ease

PAYLOCITY INTEGRATION GUIDE

Updated 1/18/2022

Introduction

This guide will provide an overview of the integration between Ease and the Paylocity system.

The guide includes:

- Roles & Responsibilities
- Integrated Data Fields
- Integration Project Plan
- Ongoing Integration Management

Integration between Ease and Paylocity will ensure that employee demographic and compensation data will be transferred from Paylocity to Ease eliminating the need for duplicate data entry for most employee information. Benefit deduction data will flow from Ease to Paylocity. There is a $500 Ease setup fee for the integration. A $1.00 per employee per month fee will be applied to clients with less than 249 lives and $0.50 per employee per month fee will be applied to clients with more than 250 lives. Fees will be applied to future Ease invoices after the integration is enabled. Paylocity also has fees associated with the integration and those should be reviewed with the employer's Paylocity Account Manager prior to initiating the integration.

The initial step to setting up an integration between Ease and Paylocity is for the employer or broker to reach out to Ease. A detailed interest email will be provided to broker and client for review. This email will outline the steps of the integration and answer frequently asked questions. Both the broker and client should also thoroughly review the Ease Help Center solution which includes the items below, before proceeding.

1. Paylocity Payroll Automatic Transfer Form
2. Ease Paylocity Questionnaire
3. Ease Statement of Work (sample)
4. Ease Memorandum of Understanding
5. Integration Timeline (sample)

When the employer is ready to proceed, the next step is for them to complete the Payroll Automatic Transfer Form and complete the Ease Paylocity Questionnaire. Once all above items have been completed, Ease will then contact the broker and employer to arrange for payment of the setup fees. A personalized Statement of Work will be provided prior to collecting any fees. Once those fees have cleared, a Kickoff call will be scheduled to review the steps of the integration, advise of any Ease portal updates and/or Paylocity system updates, and answer any questions. Once all updates are completed, if any, Ease will begin the integration set up.

The integration will usually take 3-5 weeks to complete once the plans and required information is populated into Ease. This timeframe may vary based on current volume.

Please be aware that the integration cannot be done during open enrollment. For an optimal experience, we recommend that the integration is started once the open enrollment deductions are already loaded into the payroll system.

Roles & Responsibilities

It's important that all appropriate parties are included during all steps of the integration process between Ease and Paylocity. The broker as well as the person who is responsible for ongoing payroll processing at the company and activating the integration will be key players during this process and must be included.

Each participating party's role and responsibilities are outlined below.

Broker	• Build company portal in Ease* • Add Organization Information • Create current plans • Customize portal • Import employees and enrollments
Company Administrator	• Work with Broker to ensure all company structure is configured and employee data is populated appropriately in Ease • Coordinate with Company Payroll Administrator to ensure milestones are met and on time • Collaborate with Ease to review Paylocity integration settings • Process changes in Ease
Company Payroll Administrator	• Attend all integration discussions • Test integration and payroll processing • Validate changes • Process payroll
Ease	• Work with Broker to ensure benefit/company structure correspond with Paylocity structure • Configure and enable Paylocity integration • Support Company Administrator and/or Company Payroll Administrator for integration questions and support • Collaborate with Paylocity for global integration updates and support

Paylocity	• Review fees with employer • Review the Paylocity setup requirements • Establish integration from Paylocity to Ease • Review steps to process payroll with incoming deduction files • Provide ongoing assistance and support for payroll management • Collaborate with Ease for integration support

**Ease portal must be completed prior to 45 days before the first payroll processing date. Integrations will not be set up during open enrollment.*

Integrated Data Fields

The Paylocity integration will sync/populate the following employee fields

- SSN*
- First Name*
- Last Name*
- Address
- Email
- Birth Date
- Date of Hire
- Compensation Type
- Compensation Amount
- Compensation Start Date
- Organization information - Ease can map values to coincide with Paylocity's structure (e.g., Cost Center 1 in Paylocity will map to Location in Ease)
- Pay Frequency

*Data must exist in Ease prior to start of Paylocity integration

Workflow

Employee demographic data - The Company Profile > Organizations will be mapped to match the data coming from Paylocity. Ease will map data provided by Paylocity to populate the **Employee > Profile** page. Employee data will be sent from Paylocity to Ease eliminating the need for duplicate entry of data.

Payroll deduction file - After mapping the Paylocity deduction codes and validating the deductions with the company administrator, Ease will enable the integration to send an automatic deduction file of processed changes to Paylocity nightly.

Ongoing demographic updates - Files will be automatically generated in Paylocity and sent to Ease to update the system with employee changes on a daily basis. The Ease team will update certain employee demographic fields to be read only under the Settings > Optional Fields tab. This will ensure that these fields are view only and not subject to being changed by the employee while in Ease. This data will be provided by the Paylocity import file. For an optimal employee experience, provide instructions to employees to change these fields in the Paylocity self service module.

Paylocity as system of record - With Paylocity as the system of record and the starting point for all employee data, payroll may need to be reconfigured if there are classes needed in Ease for benefit eligibility. This will be reviewed by the Ease team before starting any setup.

Integration Project Plan

To ensure the integration between Ease and Paylocity is successful, each step outlined below must be completed. The steps will also be completed in the order listed. It's important that the initial Ease portal setup is completed at least 45 days prior to the first payroll processing date with integration to allow for each of the steps below to be completed on time.

Milestone	Key Players	Steps
Configure Ease portal **new Ease customers only. Must be completed at least 45 days prior to first payroll processing date.*	- Broker - Company Administrator	• Build portal including organization types, benefits, and customization • Import employees and enrollments and assign Company Administrator
Integration Interest Email	- Broker - Company Administrator - Company Payroll Administrator - Ease	• High level overview of integration and set up process
Integration Request	- Company Administrator	• Completion of all required documents • Fees paid
Kickoff Call	- Company Administrator - Company Payroll Administrator - Ease Integration Team - Broker - Paylocity representative - optional	• Review roles and responsibilities and next steps • Review Paylocity structure and any necessary updates
Configure settings, provide test files	- Ease Integration Team	

Test file sent	- Company Administrator - Company Payroll Administrator - Ease and Broker	• Review test file for accuracy • Advise team of any discrepancies • Portal corrections done by Broker or Ease depending on issue
Final data verification and completion of integration	- Company Administrator - Company Payroll Administrator - Ease and Paylocity Integration Teams	• Verify data is updating and accurate in both systems
Process payroll	- Company Payroll Administrator	• Review file/data in Web Link, verify and process payroll

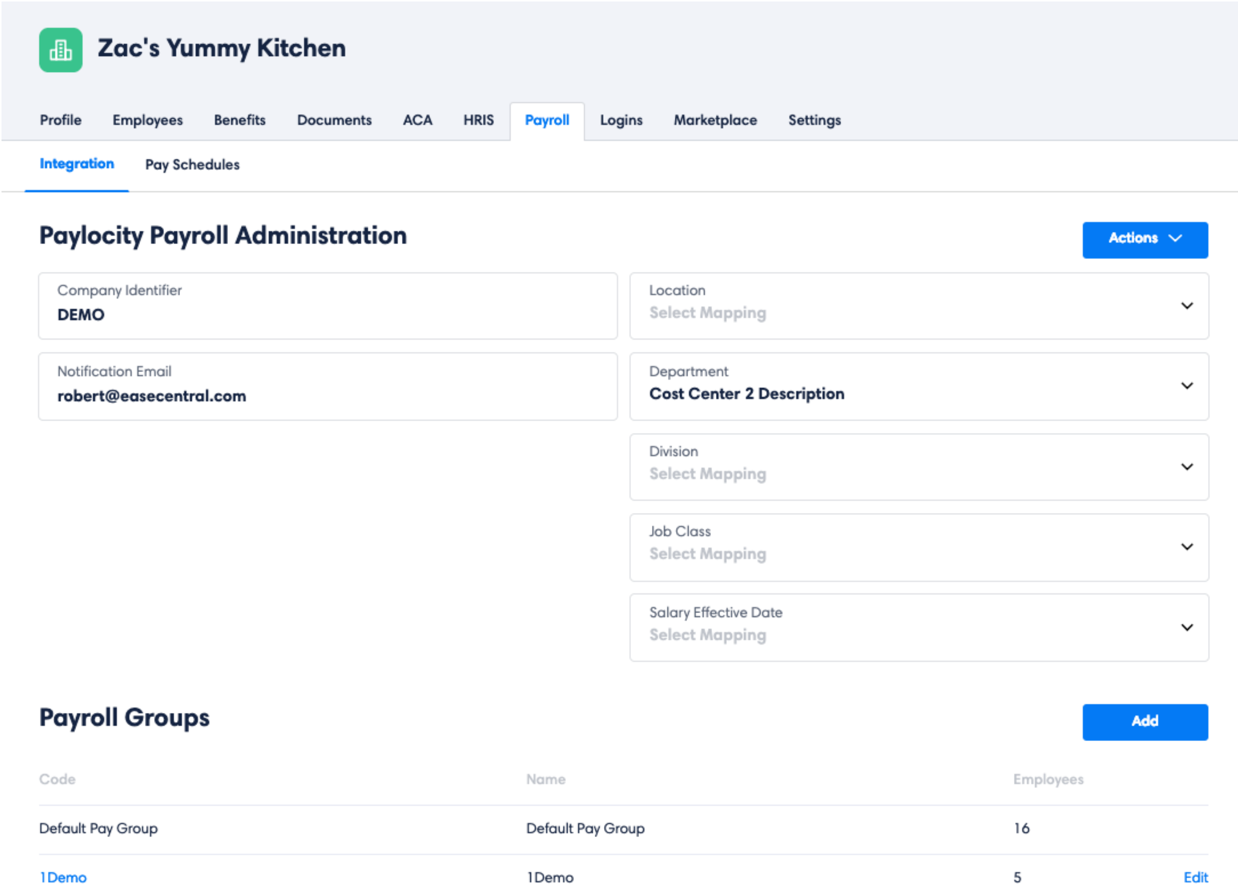
Structure in Paylocity

The Ease setup will be carefully reviewed by the Ease team to confirm that it matches the deduction codes and classes needed for the Paylocity integration. If plan updates or classes need to be added in Ease, the broker will be responsible for making these changes. A common example of this is if there is a deduction code for a benefit plan in Paylocity but the benefit plan is not in Ease. If the employer would like this benefit included in the integration, the plan will need to be added by the broker. Another example, but less common, is plan bundling. For example, if an employer has two separate deduction codes for voluntary life and voluntary AD&D, but the plan is built as one combined plan in Ease, likely the plan would need to be rebuilt in Ease as two separate plans.

If updates are needed in Paylocity, the employer would be responsible for making these. An example of this is adding post tax deduction codes to handle domestic partner benefits or adding a custom field to track benefit classes.

Configuration

Ease will configure the Paylocity settings in the Ease module based on the company structure in Paylocity. These steps will ensure demographic and work data from Paylocity updates Ease appropriately. Prior to processing payroll, data must be synced between Ease and Paylocity. By default, deduction codes will be included in this configuration. If earning codes need to be included on the file, please advise the Ease team.



Additional setup is not required on Paylocity's end, their system is ready to receive files at any time. Files sent from Ease will load as a pending item in the employer's Web Link interface. Please note, if the employer has any other files being sent to the Paylocity system, those files are likely automatically loading. The Ease team will review any existing integrations on the Kickoff call and advise of the behavior of the Web Link interface. The employer can reach out to their Paylocity Account Manager to have the Web Link interface settings adjusted if needed.

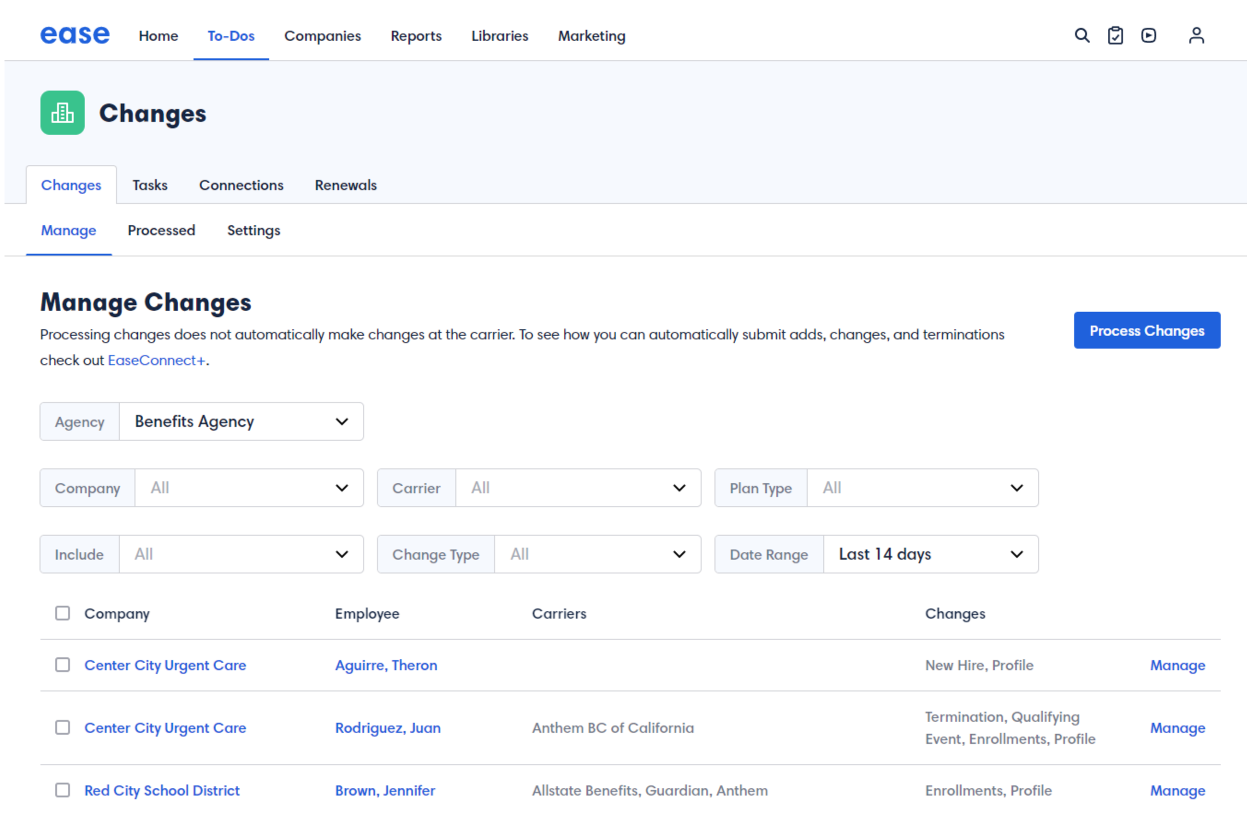
Testing

Once the configuration is set up, Ease will send a test file of deduction information to the employer. The employer will want to review the data for accuracy. When the data has been validated by the employer, Ease can complete the integration. All parties will be informed when the integration has been completed. Files will be sent daily from Paylocity. Items processed in Manage Changes will be sent to Paylocity nightly. Note: only processed items will be included on the file.

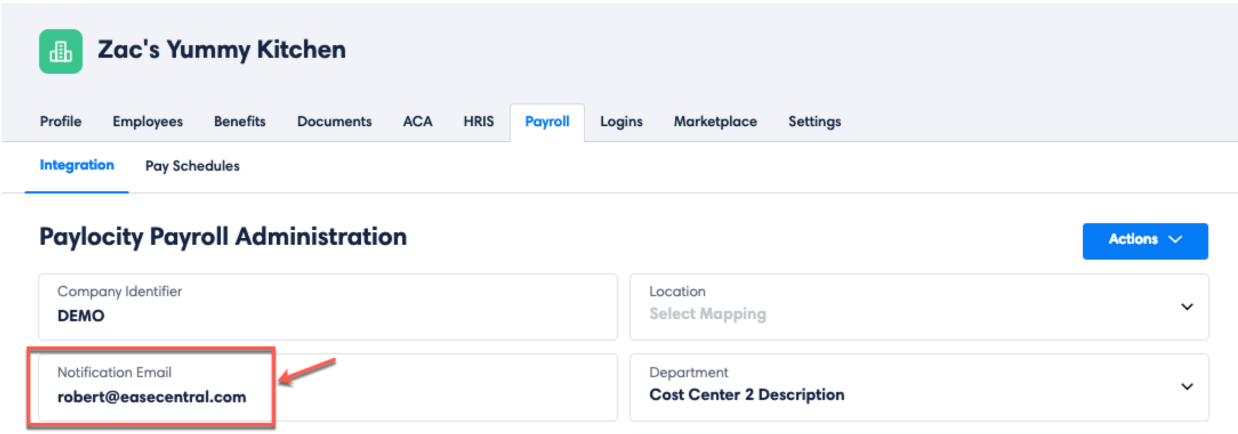
Ongoing Integration Management

Enrollment changes must be processed using the Reports > Changes > Manage > Actions > Process Employee/Company Changes feature in order to be be sent to Paylocity. We recommend that the Daily Change Notification option is enabled in the Company Administrator's Employees > Profile > Login page so they are notified when updates are entered into Ease. Processed changes will be sent to Paylocity very early in the morning the following business day (e.g., changes processed Tuesday at 5 pm will be sent at 2 am on Wednesday). Files are sent as changes are processed so timely processing is of utmost importance. Full files or changes only files can be manually generated and sent to Paylocity as needed from the company portal's Payroll > Actions > Send Census or Send Deductions tab.

Files received from Ease will appear in the employer's Web Link portal and must be approved before they are applied to payroll.



Notifications can also be sent to a single recipient so they are aware when a file is sent or received from Paylocity. This is enabled on the Payroll tab under Notification Email. Notifications can also be enabled in Paylocity to alert the payroll user that a file is in Web Link needing their approval. The employer can work with their Paylocity Account Manager to enable this.



Open Enrollment/Renewals

When making open enrollment changes in the Ease portal, please refrain from processing any changes related to the plan renewal until open enrollment has been completed. Once open enrollment is done, please reach out to the Ease team and a full file can be generated.

An additional best practice at open enrollment is to end all current deductions in the Paylocity system. At a minimum, the deductions coming from Ease should be ended. The Paylocity Account Manager can assist with this task. This should be completed before loading any deductions from the Ease system.

In Paylocity's Web Link program, approvals must be completed before transactions will be populated into the payroll system. Be sure that the transactions to end current deductions are approved before approving the new deduction transactions.

If a client is adding new benefits to the Ease portal, please notify support@ease.com and we will work with the client and Paylocity to enter the new deduction codes to the system.

Troubleshooting

Please reach out to Ease's Customer Support Team and your Paylocity Account Manager with questions or if experiencing errors.

Any missing fields or date formatting issues will be listed in Paylocity's Web Link portal. Please be sure that these are updated in Web Link prior to approving and importing the file.

Ease Support Team
Submit a Support Request in the Help Center
702.800.2690