Post-integration guide for HR & Brokers

This guide includes general instructions for the use of Employee Navigator's Payroll Integration product once a company has gone Live on the payroll API to begin exchanging demographic and deduction data in real-time.

Contents

Resources for you:

1. Employee Navigator's knowledge base for all support content: Click here
2. **Multi-EIN companies only:** How to transfer employees between Company IDs: Click here
3. How to handle severance or final payout of employees: Click here
4. How to manage Qualified Life Events within the integration: Click here
5. How to handle Open Enrollment with Integrated Payroll: Click here

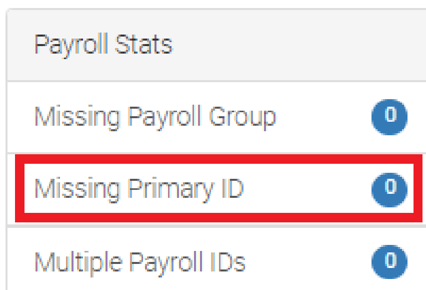
You're Live! What now?

Congratulations! You've completed the integration setup process and are now exchanging changes between Employee Navigator and your payroll provider in real-time. You're probably thinking, *"This is great news… but what am I supposed to be paying attention to, so I feel confident that this is working correctly?"*

Below are the areas we strongly advise checking or reviewing on a set cadence:

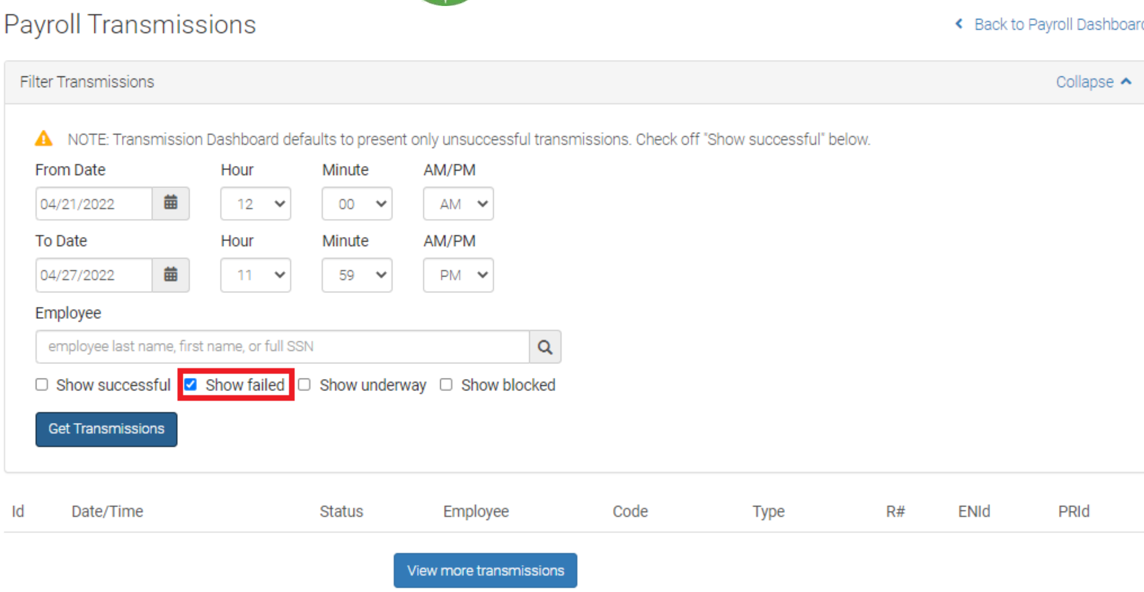
1. **Your Payroll Stats → Missing Primary ID section**

- ***What this is:*** This stat will show you any employee records that are not connected within the integration
- ***Why it's important:*** Its value should equal zero, or, have a valid reason for an employee not being connected – such as a retiree who is not paid out of payroll or an employee you've decided to block from the integration. Any employee record missing a primary ID will not have most demographic or any deduction data exchanged.



2. **Your Payroll Transmission dashboard**

- ***What this is:*** This dashboard, from your Payroll tab in EN → 'View Transmissions' button, is your comprehensive view of all incoming and outgoing changes within the integration.
- ***Why it's important:*** This is where you can find any potential errors where a change in Employee Navigator may not have made it to payroll successfully, or vice-versa. These error types are covered in the section, "Transmission Management", in greater detail.


Payroll Transmissions
Back to Payroll Dashboard
Filter Transmissions
Collapse
NOTE: Transmission Dashboard defaults to present only unsuccessful transmissions. Check off "Show successful" below.
From Date
Hour
Minute
AM/PM
04/21/2022
12
00
AM
To Date
Hour
Minute
AM/PM
04/27/2022
11
59
PM
Employee
employee last name, first name, or full SSN
Show successful
Show failed
Show underway
Show blocked
Get Transmissions
Id
Date/Time
Status
Employee
Code
Type
R#
ENId
PRId
View more transmissions

Checklist for post-integration management processes

Your new hire process

- When a new hire is entered into the payroll system, 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 'Complete employees missing HR required fields' and find the newly hired employee.
  - Click 'Complete Hire' and add the employee's Payroll Group, Class and any other fields you wish to populate.
    - Payroll Group and Class fields are not exchanged within the integration
  - Click to send out the Welcome Email if the specific employee is eligible to enroll in benefits.
- These exact steps with photos can be viewed in our Knowledge Base here: Managing new hires sent from Payroll

Your re-hire process

- When a re-hire hire is entered into the payroll system:
  - HR should be *reactivating* the originally terminated record. **You should not be creating a brand-new record for a rehired employee as this will create two records in payroll for them & will cause issues with the exchange of employee data.**
  - The reactivated record will feed to EN.
    - If the employee's record previously existed in EN, we will match on their SSN and rehire them.
    - If the employee's record has never existed in EN, we will create a new record for them and the steps from 'Your new hire process' above can be followed.

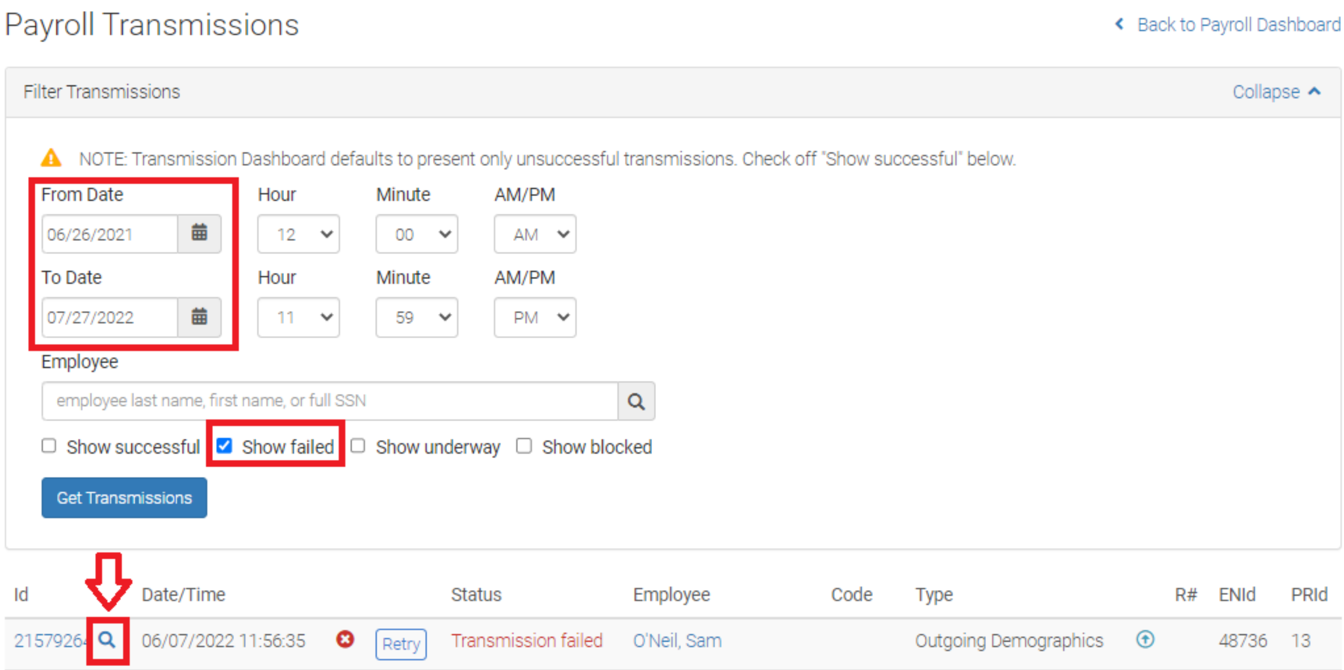
Your termination process

- When a termination is entered into the payroll system:
  - If using ADP, then the termination will not be sent to us until the employee's exact termination date
  - If using Paylocity, then the termination will not be sent to us until the pay period that includes their 'Begin Check Date' arrives
    - More on this can be found in our article: How terminations are processed
  - If using all other payroll partners, then the termination will immediately send to EN
  - Once the term arrives, it will end employment, terminate coverage & send the end-dated deductions to payroll.
- If you are using a COBRA integration, it will instantly trigger the COBRA notice on the provider's next scheduled feed.

Transmission management

How to view error messages on your transmission dashboard

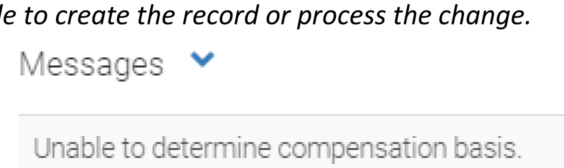
1. You can go to your Payroll tab → 'View Transmissions' button
2. EN will default to show you any errors within the last 30 days
3. This date range can be adjusted if you are seeking to look further out
4. Click on the magnifying glass icon (in red below the arrow)
5. At the bottom of the pop-up window, it will show 'Messages' and provide details on the specific error



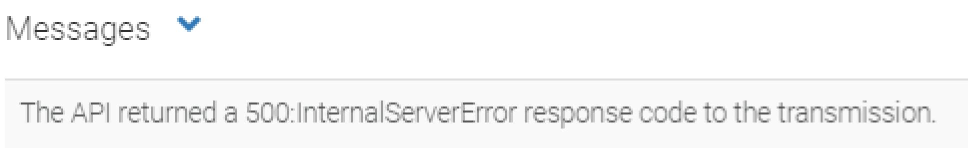
Top transmission errors you may find and how to handle each

1. Incorrect or invalid deduction code is mapped into Employee Navigator
    a. ***What it means:*** *The message will reflect wording related to 'Dcode' or 'Deduction code'. The deduction code mapped into EN for this benefit type is likely incorrect, preventing us from updating payroll with your deductions.*
    b. ***What to do:*** *Contact Payroll@employeenavigator.com and our team can help review and resolve these*
    c. ***[Click here for an appendix of these error types]()***

2. Employee record in payroll is missing required compensation data
    a. ***What it means:*** *The message will reflect wording related to 'Missing compensation' or 'Unable to determine compensation basis'*
    b. ***What to do:*** *Ensure the employee in question has a valid pay effective date, compensation basis of Hourly or Salary, and a corresponding hourly rate or annual salary value in payroll. Once they do, EN will be able to create the record or process the change.*



3. Payroll partner’s system was unavailable for EN to access to retrieve or insert data
    a. ***What it means:*** *The message will reflect wording related to the below with a 500, 502, 503 or 504 number. The payroll partner’s API was not available for us to access to retrieve or insert a change.*
    b. ***What to do:*** *Contact Payroll@employeenavigator.com and our team can help review and resolve these*



Multi-EIN companies only

If you are using Subscriber groups for your integration and *__are not__* with Paychex or ADP

If you have a current employee who you are moving to a new company ID in payroll to become their Primary company ID for compensation and deductions, you must follow these exact steps, in order, to successfully change their Primary subscriber group in EN first *before* the transfer is made in Payroll.

__Step 1__

You must assign their new subscriber group/location in Employee Navigator first:

1. Within the employee's 'Apps' section of their Profile tab, you will need to Assign the new subscriber group.
2. This will add it as an additional subscriber group under the 'Integrations' portion of the Apps section. The new group will be missing the Identifier, and will only have a check mark for Demographics:

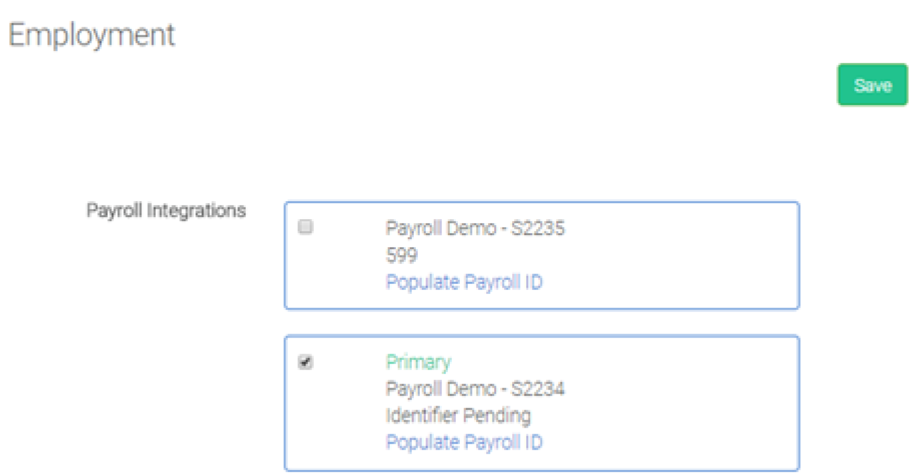
Integrations

Partner	Group	Identifier	Status	Demographics	Deductions	Primary	
Payroll Demo	S2234		Active	✓			Manage
Payroll Demo	S2235	599	Active	✓	✓	✓	Manage

__Step 2__

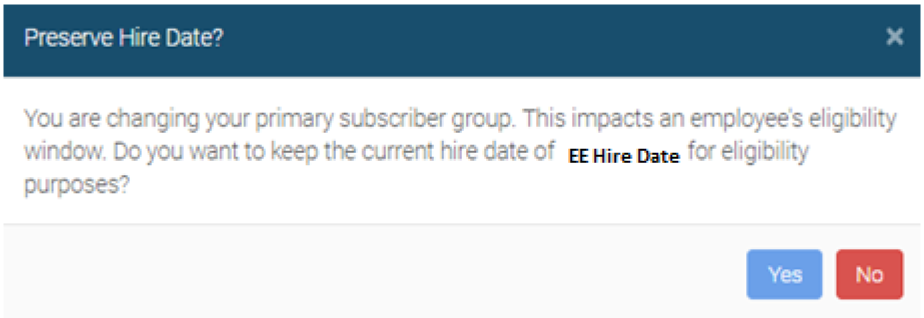
Then, go elect the new subscriber group as the 'Primary' under Profile → Employment

3. From the employee's 'Employment' section in EN, check off the box for the newly added subscriber group within the 'Payroll Integrations' section, and Save.



Step 3

Upon saving, you will be prompted with the 'Preserve Hire Date?' question.



a. If you elect, "Yes", then EN will keep the current hire date in our system, and ignore the incoming hire date upon the first incoming Demographic update from the new subscriber group in Payroll.
b. If you elect, "No", then EN will accept the incoming hire date on the first incoming Demographic update from the new subscriber group in Payroll, and overwrite the hire date currently in our system.

Step 4

The new Primary will now reflect as shown below within the 'Apps' section.

The identifier, also known as the employee's payroll ID, will still be absent (Example, S2234 above) because it has not exchanged into Employee Navigator from the new company ID in Payroll just yet. It will be sent once Step 5 is complete in Payroll.

Integrations

Partner	Group	Identifier	Status	Demographics	Deductions	Primary	
Payroll Demo	S2234		Active	✔	✔	✔	Manage
Payroll Demo	S2235	599	Active	✔			Manage

Step 5

Lastly, you will go into your Payroll system and terminate the original record for the employee (if need be) & hire the employee in their new company ID.

This new demographic information, including their Payroll ID, will exchange into Employee Navigator and update in our system for the employee.

If you are using Subscriber groups for your integration are using Paychex

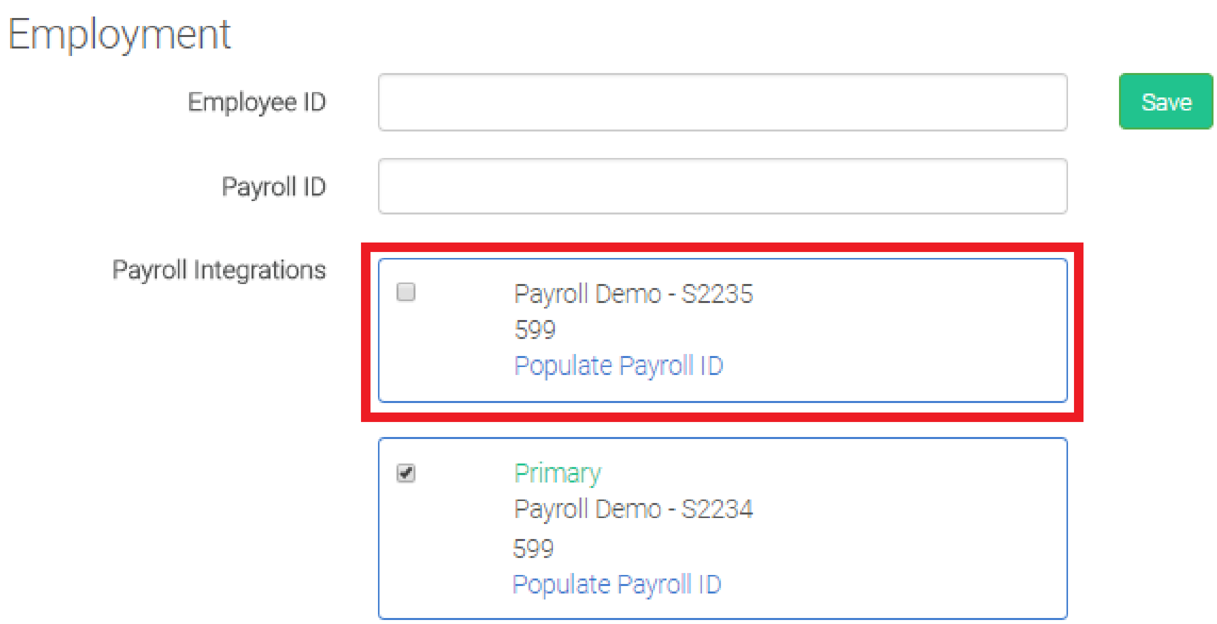
If you have a current employee who you are moving to a new company ID in payroll to become their Primary company ID for compensation and deductions, you must follow these exact steps, in order, to ensure you create the new record in Paychex *first*, then come into EN and set it as the Primary before terminating them in Paychex as the final step. This will alleviate duplicate records from being created in Paychex.

Step 1

Copy or create the employee's new record in their new company ID in Paychex. This will send the record to Employee Navigator and auto-assign them to their new subscriber group.

Step 2

You will want to log into EN --> Find the employee's Profile --> Employment link. Check off the subscriber group they are transferring to as the 'Primary' and save (ID 599 for S2235 in the example below)



Step 3

Upon saving, you will be prompted with the ‘Preserve Hire Date?’ question.

a. If you elect, “Yes”, then EN will keep the current hire date in our system, and ignore the incoming hire date upon the first incoming Demographic update from the new subscriber group in Payroll.

b. If you elect, “No”, then EN will accept the incoming hire date on the first incoming Demographic update from the new subscriber group in Payroll, and overwrite the hire date currently in our system.

Step 4

Lastly, you will go into your Payroll system and terminate the employee in their original company ID if need be. Employee Navigator will ignore the incoming termination as this company is no longer set as their Primary on our side!

If you are using Subscriber groups for your integration are using ADP

If you have a current employee who you are adding or moving to a new company code in payroll to become their Primary company for compensation and deductions, **you must follow these exact steps**, in order, to successfully transfer them in payroll to avoid having ADP send Employee Navigator an inadvertent termination that does not belong in our system:

Step 1
Create the new hire record within the employee's new company code in ADP that they are moving to.

Step 2
Select this record in the new company as the 'Primary' in ADP.

Step 3
Then, process the transfer event to terminate the employee in their original company code.

Step 4
This would ensure that when step 3 is processed in payroll, that ADP does not attempt to send Employee Navigator the termination for that employee, as that specific record is no longer the Primary record for the employee in the ADP system.

- **Please note:** When an employee is transferred between Company Codes in ADP, their deductions are not automatically moved by the system. You will need to manually transfer the deductions to the other company in ADP.

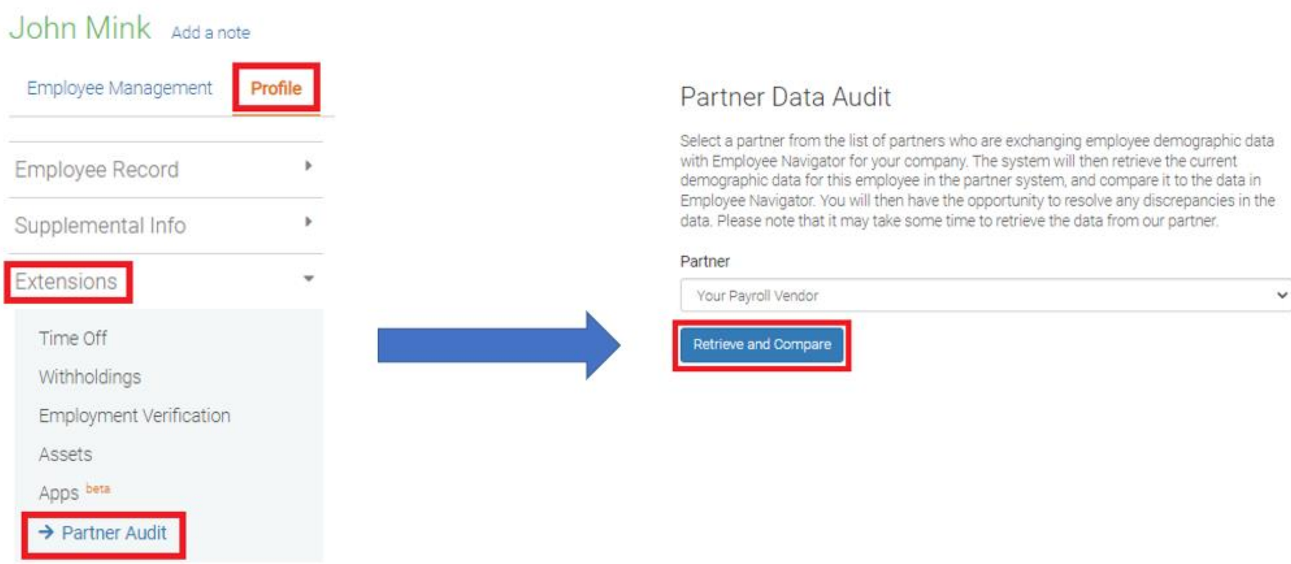
Frequently Asked Questions

Question: For some reason, an employee's record has not sent to or has not updated in EN. What can I do about it?

1. If a new hire's record or unconnected record (*missing primary*) has not sent to us, you can "trick" payroll into sending us the employee's record by having HR make a small change to an exchanged field.
    - Changing Street to St.
    - Adding a period after an employee's Middle initial
    - Adding parenthesis around the area code of their home phone
        - Something basic that will cause payroll to recognize a change and send it over to EN.

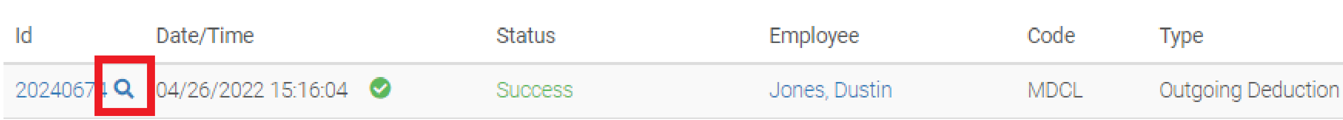
Question: I made an update in payroll for an already connected employee, but it did not update in EN – what can I do?

1. You can use our newly available Partner Audit tool to pull in & sync the change



Question: How can I confirm what deduction amount was sent to payroll for a particular employee?

1. You can use your Transmission dashboard to view the exact amount sent by clicking the magnifying glass icon and viewing the 'Sent' content



Id	Date/Time	Status	Employee	Code	Type
20240671	04/26/2022 15:16:04	Success	Jones, Dustin	MDCL	Outgoing Deduction

Question: I have subscriber groups setup to account for my multiple companies in Payroll. I had an employee transfer to a new company and the integration feed terminated them; did I do something wrong?

1. Most likely, yes. We have a specific transfer process to ensure that a user can "tell" us of the transfer *prior to* it occurring in Payroll.
    - This allows us to ignore the incoming termination from their original company, and solely accept data for the new company the employee will ultimately be moved to.
        - Our support article: [Transferring employee's between Subscriber Groups]