



# Paylocity Client Guide - Employee Navigator Integration

## Purpose

This guide includes general instructions for the use of Employee Navigator's Payroll Integration product. It is intended for use in conjunction with the Employee Navigator User Guide. Both documents should be carefully reviewed.

## Getting Started

There are a few items that will need to be addressed prior to starting the required checklist in your Employee Navigator setup.

- **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** - Paylocity validates City/State/Zip fields. Be sure to keep this in mind when going through the demographic discrepancy audit. Paylocity will not accept a zip code that is invalid for a city/state combination.
  
- **Recurring Earnings – (NOTE: Currently not supported)**

If you currently are using recurring earnings in Web Pay for ERMED or GTL this will need to be done manually for new hires or plan changes.

*If you need assistance with how to update/change data in Web Pay or Web Link please reach out to your dedicated **account manager**.*

## Understanding “The Flow” of Your Data

All new hires, rehires, compensation changes and terminations must be initiated in Paylocity 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.

**NOTE: Fields cannot be customized**

Paylocity 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 Paylocity)
City	City	Bi-directional
State	State	Bi-directional
Zip	Zip	Bi-directional
Personal Email	Primary Email	Bi-directional
Home Phone	Home Phone	Bi-directional
Birthdate	DOB	Payroll to EN only
Gender	Gender	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
Pay effective 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

## 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.

## 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 **account manager**.*

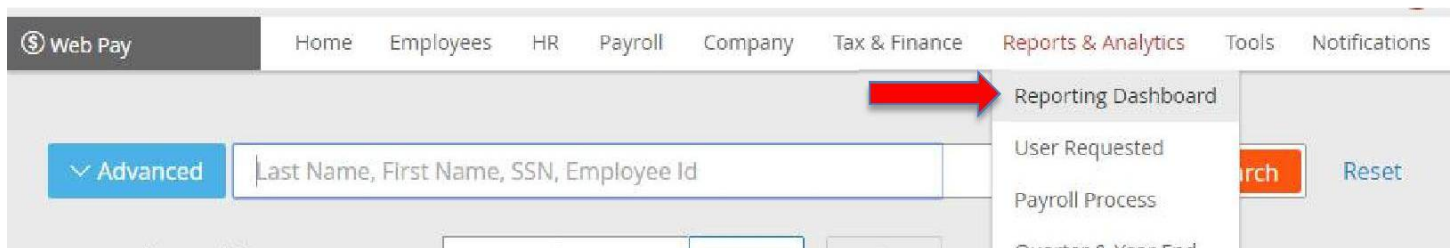
## Required Discrepancy Reports

**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 Web Pay.

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.

Within Web Pay navigate to **Reports & Analytics>Reporting Dashboard**



## Demographics

The first report you will need is the **“Comprehensive Demographic Report”**. This standard report contains employee demographics, salary and work information.

**Comprehensive Demographic Report** – Select the following filters for this report:

- **Output:** Select Excel 2007+(.xlsx)
- **Employee Status:** Select “All” (Includes: Active, Deceased, Leave of Absence, Retired, Terminated and Transferred)
- **SSN:** Select “Show”
- **Tax form:** Select W2
- **Click Save and Run Report to download**
- **Open saved report**
- **Save report to desktop**

Reports Library > Comprehensive Demographic Report

**Output**

Output Type: Excel 2007+ (.xlsx) **1**      Output File Name:

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**Standard Filters**

**Employee**

Employee Status: -- All -- **2**

Employment Type: -- All --

Employee ID:  to

Employee Last Name:  to

Supervisor: -- Select --

Supervised Employees: -- All --

Pay Type: -- All --

Pay Group: -- All --

**Cost Centers**

Department: -- All --

**Report Options**

Show All Employees:  Include Employees with no data

Show filters in Report:  Display all filter options used at run time in generated report

Sort Order:

SSN: Show **3**

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**Additional Filters**

Header for User Selected Field 1:

Header for User Selected Field 2:

Header for User Selected Field 3:

Header for User Selected Field 4:

Header for User Selected Field 5:

Header for User Selected Field 6:

Header for User Selected Field 7:

Header for User Selected Field 8:

Header for User Selected Field 9:

Header for User Selected Field 10:

Sort Order: Employee ID

Values for User Selected Field 1: -- None --

Values for User Selected Field 2: -- None --

Values for User Selected Field 3: -- None --

Values for User Selected Field 4: -- None --

Values for User Selected Field 5: -- None --

Values for User Selected Field 6: -- None --

Values for User Selected Field 7: -- None --

Values for User Selected Field 8: -- None --

Values for User Selected Field 9: -- None --

Values for User Selected Field 10: -- None --

\* Tax form: W2 **4**

Save   Save & Return   Save & Run Report **5**   Cancel

## Deductions

The second report you will need is the “**Employee Recurring Benefits Report**”. This contains all active recurring deductions/earnings by employee.

**Employee Recurring Benefits** – Select the following filters for this report:

- **Output:** Select Excel 2007+ (.xlsx)
- **Employee Status:** Select **ONLY** your active status’ such as Active, Leave, Transferred
- **SSN:** Select “Show”
- **Deductions:** Select the deduction codes needed for Employee Navigator
- **Earnings:** Select “None”
- **Save and Run Report to download**

Reports Library > Employee Recurring Benefits

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**Output**

Output Type: Excel 2003 (.xls) 1      Output File Name:

---

**Standard Filters**

**Employee**

Employee Status: -- All -- 2

Employment Type: -- All --

Employee ID:  to

Employee Last Name:  to

Supervisor: -- Select --

Supervised Employees: -- All --

Pay Type: -- All --

Pay Group: -- All --

**Cost Centers**

Cost Centers	Suppress Level
Department: -- All --	<input type="checkbox"/>

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**Report Options**

Show All Employees:  Include Employees with no data

Show filters in Report:  Display all filter options used at run time in generated report

Sort Order:

SSN: Show 3

---

**Additional Filters**

Deductions: -- All -- 4

Include Inactive Deductions/Earnings:

Earnings: -- None -- 5

Sort Order: Employee ID

6 Save    Save & Return    Save & Run Report    Default Parameters    Cancel

## 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 [support@employeenavigator.com](mailto:support@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

## Tip & Tricks

To help you maintain your integration we have put together some best practices.

## Updating Hire Dates

If you have identified incorrect hire dates in Web Pay 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 Web Pay, navigate to **Employees>Employee Search>Select Employee>Work Tab>Employee Status**

*Please reach out to your dedicated **account manager** if you need assistance in making this correction.*

### Hire

Hire Date: 03/30/2010

Rehire Date: 10/19/2016

Length Of Service: Rehire Date - 0 Yrs, 3 Mos

### Termination

Termination Date

Eligible for Rehire?

User Account Deactivation Date

### Employee Status History

Show:  Records: 3

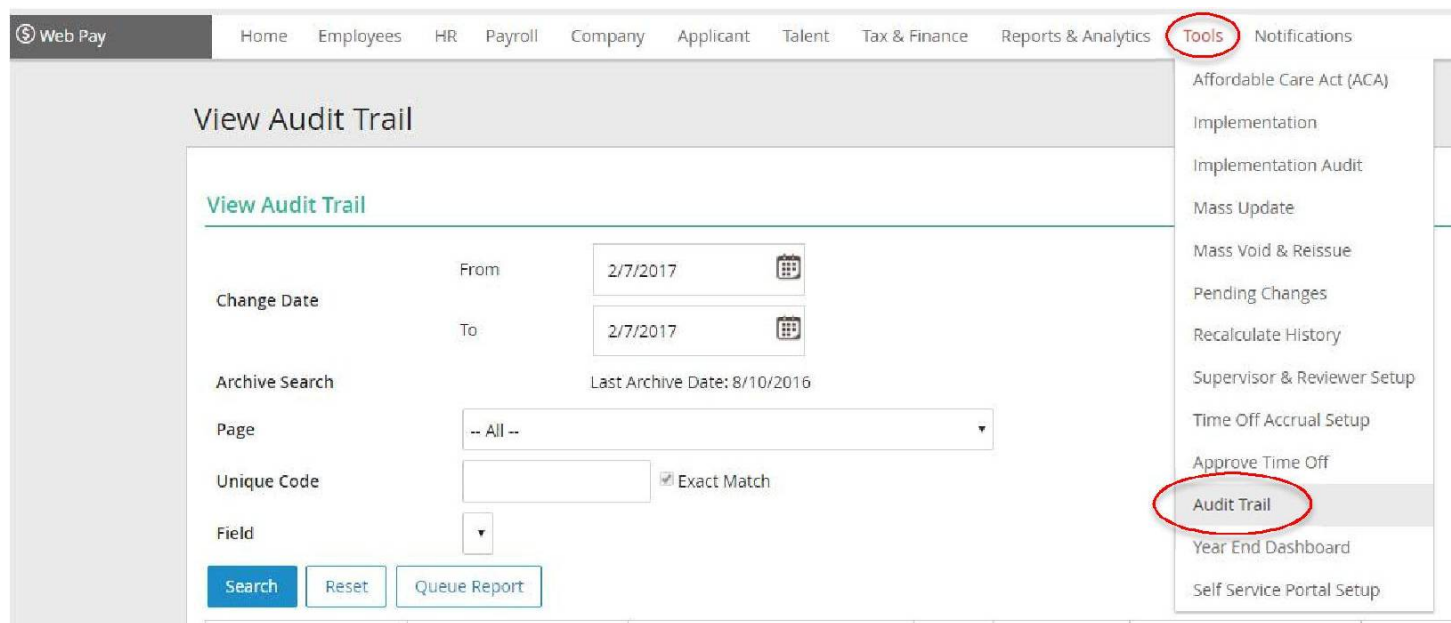
Effective Date /	Check Date	Status	Change Reason	Changed By	Edited	Action
<a href="#">10/19/2016</a>	Current	Active		AMIT ABHOL		
<a href="#">5/2/2016</a>	History	Terminated		JLee	✓	<a href="#">Delete</a>
<a href="#">3/30/2010</a>	History	Active	Hire	JLee	✓	<a href="#">Delete</a>

## Audit Trail

Review your audit trail on a regular basis to ensure data accuracy. Audit trail reports can be customized to automatically run on your behalf.

You can find this feature in Web Pay under **Reports&Analytics>Groups&Scheduling**.

- **Audit Trail** – customizable tool to search changes to employee data in Web Pay. You can find it under **Tools>Audit Trail**:
  - **Change Date**: Select the date range you would like to search.
  - **Affected Employee ID**: Select this if you would like to narrow your search to one employee.
  - **Select “Search”**



The screenshot shows the 'Web Pay' interface. The top navigation bar includes 'Home', 'Employees', 'HR', 'Payroll', 'Company', 'Applicant', 'Talent', 'Tax & Finance', 'Reports & Analytics', 'Tools', and 'Notifications'. The 'Tools' menu is open, listing various options: 'Affordable Care Act (ACA) Implementation', 'Implementation Audit', 'Mass Update', 'Mass Void & Reissue', 'Pending Changes', 'Recalculate History', 'Supervisor & Reviewer Setup', 'Time Off Accrual Setup', 'Approve Time Off', 'Audit Trail', 'Year End Dashboard', and 'Self Service Portal Setup'. The 'Audit Trail' option is highlighted. Below the navigation bar, the 'View Audit Trail' page is displayed. It features a 'View Audit Trail' heading and several search filters: 'Change Date' with 'From' and 'To' date pickers (both set to 2/7/2017), 'Archive Search' with a 'Last Archive Date' of 8/10/2016, 'Page' set to '-- All --', 'Unique Code' with an 'Exact Match' checkbox, and a 'Field' dropdown. At the bottom of the form are 'Search', 'Reset', and 'Queue Report' buttons.

## Pre-Process Register

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

## Additional Assistance

Email us at [eenavsupport@paylocity.com](mailto:eenavsupport@paylocity.com) or contact your dedicated account manager.

For Employee Navigator specific questions please contact your Broker Partner.