



Payroll Integration User's Guide - Abbreviated Version

This guide includes general instructions for the use of Employee Navigator's Payroll Integration product both for the client and for our partners. It is intended for use in conjunction with the Payroll provider-specific Appendix to this document. Both documents should be carefully reviewed.



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Abbreviated Client User Guide

Section 1 – Prefatory Information

Employee Navigator's payroll Integration allows you to share specific employee demographic and recurring deduction data with your payroll system and will allow your payroll system to share employee demographics with Employee Navigator, all in real-time.

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

- **Unsupported benefit deductions**

Currently, we do not support the following deductions to be synced with Payroll, and their Transmission Options must be set to 'Never Send'. Any changes or terminations to the deductions must be **manually managed** within the Payroll system:

- Recurring Earnings/Employer Contributions
- 401(k) plans
- Universal Plan types within Employee Navigator
- Commuter, Transit or Parking Benefits

- **New Hires who are added to Payroll once the group is Live**

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

1. New Hire is entered into Payroll and feeds over to Employee Navigator.
2. From the group's Homepage in EN, click 'Complete employees missing HR required fields' and find the newly hired employee.
3. Click 'Complete Hire' and add the employee's Payroll Group and Class.
 - Payroll Group and Class fields are not being exchanged within the integration*
4. Send out the Welcome Email if the specific employee is eligible to enroll in benefits.

- **Deduction Codes**

- Deduction codes must be unique per each Benefit Type in order for Employee Navigator to transmit the separate per pay amounts for each plan.
 - Third-Party plans must have their own unique deduction codes. For example, a Colonial Accident and Colonial Cancer plan must each have their own unique code.
 - FSA and Limited Purpose FSA plan(s) must have unique deduction codes. You cannot use the same code for both benefit types.
- Be sure that deduction codes are added in both the **pre and post-tax deduction code sections** for each 3rd Party app plan.

*Refer to Payroll tab → Integrated Fields to view which demographic fields are being exchanged for the integration. Your Payroll User Guide should have the corresponding field names that are being exchanged between Employee Navigator and Payroll as well.



1.1 Setup Checklist Overview

The checklist below, in order, summarizes items that need to be completed before the API can be switched from Audit Mode to 'On'. Please utilize it as a reference as you begin to follow the corresponding steps covered in the guide on pages 4 through 10.

Part One *(Average completion rate = < 1 day)*

- ☐ Set-up payroll group(s) in EN
 - ☐ Confirm all employees are assigned to their appropriate payroll group
- ☐ Set-up payroll calendar in EN for each payroll group
 - ☐ Pay dates must *exactly* match pay dates in Payroll System
- ☐ Add payroll deduction codes into EN. Be sure to address any codes in Payroll that:
 - ☐ Have multiple benefit plan types consolidated into one code, such as using one deduction code for Medical, Dental and Vision. These must be split out.
- ☐ Mark 'payroll group' as required in Settings → HRIS Field Tracking → Profile
- ☐ Download the required Demographic and Deduction reports from the Payroll system per your [Vendor's Appendix](#) and import them into EN.

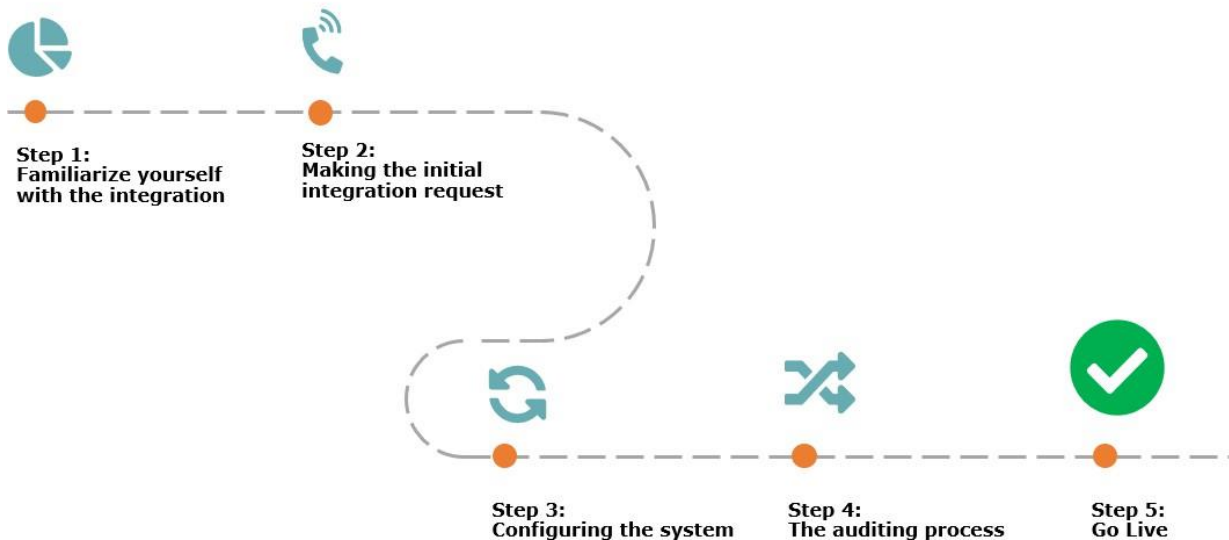
Part Two *(Average completion rate = <5 days)**

- ☐ HR and Broker reach out to EN to schedule your initial review call to walk through the Audit process together with your EN Analyst.
- ☐ HR resolves discrepancies through the Demographic Audit.
- ☐ HR **and** Broker resolve discrepancies through the Deduction Audit.
- ☐ EN contacts Payroll Provider to change API status from 'Audit Mode' to 'Live'.

*This number is based on the average group's completion rate using a sample size of 5000 integrations. Resolving all discrepancies within a 5 business day-or-less timeframe will prevent you from having to re-audit the information based on changes HR is making in the meantime.

What can I expect this process to look like and what is the purpose?

Integrated Payroll: Life Cycle Timeline



The purpose of the Audit process for your integration is three-fold:

- 1) To connect all employees with their appropriate Payroll IDs.
 - a. These IDs allow us to know exactly who to exchange data for in real-time.

Integrations

Partner	Group	Identifier	Status	Demographics	Deductions	Primary	
Vendor name	All Employees	1559	Active	✓	✓	✓	Manage

- 2) To map your deduction codes:
 - a. These are the “keys” to payroll that allow EN to insert deductions automatically.
- 3) To ensure that both systems have matching demographic and deduction data for the fields and plan types that we exchange.
 - a. This will let us know that when your group is turned “Live”, both systems are starting from a fresh slate. Future changes will constantly keep the systems in sync.

1.2 Frequently Asked Questions

Integration status

Q: How do I know if my integration has been turned Live?

A: Your Payroll tab in EN will no longer display the yellow signal it did while you were in audit mode.



Demographic audit

Q: When should I use Annual Benefit salary?

A: This field should only be used when a value *other than* the employee's salary amount from Payroll needs to be used for salary-based benefit calculations.

Examples may be: Commissioned employees with no salary value in payroll at all, or key employees who receive a salary + bonus, and the bonus value needs to be used for benefits calculations as well.

Q: Do I need to sync my terminated employee's?

A: You do not "need" to. We mainly want to ensure your Active employees have matching data: however, if you prefer to sync your terminated employees, it will not affect the integration if you decide to do so. **Do not** block your terminated employees.

Deduction audit

Q: I have employees who must receive post-tax deductions, how do I configure this?

A:

1. If they are not 2% shareholders: Create a new payroll group with the same frequency → Add the post-tax deduction codes to this group and any other pre-tax deductions for plans that must be withheld pre-tax for all → Adjust each applicable employee's payroll group to the new one.
2. If they are 2% shareholders: Go to their Profile → Employment → Statutory Class → Choose '2% Shareholder' and Save. This will allow EN to apply only the post-tax deduction codes you've mapped into your payroll group(s) for this employee.

Q: How can I filter the deduction audit to remove codes that we are not exchanging?

A: You can click the drop-down option for Payroll code within the Deduction Audit

Employee (Payroll ID)	EN Deduction Code	Payroll Deduction Code	EN Deduction Amount	EN Deduction Effective Date	Payroll Deduction Amount	Payroll Deduction Effective Date	Status
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Ongoing Management

Q: I am a multi-EIN company; how do I properly transfer an employee in payroll and avoid having them terminate in EN?

A: Follow the exact instructions in our [Transferring between subscriber groups](#) article.