with the pay basis of "Salary"</u> his/her "Annual Base Salary" will be divided by the number of pay periods in the year and entered into CPO's new employee wizard as the "Wage".
- When an employee is <u>added to EN with the pay basis of "Hourly"</u> his/her "Hourly Rate" will be entered into CPO's new employee wizard as the "Wage". Note: After the employee is created in CPO, the EN "Pay Basis" will change to "Salary".
- When an employee is <u>created in CPO</u>, his/her "Annual Base Salary" and "Hourly Rate" are calculated and sent to EN. This calculation is as follows:
  - Determine the pay type that is active, has a non-zero wage, and has the lowest sort order for the employee. The sort order is found on the Company Setup\Pay Types tab of CyberPay.
  - 2. Calculate the hourly rate by dividing this wage by the hours/unit listed for that pay type on the Company Setup\Pay Types tab of CyberPay. This is synchronized with EN.
  - 3. Multiply hourly rate by 2080 to get the annual rate. This is synchronized with the "Annual Base Salary" in EN.

Note: After the employee has been created, these hourly and annual rates cannot be edited in EN. Changes in CyberPay will update EN as described above.



# **Annual Base Salary Override**

A new "Annual Base Salary" value has been added to the Employee\HR Setup tab in CPO. This will synchronize with the "Annual Base Salary" in EN. This amount is calculated using the method described above. When an employee's rate is changed in CPO, this value will update automatically and synch with EN again.

This value can be <u>overridden</u> by clicking the Edit button for the employee. If overridden, the value will no longer automatically update with pay rate changes. The override value is sent to EN and will remain the same until manually adjusted or removed. Use of this field is <u>optional</u> and <u>does not affect payroll</u>.

Users may wish to override this salary amount when the calculation's rounding causes the employee to move to a different deduction tier. Example: Employees with annual salary of \$40,000 pay rate 1 for the deduction while employees with a rate of \$40,000.08 pay rate 2. If the extra 8 cents is caused by rounding, the employer would most likely want to override the "Annual Base Salary" amount to \$40,000. Whether the value is currently "calculated" or "overridden" is noted beside the amount.

| Employee: Bingo, Brad                           |                               |  |  |  |  |  |  |
|---|-------------------------------|--|--|--|--|--|--|
| Back to List                                    |                               |  |  |  |  |  |  |
| Employee Info Employee Self Service HR Setup HI | R Info Custom Data Allocation |  |  |  |  |  |  |
|   |                               |  |  |  |  |  |  |
| HR Information                                  |                               |  |  |  |  |  |  |
| EEO Information                                 |                               |  |  |  |  |  |  |
| EEO Clas  | s Not Available               |  |  |  |  |  |  |
| EEO Job Code                                    |                               |  |  |  |  |  |  |
| EEO Sub Job Cod                                 | e                             |  |  |  |  |  |  |
| Job Classificatio                               | n Full Time                   |  |  |  |  |  |  |
| Gende   | r Male                        |  |  |  |  |  |  |
| Eligible for Pension Pla                        | n                             |  |  |  |  |  |  |
| Statuator                                       | у                             |  |  |  |  |  |  |
| Annual Base Salary 🖲                            | 56180.80 (calculated)         |  |  |  |  |  |  |

### Employee Changes

The Employee Changes tab in the CPO Employee Navigator app, tracks automatic updates to CPO caused by employee changes made in Employee Navigator. Employee demographic changes will also be emailed to the address listed in the integration setup. Note: These same changes should also be tracked in the Audit Trail. See demographic fields that will sync in the list above.

| Employee Changes Pe | Employee Changes Pending Hires Pending Terminations Discrepancy Audit Reports |                    |                  |   |  |  |  |  |
|---------------------|---|--------------------|------------------|---|--|--|--|--|
| Timestamp           | Company Name  | Employee Name      | Record Type      | Description   |  |  |  |  |
| 06/28/2017          | Employee Navigator Test 1   | 1026: Stone, Sarah | PREmployeeDeduct | "Short Term Disabilty" Was Updated<br>- EndDate changed from "2099-01-01" to "2017-06-30" |  |  |  |  |
| 06/28/2017          | Employee Navigator Test 1   | 1026: Stone, Sarah | PREmployeeDeduct | "Long Term Disability" Was Updated<br>- EndDate changed from "2099-01-01" to "2017-07-31" |  |  |  |  |
| 06/28/2017          | Employee Navigator Test 1   | 1026: Stone, Sarah | PREmployeeDeduct | "Vision Plan" Was Updated<br>- EndDate changed from "2099-01-01" to "2017-06-30"          |  |  |  |  |



## **Employee Deduction Synchronization**

The following employee deduction setup will flow from EN to CPO, but <u>not vice versa</u>. Updates made in CPO to these fields <u>will not flow back</u> to EN. Since EN is the system of record for deductions it is not recommended to make changes to them in CPO.

- Deduction Start Dates
- o Amounts
- Enrollment End Dates

Deduction changes made in EN should be logged in the Employee Changes tab in CPO. These should also be tracked in the Audit Trail.

### **Employee Terminations**

When an employee is <u>terminated in CPO</u>, the employee will automatically be terminated in EN and the termination dates will sync. When an employee is <u>terminated in EN</u>, the employee is not automatically terminated in CPO. The update to the employee's active flag and termination date in CPO is held until a user completes the termination. However, applicable deduction end date changes from EN will not be held and will synch with CPO automatically. This is done so that the employee's last payroll can be processed in CPO before termination.

1. To complete the termination for an employee in CPO, go to the "Pending Terminations" tab of the Employee Navigator application.

| Employee Changes Pending Hires Pending Terminations Discrepancy Audit Reports |              |                         |            |                         |            |                         |           |                         |                  |
|---|--------------|-------------------------|------------|-------------------------|------------|-------------------------|-----------|-------------------------|------------------|
|   |              |                         |            |                         |            |                         |           |                         |                  |
| Actions   | Company Code | $\overline{\mathbf{v}}$ | Search Key | $\overline{\mathbf{v}}$ | First Name | $\overline{\mathbf{v}}$ | Last Name | $\overline{\mathbf{v}}$ | Termination Date |
| Terminate   | ENT1         |                         | 1026       |                         | Sarah      |                         | Stone     |                         | 07/02/2017       |

- 2. Click the "Terminate" link for the employee that you wish to terminate in CPO.
- 3. The termination window will open to complete the process.

| Stone, Sarah : Terminate                                |                           |                                 | Save Cancel                          |
|---|---------------------------|---------------------------------|--------------------------------------|
|   |                           |                                 |                                      |
| Confirm Status Change                                   |                           |                                 |                                      |
| Upon termination in payroll, you will no longer be able | e to pay this employee. P | lease issue the last paycheck p | rior to termination of the employee. |
| Change the Workflow Status of Stone, Sarah to Termin    | ated ?                    |                                 |                                      |
| Termination Date  | 06/26/2017                |                                 |                                      |
| Termination Reason                                      |                           |                                 |                                      |
|   |                           |                                 |                                      |
| Rehire Eligible   | No                        | •                               |                                      |
|   |                           |                                 |                                      |
|   |                           |                                 | Save Cancel                          |



# **Nightly Demographic Pull**

As mentioned at the beginning of this document, changes that are made in CyberPay (not CPO) will not automatically flow over to Employee Navigator. Please make all demographic changes to employees in <u>CPO and not CyberPay</u>. EN will perform a nightly demographic pull from CPO. This checks the demographic fields synchronized between the two products (see list earlier in this document) for changes made to employees in CPO. This would potentially catch changes that were entered into CyberPay. However, this would not identify new employees added to CPO from CyberPay.

Note: CyberPay changes are logged in CPO's Audit Trail. EN will log updates made during this demographic update.