Employee Navigator Users Guide

Getting Started

This Employee Navigator User Manual contains essential information for Client's ("Client" "You" "Your") successful use of its subscription to the Employee Navigator ("EE Nav") services.

Before going "live" in the EE Nav portal, Client is required to complete the following tasks:

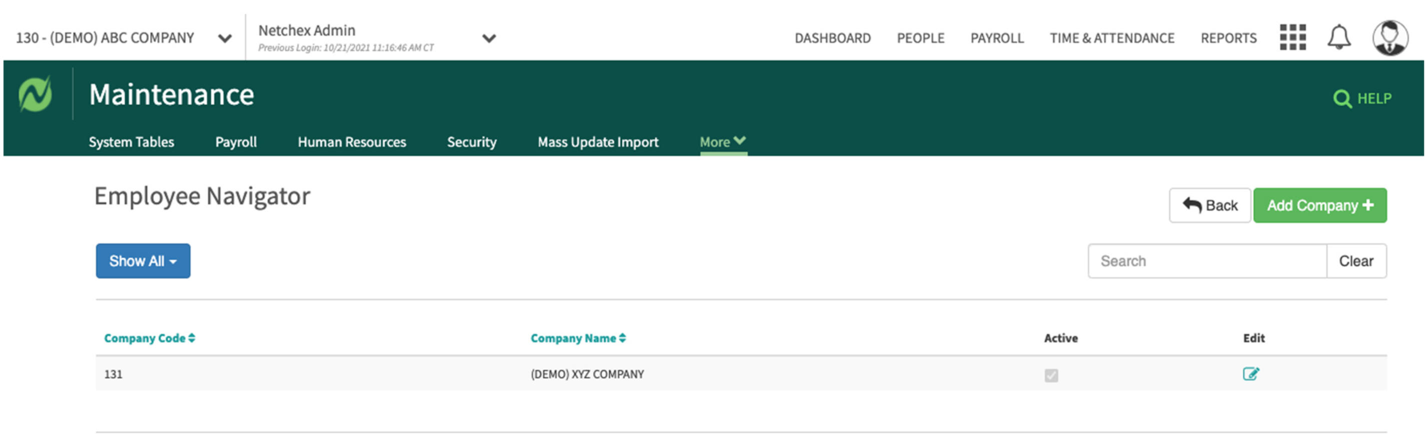
- **Run two (2) completed payroll cycles with Netchex** prior to beginning the required set up checklist provided by EE Nav
- **Obtain and provide EE Nav with Your Broker's approval** to integrate the EE Nav platform with Netchex
- Fulfilled all integration tasks provided to Client by EE Nav **at least thirty (30) days prior to the first day of Client's Open Enrollment Period**

Other data entry details:

- **Compensation – NOTE: Employee Navigator requires compensation based on pay type**
  - Verify salary employees have an annual salary amount populated in the pay rate screen.
  - Verify hourly employees have a base rate populated in the pay rate screen. ·
- **City/State/Zip fields** - Netchex validates City/State/Zip fields. Be sure to keep this in mind when going through the demographic discrepancy audit. Netchex will not accept a zip code that is invalid for a city/state combination.

If you need assistance with how to update/change data in Netchex please reach out to your dedicated Team Lead or Implementation Lead.

Understanding "The Flow" of Your Data



All new hires, rehires, compensation changes and terminations must be initiated in Netchex and will then be synchronized to Employee Navigator. The chart below highlights the fields currently being exchanged and in which direction(s) between each platform.

Deduction Data

All deduction information including amounts, effective dates, change dates and end dates will always be sent from Employee Navigator to Payroll. Temporary changes for deductions can and should be made in payroll. See Exception Processing below for further assistance.

NOTE: Fields cannot be customized

Netchex Field Name	Employee Navigator Field Name	Direction of Exchange
Employee Id	Payroll Id	Payroll to EN only
SSN	SSN	Payroll to EN only
First Name	First Name	Bi-directional
Middle Name	Middle Name	Bi-directional
Last Name	Last Name	Bi-directional
Address 1	Address 1	Bi-directional
Address 2	Address 2	Bi-directional (note: this field can be "blanked out"in the payroll system when data is transmitted FROM Employee Navigator to Netchex)
City	City	Bi-directional
State	State	Bi-directional
Zip	Zip	Bi-directional
Personal Email	Personal Email	Bi-directional
Home Phone	Home Phone	Bi-directional
Birthdate	DOB	Payroll to EN only
Work Email	Work Email	Bi-directional
Hire Date or Rehire (most recent hire date is exchanged)	Hire Date	Payroll to EN only
Termination Date	Termination Date	Payroll to EN only
Last Pay Change Date	Salary effective date	Payroll to EN only
Pay Type	Pay basis	Payroll to EN only
Annual salary	Annual base salary	Payroll to EN only
Base Rate	Hourly Rate	Payroll to EN only

Exception Processing

There will be instances when you may need to make an adjustment to an employee because they were over withheld or under withheld in payroll for a benefit deduction. The Payroll Batch Override is used to enter these one-time adjustments. Follow normal procedures to start your payroll batch, then:

1. Enter your Payroll batch and click on employee where you need to make the one- time adjustment
2. Under the Line Items section, add an entry for the respective benefit code with the one-time adjustment (use a negative for correction of over withholding) in the Amount field.
3. View check details to ensure desired amount matches the employee's check.

If you need assistance with how to run a payroll batch override, please reach out to your dedicated **Team Lead or Implementation Lead.**

Required Discrepancy Reports

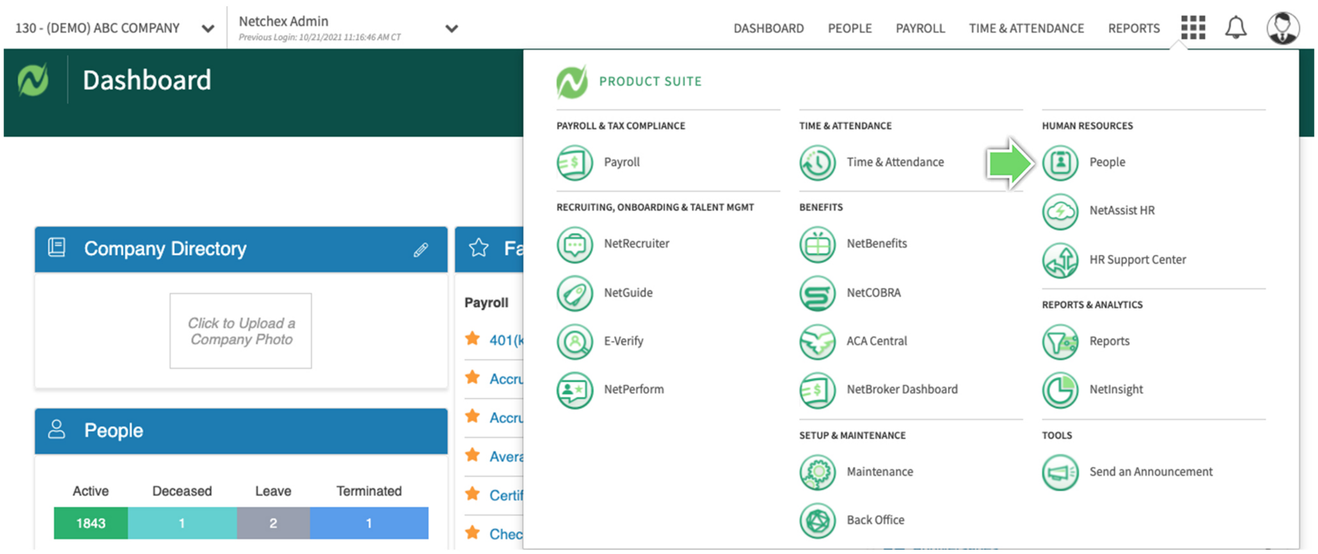
Before starting the discrepancy process, you and your broker partner MUST ensure you have completed all of the required setup needed within Employee Navigator.

The next step is to confirm that your employee demographics and deductions match between both systems. Employee Navigator has developed a tool that allows you to compare specific values between both systems and if there is a discrepancy, choose which value is correct and automatically update the incorrect system accordingly.

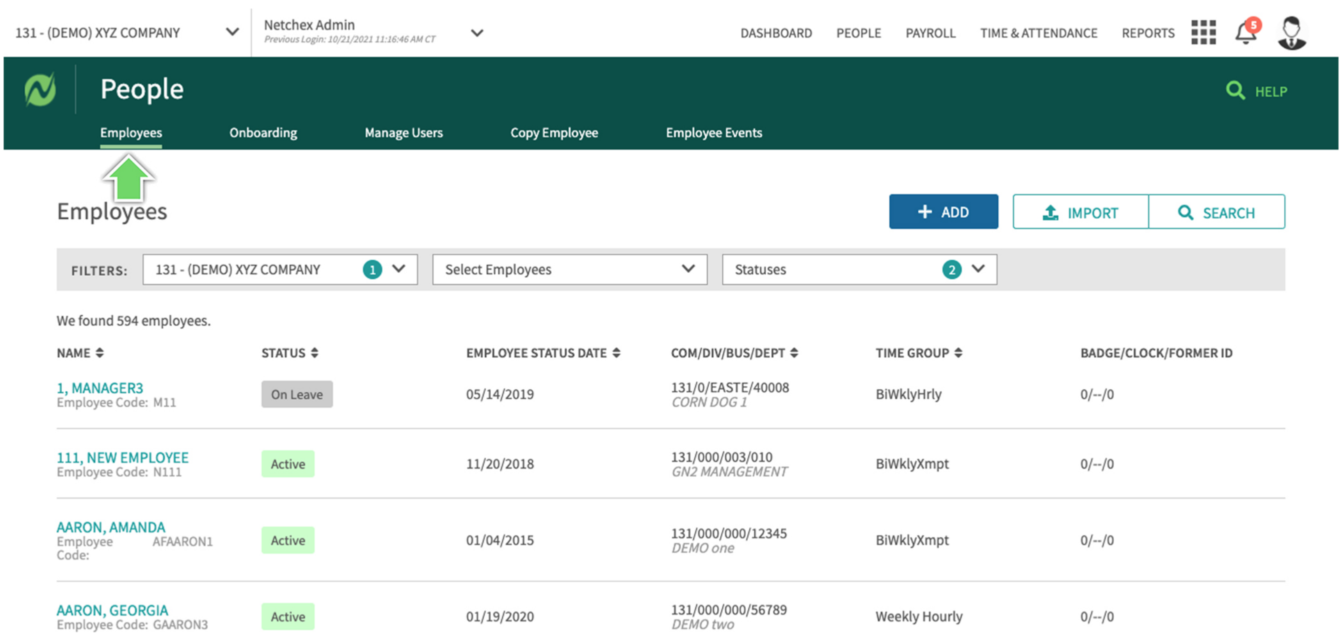
The audit and synchronization process occurs in two steps: The Employee Discrepancy Audit (demographics) and the Deduction Discrepancy Audit (deductions). To complete these steps, you will need to run and download each of the following reports in Netchex.

Once you have reviewed the above and completed the required setup needed within Employee Navigator your next step will be to obtain the reports you will need to load into Employee Navigator.

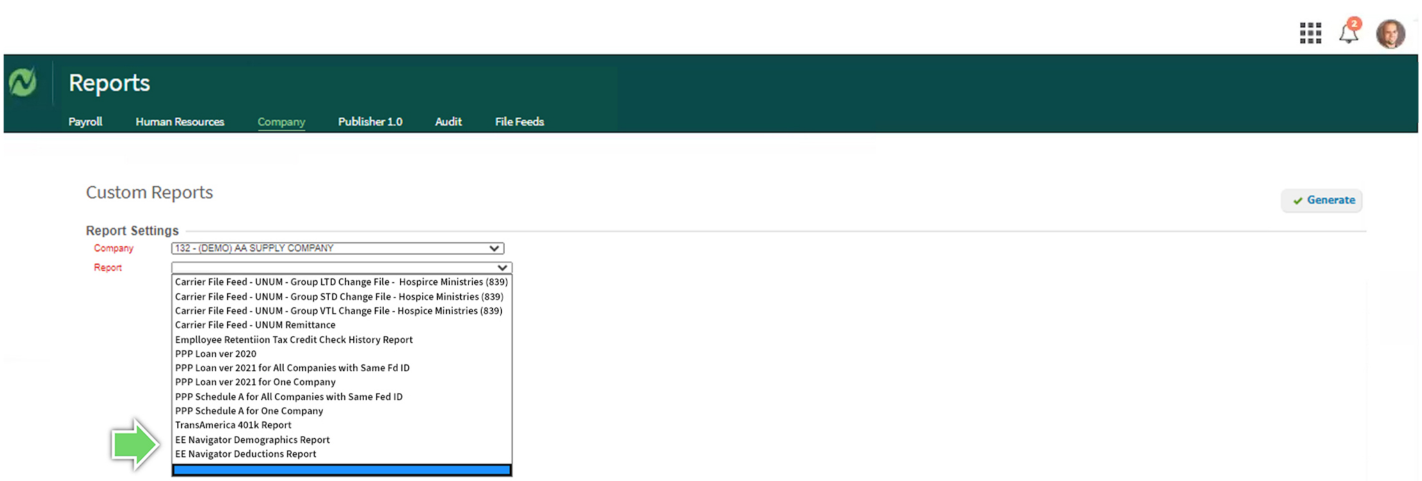
NETCHEX®



130 - (DEMO) ABC COMPANY
Netchex Admin
Previous Login: 10/21/2021 11:16:46 AM CT
DASHBOARD
PEOPLE
PAYROLL
TIME & ATTENDANCE
REPORTS
Dashboard
PRODUCT SUITE
PAYROLL & TAX COMPLIANCE
Payroll
RECRUITING, ONBOARDING & TALENT MGMT
NetRecruiter
NetGuide
E-Verify
NetPerform
TIME & ATTENDANCE
Time & Attendance
BENEFITS
NetBenefits
NetCOBRA
ACA Central
NetBroker Dashboard
SETUP & MAINTENANCE
Maintenance
Back Office
HUMAN RESOURCES
People
NetAssist HR
HR Support Center
REPORTS & ANALYTICS
Reports
NetInsight
TOOLS
Send an Announcement
Company Directory
Click to Upload a Company Photo
People
Active
Deceased
Leave
Terminated
1843
1
2
1
Payroll



131 - (DEMO) XYZ COMPANY
Netchex Admin
Previous Login: 10/21/2021 11:16:46 AM CT
DASHBOARD
PEOPLE
PAYROLL
TIME & ATTENDANCE
REPORTS
People
HELP
Employees
Onboarding
Manage Users
Copy Employee
Employee Events
Employees
ADD
IMPORT
SEARCH
FILTERS:
131 - (DEMO) XYZ COMPANY
Select Employees
Statuses
We found 594 employees.
NAME
STATUS
EMPLOYEE STATUS DATE
COM/DIV/BUS/DEPT
TIME GROUP
BADGE/CLOCK/FORMER ID
1, MANAGER3
Employee Code: M11
On Leave
05/14/2019
131/0/EASTE/40008
CORN DOG 1
BiWklyHrly
0/--/0
111, NEW EMPLOYEE
Employee Code: N111
Active
11/20/2018
131/000/003/010
GN2 MANAGEMENT
BiWklyXmpt
0/--/0
AARON, AMANDA
Employee Code: AFAARON1
Active
01/04/2015
131/000/000/12345
DEMO one
BiWklyXmpt
0/--/0
AARON, GEORGIA
Employee Code: GAARON3
Active
01/19/2020
131/000/000/56789
DEMO two
Weekly Hourly
0/--/0



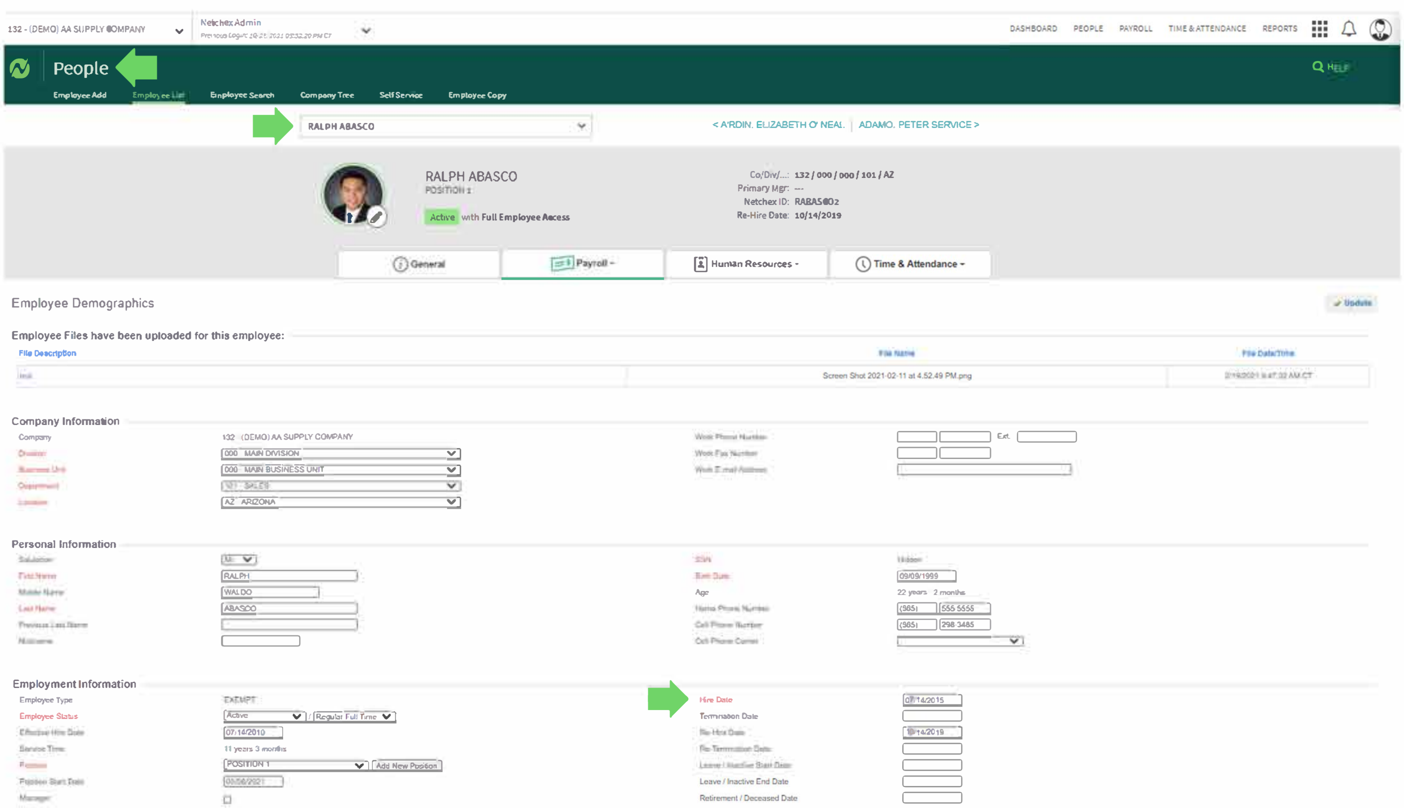
Reports
Payroll
Human Resources
Company
Publisher 1.0
Audit
File Feeds
Custom Reports
Generate
Report Settings
Company
132 - (DEMO) AA SUPPLY COMPANY
Report
Carrier File Feed - UNUM - Group LTD Change File - Hospirce Ministries (839)
Carrier File Feed - UNUM - Group STD Change File - Hospice Ministries (839)
Carrier File Feed - UNUM - Group VTL Change File - Hospice Ministries (839)
Carrier File Feed - UNUM Remittance
Emplloyee Retentiion Tax Credit Check History Report
PPP Loan ver 2020
PPP Loan ver 2021 for All Companies with Same Fd ID
PPP Loan ver 2021 for One Company
PPP Schedule A for All Companies with Same Fed ID
PPP Schedule A for One Company
TransAmerica 401k Report
EE Navigator Demographics Report
EE Navigator Deductions Report

Employee Navigator Discrepancy Process
(Refer to EN User Guide)

After you have run, downloaded and saved your reports, you are ready to load your data into Employee Navigator to start the discrepancy process. Please refer to the detailed instructions within the EN User Guide on how to complete these important steps. Once you have thoroughly completed both the demographic and deduction synchronization tasks notify Employee Navigator at **payroll@employeenavigator.com**. Your EN support specialist will notify us that you are ready to “go live”. We will confirm via email that we have enabled the API and notifications for moving forward. This step will fully enable your integration and live data will start to sync between both systems.

Updating Hire Dates

If you have identified incorrect hire dates in Netchex during the discrepancy process, you can update the original hire date by simply clicking on the incorrect date and changing it. To do this in Netchex, navigate to:



Pre-Process Register

Always run the **pre-process register** prior to payroll to ensure your deductions are accurate.

Additional Assistance

Email us at **ENSupport@netchexonline.com** or contact your dedicated account manager.

For Employee Navigator specific questions please contact your **Broker Partner**.