

Employee Navigator Integration



Everee and Employee Navigator are integrated with an automatic synchronization process. To begin the integration process for your Everee account, please contact support@everee.com.

About the integration

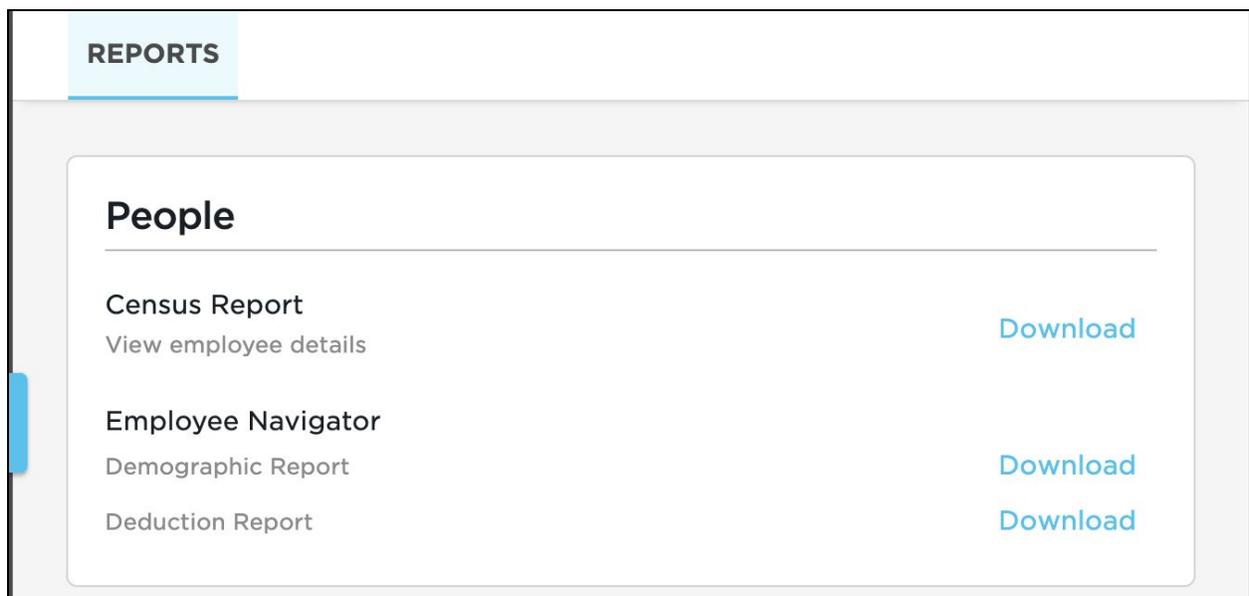
Integration with Employee Navigator allows payroll admins to manage employee HR data through both Everee and Employee Navigator, and automatically synchronizes benefits deductions from Employee Navigator into Everee.

When employee HR data changes in either system, the change is automatically synchronized to the other system. Some actions, like employee termination, can only be triggered from Everee, while other actions, like deduction amount changes for integrated benefits, can only be triggered from Employee Navigator.

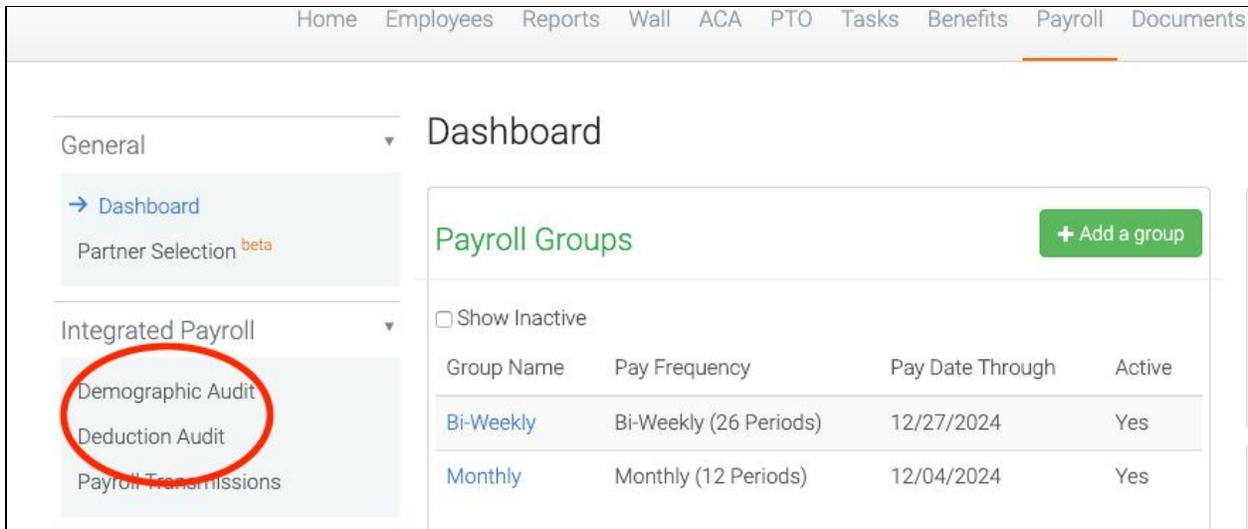
During the integration setup process, a list of integrated benefit types will be determined and configured. The Everee system will expect to receive deduction and contribution settings for those integrated benefits from Employee Navigator once the integration is active.

Synchronizing data

To begin sharing data, Everee and Employee Navigator needs an initial data sync. This is done by navigating to Reports in Everee and downloading the Employee Navigator Demographic report and Employee Navigator Deduction report.



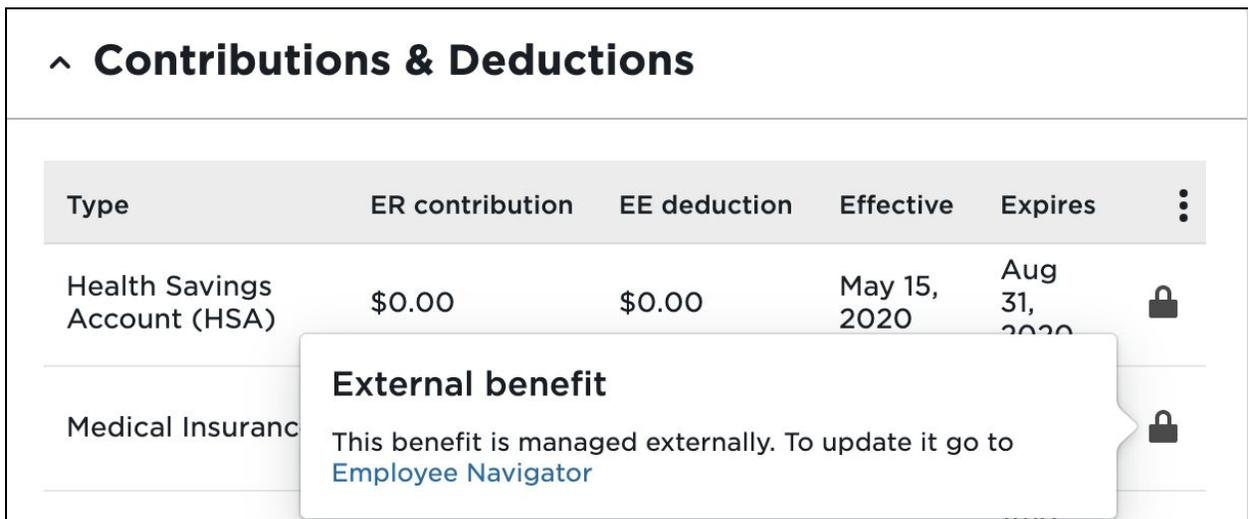
With these reports downloaded, Everee admins can head to Employee Navigator, upload the reports using the “Demographic Audit” and “Deduction Audit” links under the “Payroll” tab, and an initial data comparison will be run.



This process will display any discrepancies between the two systems that need to be validated or changed. Once the data is consistent between systems, changes that occur in one system will be automatically reflected in the other after a short delay.

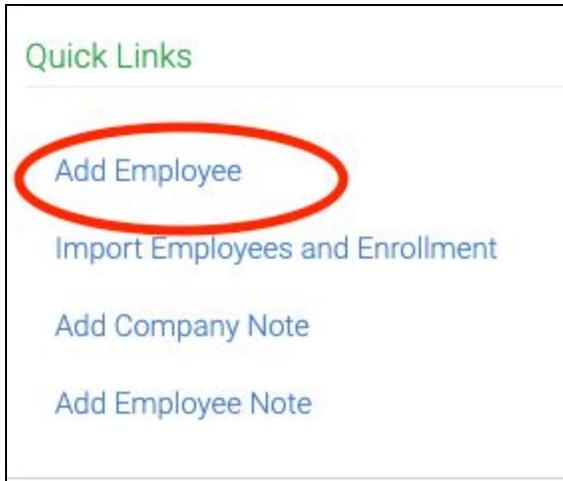
Benefit records in Everee

To see integrated benefit records in Everee, navigate to an employee’s details and expand the Contributions & Deductions section. Integrated benefit records will show a lock icon, indicating they can only be altered in the Employee Navigator system. Other benefit records can be managed directly in Everee.

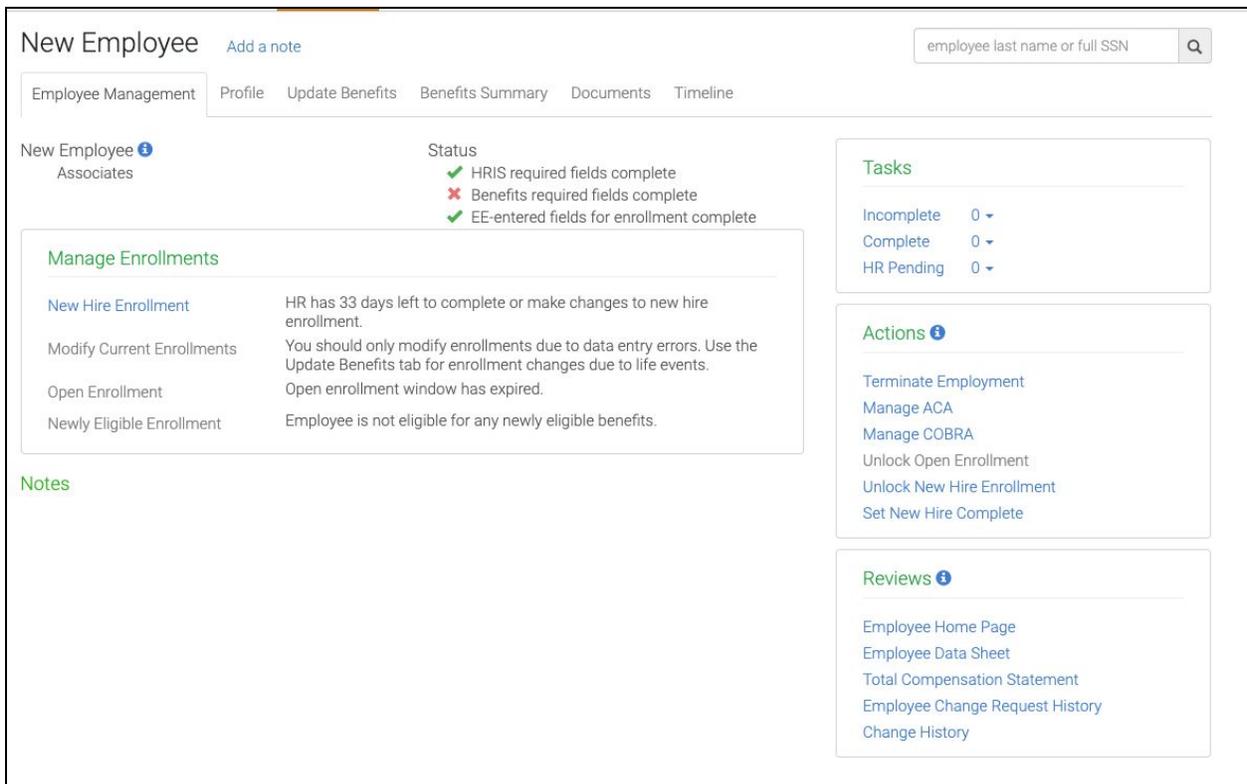


Using Employee Navigator

To onboard a new employee through Employee Navigator, use the “Add Employee” quick link and follow the instructions.



Once the employee has been onboarded, there will be a screen displaying the options for that employee including enrolling in benefits, a profile overview, a benefits summary, and more. The new employee record will also appear in Everee after a short delay, and payroll administrators can complete their payroll record at this time.



The screenshot shows the 'New Employee' dashboard. At the top, there is a search bar for 'employee last name or full SSN' and a tabbed interface with 'Employee Management' selected. Below this, the 'New Employee' status is shown as 'Associates'. A 'Status' section lists three items: 'HRIS required fields complete' (checked), 'Benefits required fields complete' (unchecked), and 'EE-entered fields for enrollment complete' (checked). The 'Manage Enrollments' section includes options for 'New Hire Enrollment', 'Modify Current Enrollments', 'Open Enrollment', and 'Newly Eligible Enrollment'. On the right, there are sections for 'Tasks' (Incomplete, Complete, HR Pending), 'Actions' (Terminate Employment, Manage ACA, Manage COBRA, etc.), and 'Reviews' (Employee Home Page, Employee Data Sheet, etc.).

The employee can also be sent a new-hire enrollment email that allows the employee to self-enroll in available benefits.

Who am I enrolling?

 Myself

Which plan do I want?

 **2019 Buy-Up Copy**

\$100.00
Cost per pay period

Effective on 06/01/20
Employee

[Compare](#) [Details](#) [Selected](#)

 **2019 Base Plan- HDHP Copy**

\$106.25
Cost per pay period

Effective on 06/01/20
Employee

[Compare](#) [Details](#) [Select](#)

Once the employee completes the enrollment process, the administrator can review their selected benefits in the “Benefits Summary” section. Any applicable pay deductions will also be automatically sent to their Everee payroll record, with deductions taking effect on the appropriate date.

Alex Anderson [Add a note](#)

Employee Management Profile Update Benefits **Benefits Summary** Documents Timeline

Benefits Summary Benefits Eligibility

[View Details](#) print

Enrolled Plans

Plan Type	Carrier	Plan Name	Coverage	Effective	Cost Per Pay	Benefit
Medical	Anthem Blue Cross Blue Shield	2019 Base Plan- HDHP Copy	Employee	09/01/2019	\$27.43	
Health Savings Account	HealthKeepers (Anthem)	2019 HSA Copy	Employee	09/01/2019	\$5	
Dental	Delta Dental-Mid Atlantic	2019 Dental Plan Copy	Employee	09/01/2019	\$8	
Life	UNUM	2019 Group Life Copy	Employee	09/01/2019	\$0	\$50,000

Total Cost Per Pay Period

\$40.43

Health Savings Account

PlanType	Estimated Per Pay	Yearly Contribution	Started	Ended
HSA Employee Contribution	\$5	\$130	09/01/2019	

In the case of a qualifying life event, the employee can visit their benefits summary and make changes under the “View Details” link. An HR administrator can also update benefit settings through the “Update Benefits” tab for the employee.

Employee Management Profile **Update Benefits** Benefits Summary Documents Timeline

Employee Coverage

Add coverage

- Employee Loss of Coverage
- Special COVID-19 Enrollment
- Divorce or Legal Separation
- Death of Spouse
- Increase in Hours
- Return from Leave of Absence
- Spouse Loses Coverage at Their Employer
- Spouse Open Enrollment

Adjust coverage

- Adjust HSA
- Adjust Daycare

Drop coverage

- HR Override after open enrollment is closed
- Employee Eligible for Medicare
- Employee Married and Changes to Spouse's Plan
- Leave of Absence
- Military Leave (COBRA)
- No Longer Eligible for Benefits (COBRA)
- Reduction in Hours (COBRA)
- Spouse Gains Coverage at Their Employer
- Spouse Open Enrollment

End coverage

- Drop HSA
- Drop Daycare

Dependent Coverage

Add a family member

- Special COVID-19 Enrollment
- Marriage
- Newborn Child
- Adopt a Child
- Dependent Begins or Returns to College
- Court Ordered Dependent Coverage
- Dependent Loss of Coverage
- Temporary Legal Guardianship Begins

Drop a family member

- Unauthorized Employee Change
- Divorce or Legal Separation (COBRA)
- Death of a Dependent
- Drop Coverage for Child Leaving College (COBRA)
- Court Ordered Dependent Coverage
- Dependent Eligible for Other Coverage
- Dependent Eligible for Medicare
- Temporary Legal Guardianship Ends
- Drop Coverage When Dependent Over Eligible Age (COBRA)

When an employee is terminated, their benefit coverage can be scheduled for removal, and a transfer to a third-party COBRA administrator will be initiated automatically upon loss of coverage. Employee Navigator supports over 50 COBRA TPAs. [The current list of TPAs can be found here.](#)

Exchanged data fields

Bidirectional	Everee to Employee Navigator only	Employee Navigator to Everee only
First name	SSN	Enrolled benefit types
Middle name	Compensation basis	EE benefit deduction amounts
Last name	Annual salary	ER benefit contribution amounts <i>(Navigator is currently developing this functionality)</i>
Date of birth	Base hourly rate	Benefit effective dates
Hire date	Hours worked per week	Benefit expiry dates
Home address	Team	
Email	Termination date	
Phone		