UKG Workforce Ready Integrated Payroll Configuration Guide By Kronect Integrations

Version 1.9

Key
UKG - Ultimate Kronos Group
WFR - Workforce Ready
EN - Employee Navigator
API - Application Programming Interface

Version	Change	Date
1.2	Added retrieval of Demographic and Deduction discrepancy reports from Kronos through Kronect Dashboard.	4/14/2019
1.3	Removed Address 3 and Statutory Class fields from data exchange. No longer necessary to include Address 3 and Statutory Class in Demographic Discrepancy Audit reports or map field upon import to Employee Navigator.	7/3/2019
1.3	Added *Is Current* column to Kronos API_COMPENSATION_HISTORY report	7/3/2019
1.3	Added *Active* field to Kronos API_DEDUCTIONS report	7/3/2019
1.3	Added *Primary Email* to Kronos API User account	7/3/2019
1.3	Added Kronos API_DEDUCTION_CODES Kronos report	7/3/2019
1.4	Added clarification of Kronos Security Profile for API User	7/24/2019
1.5	Added instructions for Broker selection of integrated payroll in the client's Employee Navigator account.	8/21/2019
1.5	Added Single Platform Demographic Update option to only update demographic data in Kronos WFR or Employee Navigator	8/21/2019
1.5	Added Exclude Employee Type option to exclude a Kronos WFR Employee Type from transmitting data to Employee Navigator	8/21/2019
1.6	Add *Begin Date* column to API_DEDUCTIONS Kronos report.	1/9/2020
	API User Manager access for Kronos clients utilizing Groups.	1/9/2020
	Add *Date Re-Hired* column to API_CENSUS Kronos report	1/9/2020
	Added additional Multi-EIN settings configuration in Kronect	1/9/2020

1.9	**Added Open Enrollment dates, Benefit Plan Functionality, Transaction ID Functionality, Switch to transmit bulk transmissions, OE date/Plan Year data storage, Administration Notes, Client Notes**	**8/1/2021**

Overview

UKG Workforce Ready is an extremely configurable payroll platform and can have many different variations. This guide will walk you through the Setup & Configuration of the ***UKG Workforce Ready/Employee Navigator Integrated Payroll Solution by Kronect Integrations***. Use this guide in conjunction with the **Employee Navigator Integrated Payroll Bureau Guide**.

Follow this guide after your bureau's account has been created with Kronect Integrations.

Please read this entire guide before you begin integrating a client.

Getting Started

Be sure to address the following items before completing setup:

The Broker or Client must login to **Employee Navigator** and perform the following steps: At the top of the dashboard click on Payroll>Partner Selection>Add a service+ >Kronect Integrations LLC: Kronos **Workforce Ready** by Kronect

Employee Navigator requires compensation based on pay type. Verify salaried and hourly employees have a rate populated according to their pay type.

If you plan on exchanging Default Job (**UKG**) to Job Title (**EN**) you must first Sync Kronos Jobs in the Kronect Dashboard.

If you plan on exchanging Employee Type (**UKG**) to Full Time (**EN**) you must set up Employee Type in Payroll.

Data Flow

All new hires, terminations and rehires must be performed in Payroll. Additionally, all compensation changes must also be performed in Payroll. The employee record will then be updated in **Employee Navigator** accordingly. The table below shows the mapped fields from each system and their respective data flow. Most demographic fields are bi-directional meaning those fields are exchanged in each system. The fields labeled **EN** to **UKG** or **UKG** to **EN**, only flow in that direction. The Kronect system also allows for the ability to skip/override additional fields on a per-client basis.

UKG WORKFORCE READY FIELD	EMPLOYEE NAVIGATOR FIELD	EXCHANGE
External Id	EmployeeID	EN to Kronos only
Account Id	Payroll ID	Bi-Directional
Badge	TimeClockID	Bi-Directional
SS#	SSN	UKG to EN only
First Name	First Name	Bi-Directional
MI	Middle Name	Bi-Directional
Last Name	Last Name	Bi-Directional
Suffix	Suffix	Bi-Directional
Address 1	Address 1	Bi-Directional
Address 2	Address 2	Bi-Directional
City	City	Bi-Directional
State	State	Bi-Directional
Zip Code	ZIP	Bi-Directional
Country	Country	Bi-Directional
Cell/Home/Work Phone	Phone	Bi-Directional
Date: Birthday	Date of Birth	Bi-Directional
Email	Email	Bi-Directional
Gender	Gender	Bi-Directional
Employee Type	FullTime	Bi-Directional
Is Seasonal	Is Seasonal Employee	Bi-Directional
Default Jobs: Name	Job Title	Bi-Directional
Date: Hired	Hire Date	UKG to EN only
Date: Terminated	Termination Date	UKG to EN only
Citizenship	U.S. Citizen	Bi-Directional
Compensation History-Salary	Annual Base Salary	UKG to EN only
Compensation History-Period	Compensation Basis	UKG to EN only
Compensation History-Hourly	Hourly Rate	UKG to EN only
Compensation History-Effective From	Salary Effective Date	UKG to EN only

Deduction data is owned by Employee Navigator and is only transmitted from EN to Kronos. A change in a deduction in Kronos WILL NOT transmit to EN, however if you need to make a temporary change to a deduction in Kronos this can be done with no effect on EN elections.

Kronect Client Documentation

Thank you for choosing to integrate with Kronect Integrations! In this guide you can find an outline of prefatory information, set up requirements to create an **API** User, as well as a brief description of this integration process between Employee Navigator and **UKG WFR**. Do not hesitate to contact support@kronect.com if you have any questions. We are looking forward to integrating with you!

Prefatory Information

This integration allows you to share specific employee demographic and recurring deduction data from **Employee Navigator** to the **UKG Workforce Ready** (**WFR**) platform, and **UKG** will share employee demographics with the **Employee Navigator** platform. Any transmission sent from **Employee Navigator** to **UKG** can be seen in the corresponding system within a few seconds, while transmissions from **UKG** to **Employee Navigator** can take anywhere from a few minutes to an hour and a half (due to the way the **UKG API** is set up, please contact support@kronect.com for additional information on this).

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

Benefit Modules in UKG

Benefit Modules in **UKG** must be suspended for any benefit types the group will be exchanging deductions for within the integration.

Unsupported benefit deductions

Currently, **Employee Navigator** does not support the following deductions to be synced with Payroll. Any changes or terminations to the deductions must be **manually managed** within the Payroll system:

Be sure to address the following items before completing setup:

• 401(k) plans • Universal Plan types within **Employee Navigator** • Commuter Benefits

New Hires added to Payroll once the group is Live

When a new hire is entered into the Payroll system (**UKG WFR**), the process for finding and completing them is as follows:

• New Hire is entered into Payroll and feeds over to **Employee Navigator**.
• From the group's Homepage in **EN**, click 'Employee Missing HR Required Fields' within the Status section and find the newly hired employee.
• Click "Re-Start Hire" and add the employee's **Payroll Group** and Class.
    o **PayrollGroup** and **Class** fields are **not** being exchanged within the integration
• Send out the Welcome Email if the specific employee is eligible to enroll in benefits.

Compensation Requirements

All compensation values must be configured in the Payroll system, as it will overwrite **EN** values since the **API**'s direction of exchange for compensation is one-way, from Payroll to **EN** only.

Benefit Deduction Start Dates

Currently **Employee Navigator** uses the effective date of the benefit as the start date of the deduction in payroll. This date will transmit from **Employee Navigator** into Payroll. Any update would have to be manual in Payroll.

Deduction Codes

• Deduction codes must be separate per Benefit Type and Benefit Plan in order for **Employee Navigator** (**EN**) to transmit the separate per pay amounts for each.

o Here are a couple examples: FSA and Limited Purpose FSA plan(s) must have unique deduction codes (i.e. FSA, LPFSA) or if two medical plans offered must have unique deduction codes (i.e. MED1, MED2)

o You can not use the same code for both benefit types or benefit plans.

o **Employee Navigator** requires compensation based on **Pay Type (Hourly or Salary)**.

o **EN** allows for only one HSA deduction code.

o Deduction codes must match exactly in both **EN & UKG WFR** systems.They are case sensitive and space sensitive. Be sure that there are no leading or trailing spaces within the deduction code in **BOTH WFR** and **EN**.

Discovery Questionnaire

Once the **Employee Navigator** request for integration has been initiated, we create a company profile within Kronect, as well as user profile's for any HR representative's, broker's or client's that are involved (an email will be sent to set up a password for your user account). Our Discoery Questionnaire will be sent to the contact who initiated the integration request. This questionnaire will need to be completely filled out and sent back to proceed with the integration. If there is any missing information, an email will be sent to all contacts provided for the company to obtain this information. Once this is complete, an App Invite email will be sent to all contacts involved, including the client, any HR representatives, broker, Kronect support and **Employee Navigator** support.

API User Setup

The creation of the **API** User is the first step that allows our platform to transmit the necessary data for this integration. Below we have provided the steps and security requirements for this user that are necessary to move forward with the integration.

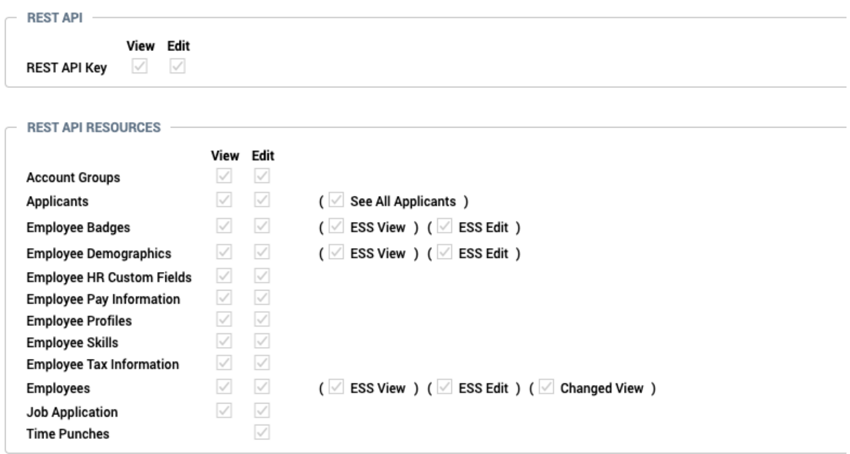
Where to start

The creation of the **API** User is just like hiring a new employee. In **WFR**, navigate to **My Team**> **Employee Information**> **Hire**.

- First Name: **API**
- Last Name: **User**
- Username: **apiuser**
- Password: **Kronect** + **Today's Date** + **!**
    - Example: **Kronect05172020!**
- This user needs to be **unlocked**
- Social Security: 999-99-9999 or one of your choosing
- Primary Email: support@kronect.com
- Any state/employee type/hire dates can be of your choosing

Add Security Profile to API User

The Security Profile assigned to the **API User** account must be ***System Administrator*** or the equivalent. Click on the **three-bar menu** in the top left corner, then click on the **gear symbol**, go to **Company Settings**>**Profiles/Policies**>**Security**. The **API** User needs the ability to see all employees, managers and groups as well as modify (edit) their accounts. The Security Profile must also have the following boxes checked:



REST API

	View	Edit
REST API Key	✓	✓

REST API RESOURCES

	View	Edit	
Account Groups	✓	✓	
Applicants	✓	✓	(✓ See All Applicants)
Employee Badges	✓	✓	(✓ ESS View) (✓ ESS Edit)
Employee Demographics	✓	✓	(✓ ESS View) (✓ ESS Edit)
Employee HR Custom Fields	✓	✓	
Employee Pay Information	✓	✓	
Employee Profiles	✓	✓	
Employee Skills	✓	✓	
Employee Tax Information	✓	✓	
Employees	✓	✓	(✓ ESS View) (✓ ESS Edit) (✓ Changed View)
Job Application	✓	✓	
Time Punches		✓	

If the client is utilizing Groups in the Kronos, you must provide the **API** User Manager Group Access. To do this, Click on the **three-bar menu**, then click on the **gear symbol**, go **Company Settings>*Global Setup>Groups>Manager Group Access.*** Add the **API** User to the group profile that has access to all company EE's or equivalent.

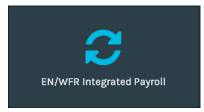
The **API** User security access can **NOT** be adjusted once the integration is Live. If security access is limited,

Multi-EIN

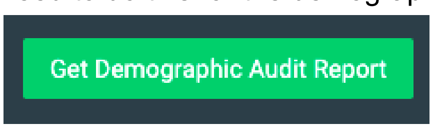
If the company being integrated is a **Multi-EIN**, the set up of **subscriber groups** in **Employee Navigator** is mandatory for this integration. A request from each subscriber group will need to be submitted from **Employee Navigator**.

Pulling Reports

Once the API User access has been verified, we go into Payroll and create a demographic, deduction and deduction code report. These reports are used during the auditing process to audit the data in Payroll to the data in Employee Navigator. Each client has the option to make an Employee Navigator user account for us so we can pull these reports from our system for you, or, you can follow the steps below to pull these reports yourself and import them into Employee Navigator.

1. Log in to your Kronect account
2. In the **Dashboard**, find and click on the client name you are pulling reports for
3. Click on the **EN/WFR Integrated Payroll** box 

4. This will take you to the Default Settings page. Towards the **top right** of this page, across from Edit Client, find and click on the **three-dot menu** 
5. In this menu, click on **Reports** 

6. On this page you will see 2 columns, the left column titled Map Kronos System Reports and the right titled **Discrepancy Audit Reports**. To pull the reports, you will **only** need the right column. Each report has their own green box, for example, the Demographic report box is titled “Get Demographic Audit Report”. **Click on the highlighted box**, wait a few seconds and the report automatically generates in your computer. Once this is generated, you can download this report to then import into Employee Navigator. You will need to do this for the demographic, deduction and deduction code report.


7. **Multi-EIN Only:** If your group is a Multi-EIN, your reports will look a little different. Instead of the highlighted green box, you will see a drop down box that is titled **“Select EIN”.** Click this drop down and select the EIN you are pulling these reports for, wait a few seconds and the report will automatically generate on your computer. Each EIN has their own demographic, deduction and deduction code report that will need to be imported into Employee Navigator.


Integration Fees

Integration Setup & Configuration and recurring Per Employee Per Month (PEPM) fees will apply as Kronect Integrations LLC is a third party software developer. Please contact support@kronect.com for further information.

What happens next?

Once our support team has access to the **API** User and the security credentials have been verified, our team starts to create three reports in the payroll system, a census report, deduction report and deduction code report. Our team will reach out to you to verify any demographic/deduction settings that may apply. These reports are then synced into Kronect, and are pulled into **Employee Navigator** by their support specialist. We will then reach out to this assigned specialist to initiate the auditing call to audit any demographic, deduction and deduction code discrepancies. Once these discrepancies have been resolved, the group can go Live. Going Live means that demographic information will automatically transmit between both systems (unless a single platform demographic update is chosen) and deductions will flow from **Employee Navigator** to Payroll.

Congratulations!
You have completed the steps of integration between UKG Workforce Ready and Employee Navigator!