**Uzio Integration with Deputy**

* **Aug 29, 2024**
* **Knowledge**

**About This Integration**

Deputy is an all-in-one web-based solution that simplifies scheduling, timesheets, tasking, and communication. With the Uzio + Deputy integration, you can seamlessly import employees’ hours worked and automate payroll in UZIO.

**Integration Setup**

Integrations with Deputy require admin users with the integration setup permission in UZIO to perform three simple steps through self-service.

**Step-1: Establish a Connection**

Login to Uzio [Employer Portal](https://app.uzio.com/employer/loginPage). Once logged in from left side menu, click on **Integrations**, click on **Connect** button available against Deputy tile.

A screenshot of a computer

AI-generated content may be incorrect.

You will be prompted to log in to your Deputy account using either your Deputy credentials, or by social login. If you don't see this window, make sure your browser is not blocking pop-ups.

A screenshot of a website

AI-generated content may be incorrect.

On the next page, you will be prompted to **Select Business** that you want to integrate with UZIO. Click **Allow Access** to allow UZIO to connect to Deputy.

A screenshot of a login page

AI-generated content may be incorrect.

After the connection is successfully established, it will redirect you to the Deputy Integration settings page in Uzio, as explained in the next step.

**Step-2: Manage Deputy Integration Settings**

After establishing the connection, the next step is to complete the mapping setup for the information to flow. To do this, click on the **Manage** button.

A screenshot of a computer

AI-generated content may be incorrect.

When managing Deputy integrations for the first time, you need to complete three settings: Work Locations, PTO and Timesheets, and Employees Sync settings.

**Work Locations**

On this page, you will link your work locations in UZIO with Deputy locations. This ensures that new employees are automatically assigned and linked to the respective location in Deputy.

**Notes:**

* To exclude locations or prevent employee syncing from UZIO to Deputy, select 'None' from the Deputy location drop-down. If a UZIO location is linked to 'None' in Deputy, employees from that location won't sync, regardless of the employees sync criteria in the next section.

A screenshot of a computer

AI-generated content may be incorrect.

**PTO and Timesheets**

This page will allow you to define the mappings for PTOs and Timesheets.

**PTO Sync**

In this PTO Sync section, you will select the platform where you manage your employees' time off. You have the following options.

**Uzio**

Select this option when your employees' PTO accrual, requests, approvals, and balances are managed in Uzio. Linking your Uzio PTOs with the respective Deputy Leaves enables you to send leave information, along with its status, to Deputy. This information will appear on the schedule, allowing the person planning the roster/schedule to see who is out on any given date.

**Notes:**

* If your company's PTO accrual is based on hours worked, utilizing UZIO for Payroll and PTO offers the advantage of automatically calculating time-off accruals based on payroll hours. Therefore, it is recommended to manage PTOs in UZIO. This entails that PTO accruals, requests, and approval/denials should occur using the UZIO platform. These functionalities are available on both the web and the UZIO mobile app.

A screenshot of a computer

AI-generated content may be incorrect.

**Deputy**

Select this option if your employees' PTO accrual, requests/approval, and balances are maintained in Deputy. Here, you would need to specify Deputy leave mappings with Uzio earnings. This ensures that approved time-off hours from Deputy syncs directly to Uzio payroll earnings for payroll processing.

**Notes:**

* If leaves mapping is not specified, then employees’ PTO information won’t be processed into payroll.
* The limitation of this option is that it does not flow back the holiday hours information to UZIO. Only PTO requests and hours worked on holidays will sync. You can add holiday hours for specific employees directly on the payroll grid while processing payroll.
* In this option, PTO hours will be received from Deputy, but these PTOs are paid based on the hourly rate specified on the employee's profile in Uzio.

A screenshot of a computer

AI-generated content may be incorrect.

**None**

This option is unlikely to be used; if selected, time-off information will not sync between Uzio and Deputy from either side.

**Notes:**

* If the PTO policy, accrual, requests, and approval/denial are maintained in Uzio for a set of employees, their PTO information will continue to flow into payroll for processing as usual.

A screenshot of a computer

AI-generated content may be incorrect.

**Timesheets Sync**

In this 'Timesheets Sync' section, you will specify the mapping of employees' timesheets Pay Rates in Deputy to respective hourly paid earning at Uzio. This will enable automatically syncing of employees' timesheets into payroll for processing. Hence, it is important to map these to UZIO earnings for Payroll processing else the hours for that Pay Rates in Deputy will not sync into UZIO.

**Notes:**

* The system by default creates a mapping for most frequent applicable Pay Rates categories Regular, Overtime, and Double Overtime to respective earnings in Uzio. You can make changes to the default selected if necessary.
* For the remaining Pay Rates (Custom pay types, premiums and penalties if created in Deputy), map them to respective earnings at Uzio; if not applicable, select 'None'.
* If the required earning is not in the list, add it first in your payroll setup on the Company Earnings page and then map it here.
* Only pay rates compliant with US state regulations, as mentioned under the Timesheets Sync section, are supported through this integration. Any other pay rates may need to be handled explicitly. You can update that pay rates information directly on the pay grid while processing the payroll.

A screenshot of a computer

AI-generated content may be incorrect.

**Employees Sync**

This page will allow you to define the employee sync criteria that will enable employees including new hires matching the criteria to move automatically into Deputy and eliminate duplicate entries. This syncing in a one-sided process, i.e., from Uzio to Deputy, where Uzio is considered the source of truth.

Here, you will also be able to specify whether to sync only a specific category of employees or all employees. You will get an option to decide if “**I Will Add Manually**” to Deputy, meaning the employee sync will never happen from UZIO to Deputy and you will always create the employee record manually into Deputy.

**Existing Employees Syncing -** You will also be able to decide whether all existing employees matching the sync criteria should sync with Deputy or not. The syncing will happen after this integration setup is successfully completed. *If you have already setup the employees into Deputy, then you should avoid selecting this checkbox to Sync existing employees.*

**Invite Employees to Join Deputy -** If you select the checkbox 'Send an email to these newly synced,' employees synced from Uzio to Deputy after enabling this setting will receive an invitation email from Deputy with registration details.

**Notes:**

* Employees records are required to be available in Uzio for payroll purposes and Deputy for time tracking.
* Uzio employee ID is mapped to Payroll ID in Deputy; it is a unique attribute to identify common employees in both systems.
* Employees must have a valid and unique email address in Uzio, as Deputy does not accept invalid or duplicate emails.
* While syncing employees’ information to Deputy, Deputy doesn't accept "Employment Type" and "Pay Rates" rule. Hence, this information will not be synced from UZIO to Deputy and may require to be set up directly in Deputy. Refer to this help article from Deputy to [learn more about pay rates setup](https://help.deputy.com/hc/en-au/articles/4662818043791-Applying-U-S-pay-rates).
* Employee syncing occurs at every 5-minute intervals.

A screenshot of a computer

AI-generated content may be incorrect.

**Step-3: Sync Timesheets From Deputy to UZIO**

Once the connection is successfully established, you will see the 'Sync Timesheets from Deputy' button on the payroll grid for the regular payroll. Clicking this button will sync the employees' approved timesheets into the payroll grid for the pay period. The Sync Timesheets from Deputy button will disappear if an active integration connection with Deputy doesn't exist.

A screenshot of a computer

AI-generated content may be incorrect.

After timesheets are successfully synced, the system will start displaying the last sync time.

A screenshot of a computer

AI-generated content may be incorrect.

Once timesheets are synced from Deputy and if rest everything else is completed on this grid, then you should be set to click “Continue” in the workflow to proceed with the payroll processing.

**Notes:**

* After the integration connection has been successfully established, all the approved time entries flow directly into UZIO. Any changes made to employees' timesheets before the connection is established will not be synced.
* Please ensure that the employee's ID in Uzio matches the Payroll ID in Deputy for that employee's record, as timesheets will only sync for employees common to both systems.
* For salaried employees tracked in Deputy with PTO managed there, the system automatically deducts PTO hours from the regular hours when retrieving PTO information. This clearly splits the hours between regular and PTO hours.
* Syncing from Deputy will take precedence and will override any previous numbers available on the payroll grid in UZIO. Anything that is not flowing from Deputy will remain intact on the grid.

**Deputy Areas and Pay Rates**

In Deputy, Areas are the teams, groups or roles that work together at each Location in your organization. For more details, refer to this Deputy help article “[Areas in Deputy](https://help.deputy.com/hc/en-au/articles/5832768874127-Areas-in-Deputy)”.

In UZIO, these are considered as Jobs that can be created in the Jobs master, which can later be assigned to employees with the required rates for payroll processing. Alternatively, if you don’t assign the Jobs in UZIO and in Deputy the hours are recorded against the areas, then the integration will automatically get the hours and rates of these employees for the payroll processing and update the employee profile with the additional jobs as applicable. If jobs don’t exist and are automatically created, then the job code assigned will be a combination of (location code + area code) – Area Name, e.g. “STR7 – Workshop Manager” from Deputy. This can be changed later.

**How Rates are Determined**

In Deputy, an employee could have been assigned an Area, or an employee can be without an assignment of area. The regular rate specified in Deputy for the Area or Pay Rates section is used to process the Regular, Overtime, and Double Overtime hours in the Uzio payroll system. If rates for an employee in Deputy are not defined, then regular, OT, and DOT hours worked by that employee will be processed with 0 rates. All timesheets except regular, OT, and DOT are processed with the employee’s profile rate in Uzio.

**Rates Change in the Mid of Pay Period -** In Deputy, rates do not have effective dates. This can pose a challenge if an employee's rates change during a pay period, as there's no provision for processing prorated rates based on effective dates within that period. However, a workaround exists. Within an employee's profile, additional job section in Uzio, you can assign two jobs. Then while processing the payroll, on the pay grid, you can allocate hours between both jobs and assign the old and new rates to the respective jobs as applicable in that payroll’s pay grid itself. This allows for better management of rate changes mid-pay period.

**How to Disconnect the UZIO Integration with Deputy Account?**

To disconnect the integration with Deputy, go to the integrations page in UZIO from the left menu, expand the Deputy row on this page, and click the 'Disconnect' button.