ease

TRAXPAYROLL INTEGRATION GUIDE

Updated 4/16/2019

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Introduction

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

The guide includes:

- Roles & Responsibilities
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Integration between Ease and TRAXPayroll will ensure that employee demographic, compensation, benefit deduction, and onboarding data will be transferred from Ease to TRAXPayroll eliminating the need for duplicate data entry for most employee information.

Ease is considered the “system of record” for new hires, terminations, status changes, compensation changes, enrollment changes, direct deposit, W4, and most HR tracking. Note, TRAXPayroll will send address corrections to Ease.

Payroll only related data, like garnishments, liens, general ledgers, and tax information will be entered and managed directly into TRAXPayroll.

Roles & Responsibilities

It’s important that all appropriate parties are included during all steps of the integration process between Ease and TRAXPayroll. The person who is responsible for ongoing payroll processing will be the key company player 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 ● Populate all required integration fields
Company Administrator	● New TRAXPayroll clients - Provide

	TRAXPayroll implementation requirements ● Work with Broker to ensure all employee data is populated appropriately in Ease, including EIDs (employee IDs) ● Populate W-4 and direct deposit data for existing employees in Ease ● Attend all integration discussions ● Coordinate with Company Payroll Administrator to ensure milestones are met and on time.
Company Payroll Administrator	● Attend all integration discussions ● Sync data from Ease to TRAXPayroll ● Test integration and payroll processing ● Validate changes ● Process payroll
Ease	● Support Broker to configure Ease company portal ● Configure and enable TRAXPayroll integration ● Support Company Administrator and/or Company Payroll Administrator for integration questions and support ● Collaborate with TRAXPayroll for integration updates and support
TRAXPayroll	● Guide Company Administrator and/or Company Payroll Administrator through the TRAXPayroll setup requirements and implementation ● Establish integration from Ease to TRAXPayroll ● Review new deduction codes and process after sync ● Review steps to sync data from Ease and process payroll ● 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.*

Integrated Data Fields

The below fields need to be populated in the Employee > Profile page in Ease for all employees before the TRAXPayroll integration is enabled. Once the integration is completed, data in these fields will be sent from Ease to TRAXPayroll, eliminating the need for duplicate entry of data. Ease will be the system of record for the below information, the information must be entered and updated in Ease so it will populate in TRAXPayroll once synced. If the below data is updated in TRAXPayroll after the integration is live, it will not populate back into the Ease portal.

The below data must be populated prior to activating integration in Ease. This data may be populated during the initial setup by the Broker but can also be added or updated at any time by the Broker or Company Administrator. The best practice is to verify the information is complete and accurate. Run an employee census in the Employees > Actions > Generate Census page. Verify that the below required data is up-to-date and accurate on the census and identify any missing data in the Ease portal. For any data that needs to be added or corrected, update the information on the CSV census file and then import updated fields into Ease in Employees > Actions > Import Employees.

Direct Deposit information for existing employees can be imported into Ease using the template found on the Employees > Actions > Import Direct Deposits page.

W-4 data for existing employees can be imported into Ease using column headers at the end of the the All-Inclusive Template found here:
https://support.Ease.com/support/solutions/articles/4000058203-employee-import-census-templates-

If the client is a new customer to both Ease and TraxPayroll, the best practice is to populate the employee data into Ease first. Then TraxPayroll will sync required data into the TRAXPayroll system using the API integration.

Employee Demographic/Indicative Data

- EID (best practice is not to use SSN as the employee's ID # for TRAX integrations. If the employer is already a TRAXPayroll customer, use the TRAXPayroll ID number for the EID)
- SSN
- First Name
- Last Name
- Address (Street, City, State, Zip)
- Email

- Birth Date
- Hire Date
- Compensation Type
- Compensation Amount
- Compensation Start Date
- Marital Status (Single, Married, and Divorced)
- Job Title
- Pay Cycle
- Pay Group (If more than one Pay Groups exists in TRAXPayroll, each should added in Ease in the TRAXPayroll page. Employees will need to be assigned to the appropriate pay group. If only one Pay Group exists in TRAXPayroll a default Pay Group will be assigned to the employee).

Employee Enrollments

- Current benefit plans with appropriate eligibility settings
- Current elections for all plans requiring a paycheck deduction
- Correct employee deduction amounts per pay period

**New deduction amounts and deduction changes will be populated from Ease to TRAX using the API integration immediately. Note, the employee must finish their enrollment and sign forms.*

Employee New Hire Onboarding

- W-4 Federal filing status
- W-4 Federal withholding allowance
- W-4 Federal additional withholding
- Direct Deposit - Account type
- Direct Deposit - Routing number
- Direct Deposit - Bank name
- Direct Deposit - Account number

**No State Filing Status and Exemptions are integrated at this time.*

Time Off

- Time Off Type (Vacation, PTO, Jury Duty, Sick, etc.)
- Total approved hours within the pay period

**Ease and TRAXPayroll customers may use either the Ease Time Off features offered within our HRIS module to track and manage PTO or TRAXPayroll's Time Off features. Hours-worked time tracking features will be managed in TRAXPayroll only.*

Integration Project Plan

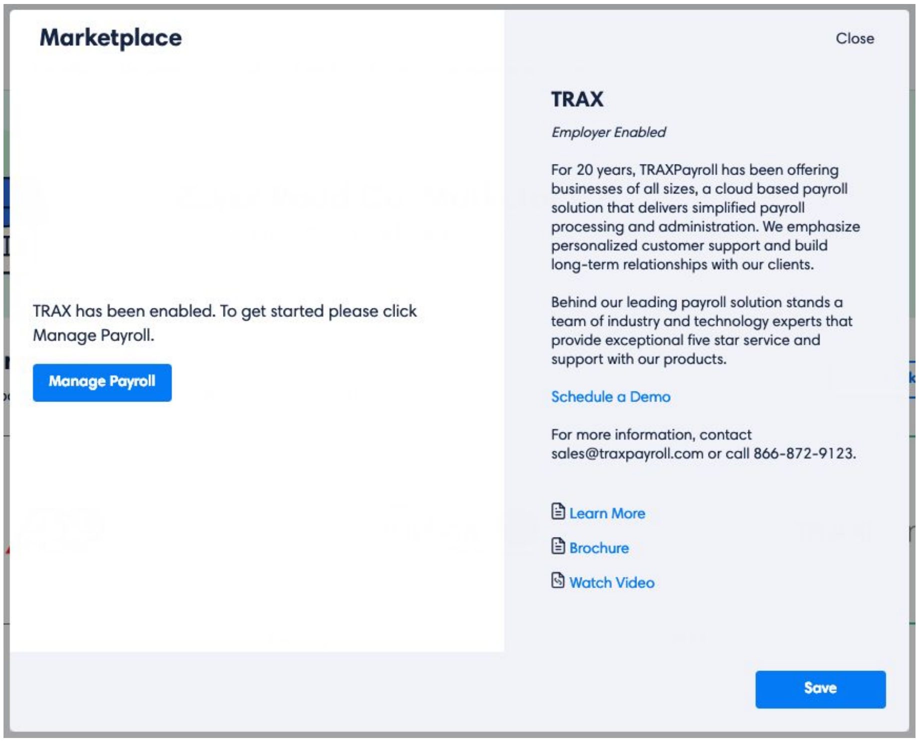
To ensure the integration between Ease and TRAXPayroll is successful, each step outlined below must be completed. The steps will also be completed in the order listed. It's important that the initial Ease portal is set up at least 45 days prior to the first payroll processing date with integration to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

Milestone	**Key Players**	**Steps**
Provide TRAXPayroll implementation requirements and YTD info **new TRAXPayroll customers only*	Company Administrator Company Payroll Administrator	Complete TRAXPayroll implementation requirements and company details and send to TRAXPayroll
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
Enable integration, configure settings	Ease Integration Team	
API Employee Import/Sync	TRAXPayroll	Pull employee indicative data from Ease to TRAXPayroll and establish individual integration
Kickoff	Company Administrator Company Payroll Administrator Ease Integration Team Broker TRAXPayroll Administrator	Review roles and responsibilities and review next steps Review missing data required for integration and new deduction types created

Populate/update required Ease data fields and plans	Company Administrator Broker	Upload or update required data fields and/or plans for TRAXPayroll integration
Integration Demonstration and Walkthrough	Company Administrator, Company Payroll Administrator Ease and TRAXPayroll Integration Teams	Review the integration/Web Link process, ongoing verification and approval responsibilities related to integration.
Data verification and testing	Company Administrator Company Payroll Administrator Ease and TRAXPayroll Integration Teams	Verify data in TRAXPayroll and test employee integration Test employee view of pay stubs in Ease
Process payroll - TEST	Payroll Administrator	Sync data, verify and approve changes, then process dry payroll run
Process payroll	Company Payroll Administrator	Review file/data in Remote Link, verify and process payroll

Enable API Integration

Ease enables Payroll Integration in the Ease Marketplace page. There is no cost for the integration between Ease and TRAXPayroll.



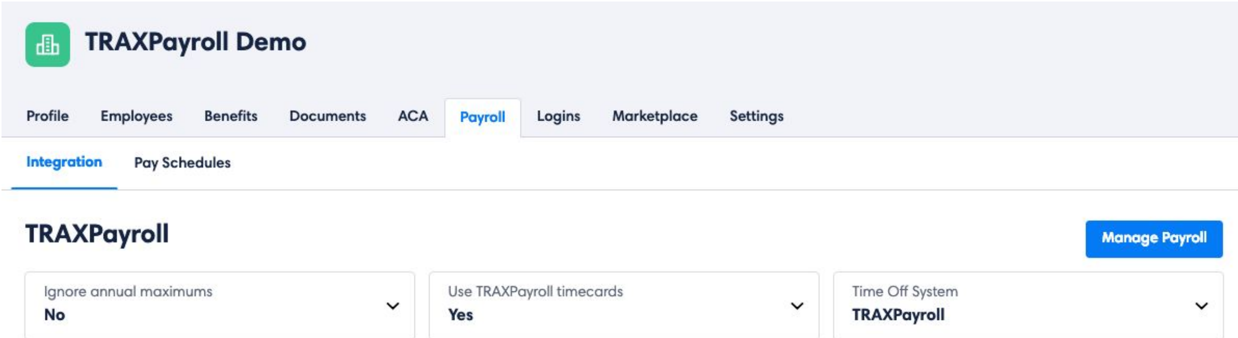
Configure TRAXPayroll Settings

Ease will configure and provide integration details to TRAXPayroll.

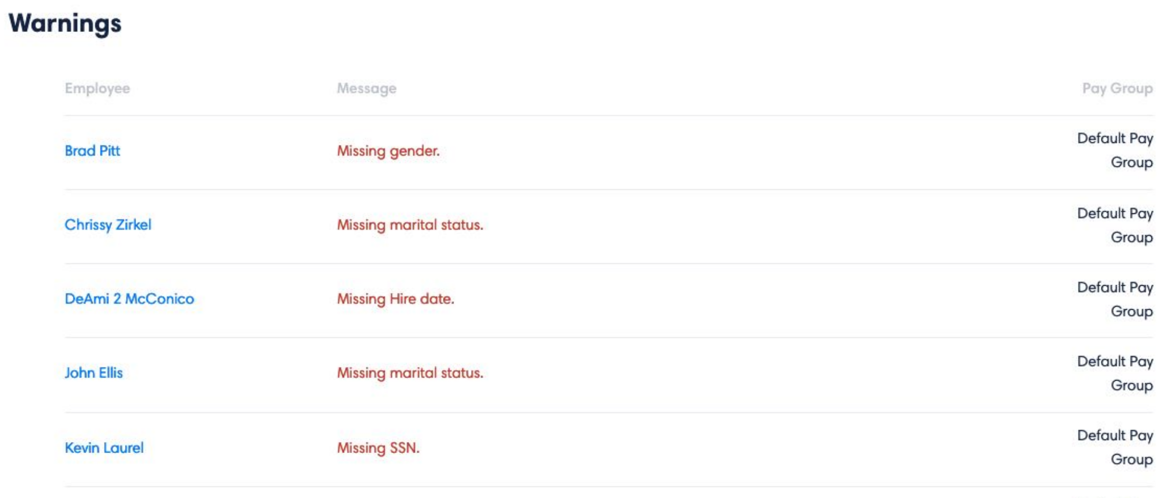
The **IGNORE ANNUAL MAXIMUMS** setting will determine whether employee-elected annual amounts for 401(k), Flexible Spending Accounts, and Health Savings Accounts plans will be sent to TRAXPayroll on the API integration. If the preference is for annual maximum contributions to be handled in TRAXPayroll directly instead of using data from Ease, we will set the **IGNORE ANNUAL MAXIMUMS** to **Yes**. The default option is that Ease will send the annual elections so this field will be set as **No**.

The **USE TRAXPAYROLL TIMECARDS** setting will confirm whether the employer is using the Time Tracking features in TRAXPayroll to manage time worked for Non-Exempt or Exempt employees.

The **TIME OFF SYSTEM** determines whether the employer is using the Time Off/PTO Tracking features in TRAXPayroll or Ease. This option will be set to either **None**, **TRAXPayroll** or **Ease HRIS**. If Time Off Tracking is enabled in Ease as part of the HRIS features the time taken will be sent to TRAXPayroll to be accounted for in payroll processing.

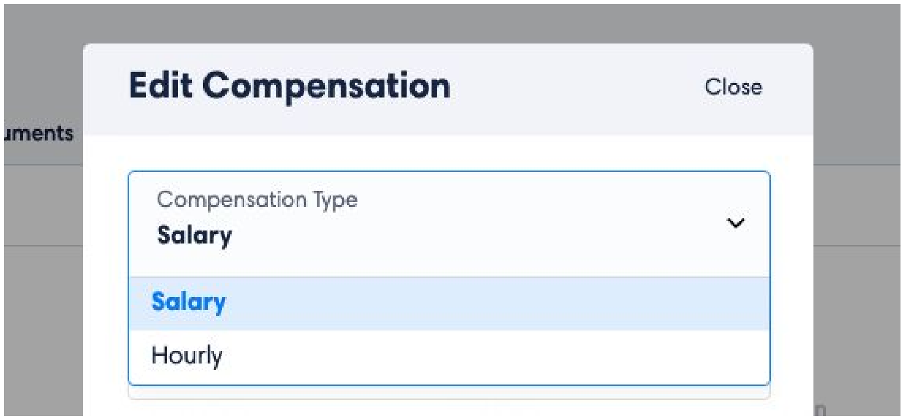


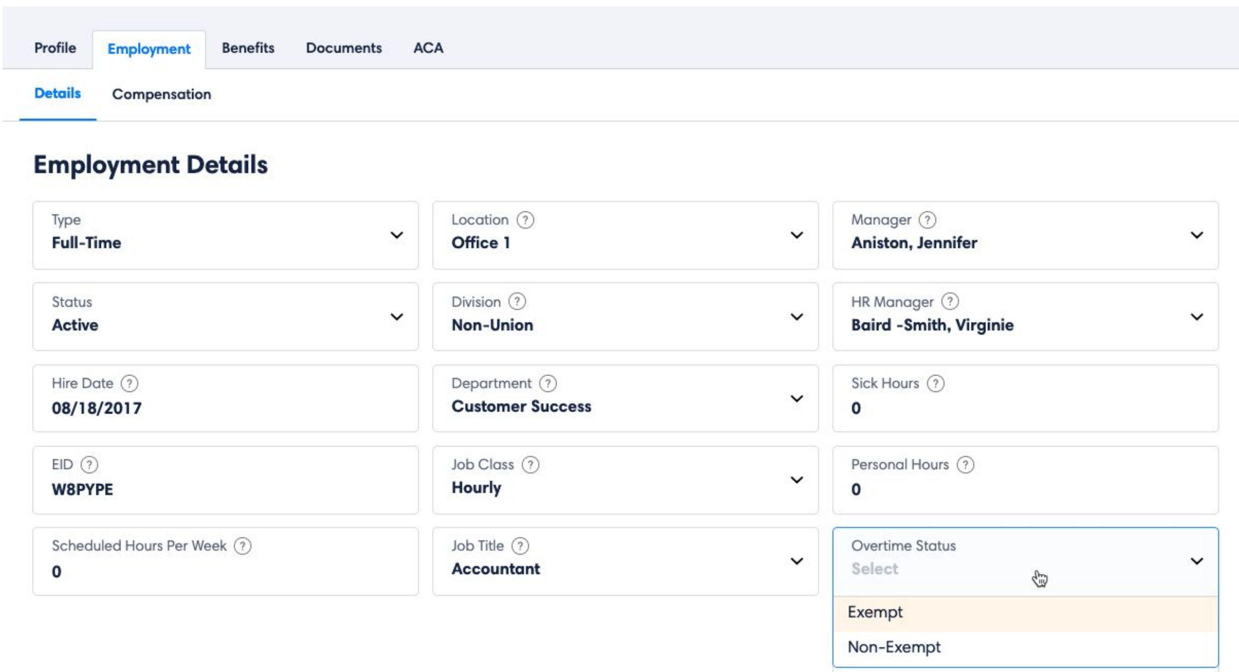
After the TRAXPayroll integration is configured the Company Administrator will be able to access the TRAXPayroll page to determine whether there are any employees who are missing required data in their Ease profile.



Overtime Status

By default, Ease will send employees with a **Salary COMPENSATION TYPE** as Exempt employees to TRAXPayroll. Employees with an **Hourly COMPENSATION TYPE** will be sent to TRAXPayroll as Non-Exempt employees. If the employer has salaried employees that are considered Non-Exempt, please be sure to select the appropriate **OVERTIME STATUS** on the **Employee > Employment** page so the appropriate tax status will be assigned in TRAXPayroll.



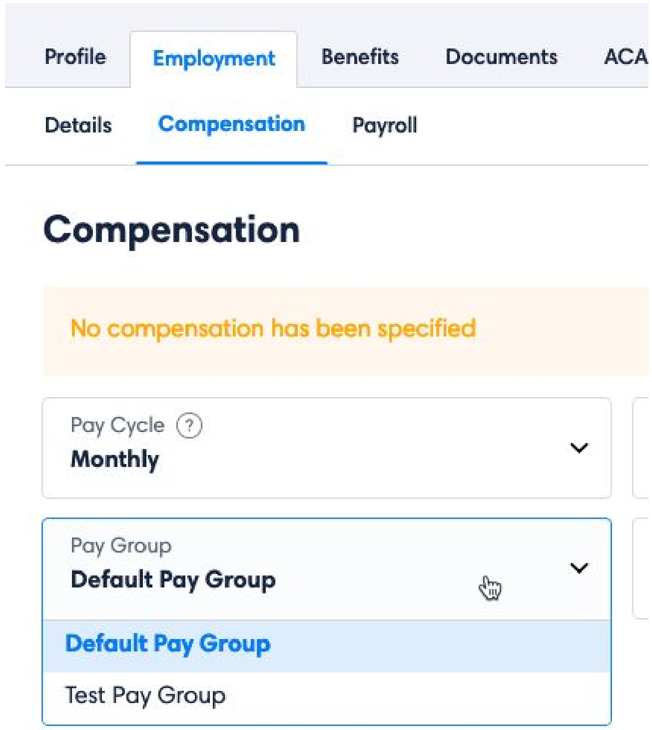


Pay Groups

Each pay schedule needs its own separate Pay Group. If only one Pay Group exists, the Pay Group will be defaulted into each Employees > Profile > Employment page. If the company has more than one Pay Group, Company Administrators must import or enter Pay Groups for each employee in the Employees > Profile > Employment page.

Pay Groups can be imported into Ease on the Employee Import Template. The column heading is "Pay Group", which maps to a valid existing Pay Group name. The Pay Group must be added in Ease before they can be assigned to employees via import or in the Employees > Profile > Employment page.

A Test Pay Group will be created for test employees entered into Ease.

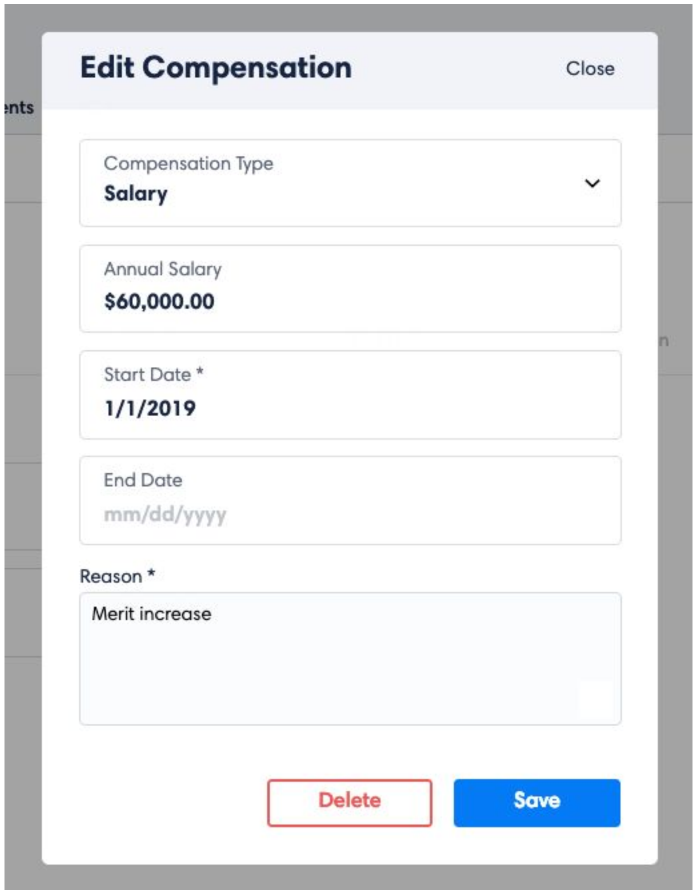


Testing

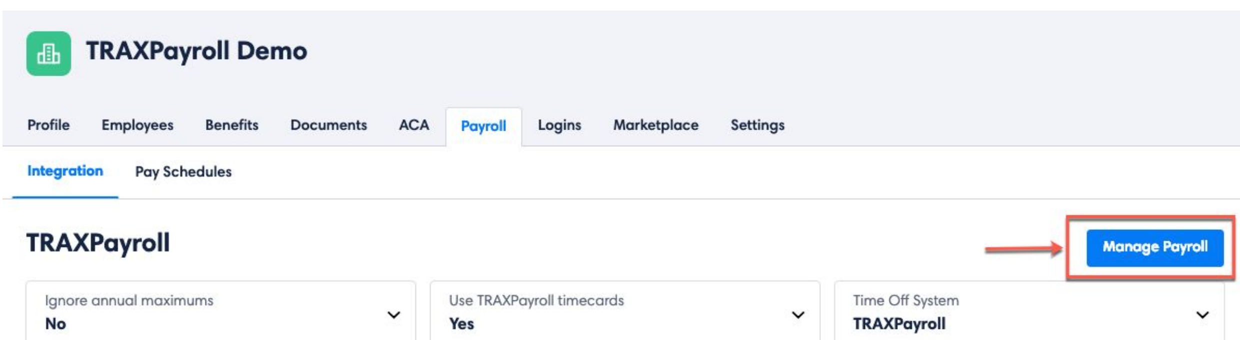
Once the configuration is enabled by TRAXPayroll the employer will want to review all data for accuracy in TRAXPayroll's Remote Link portal. When live, the data will be available in the TRAXPayroll Remote Link page immediately. Changes will be identified by showing differences between the Ease and TRAXPayroll data in the Remote Link page. The TRAXPayroll will formally be updated when the data is added or changes applied in Remote Link.

Ongoing Integration Management

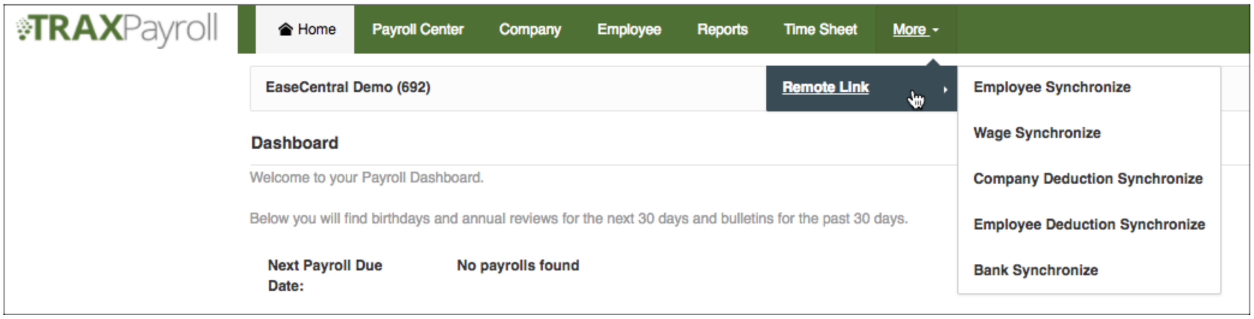
Newly hired employees, terminations, status changes, compensation changes, benefit elections, etc. will be entered into Ease.



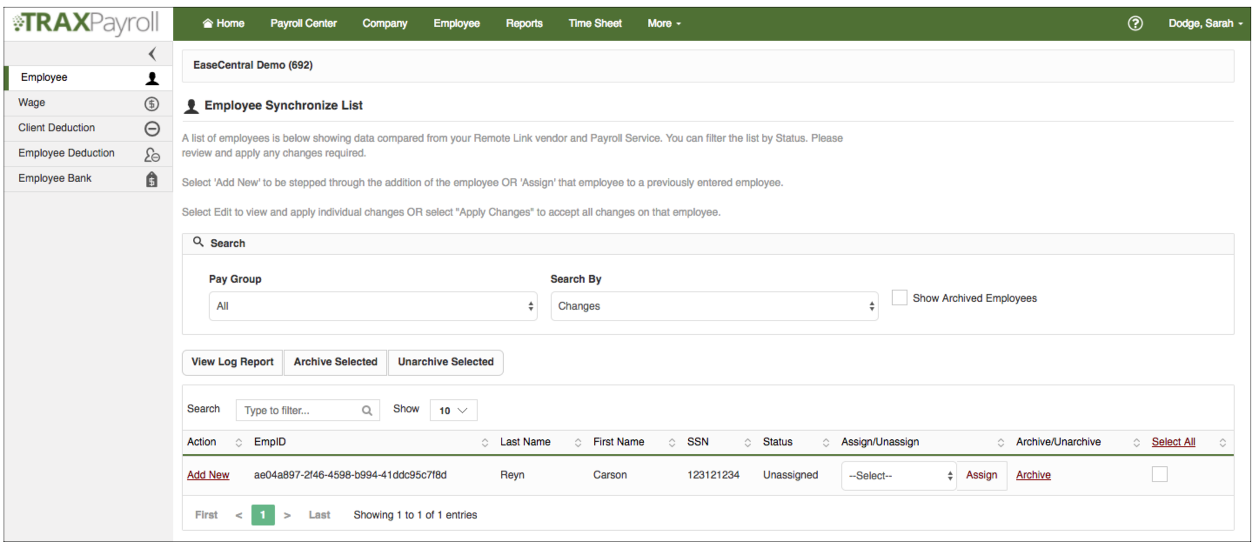
Prior to processing payroll, data must be synced between Ease and TRAXPayroll to update the payroll system. The Payroll Administrator selects Payroll > Integration > Manage Payroll to run payroll and sync the data from Ease to TRAXPayroll.

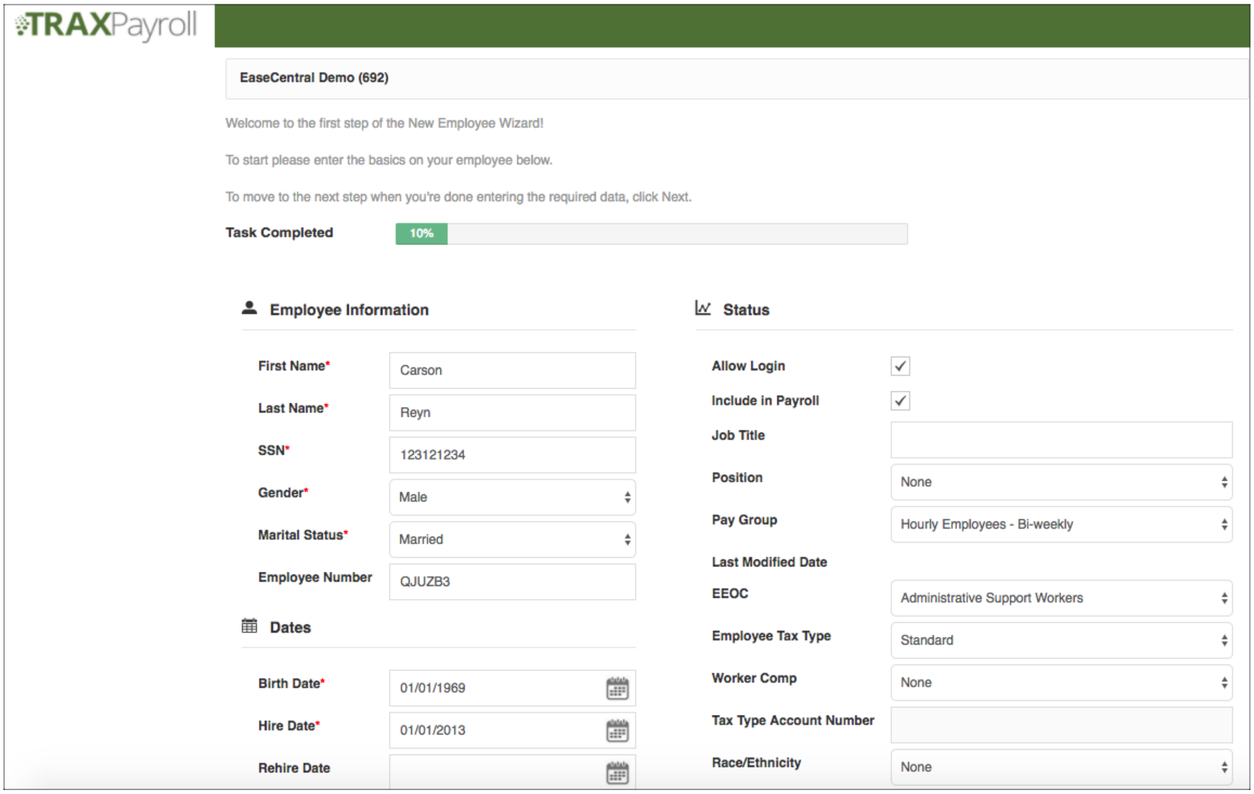


The Remote Link page will allow the Payroll Administrator to synchronize the data between the two systems. Every time the Remote Link tab is selected, a realtime compare is completed to see what data elements are new and what data elements have changed.

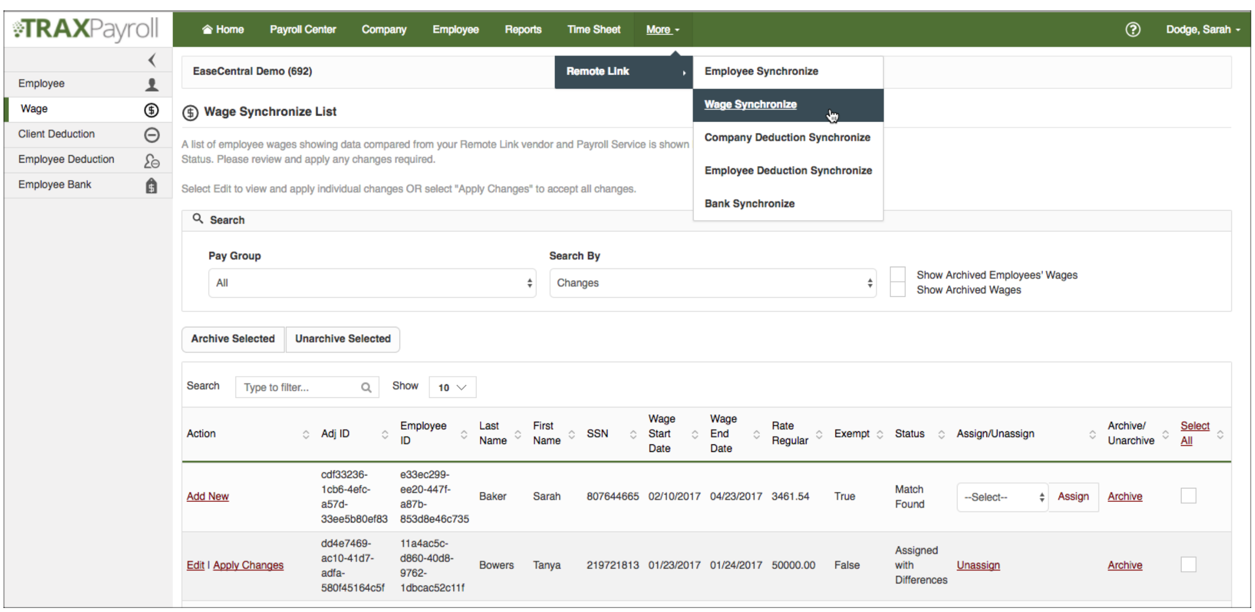


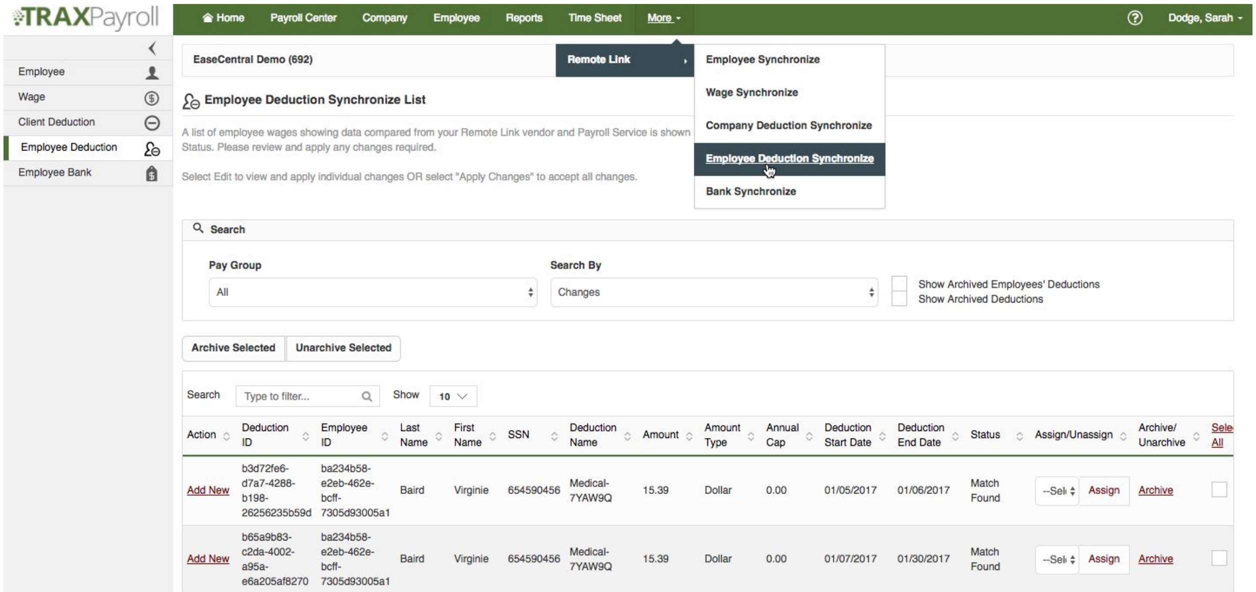
In the Employee Synchronize page, Add New will add the employee from Ease into TRAXPayroll. It will pre-populate the Add New Employee Wizard with data already entered into Ease.



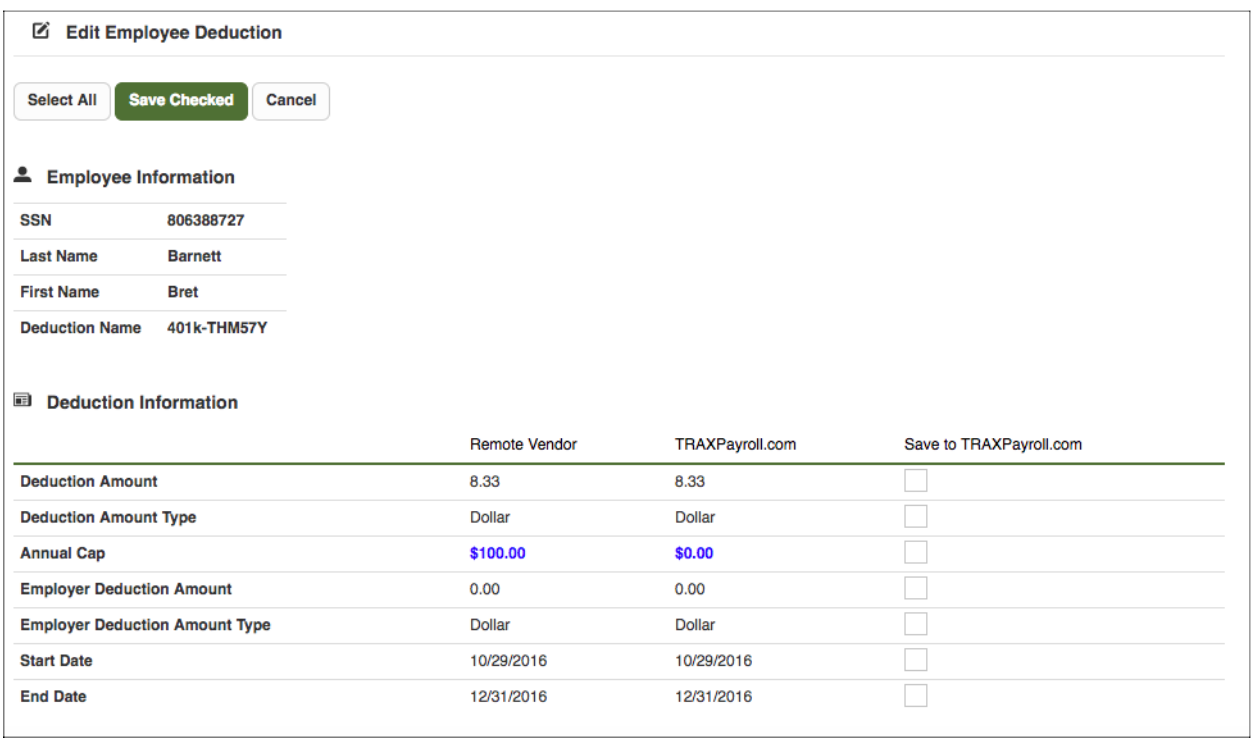


If the employee record exists in Ease and TRAXPayroll already, the Edit or Apply Changes options can be used in any of the Remote Link pages. Apply Changes will automatically update TRAXPayroll with any changes made in Ease.





The Edit option will allow changes to be reviewed before being applied to the payroll system. The Remote Vendor column will display the data in Ease. The TRAXPayroll column will show the data that currently exists within TRAXPayroll. Any data fields highlighted in bold show data that was changed in Ease and will be updated in TRAXPayroll. Select the checkbox next to the fields to be updated and click Save Checked.

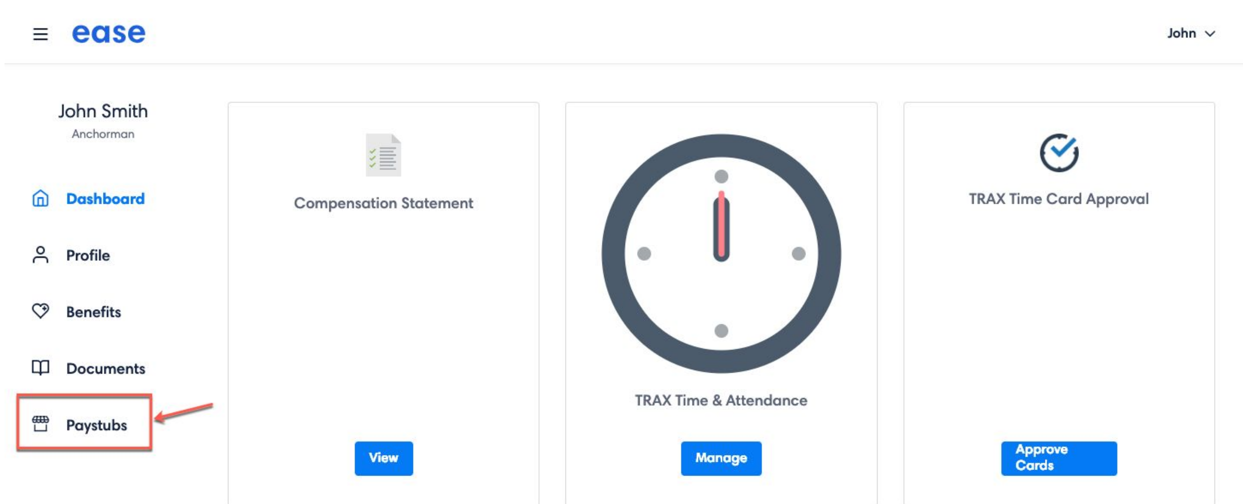


Note: $0 Deductions will not be sent from Ease to TRAXPayroll.

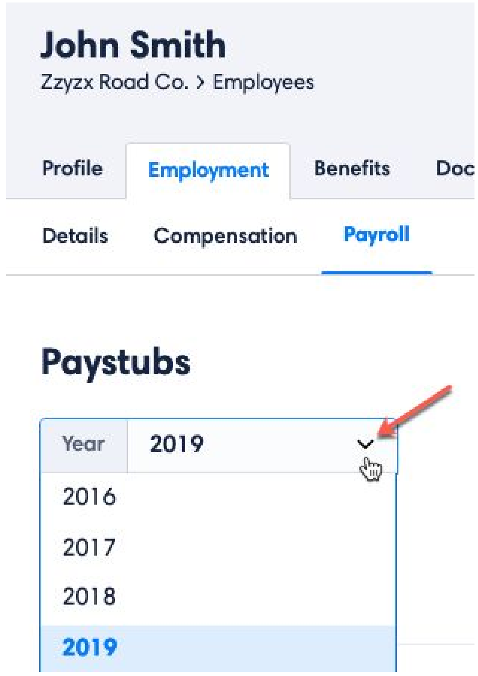
Pay Stubs

Employees can access the TRAXPayroll pay period data, YTD data, W-2, Time Cards, and Time Off information in Ease in the Paystubs and TRAX Timecard pages in their Ease dashboard.

Note: If the company is using Ease for Time Off Tracking, employees will request time off and view balances in the Time Off page in Ease.



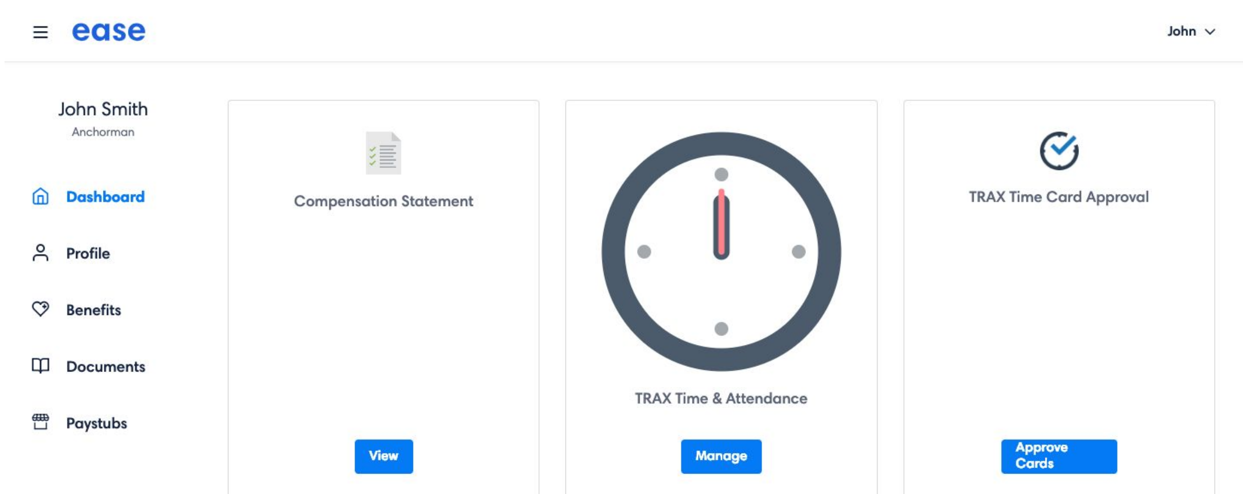
Note: You will need to toggle to view the correct reporting year in order to see the option to download W2s from the 'Actions' menu. To toggle between years, click the caron symbol to the right of the page. See the screenshots below for reference.



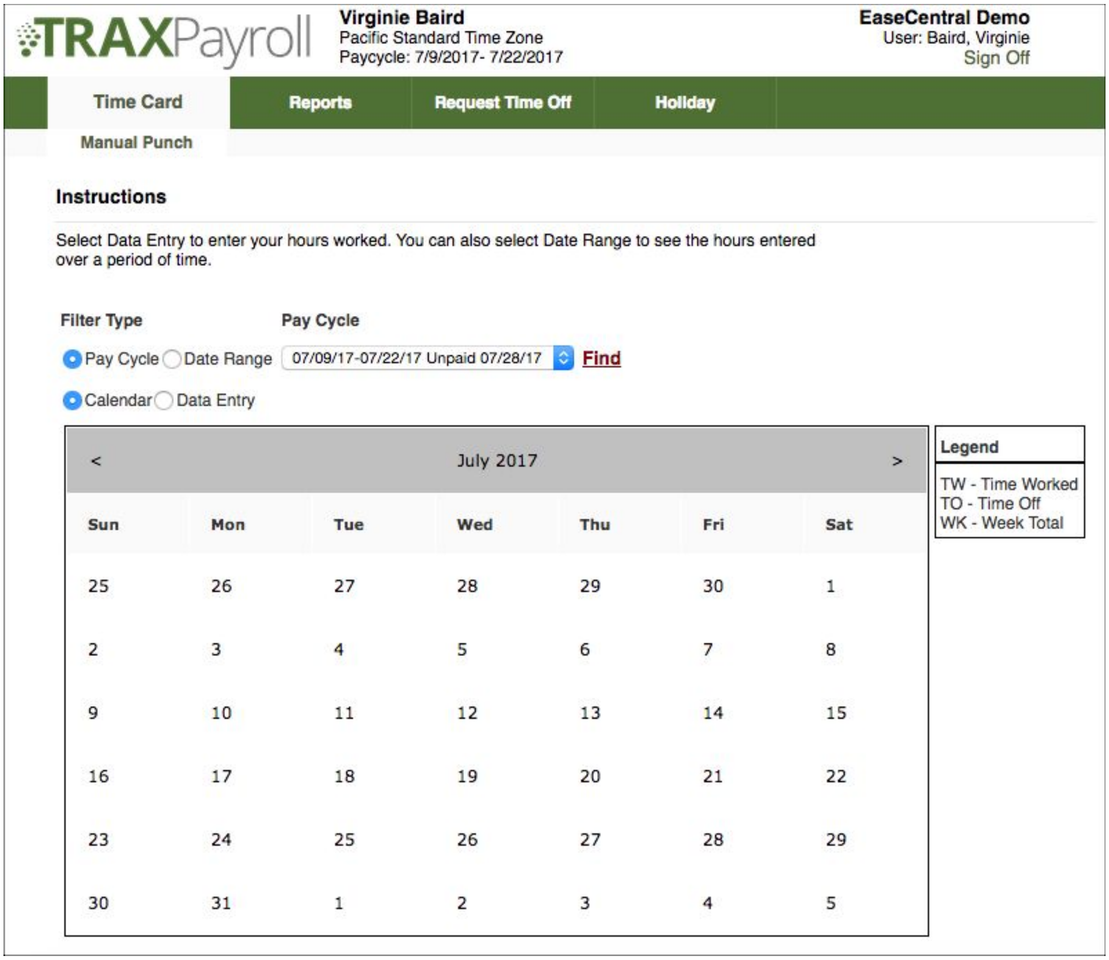
Time Management

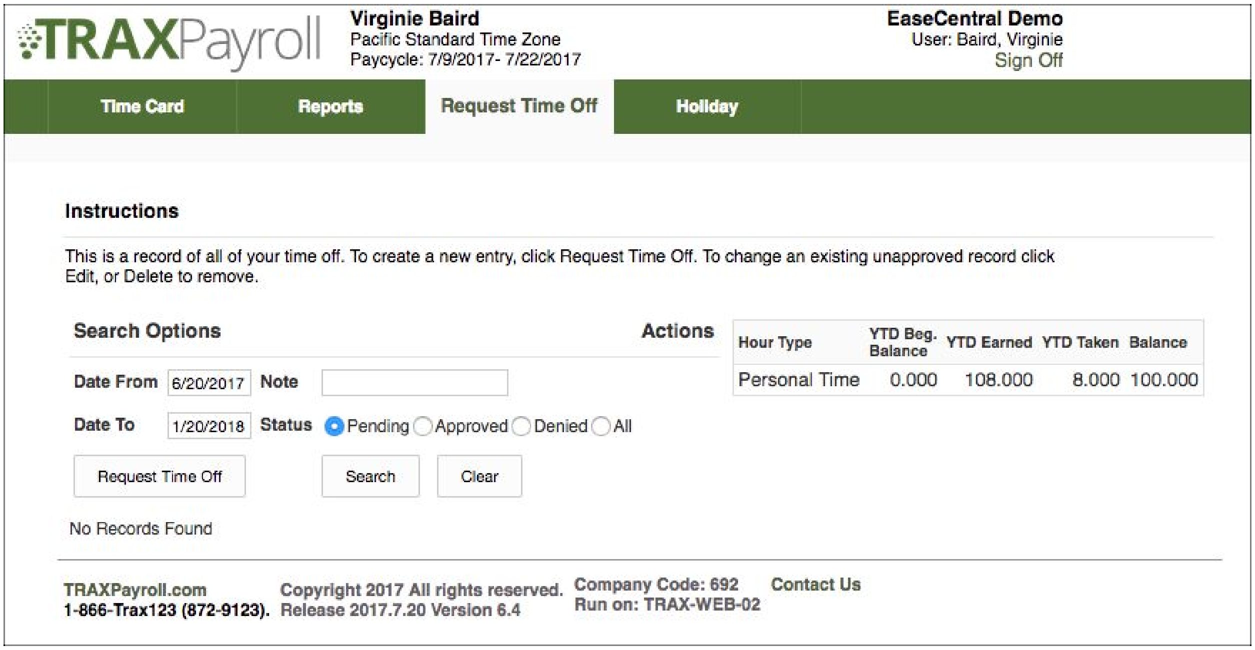
If Time Off Tracking is enabled in Ease as part of the HRIS features the time requested/taken by employees and entered into Ease will be sent to TRAXPayroll to be accounted for in payroll processing.

If the TRAXPayroll Time Off or TRAXPayroll Time Cards service features are enabled in TRAXPayroll, employees will be able to enter time worked for Non-Exempt employees or request time off by first selecting the TRAX Timecard option on their Ease dashboard.

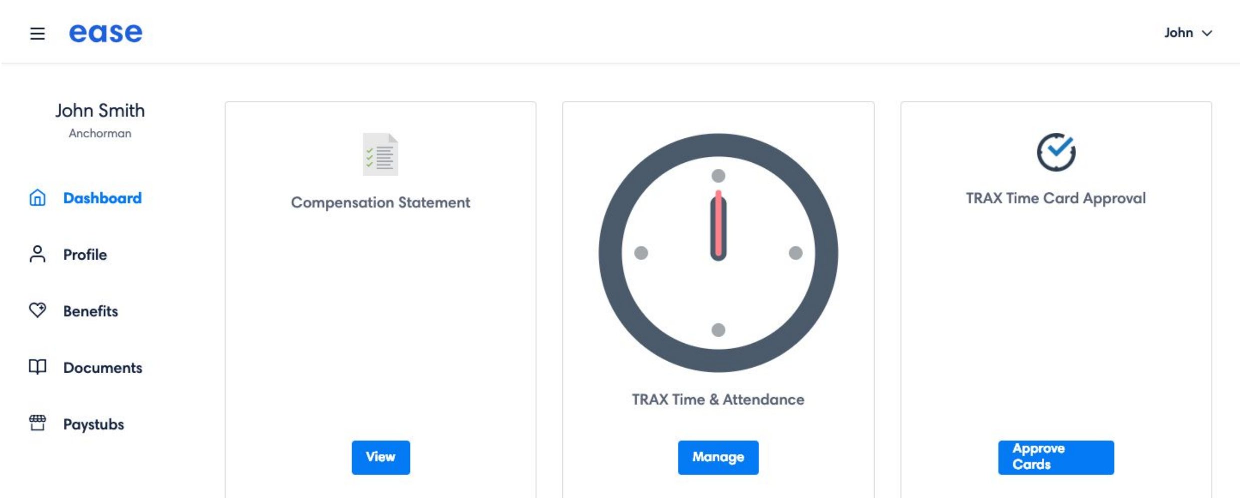


This option will use single-sign on (SSO) to log the employee into TRAXPayroll's timekeeping module where the employee can enter time worked, request time off, and view their balances.



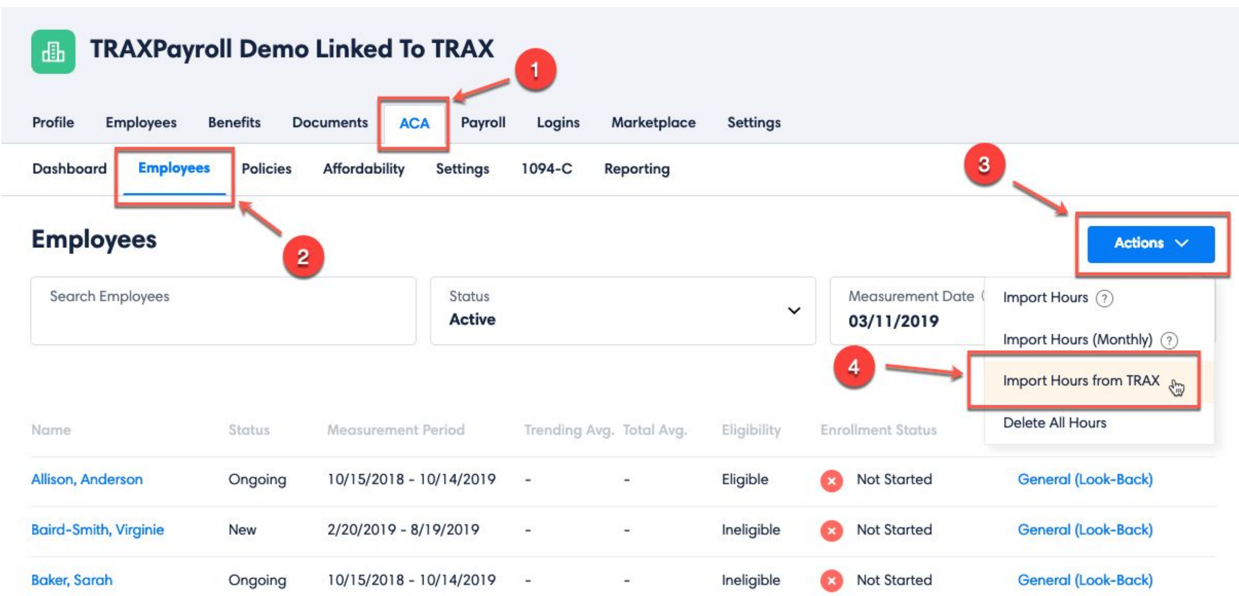


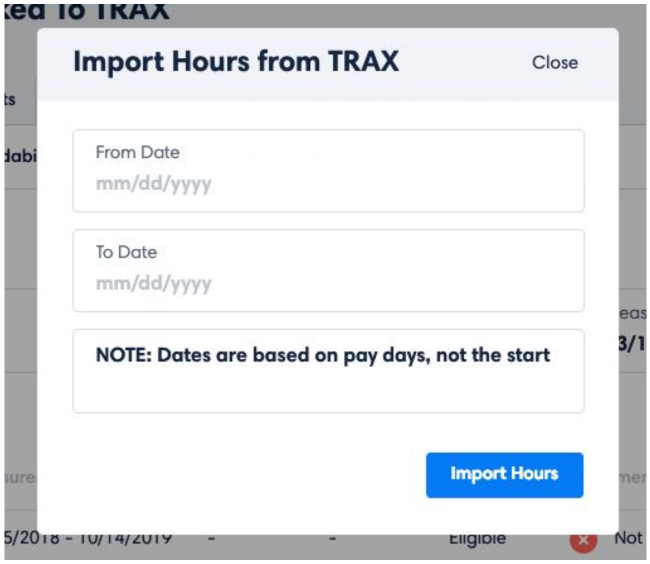
A Manager Time Approval option will display in the employee's Ease dashboard the TRAXPayroll Time Cards service and/or the TRAXPayroll Time Off features are enabled in TRAXpayroll and the employee is assigned as a Manager in the Ease system on an employee's Profile > Employment page. The Manager Time Approval option will bring the employee to the appropriate page in TRAXPayroll if the employee is also set as a manager in TRAX and has the ability to approve time off and/or time worked in TRAXPayroll.

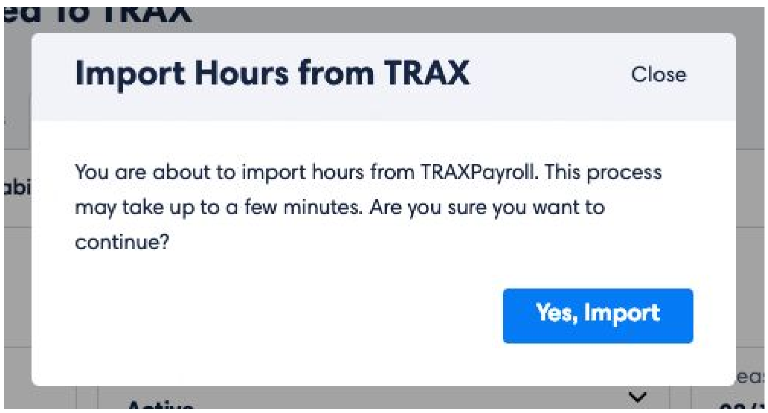


ACA Full-Time Status Eligibility Tracking

Employers using Ease's ACA module to track employees' Full-Time eligibility status, who are also tracking hours worked for Variable-Hour employees in TRAXPayroll can use the ACA Import Hours from TRAX menu in Ease. The button can be found on the ACA > Employees > Actions dropdown menu on a button labeled, "Import Hours from TRAX" (note that this button will only appear if the company has the TRAXPayroll integration enabled via the Ease Marketplace). Once clicked, a modal will open in which the From and To dates can be entered. Finally, a spinner will appear as the sync takes place and will disappear once the sync has completed. Please see the following screenshots for details:







Then Ease will track the employee's Full-Time status according to the measurement Policy set up in the ACA module.

Troubleshooting

Please reach out to Ease's Customer Success Team and your TRAXPayroll Representative with questions or if experiencing errors.

Ease Success Team
support@Ease.com
702.800.2690

TRAXPayroll Support
customerservice@traxpayroll.com