# AURIS™

# Employee Navigator:

# Client User Guide

# Table of Contents

# Auris and Employee Navigator Integration

Auris has partnered with Employee Navigator to offer a bi-directional integration to exchange demographic, compensation, and benefits information between the two systems.

Updates to specific employee demographics can be entered in either Employee Navigator or Auris, and changes will be reflected in the corresponding system in real time. Additionally, changes to employee benefits in Employee Navigator will be updated in Auris' payroll system in real time.

Using this integration will significantly reduce the manual entry in both systems, saving you time while improving accuracy and reducing errors.

# Getting Started

### Work with your Broker to set up Employee Navigator

To enable the Auris / Employee Navigator integration, you must first ensure your broker is licensed with Employee Navigator (EN). Once that has been confirmed, work with your broker to set up your EN account.

Two criteria must be met in addition to those mentioned above:

- You must be at least 30 days outside of your open enrollment period, and
- You must have processed at least two payrolls within Auris

Our Integrations Team will send a welcome email with instructions for adding a service under *Partner Selection* in Employee Navigator, if it has not already been done.

### Expectations

Employee Navigator and Auris will partner with you and your broker to ensure the setup on your account is timely and accurate.

Employee Navigator will handle the bulk of your setup and lead the movement of your account through each phase.

Setup times will vary and are dependent on completing the two audits on the following page. To expedite the setup, please remain in communication and provide timely responses to any questions directed to you.

# Run reports in Auris for audit process in Employee Navigator

Once the setup criteria is satisfied, you will begin the audit process in Employee Navigator.

There are two audit reports that you will pull from Auris:
- Employee Navigator Demographics Export (**rename** report to Demographic Import Audit)
- Employee Navigator Deductions Export (**rename** report to Deduction Import Audit)

To generate the reports, access your payroll account and follow these steps for paygroup:
- Visit the *Reports* tab from the menu and select *On-Demand Reports*
- Choose the *Employee Navigator Demographics Export* report from the menu
- Save the report and **rename** as noted above

💡 Complete these steps for both the *Employee Navigator Demographics Export* and the *Employee Navigator Deductions Export*.

## Audit Process and Data Exchange between Auris and Employee Navigator

Once you have downloaded the reports, work with your broker and your Employee Navigator contact to start the audit process in your Employee Navigator account. Auris will update your account in Employee Navigator to *Audit Mode*. During this process, there will be a live, limited-demographic feed that lets you choose which data is most up-to-date for employees. Both systems will update automatically.

Once the audit is complete, your Employee Navigator contact will alert Auris, and we will update your account status to *Live*. Your Integration Specialist will connect with you to schedule a brief call to review key details to ensure the success of your integration.

## Data Exchange and Maintenance

One of the most beneficial features of the Auris and Employee Navigator integration is that specific data can be updated in either system, and will display in the other system in real time.

Certain data fields can only be exchanged via a one-way feed, meaning that if you enter data in the incorrect system, it will not update the other system. To enjoy the benefits and reduce errors, it is essential to understand how data flows, your responsibilities, and the steps to take first to see results.

Here is a list of client responsibilities, along with a breakdown of the information exchanged and the direction in which it flows.

| First Steps / Maintenance | One Way Data Feed | | Bi-Directional Data Feed |
|---|---|---|---|
| **Client Responsibility in Setup and Maintenance** | **Auris to Employee Navigator** | **Employee Navigator to Auris** | **Auris To/From Employee Navigator** |
| - Provide Auris team with a list of benefits in EN<br>- Request deduction codes from Auris to set up EN<br>- Download Employee Demographic Audit report from Auris<br>- Download Deduction Import Audit report from Auris<br>- Use EN's audit tool to reconcile data between systems<br>- Reach out to Auris any time you add new benefits | - SSN<br>- Payroll ID<br>- Annual Base Salary<br>- Base Hourly Rate<br>- Pay Effective Date<br>- Pay Basis<br>- Hire Date<br>- Terminate Date | - Benefit Deduction Amount<br>- Benefit Start Date<br>- Benefit End Date | - First Name<br>- Last Name<br>- Middle Name<br>- Date of Birth<br>- Address Line 1<br>- Address Line 2<br>- City<br>- State<br>- Zip<br>- Work Email<br>- Personal Email<br>- Phone |

*(continued)*

# Client Responsibilities / Ongoing Maintenance

## Setting Up Benefits in Employee Navigator

Before your integration is completed, your Integration Specialist will provide benefit codes to you and/or your broker to enter into Employee Navigator. Enter these codes **exactly** as provided, as this is what our system uses to identify the correct benefit type for your employees and to ensure proper mapping.

## Adding New Benefits

Once everything is set up, you must notify your payroll team anytime you add a new benefit to Employee Navigator. New benefit deduction codes must be added to your payroll account before the integration can recognize and map them. If you do not notify your payroll team, the benefit will not be mapped, resulting in errors and missed benefit deductions.

## Missing deductions / Makeup deductions

If your employee is missing a benefit deduction or had an inaccurate amount taken from their pay, work with your payroll team to create a separate payroll benefit deduction for this purpose. The integration does not identify if an employee misses a benefit deduction or has a different amount withheld from their paycheck due to keying errors during setup.

## Deduction Titles & Codes

For a deduction to be recognized, it must be added in Auris and assigned a unique *Title*. The *Title* in Auris needs to match the Employee Navigator *Code*. Deductions that are both pre-tax and post-tax must be added separately in Auris with two different *Titles*. They must also be set up in Employee Navigator with the *Deduction Code* matching the *Title* in Auris.

> Example: You have an Accident plan that can be either pre-tax or post-tax. Two plans must be added in Auris with two unique *Titles*: one for pre-tax and one for post-tax. The *Title* must be unique based on the deduction type and taxability. A standard option is to set up deductions based on their taxability and reference them by the *Title* in Auris and the *Deduction Code* in Employee Navigator ("Accident Pre-Tax" or "Accident Post-Tax").

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## Reviewing Payroll Reports / Audit Payroll Accounts

To ensure accuracy, you must always preview your payroll and review reports each time you process. You can review changes made to your employees' profiles in Auris by viewing the *Employee Change Log*.

- Visit the *Reports* tab from the menu and choose *On-Demand Reports*
- Choose the *Date Range Reports* tab
- Select *Employee Change Log Report and enter* a *From Date* (start date) and *To Date* (stop date)



Once the report is generated, you will see employee info, the date the change was made, and the old and new values. You can also see who made the change. Any changes made due to the integration between Employee Navigator and Auris will have the username *HCM.Hub.APIUser*.



You can run a report for ALL employees or review changes for specific employees by using the *Employee* box and selecting the specific employee from the list.

### One-Way Data Feeds

#### Auris → Employee Navigator

Auris is the System of Record for all new-hire information, terminations, and compensation. This means you will create the employee profile in Auris first, process terminations, and update any salary or job title information in Auris. **This data will flow from Auris to Employee Navigator only.**

#### Employee Navigator → Auris

Once the integration is completed, Employee Navigator is the System of Record for all benefit-specific data. This includes the benefit amount, the benefits start date, and the benefits end date. This means any changes to employee benefits must be made in Employee Navigator first. **This data will flow from Employee Navigator to Auris only.**

### Bi-Directional Data Feed

#### Auris ↔ Employee Navigator

Exclusive to the Employee Navigator and Auris Integration is the bi-directional data feed with specific employee demographic fields, including first name, last name, middle name, date of birth, address, city, state, zip, work email, personal emails, and phone number.

This means that your employees can log in to either system and update their information one time in either place, and the corresponding system will receive the update in real time.

See the next page for a comprehensive chart of corresponding data fields and the direction of the data exchange.

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## Corresponding Data Fields Between Auris and Employee Navigator

| Auris Data Field | Employee Navigator Data Field | Direction of Data Exchange |
|---|---|---|
| First Name | First name | Auris ↔ Employee Navigator |
| Middle Name | Middle name | Auris ↔ Employee Navigator |
| Last Name | Last name | Auris ↔ Employee Navigator |
| Birth Date | DOB | Auris ↔ Employee Navigator |
| Address Line 1 | Address 1 | Auris ↔ Employee Navigator |
| Address Line 2 | Address 2 | Auris ↔ Employee Navigator |
| City | City | Auris ↔ Employee Navigator |
| State | State/Territory | Auris ↔ Employee Navigator |
| Zip | Zip Code | Auris ↔ Employee Navigator |
| Work Email | Work Email | Auris ↔ Employee Navigator |
| Personal Email | Personal Email | Auris ↔ Employee Navigator |
| Mobile Phone | Phone | Auris ↔ Employee Navigator |
| SSN | Social security number | Auris → Employee Navigator Only |
| Payroll ID | Payroll ID | Auris → Employee Navigator Only |
| Annual Salary | Annual Base Salary | Auris → Employee Navigator Only |
| Base Hourly Rate | Hourly rate | Auris → Employee Navigator Only |
| Effective Date | Salary Effective Date | Auris → Employee Navigator Only |
| Pay Type | Pay Basis | Auris → Employee Navigator Only |
| Hire Date | Hire date | Auris → Employee Navigator Only |
| Termination Date | Termination date | Auris → Employee Navigator Only |
| Amount | Employee Cost Per Pay | Employee Navigator → Auris Only |
| Start Date | Enrollment Start Date | Employee Navigator → Auris Only |
| Benefit End Date | Enrollment End Date | Employee Navigator → Auris Only |

# FAQ

**I just hired a new employee; I do not see them in Auris. What should I do?**

New hires need to be added to Auris first. Once your integration is complete, Auris will send new-hire information to Employee Navigator. New Hires will show in the *Employee's missing HR required fields* section on your Homepage in Employee Navigator under *Things to do*' choose *Complete Hire* and assign the proper Payroll Group and Benefit Class for the new hires. Be sure to send the employee the registration/login information email to enroll in benefits (if applicable).

**I terminated an employee - what happens next?**

As with new hires, terminations need to be completed within Auris first. Navigate to your payroll account and terminate the employee. The termination date will then be sent to Employee Navigator.

**We just added a new benefit to Employee Navigator - why is it not showing up in Auris?**

Before you add a new benefit to Employee Navigator, you must ensure it is set up in Auris. Please contact your payroll team at Auris to add the new benefit to your payroll account. They will provide the benefit code to enter in Employee Navigator.

**What happens if deductions are under OR over withheld for any reason?**

This needs to be completed in Auris, since Employee Navigator does not track missed or duplicated deductions from payroll, nor does it send over missed deduction amounts or overpayment amounts.

Please contact your payroll team to set up a new deduction to withhold additional funds, or to compensate your employee if funds were overwithheld from their paycheck.

**Employee Navigator and Auris Employee Self-Service**

- If you use Hire to onboard new employees, the email address you use to send their onboarding documents will be their work email address.
  - This data field is exchanged during the initial data that is sent from Auris to Employee Navigator to create the new employee profile.
  - Once the profile is created, this information can be updated in either system.
- The work email in Auris is also the email address that is associated with the Employee Self-Service account.
  - If you have this service enabled, and an employee logs in to Employee Navigator to update their work email address, this WILL impact their self-service account credentials.
  - In addition, this could impact MFA (Multi-Factor Authentication).

# Support & Questions

## Employee Navigator Questions

For Employee Navigator-related questions, please contact their team at Payroll@Employeenavigator.com

## Auris Payroll Questions

For any needs related to the Auris Payroll system, please contact your payroll support team:

*Payroll account questions:* contact your payroll team via email or by calling 877-729-2968

*Employee Navigator Integration questions:* email our HCM team at benefits.productsupport@e-hps.com