



Employee Navigator

Users Guide



Getting Started

This Employee Navigator User Manual contains essential information for Client's ("Client" "You" "Your") successful use of its subscription to the Employee Navigator ("EE Nav") services.

Before going "live" in the EE Nav portal, Client is required to complete the following tasks:

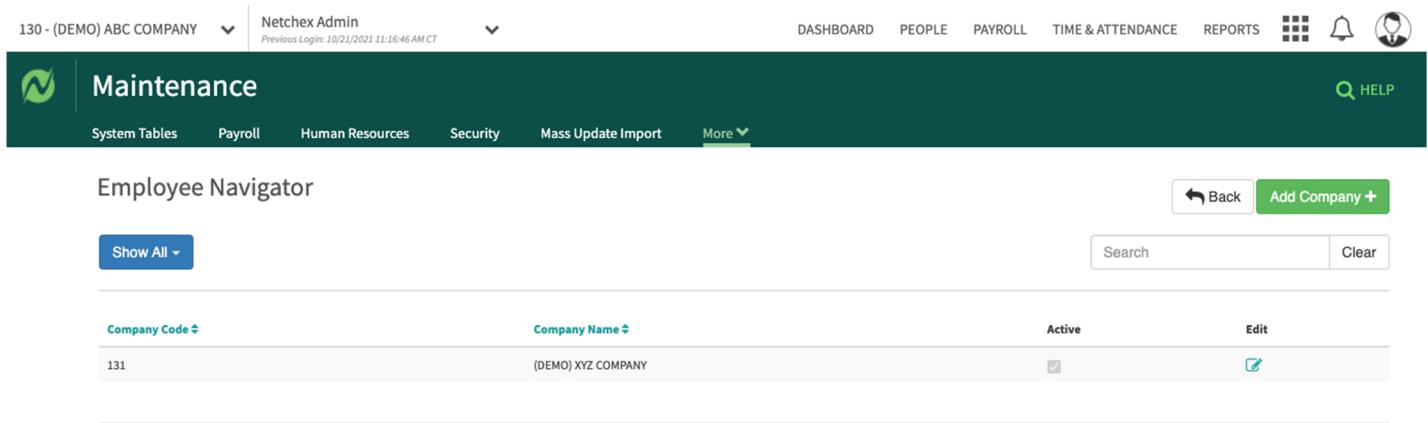
- **Run two (2) completed payroll cycles with Netchex** prior to beginning the required set up checklist provided by EE Nav
- **Obtain and provide EE Nav with Your Broker's approval** to integrate the EE Nav platform with Netchex
- Fulfilled all integration tasks provided to Client by EE Nav **at least thirty (30) days prior to the first day of Client's Open Enrollment Period**

Other data entry details:

- **Compensation – NOTE: Employee Navigator requires compensation based on pay type**
 - Verify salary employees have an annual salary amount populated in the pay rate screen.
 - Verify hourly employees have a base rate populated in the pay rate screen. ·
- **City/State/Zip fields** - Netchex validates City/State/Zip fields. Be sure to keep this in mind when going through the demographic discrepancy audit. Netchex will not accept a zip code that is invalid for a city/state combination.

If you need assistance with how to update/change data in Netchex please reach out to your dedicated Team Lead or Implementation Lead.

Understanding “The Flow” of Your Data



The screenshot shows the Netchex Admin interface with the following details:

- Header:** Shows "130 - (DEMO) ABC COMPANY" and "Netchex Admin" with a previous login timestamp of "10/21/2021 11:16:46 AM CT".
- Top Navigation:** Includes links for DASHBOARD, PEOPLE, PAYROLL, TIME & ATTENDANCE, REPORTS, and various icons for settings and notifications.
- Middle Navigation:** Shows the "Maintenance" section with sub-links: System Tables, Payroll, Human Resources, Security, Mass Update Import, and More.
- Employee Navigator Sub-Page:**
 - Title:** Employee Navigator
 - Buttons:** Back, Add Company +, Show All, Search, Clear.
 - Table:** Displays company data with columns: Company Code, Company Name, Active, and Edit. One row is shown: "131" and "(DEMO) XYZ COMPANY" with an active checkbox checked and an edit icon.

All new hires, rehires, compensation changes and terminations must be initiated in Netchex and will then be synchronized to Employee Navigator. The chart below highlights the fields currently being exchanged and in which direction(s) between each platform.

Deduction Data

All deduction information including amounts, effective dates, change dates and end dates will always be sent from Employee Navigator to Payroll. Temporary changes for deductions can and should be made in payroll. See Exception Processing below for further assistance.

NOTE: Fields cannot be customized

Netchex Field Name	Employee Navigator Field Name	Direction of Exchange
Employee Id	Payroll Id	Payroll to EN only
SSN	SSN	Payroll to EN only
First Name	First Name	Bi-directional
Middle Name	Middle Name	Bi-directional
Last Name	Last Name	Bi-directional
Address 1	Address 1	Bi-directional
Address 2	Address 2	Bi-directional (note: this field can be “blanked out” in the payroll system when data is transmitted FROM Employee Navigator to Netchex)
City	City	Bi-directional
State	State	Bi-directional
Zip	Zip	Bi-directional
Personal Email	Personal Email	Bi-directional
Home Phone	Home Phone	Bi-directional
Birthdate	DOB	Payroll to EN only
Work Email	Work Email	Bi-directional
Hire Date or Rehire (most recent hire date is exchanged)	Hire Date	Payroll to EN only
Termination Date	Termination Date	Payroll to EN only
Last Pay Change Date	Salary effective date	Payroll to EN only
Pay Type	Pay basis	Payroll to EN only
Annual salary	Annual base salary	Payroll to EN only
Base Rate	Hourly Rate	Payroll to EN only

Exception Processing

There will be instances when you may need to make an adjustment to an employee because they were over withheld or under withheld in payroll for a benefit deduction. The Payroll Batch Override is used to enter these one-time adjustments. Follow normal procedures to start your payroll batch, then:

- 1 Enter your Payroll batch and click on employee where you need to make the one- time adjustment
- 2 Under the Line Items section, add an entry for the respective benefit code with the one-time adjustment (use a negative for correction of over withholding) in the Amount field.
- 3 View check details to ensure desired amount matches the employee's check.

If you need assistance with how to run a payroll batch override, please reach out to your dedicated **Team Lead or Implementation Lead**.

Required Discrepancy Reports

Before starting the discrepancy process, you and your broker partner MUST ensure you have completed all of the required setup needed within Employee Navigator.

The next step is to confirm that your employee demographics and deductions match between both systems. Employee Navigator has developed a tool that allows you to compare specific values between both systems and if there is a discrepancy, choose which value is correct and automatically update the incorrect system accordingly.

The audit and synchronization process occurs in two steps: The Employee Discrepancy Audit (demographics) and the Deduction Discrepancy Audit (deductions). To complete these steps, you will need to run and download each of the following reports in Netchex.

Once you have reviewed the above and completed the required setup needed within Employee Navigator your next step will be to obtain the reports you will need to load into Employee Navigator.



130 - (DEMO) ABC COMPANY

Netchex Admin
Previous Login: 10/21/2021 11:16:46 AM CT

DASHBOARD PEOPLE PAYROLL TIME & ATTENDANCE REPORTS



Dashboard

Company Directory

Click to Upload a Company Photo

People

Active	Deceased	Leave	Terminated
1843	1	2	1

PRODUCT SUITE

PAYROLL & TAX COMPLIANCE

- Payroll

RECRUITING, ONBOARDING & TALENT MGMT

- NetRecruiter
- NetGuide
- E-Verify
- NetPerform

BENEFITS

- NetBenefits
- NetCOBRA
- ACA Central
- NetBroker Dashboard

TIME & ATTENDANCE

- Time & Attendance

HUMAN RESOURCES

- People
- NetAssist HR
- HR Support Center

REPORTS & ANALYTICS

- Reports
- NetInsight

SETUP & MAINTENANCE

- Maintenance
- Back Office

TOOLS

- Send an Announcement

131 - (DEMO) XYZ COMPANY

Netchex Admin
Previous Login: 10/21/2021 11:16:46 AM CT

DASHBOARD PEOPLE PAYROLL TIME & ATTENDANCE REPORTS



HELP

People

Employees

Onboarding

Manage Users

Copy Employee

Employee Events



+ ADD

IMPORT

SEARCH

FILTERS:	131 - (DEMO) XYZ COMPANY	1	Select Employees	Statuses	2
We found 594 employees.					
NAME	STATUS	EMPLOYEE STATUS DATE	COM/DIV/BUS/DEPT	TIME GROUP	BADGE/CLOCK/FORMER ID
1, MANAGERS Employee Code: M11	On Leave	05/14/2019	131/0/EASTE/40008 CORN DOG 1	BiWklyHrly	0/~/0
111, NEW EMPLOYEE Employee Code: N111	Active	11/20/2018	131/000/003/010 GN2 MANAGEMENT	BiWklyXmpt	0/~/0
AARON, AMANDA Employee Code: AFAARON1	Active	01/04/2015	131/000/000/12345 DEMO one	BiWklyXmpt	0/~/0
AARON, GEORGIA Employee Code: GAARON3	Active	01/19/2020	131/000/000/56789 DEMO two	Weekly Hourly	0/~/0



Reports

Payroll

Human Resources

Company

Publisher 1.0

Audit

File Feeds

Custom Reports

Generate

Report Settings

Company

132 - (DEMO) AA SUPPLY COMPANY

Carrier File Feed - UNUM - Group LTD Change File - Hospice Ministries (839)
Carrier File Feed - UNUM - Group STD Change File - Hospice Ministries (839)
Carrier File Feed - UNUM - Group VTL Change File - Hospice Ministries (839)
Carrier File Feed - UNUM Remittance
Employee Retention Tax Credit Check History Report
PPP Loan ver 2020
PPP Loan ver 2021 for All Companies with Same Fed ID
PPP Loan ver 2021 for One Company
PPP Schedule A for All Companies with Same Fed ID
PPP Schedule A for One Company
TransAmerica 401k Report
EE Navigator Demographics Report
EE Navigator Deductions Report



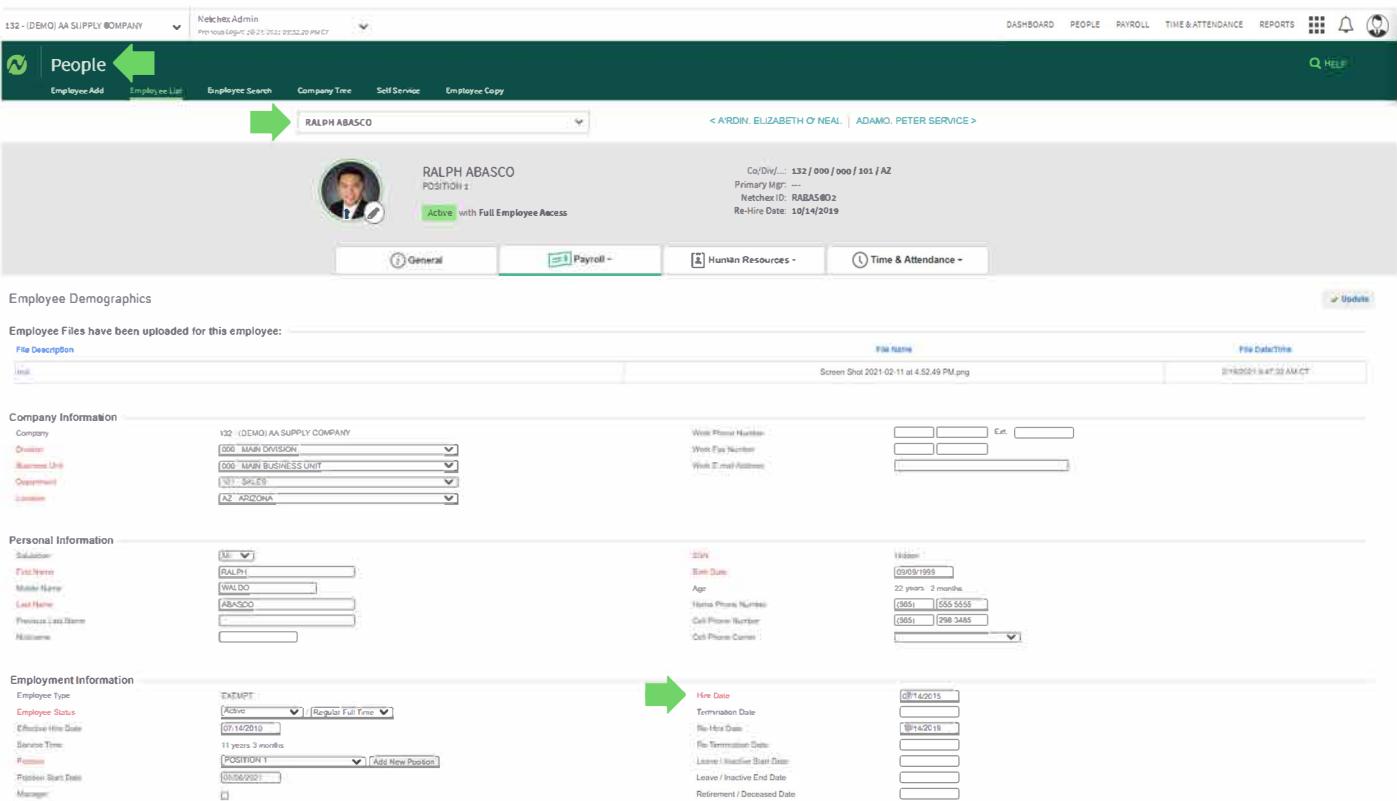
Employee Navigator Discrepancy Process

(Refer to EN User Guide)

After you have run, downloaded and saved your reports, you are ready to load your data into Employee Navigator to start the discrepancy process. Please refer to the detailed instructions within the EN User Guide on how to complete these important steps. Once you have thoroughly completed both the demographic and deductions synchronization tasks notify Employee Navigator at payroll@employeenavigator.com. Your EN support specialist will notify us that you are ready to “go live”. We will confirm via email that we have enabled the API and notifications for moving forward. This step will fully enable your integration and live data will start to sync between both systems.

Updating Hire Dates

If you have identified incorrect hire dates in Netchex during the discrepancy process, you can update the original hire date by simply clicking on the incorrect date and changing it. To do this in Netchex, navigate to:



The screenshot shows the Netchex Admin interface with the following details:

- Header:** Netchex Admin, Previous Logon: 20-21-2022 05:32:20 PM CT, DASHBOARD, PEOPLE, PAYROLL, TIME & ATTENDANCE, REPORTS, HELP.
- Left Navigation:** People (highlighted with a green arrow), Employee Add, Employee List, Employee Search, Company Tree, Self Service, Employee Copy.
- Search Bar:** RALPH ABASCO (highlighted with a green arrow).
- Employee Profile:** RALPH ABASCO, POSITION: Active, with Full Employee Access. Co/Div: 132 / 000 / 000 / 101 / A2. Primary Mgr: Netchex ID: RABAS02. Re-Hire Date: 10/14/2019.
- Tab Selection:** Payroll (highlighted with a green arrow).
- Employee Demographics:** File Description: File Name: Screen Shot 2021-02-11 at 4:52:49 PM.png, File Date/Time: 2/11/2021 4:52:49 AM CT.
- Company Information:** Company: 132 - (DEMO) AA SUPPLY COMPANY, Division: 000 - MAIN DIVISION, Business Unit: 000 - MAIN BUSINESS UNIT, Department: 001 - SALES, Location: A2 - ARIZONA.
- Personal Information:** First Name: RALPH, Middle Name: VALDO, Last Name: ABASCO, Previous Last Name: , Nationality: . SSN: 09/09/1999, Birth Date: 09/09/1999, Age: 22 years, 2 months, Home Phone Number: (605) 555-5556, Cell Phone Number: (605) 298-3456, Cell Phone Carrier: .
- Employment Information:** Employment Type: EXEMPT, Employee Status: Active, Regular Full Time, Effective Hire Date: 07/14/2010, Service Time: 11 years 3 months, Position: POSITION 1, Add New Position, Previous Start Date: 05/06/2021, Manager: .
- Hire Date:** The 'Hire Date' field is highlighted with a red box and a green arrow pointing to it, showing the value 07/14/2015.



Pre-Process Register

Always run the **pre-process register** prior to payroll to ensure your deductions are accurate.

Additional Assistance

Email us at ENSupport@netchexonline.com or contact your dedicated account manager.

For Employee Navigator specific questions please contact your **Broker Partner**.