ease

BenefitMall PayFocus Pro Integration Guide

Updated 3/20/2019

Introduction

This guide will provide an overview of the integration between Ease and the BenefitMall PayFocus Pro system.

The guide includes:

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

Integration between Ease and BenefitMall PayFocus Pro will ensure that employee demographic, compensation, benefit deduction, and onboarding data will be transferred from Ease to BenefitMall PayFocus Pro 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, and W4 tracking. Payroll only related data, like garnishments, liens, general ledgers, and other tax information will be entered and managed directly into BenefitMall PayFocus Pro.

At this time, time off taken and balances are not integrated and will not transfer from Ease to BenefitMall. If HRIS is enabled in Ease, time off information will also need to be populated into BenefitMall manually.

This integration is for existing BenefitMall PayFocus Pro clients only. Clients new to BenefitMall PayFocus Pro must run at least 2 successful payrolls before the Ease integration can be enabled.

Roles & Responsibilities

It's important that all appropriate parties are included during all steps of the integration process between Ease and BenefitMall PayFocus Pro. 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/Payroll Administrator	• Review and correct discrepancies • Test integration and payroll processing • Validate changes • Process payroll
Ease	• Enable BenefitMall PayFocus Pro integration • Collaborate with BenefitMall PayFocus Pro for integration updates and support
BenefitMall	• Review steps to verify discrepancy report • Provide broker/client with any BenefitMall PayFocus Pro support • Collaborate with Ease for integration enablement and 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 below fields need to be populated in Ease for all employees before the BenefitMall PayFocus Pro integration is enabled. Once the integration is completed, data in these fields will be sent from Ease to BenefitMall PayFocus Pro, eliminating the need for duplicate entry of data.

Employee Demographic Data

- EID
- SSN
- First Name
- Last Name
- Address (Street, City, State, Zip)
- Email
- Personal Phone
- Work Phone
- Birth Date
- Gender
- Marital Status
- Hire Date
- Rehire Date
- Termination Date
- Job Title
- Compensation - Added at initial population only. Changes will need to be done in both systems.
- Pay Cycle
- Pay Group

Employee Deductions

- Deduction amounts
- Effective dates

Employee New Hire Onboarding

- W-4 Federal filing status
- W-4 Federal withholding allowance
- W-4 Federal additional withholding
- W-4 State filing status (only for states using federal guidelines)
- W-4 State withholding allowance (only for states using federal guidelines)
- W-4 State additional withholding (only for states using federal guidelines)
- Direct Deposit Account type
- Direct Deposit Routing number
- Direct Deposit Bank name

- Direct Deposit Account number

Integration Project Plan

To ensure the integration between Ease and BenefitMall PayFocus Pro is successful, each step outlined below must be completed. The steps will also be completed in the order listed.

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	Build portal including organization types, benefits, and customization Import employees and enrollments and assign Company Administrator
Enable Integration	Ease	Enable in client Marketplace, provide API data to BenefitMall team
Kickoff Call	Company Payroll Administrator BenefitMall Broker	Review roles and responsibilities Review discrepancy report and steps needed to sync systems
Discrepancy Audit/Deduction Review	Company Administrator/Payroll Administrator	Verify data and update appropriate system
Data Sync	BenefitMall	Enable the data sync between Ease and PayFocus Pro
Process payroll	Company Payroll Administrator	Complete payroll processing using the data synced from Ease

Enable Integration

Interested clients should reach out to their BenefitMall team to request the integration. Once the request is received and the Ease portal is verified, Ease will enable the Payroll Integration in the client's Ease Marketplace and provide API data to BenefitMall.

Kickoff Call

A call will be scheduled with the client and the BenefitMall team to review the flow of the integration and review next steps.

Discrepancy Audit

The discrepancy audit should be run in the Ease portal and all discrepancies resolved prior to the completion of the integration set up.

To run the audit, go to Payroll > Run Discrepancy Audit.

A listing will display all employee demographic differences between the Ease and the BenefitMall PayFocus Pro systems. If the BenefitMall PayFocus Pro data is correct, the client can select which fields to update with payroll data by checking the box next to the value to sync. If Ease data is correct, no further action is needed as it will override payroll data when the integration is enabled.

Deduction Review

At the completion of the discrepancy audit, the client should click the Download Deductions Report from the Payroll tab in their Ease portal. A comparison should be done against existing deductions in BenefitMall PayFocus Pro.

If there is a discrepancy, the Ease platform will likely need to be updated as Ease is the system of record for benefit deductions and will overwrite existing values in BenefitMall PayFocus Pro.

Data Sync

Once the data has been reviewed and any discrepancies updated in the appropriate system, the client should reach out to BenefitMall to ask for the integration to be enabled. When the integration is live, the data is synced from Ease to BenefitMall PayFocus Pro immediately.

Note: Data may take up to five minutes to populate from Ease to PayFocus Pro.

Ongoing Integration Management

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

Notes: Compensation changes will need to be entered manually into both Ease and BenefitMall PayFocus Pro.

$0 Deductions will not be sent from Ease to BenefitMall PayFocus Pro.

Pay Stubs

Employees can access the BenefitMall PayFocus Pro pay period data, YTD data, and W-2 information in Ease in the Paystubs page in their Ease dashboard.

Troubleshooting

Please reach out to Ease's Customer Support Team or your BenefitMall PayFocus Pro Representative with questions or if experiencing errors.

Ease Support Team
support@ease.com
702.800.2690

BenefitMall Support
HRAdmin@Benefitmall.com
844.473.6287