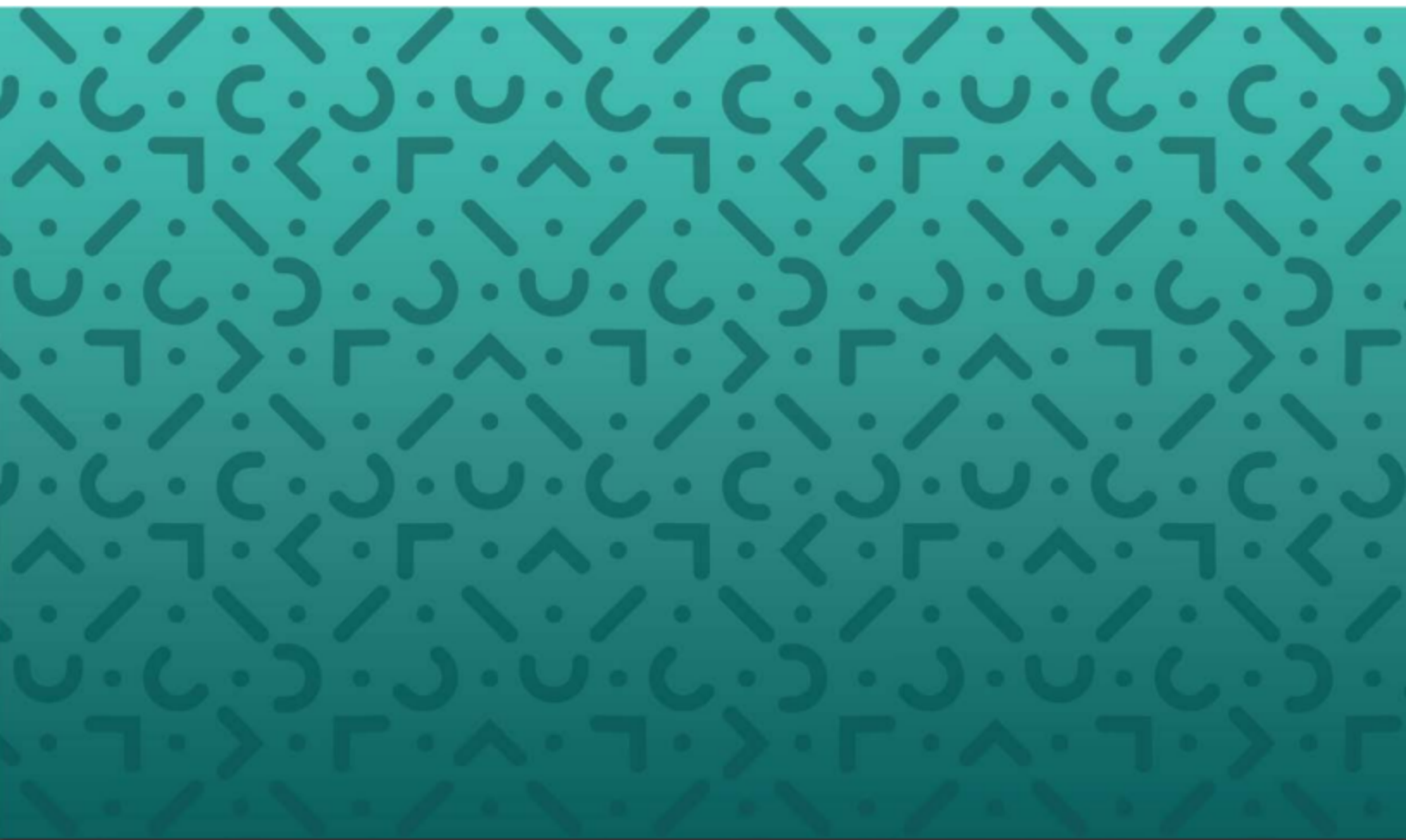




Employee Navigator Benefits Integration

User Guide



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Employee Navigator Benefits Integration

Employee Navigator Benefits Integration is a comprehensive platform for benefits, HR, and compliance management. It is used by thousands of brokers to manage employee benefits, onboarding, ACA compliance and more through an intuitive and centralized system. Employee Navigator will make it possible to share employee, demographic, and compensation data and receive payroll deduction information based on which benefit plans an employee elects via enabled brokers. Employees can access the Employee Navigator Benefits Integration platform to enroll in benefit plans and review their enrollment.

Who are insurance brokers?

Insurance brokers are a licensed intermediary between insurance carriers and businesses. They are experienced in varying types of insurance policies. They help companies find and procure benefit types that best fit their staff's demographic.

Requirements & Limitations

System Prerequisites

- Ready Payroll sub-system must be enabled and actively used. (Customers must be live on payroll or after payroll live)
- Integration can be enabled only for Single EIN companies; Multi-EIN companies are not supported (see Limited Release details: ["Employee Navigator Benefits Integration: Limited Release" on the next page](#))
- Integration must be activated more than 30 days before enrollment year start date.

Special Configurations

- **Block 3rd/5th deductions:** If used, must be configured identically in both systems.
- **Goals:** Must be disabled in Ready when creating deduction codes for Employee Navigator integration.

ACA

If your company is using Employee Navigator Benefits Integration for benefits, you should use its native capabilities to process and file your ACA reports since the benefits information resides there. If you try to use UKG Ready™ ACA Manager to process your ACA filings while also using Employee Navigator Benefits Integration, it will be a completely manual process on the Ready side because your benefits information will no longer reside there.

Ready fields to have configured for your employees

The following fields should be complete in your employee profiles: SSN, first name, last name, gender, DOB, address, phone number, email address, hire date, base and compensation details.

Note that some demographic information will not be exchanged bi-directionally such as hire and termination dates, birthday, job title and compensation. This data will only come from UKG Ready to Employee Navigator and not vice-versa.

Additional Information

See the ["Employee Navigator Benefits Integration: FAQs" on page 33](#) for more information on requirements and other questions.

Employee Navigator Benefits Integration: Limited Release

Limited Release Customer Segments

Employee Navigator Benefits Integration is in limited release.

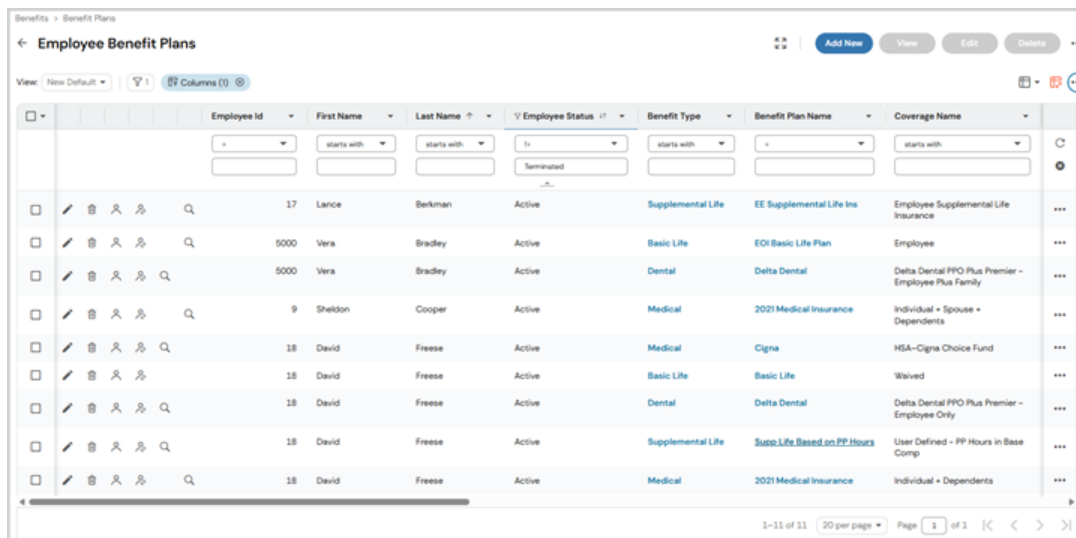
Important: Please note in Limited Release, Employee Navigator Integration is not available for Multi-EIN customers.

Please check your customer segment and follow the relevant setup instructions to enable integration.

Customer Segment	Readiness	Action Required
Customer Segment 1 Net new customers or those without Ready Benefits enabled	Fully Supported	The solution is ready to use, and customers can easily enable the integration by following the minimal setup and configuration steps outlined below.
Customer Segment 2 Customers with Ready Benefits enabled but benefit plans were never assigned to employees	Partially Supported	Customers will need to complete 1 or 2 additional applicable steps as outlined below to enable the integration. These will be automated for General Availability to make them "Full Ready"
Customer Segment 3 Customers actively using Ready Benefits and with any enrollments, or Multi-EIN clients	Not Supported	Employee Navigator integration is not currently available for this customer segment. We're actively working on this and will notify as soon as its ready.

Employee Navigator Benefits Integration: Applicable only for Customer Segment 2

Step 1: Navigate to **Team > Benefits > Benefit Plans** to check if you any benefit plans.



The screenshot shows the 'Employee Benefit Plans' table in a web application. The table has columns for Employee Id, First Name, Last Name, Employee Status, Benefit Type, Benefit Plan Name, and Coverage Name. There are filters for each column, including dropdowns for status (Active, Terminated) and benefit type (Supplemental Life, Basic Life, Dental, Medical). The table lists several benefit plans for different employees, including 'Supplemental Life', 'Basic Life', 'Dental', and 'Medical' plans. The interface includes a search bar, a 'View' button, and a 'Columns' button to toggle columns. The bottom of the table shows pagination: '1-11 of 11', '20 per page', and 'Page 1 of 1'.

Employee Id	First Name	Last Name	Employee Status	Benefit Type	Benefit Plan Name	Coverage Name
17	Lance	Berkman	Active	Supplemental Life	EE Supplemental Life Ins	Employee Supplemental Life Insurance
5000	Vera	Bradley	Active	Basic Life	EO Basic Life Plan	Employee
5000	Vera	Bradley	Active	Dental	Delta Dental	Delta Dental PPO Plus Premier - Employee Plus Family
9	Sheldon	Cooper	Active	Medical	2021 Medical Insurance	Individual + Spouse + Dependents
18	David	Freese	Active	Medical	Cigna	HSA-Cigna Choice Fund
18	David	Freese	Active	Basic Life	Basic Life	Waived
18	David	Freese	Active	Dental	Delta Dental	Delta Dental PPO Plus Premier - Employee Only
18	David	Freese	Active	Supplemental Life	Supp Life Based on PP Hours	User Defined - PP Hours in Base Comp
18	David	Freese	Active	Medical	2021 Medical Insurance	Individual + Dependents

Step 2: Confirm you have **NO** active employee(s) attached to the benefit plan(s).

If yes, then you are actively using Ready Benefits.

- Please refer to Customer Segment 3 instructions in: "[Employee Navigator Benefits Integration: Limited Release](#)" on [the previous page](#)

If no, follow the steps below to continue.

- Identify and end benefit plans and deductions by navigating to **Profiles/Policies > Benefits > Plans**.
- Identify and select the benefit plan(s) that need to be end-dated due to the transition to Employee Navigator.
- For each plan, select the edit icon next to the selected benefit plan. In the **Effective To** field, enter the desired end-date for the benefit plan.

Profiles/Policies > Benefits

← Benefit Plan

Benefit Plan

Benefit Type: Dental

Name*: 2024 Delta Dental

Currency: United States Dollar (\$)

DEDUCTION/EARNING #1

Coverage Type: Premium

Earning/Deduction

Dates

DESCRIPTION	EFFECTIVE FROM/TO
	07/01/2024 12/31/9999

Note: If there is a deduction code assigned to the benefit plan, the deduction code must be removed by deleting the value in the Earning/Deduction field.

Employee Navigator Benefits Integration: UKG Ready Customers

Establishing an Employee Navigator Account

No Existing Employee Navigator Account

If you are interested in Employee Navigator and do not have a relationship with a Broker or Employee Navigator, you can reach out to UKG Ready Sales personnel and they will help guide you through the process.

Based on direction from UKG Ready Sales, you can request an Employee Navigator account by reaching out to Employee Navigator (<https://www.employeenavigator.com/contact/>). This can take around 10-14 days. Once you have an Employee Navigator account, log in to UKG Ready

- HR Admin installs the Employee Navigator Benefits Integration app from Solutions Exchange.
- HR Admin enables security permissions to give employees access to the Employee Navigator menu item.

Existing Employee Navigator Account

If you have an existing relationship with a Broker and with Employee Navigator, you can simply contact the Broker directly and use your existing Employee Navigator account.

- HR Admin installs the Employee Navigator Benefits Integration app from Solutions Exchange.
- HR Admin enables security permission to give employees access to the Employee Navigator menu item.

Adding the Employee Navigator Benefits Connector

Important: If you are using other benefits integrations, ensure you deactivate the existing benefits integration before enabling Employee Navigator!

To begin the process of adding the connector for Employee Navigator Benefits Integration, navigate to: Settings > Solutions Exchange > Solutions Exchange.

1. Use the search field to locate **Employee Navigator Benefits Integration**.
2. Select **Learn More**.
3. Select **Install**.
4. Read and agree to the terms and conditions. Select **Continue**. Enter your password and select **I Agree**.
5. Optionally select a security profile for the person(s) who will manage the integration. If left blank, the system will default to the security profile assigned to the installer.

6. Select **Finish Install**. It may take several minutes for the installation to complete.
7. You can select **Go to settings** to review your configuration (Description, Terms and Conditions, and Instructions), or select **I'll do it later**. The terms and conditions must be reviewed and signed for the integration to be active.

The screenshot shows the 'Marketplace Product Settings' page for 'Employee Navigator Benefits Integration'. The page is divided into three main sections:

- Company Marketplace Product:** Contains a 'Name*' field with the value 'Employee Navigator Benefits Integration' and a 'Description' field.
- Sign Up:** Contains a message: 'Please complete the registration to start using Employee Navigator Benefits Integration.' and a link: 'Accept Terms and Conditions (Signed By System Administrator)'.
- Employee Navigator Benefits Integration Instructions:** Contains a list of instructions for establishing an account, adding the connector, and setting security permissions. The instructions are as follows:
 - Establishing an Employee Navigator Account:**
 - If you are using other benefit integrations, you need to ensure they are deactivated before enabling the Employee Navigator Benefits Integration.
 - If you do not have a relationship with a Broker or Employee Navigator, you can reach out to UKG Ready Sales personnel where the sales team will ensure you are properly set up behind the scenes.
 - Once you are set up behind the scenes, you can then get an Employee Navigator account. Each user will establish their own Username and Password and register as a new user within Employee Navigator.
 - If you have an existing relationship with a Broker and with Employee Navigator, you can simply contact the Broker directly and use your existing Employee Navigator account.
 - Adding the Employee Navigator Benefits Connector:**
 - In the Company Marketplace Product widget, you can optionally add a description if not already added.
 - In the Sign Up widget, click on **Accept Terms and Conditions**.
 - Review the Terms and Conditions and select **Continue**.
 - Enter your password and select **I Agree**.
 - Click on **Save**.
 - Ready Security Permissions for Employee Navigator:**
 - To give employees access to the Employee Navigator menu item (My Info > My Benefits > Employee Navigator), enable the **Employee Navigator** permission under Settings > Profiles/ Policies > Security, 'Employee Self Service' tab.
 - Administrators and Managers will sign into Employee Navigator directly using the credentials provided by the Employee Navigator team.

NOTE: Customers using other benefits integrations should ensure they deactivate their existing benefits integration before enabling Employee Navigator.
For other questions, please refer to the [Employee Navigator Integration user guide](#).

Company Marketplace Product Widget

This widget will list the Name of the app. You can optionally add a Description if not already added.

Sign Up Widget

This widget will indicate that the terms and conditions have been signed. A check will display next to the link if the terms have been accepted. You can select the link to complete and accept, or review the terms and conditions at any time. If edits have been made to the widgets, select Save.

Employee Navigator Benefits Integration Instructions

This widget contains information to guide you in the process of establishing an Employee Navigator account (if you don't already have one), how to add the Employee Navigator connector, and security permissions you should enable. A hyperlink is available that will open the Employee Navigator Integration User Guide.

Summary Page of Installed Integration

Upon using the back arrow, the system will display the following information in the header.

- **Vendor:** Shows the represented vendor, Employee Navigator.
- **Required Module:** Will show HR or Payroll as the required module. Payroll is required. HR is optional.
- **Status:** Will show Installed or Not installed (if you're exploring with the Learn button and haven't installed yet, 'Not installed' will display).
- **Date installed:** Shows date of installation in your company's date format.
- **System ID:** The system will automatically assign an ID to the connector.
- **Configure button:** Select to view or edit the widgets.
- **Uninstall button:** Select to remove the app from your company.

Ready Security Permissions for Employee Navigator

On the Ready side, the security permission must be enabled for your employees so they can access the Employee Navigator menu item under My Info > My Benefits > Employee Navigator. Employees will sign in via SSO once accessing this page.

- **For Employees:** Enable the **Employee Navigator** permission under the 'Employee Self Service' tab. Security level: Low (gives access to employee self-service menus within Employee Navigator)

Note: Administrators and Managers will sign-in to Employee Navigator directly using the credentials provided by the Employee Navigator team. SSO within Ready is not supported for Admins and Managers.

SSO - Single Sign On for Employee Navigator

SSO is supported for Employee Navigator users. Add the SSO link to your employee's portal by logging into Employee Navigator and searching 'UKG SSO' within the Help icon, or by following the directions found here:

When employees log in to the Ready system and select their Employee Navigator menu item, a tab will open and the user will be able to log in to Employee Navigator using SSO. For more details on how employees sign in to Employee Navigator, see ["Employee Navigator Benefits Integration: User Experience" on page 30](#)

More information on SSO

If you need further assistance configuring SSO, please see the [Single Sign-On \(SSO\) with OAuth 2.0 and SAML 2.0 User Guide](#)

What Comes Next

As a Ready Admin, you will need to configure a few items on both the Ready and Employee Navigator side.

UKG Ready

To help guide you through the configuration required on the Ready side, see: ["Employee Navigator Benefits Integration: Payroll Deductions" on page 19](#)

Also ensure your employees' security profiles are enabled with the Employee Navigator permission discussed above so they can access the Employee Navigator menu item.

Employee Navigator

To help guide you through the final steps on the Employee Navigator side and complete your integration, see this short video and review the steps on the Employee Navigator help site: [Employee Navigator Payroll Integration Video](#)

Uninstalling the Employee Navigator App

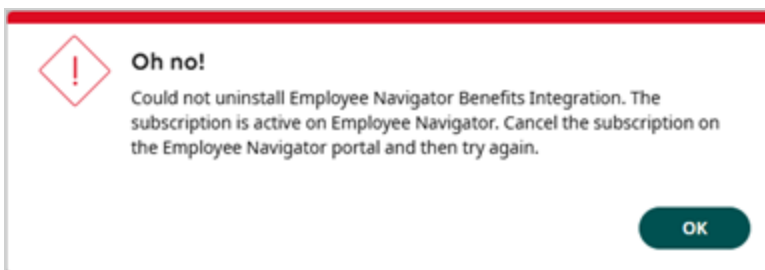
If you choose to uninstall the Employee Navigator app from your company, the system will send an API call to the Employee Navigator system and confirm if your subscription is active or inactive. If active, you will be prompted to end your subscription prior to uninstalling.



Company: Short Name	Company: Unique ID	Company: Name	Company: Type	TLM Status	HR Status	PR Status
ChaseAdminAdmin	71634460-0243-4918-908F-F08FC3E46EFA	ChaseAdmin Admin	Admin	Importing Data	Importing Data	Importing Data
ChaseClientDemo	11794368-6183-428C-8029-48F10E329AC	ChaseClientDemo	Client	Importing Data	Importing Data	Importing Data
chaseclientdemo2	DC460290-553C-44A1-8085-9D428902AEC3	chaseclientdemo2	Client	Importing Data	Importing Data	Importing Data

Uninstalling Employee Navigator in Client Companies

If a client chooses to uninstall the Employee Navigator app from their company, the system will send an API call to the Employee Navigator system and confirm if their subscription is active or inactive. If active, they will be prompted to end their subscription prior to uninstalling.



Company Groups

Under Maintenance > Admin Company > Company Groups, assume you have created a manual group named Employee Navigator. When checking the Group Members area, no client companies with Employee Navigator are listed. After Employee Navigator is added to client companies, go back to check the group and the client companies will be listed under Group Members.

Employee Navigator Notification Profile in Client Companies

When Employee Navigator is enabled at the client company level, a notification profile will be automatically added. It will be used to send notifications using the notification template for communicating changes to EINs via webhooks.

What Comes Next

There are some additional elements that need to be configured for both Ready and for Employee Navigator.

- Please refer to this topic for more details on UKG Ready Payroll Deductions: ["Employee Navigator Benefits Integration: Payroll Deductions" on the next page](#)
- Please refer to these topics for details: ["Employee Navigator Benefits Integration: UKG Ready Customers" on page 8](#) and ["Employee Navigator Benefits Integration: Payroll Deductions" on the next page](#)
- To help guide you through the steps on the Employee Navigator side, see this short video and complete the steps necessary for your client companies: [Employee Navigator Payroll Integration Video](#)

Employee Navigator Benefits Integration: Payroll Deductions

Supported Deduction Codes

The following Ready deduction codes are supported in Employee Navigator.

Ready Deduction Name	Description
Custom After-Tax Deduction	Custom after-tax deduction which allows for override of the W2 Box Types to address specific situations.
Custom Pre-Tax Deduction	Custom pre-tax deduction which allows for the override of the W2 Box Types and requires taxability to be specified for each federal, state, and local tax.
Custom Section 125	This deduction type is just like the Section 125, except that it allows for the override of the W2 Box Types to address specific situations.
FSA Dependent Care	Dependent Care Flexible Spending Account (FSA) allows employees to use pre-tax dollars to pay for eligible expenses related to childcare, disabled spouse, elderly parent, or other dependent who is physically or mentally incapable of self-care.
FSA Medical Expense (Section 125)	Medical Expense Flexible Spending Account (FSA) allows employees to use pre-tax dollars to pay for medical expenses not paid for by insurance, usually deductibles, co-payments, and co-insurance for the employee's health plan.
HSA Post Tax Family	Health Savings Account (HSA) Family contributions made on a post-tax basis with a different maximum statutory annual limit than an Individual contribution.
HSA Post Tax Individual	Health Savings Account (HSA) Individual contributions made on a post-tax basis with a different maximum statutory annual limit than a Family contribution.
HSA Pre Tax Family	Health Savings Account (HSA) Family Contributions from an employer or employee may be made on a pre-tax basis through an employer with a different maximum statutory annual limit than an Individual contribution.
HSA Pre Tax Individual	Health Savings Account (HSA) Individual Contributions from an employer or employee may be made on a pre-tax basis through an employer with a different maximum statutory annual limit than an Family contribution.
Section 125	Section 125 is an IRS-approved plan for employers and employees to change and personalize benefits while controlling plan costs. Employees can use pre-tax dollars to pay for certain benefits, thus reducing their taxable income and taxes. The employer is able to update benefits and, in most cases, reduce employer taxes and workers compensation contributions.
Standard	Used to set up an after-tax deduction that does not have any special taxation applied and allows for specifying the W2 box Types to address specific situations.
Standard Deduction	Used for Deductions with no tax implications.

The Employee Navigator Benefits Integration is available for the following deduction scenarios:

- New customers using UKG Ready & new to Employee Navigator
- Existing UKG Ready customers and existing Employee Navigator customers (using Employee Navigator via manual data export)

Important: Existing Ready customers utilizing Ready Benefits and transitioning to Employee Navigator is not in scope at this time.

Creating New Deduction Codes

Navigate to **Settings > Payroll Setup > Deduction Codes** and select **Add New Deduction Code**.

Select one of the supported roll-up deductions and check the **Is Employee Navigator** checkbox. This will allow the new code to be used in Employee Navigator.

The screenshot shows a 'Question' dialog box with the following fields and settings:

- Country:** United States (dropdown)
- Roll up Deduction:** Standard (dropdown)
- SETTINGS:**
 - Is Employee Navigator:** ☒
 - Has Employee Portion:** ☒
 - Capture Units:** ☐
 - Has Employer Portion:** ☒
 - Disposable Type:** -- (dropdown)
 - Currency:** United States Dollar (\$) (dropdown)

At the bottom right, there are 'Cancel' and 'OK' buttons.

Converting Deduction Codes from UKG Ready to Employee Navigator

When aiming to utilize existing deductions with Employee Navigator and the integration has been activated within your company, a **Convert To Employee Navigator** button will display on the Deduction Codes maintenance page. This option allows you to convert already created deduction codes so they can be used in Employee Navigator.

Before proceeding with the conversion, ensure that the desired deductions under Payroll Setup > Deduction Codes meet the following criteria:

- **Employee Default Amount:** Set to "Flat Amount." Apply the same setting to the Employer portion, if applicable.
- **Employee Frequency:** Leave blank or set to "Every Scheduled Pay." Apply the same setting to the Employer portion, if applicable.

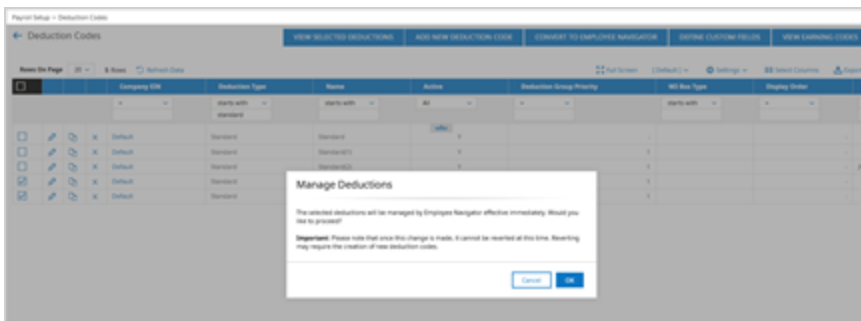
Note: Please note that changing the deduction setting from "Every Pay" to "Every Scheduled Pay" will exclude deductions from off-cycle payrolls, such as bonuses. The "Every Pay" option includes deductions from commission payments, bonus payments, supplemental payrolls, and every scheduled pay period. In contrast, "Every Scheduled Pay" applies only to regular payroll cycles, such as weekly or biweekly schedules.

- Define Eligibility: Leave this field blank
- Benefit Plan Association: Ensure deductions are not part of a benefit plan.

Select one or multiple deduction codes, select the **Convert To Employee Navigator** button, and a Question pop-window displays that allows you to set an 'As of' date. The date will default to today's date, but you can set it for a future date. Past dates are not supported.

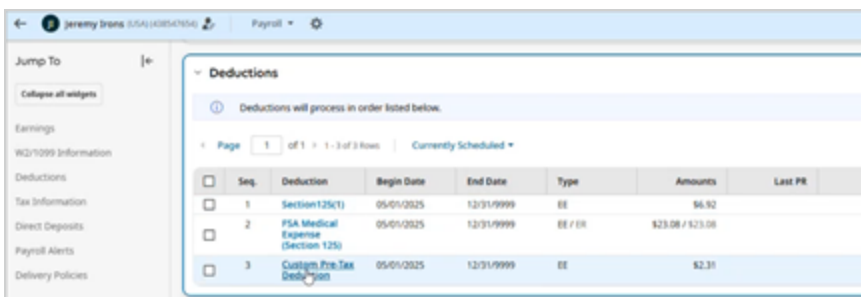
- When converting a deduction code to be managed in Employee Navigator, a pop-up window adds a warning stating that once the code is changed, it cannot be reverted for use in Ready which may require you to create a new deduction on the Ready side.
- When successfully converted, you will get a Success message stating the deduction [name] is now managed by Employee Navigator.

Once the conversion is completed it enables these deductions to receive information from Employee Navigator, but after that any changes made to those converted codes within Ready are not sent to Employee Navigator.



When your employees select a benefit that requires employee deductions within payroll, Employee Navigator will use these codes to push the information from them to you so you can process payroll to include the benefit deduction amount on employee pay statements. Ready is capable of handling the Employer portion of the deduction for the list of supported Employee Navigator deductions.

You can view your employees' deductions in the Deductions widget of their employee profile under Employee Information.



Ready Deduction Codes Report Page for Employee Navigator

On the Deduction Codes report page, two Employee Navigator columns are available to be added. The columns will populate Y or N.

- **Is Employee Navigator:** Y indicates the deduction code has been converted for use with Employee Navigator. N indicates it hasn't.
- **Supports Employee Navigator:** Y indicates the deduction code is compatible with Employee Navigator. N indicates it isn't.

Employee Navigator Help Site for Deduction Codes

For more information on how deduction codes are handled in Employee Navigator, use this link to navigate to their help site: [Employee Navigator Deduction Codes Help Site](#)

Ready Payroll Alerts for Employee Navigator Updates

Payroll administrators will receive a payroll alert whenever a change is made by Employee Navigator. The alert notifies you of any new or changed deductions for employees. This allows you to review and confirm they are configured correctly. The alert will generate as the last step in the POST processing (if applicable.)

Payroll alerts can be viewed in the employee's profile under Employee Information. A **Payroll Alerts** widget is available (usually under the Payroll tab). Alerts can be added here and the system generated alerts can be viewed and acknowledged.

- The payroll admin must check the **Require Sign-off** checkbox and save to acknowledge the message and confirm the deduction is configured correctly.
- Once the payroll admin confirms the deduction is configured correctly, payroll processing will proceed as usual.

Payroll Alerts

When a new deduction is pushed by Employee Navigator, the system will automatically add a Payroll Alert to the employee's record as follows:	
Label	System Added A New Employee Navigator Deduction
Alert Text	A new Employee Navigator {deductionCode} deduction has been added. Please verify and/or check Employee Navigator for details.
When a change is made by Employee Navigator, the system will automatically add a Payroll Alert to the employee's record as follows:	
Label	System Modified An Existing Employee Navigator Deduction
Alert Text	An existing Employee Navigator {deductionCode} deduction has been modified. Please verify and/or check Employee Navigator for details.
When the POST request made by Employee Navigator fails, the system will automatically add a Payroll Alert to the employee's record as follows:	
Label	System Failed to Add/Modify a New or Existing Employee Navigator Deduction
Alert Text	Unable to add/modify the information sent by Employee Navigator. Please verify and/or check Employee Navigator for details.

Employee Navigator Benefits Integration: Synching

The following features are part of the synching process between Ready and Employee Navigator Benefits Integration.

- Bi-directional (360) integration: Employee demographic data changes made in Ready is updated real-time in Employee Navigator Benefits Integration and can be maintained in either system. Some fields are one-directional. See: ["Employee Navigator Benefits Integration: Data Fields" on page 25](#) below for details.
- Syncs benefits and payroll data in real-time: Manage your benefit election changes for the employee in Employee Navigator Benefits Integration and automatically sync to payroll.
- Eliminates dual entry and reduces errors: Decreases the workload during benefit open enrollments elections or as life changes are made.
- Event-based, real-time integration ensures a seamless data flow across applications (within 45-60 seconds).
- New hires, terminations, and rehires must be initiated in UKG Ready.
- In Multi-EIN companies, for employees who have profiles in multiple EINs, only the primary EIN account will be synchronized with Employee Navigator.

Employee Payroll Deduction Sync

Employee deductions are managed within Employee Navigator Benefits Integration and then flow to UKG Ready.

- Recurring deductions supported
- Earnings/ Employer contributions not included

May be overridden in UKG Ready

- Example: Retroactive or catch-up contributions for missed pay periods

Base Compensation Sync

Compensation must be managed in UKG Ready.

- Changes flow to Employee Navigator Benefits Integration
- Base Salary & Hourly Rate included

Employee Demographic Sync

Employee demographic data is handled with a bi-directional Employee Sync.

- Employee records can be updated in either system. Some fields are one-directional. See: ["Employee Navigator Benefits Integration: Data Fields" on page 25](#) below for details.
- Employee records are linked by SSN and Payroll ID

Note: Payroll ID is the Employee Navigator term. In the Ready system, this would equal Primary Account ID.

For Multi-EIN companies, to ensure that the correct employee profile in Ready is synched with Employee Navigator, we provide the following guidelines for EIN transfer:

If you are transferring an employee to a new EIN and this will be the only EIN they will be working in, follow the steps below:

1. Hire the employee in the new EIN in Ready.
2. Set the new employee profile to primary from the Switch Primary EIN button on the Employee Profile.
3. Terminate the employee in the old EIN.

Following the steps in this order will ensure that the employee will continue to have an active account in Employee Navigator and their data will continue to synch with the newly created account.

If you are transferring an employee to a new EIN and their profile in the existing EIN will continue to be active, but their profile in the new EIN should be the primary one, make sure that you click on Switch Primary EIN button in the newly created profile.

Employee Navigator Benefits Integration: Data Fields

We exchange bi-directional demographics with Employee Navigator in real-time on a change-only basis. This means that address, phone number, and other demographic updates can be made in either system. As soon as the update is made the change is reflected in the alternate system within 45-60 seconds.

New hires and terminations will happen only in the Ready system. All employees are exchanged including Active, Part-time & benefit ineligible, and Terminated.

For new hire records to successfully sync with Employee Navigator, you need to ensure that certain required fields are updated during hire.

If not already set as required fields, you may want to consider making these fields required during the hiring process (both manual hire and through HR actions.)

- First Name / Legal First Name
- Last Name
- Birthday
- SSN
- An active base compensation record with effective date on or after Hired Date.

Incorrectly entered hire dates can be corrected in Ready. Both future and past hire dates can be used and this will not have any negative impact on the integration.

Demographic - Data Fields Exchanged between Ready & Employee Navigator

Ready Field Name	Employee Navigator Field Name	Direction of Exchange <ul style="list-style-type: none">• Bi-Directional• Ready to EN Only• EN to Ready Only	Additional Logic	Employee Navigator Allowed Values
First Name/ Legal First Name	First Name	Bi-Directional	If 'Legal First Name' in Ready is not blank, it will be sent to Employee Navigator with priority over First Name.	
Middle	Middle Name	Bi-Directional		
Last Name	Last Name	Bi-Directional		

Suffix	Suffix	Bi-Directional	If a value different from the Employee Navigator 'allowed values' is entered in Ready, it will be ignored by Employee Navigator.	CPA, CRNP, D.O., DDS, DMD, II, III, IV, JD, Jr., MD, PA-C, PhD, RN, Sr., V, VI
Address 1	Address 1	Bi-Directional	<p>The primary address fields in Ready (Address 1, Address 2, City, State, Zip) will be synched with the Home address fields in Employee Navigator. The mailing address in Ready will not synch with Employee Navigator.</p> <p>If you blank out the fields in Ready, this will not be reflected in Employee Navigator since they do not allow address fields containing data to be blanked out through API in order to ensure they always have a valid address. You can, however, blank out the respective fields in Employee Navigator and the update will synch with Ready. Generally, leaving the Address fields blank is not recommended since this information is required by brokers.</p>	
Address 2	Address 2	Bi-Directional		
City	City	Bi-Directional		
State	State	Bi-Directional		
Zip	ZIP	Bi-Directional		US States only
Work Phone	Work Phone	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow phone fields containing data to be blanked out through API in order to ensure they always have a valid phone number. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Home Phone	Home Phone	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow phone fields containing data to be blanked out through API in order to ensure they always have a	

			valid phone number. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Cell Phone	Mobile Phone	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow phone fields containing data to be blanked out through API in order to ensure they always have a valid phone number. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Personal Email	Personal Email	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow email fields containing data to be blanked out through API in order to ensure they always have a valid email address. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Primary Email	Work Email	Bi-Directional	If you blank out this field in Ready, this will not be reflected in Employee Navigator since they do not allow email fields containing data to be blanked out through API in order to ensure they always have a valid email address. You can, however, blank out the field in Employee Navigator and the update will synch with Ready.	
Gender	Sex	Bi-Directional	This should be gender at birth. Gender values of 'Undefined' and 'Non-Binary' will not be processed by Employee Navigator.	Male, Female
Hired/Re-Hired	Hire Date	Ready to EN Only	If Re-Hired is blank, we will send Hired date	
Terminated	Termination Date	Ready to EN Only		
Birthday	DOB	Ready to EN Only		
Social Security Number	SSN	Ready to EN Only	Records with invalid SSNs will not be processed by Employee Navigator	
Default Job	Job Title	Ready to EN Only		
Primary Account ID	Payroll ID	Ready to EN Only		

Effective From	Pay Effective Date	Ready to EN Only	Must be on or after employee's Hired date. When you hire an employee in Ready, a default base compensation record with Effective From date 12/31/1900 is created automatically. In order for employee profiles to synch with Employee Navigator, you need to create a new base compensation record with an effective date on or after Hired date.	
Salary	Annual Base Salary	Ready to EN Only		
Per	Pay Basis	Ready to EN Only	Value 'Hour' in Ready will transfer as 'Hourly' in Employee Navigator. Any other value in Ready will transfer as 'Salary' in Employee Navigator.	Salary, Hourly
Hourly Pay	Hourly Rate	Ready to EN Only		

Demographic - Data Fields NOT Exchanged between Ready & Employee Navigator

Ready Field Name	Additional Logic
Termination Reason	All terminated employees will be given the Termination reason 'Voluntary Termination' in Employee Navigator
Employee Contacts (Dependents)	Those will be handled manually in both systems.
Pay Type	Since this field contains customer-defined values, it cannot be used to synch with Employee Navigator. Instead, we are using the Per field in the Base Compensation widget to synch with Employee Navigator and determine if the employee is salaried or hourly.

Deductions - Data Fields Exchanged between Ready & Employee Navigator

Ready Field Name	Employee Navigator Field Name	Direction of Exchange
		<ul style="list-style-type: none"> • Bi-Directional • Ready to EN Only • EN to Ready Only
Deduction Code (EE Portion)	Deduction Code	EN to Ready Only

Deduction Start Date	Dates	EN to Ready Only
Deduction End Date	Dates	EN to Ready Only
Employee Per Period Cost		EN to Ready Only
Earning Code (ER Portion)	Earning Code	EN to Ready Only
Earning Start Date	Dates	EN to Ready Only
Earning End Date	Dates	EN to Ready Only
Employer Per Period Cost		EN to Ready Only

Deductions - Data Fields NOT Exchanged between Ready & Employee Navigator

Ready Field Name	Additional Logic
401K (Retirement)	
Commuter / Transit	

Other - Data Fields NOT Exchanged between Ready & Employee Navigator

Ready Field Name	Additional Logic
Class structures	
Payroll groups	
Custom fields	

Employee Navigator Benefits Integration: User Experience

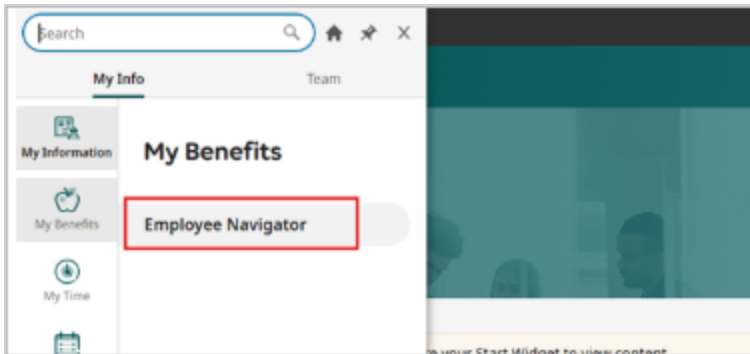
Ready Menus for Employee Navigator

Once security has been enabled for employees, they will have access to Employee Navigator from the following menu item.

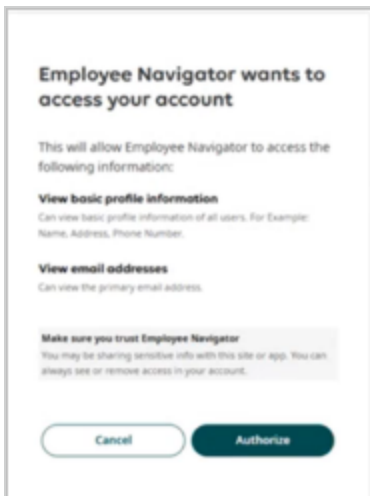
- **Employees:** My Info > My Benefits > Employee Navigator

SSO - Single Sign On for Employee Navigator

With SSO enabled, when employees log in to the Ready system and select their Employee Navigator menu item, a tab will open where users will be prompted to authorize Employee Navigator access to their account information.



Employees must authorize their account to be used in Employee Navigator. Upon selecting Authorize, the employee will be redirected to the Employee Navigator Terms of Use & Privacy Policy page.



Before proceeding, you must agree to the following terms by clicking Accept and Continue at the bottom of this page

Employee Navigator Terms of Use & Privacy Policy

Privacy Statement

Our Commitment to Privacy

Your privacy is very important to us. To better protect your privacy, we provide this notice explaining our online information practices and the choices you can make about the way your information is collected and used. To make this notice easy to find, we make it available on our homepage and on other pages where personally identifiable information may be requested. This notice applies to all information collected or submitted by you and/or your employer. Please read the following to learn more about how we treat the nonpublic personal information that is gathered from you when you use our products and services.

The Information We Collect

Employee Navigator will collect certain information, including nonpublic personal information, from you or your employer to enable you to use this service. This information includes, but is not limited to, your name, address, social security number, and information about your family, employment, and income. We may also collect (i) information about you from our business partners, such as information that you provide to them on applications or other forms, and (ii) information about your transactions with us, our business partners, or others, such as information regarding your use of the products and services that we offer or information necessary to provide those products and services to you. In addition, we may receive and record information on our server logs from your browser, including your IP address, cookie information (discussed below) and the pages you visited.

The Way We Use Information

As with all information we obtain from you, Employee Navigator will never rent, license, or sell your personal information without your permission, except as noted herein. If you use any of the services that Employee Navigator offers through our partners, affiliates and others, you may be asked to supply identifying information about yourself and/or other family members to facilitate delivery of such services to you. In all instances, the information is only used for the purpose for which it was supplied and is not otherwise used or disclosed. Employee Navigator offers several services on our site where we will, by necessity, need to provide some of your information to the third party offering the services. We supply this information only as necessary to provide these services. Except as set forth herein, we will not disclose to unaffiliated entities any information we gather from you that could be used to identify or contact you, unless we believe in good faith that such disclosure is required by applicable law, regulation, government authorities, or court order or is otherwise permitted by law. Any such personal information provided to entities affiliated with us will be treated in accordance with the terms of this Privacy Statement, unless you are otherwise notified. We also provide personal information to our vendors and suppliers where it is necessary for them to provide you or us with products and services offered. We will attempt to require that each of these outside vendors not further use or disclose your personal information for any purpose other than providing you or us with products and services. Of course, we cannot guarantee their compliance with these restrictions. Finally, we never use or share the personally identifiable information provided to us online in ways unrelated to the ones described above without also providing you an opportunity to opt-out or otherwise prohibit such unrelated uses.

If your browser is set up to accept them, we may use a feature known as a "cookie" to enhance your use of the site. A cookie is an item of data stored on the user's hard drive containing information about the user. Usage of a cookie is in no way linked to any personally identifiable information while on our site. For instance, by using a cookie, we may enable a user on our site to log in and enter a password only once per session, thereby saving you time while on our site. Your browser can be set to warn you before accepting cookies. If you choose this option, you will receive a warning message with each cookie. You can choose to refuse cookies by turning them off in your browser. You do not need to have cookies turned on to use our web site, however, you should be aware that rejecting cookies from the Employee Navigator web site may diminish your experience at our web site, and certain features will not work as intended. We may use the anonymous, aggregated information collected through the use of cookies to improve the content and navigation features of our web site. Some of our business partners, affiliates, and advertisers may also use cookies. We have no access to or control over these cookies.

Some states do not allow the exclusion of implied warranties, so the above exclusion may not apply to all Authorized Users. This document gives you specific legal rights, and you may also have other rights which vary from state to state.

Employee Navigator's failure to exercise or enforce any right or provision of these Terms shall not constitute a waiver of such right or provision.

IX. Dispute Resolution. In any dispute between an Authorized User and Employee Navigator, as an Authorized User you agree as follows:

- The dispute will be governed by the laws and decisions of the State of Maryland without regard to its conflict of law provisions.
- Employee Navigator shall only be subject to suit in the State and/or Federal Courts serving the County of Montgomery in the State of Maryland.
- Authorized User consents to the jurisdiction of the State and/or Federal Courts serving the County of Montgomery in the State of Maryland.
- Authorized User and Employee Navigator hereby WAIVE THE RIGHT TO A TRIAL BY JURY (this means a judge will decide all issues of law and fact).

XII. Refund Policy

- No refunds or credits for Subscription Charges or other fees or payments will be provided to You if You elect to terminate Your subscription to the Service or cancel Your Account prior to the end of and of Your then effective Subscription Term.
- Following the termination or cancellation of Your subscription to the Service and/or Account, we reserve the right to delete all Your Data in the normal course of operation after 180 days of the end of your subscription effective end date. Your Data cannot be recovered after 180 days from your service end date.

XIV. Entire Agreement & Future Amendment

- Employee Navigator may amend this Agreement at any time, for any reason, by notice conspicuously posted on the Site. Amendments will be effective as stated in the notice. Continued use of the Site after any Amendment becomes effective shall indicate the Authorized User's consent and agreement to the Amendment.
- Except as may be provided in any separate license agreement, royalty agreement, or fee per use agreement, these posted Terms, together with the Copyright & Legal Notices, constitute the entire contract and agreement regarding Terms of Use for this Site.

Employee Navigator Copyright & Legal Notices

Use of the Employee Navigator website is subject to these Copyright & Legal Notices and the separately posted Terms of Use. In event of any conflict between these Legal Notices and separately posted Terms of Use, these Legal Notices shall control.

I. Employee Navigator System Defined. The Employee Navigator System ("Employee Navigator" or "The System") is an Application Service Provisioning ("ASP") computer software application hosted by Employee Navigator, LLC ("Hosting Service"), a Maryland LLC. Employee Navigator was created to facilitate the administration of insurance products such as group health, dental, life, or disability plans. Unless otherwise indicated below, references to Employee Navigator include computer software, object code, source code, user guides, user interfaces, databases, trademarks, copyrights, and all other intellectual property rights relating to Employee Navigator.

II. Notice of Ownership.

- Hosting Service's address is Employee Navigator, LLC, 7979 Old Georgetown Road Suite 300 Bethesda, MD 20814. Hosting Service is the authorized agent and licensee of The System's owner and developer, Employee Navigator, LLC.
- Employee Navigator owns all proprietary rights relating to Employee Navigator. These rights include, but are not limited to, database rights, design and layout, copyright (whether registered or unregistered), proprietary solutions and trade secrets, trademarks (whether registered or unregistered) and other similar rights, wherever existing in the world, together with the right to apply for protection of the same.
- The Employee Navigator name and graphic logo are trademarks of Employee Navigator.
- No claim is made to data as entered into Employee Navigator by Authorized Users; but copyright is claimed as to the format and layout of that data when displayed through Employee Navigator.
- No person may re-produce, distribute, or reproduce in any way any of Employee Navigator's copyrighted material, trademarks, or other proprietary information without obtaining the prior written consent of Hosting Service or Employee Navigator.

III. Agent for Notice of Infringement. If you believe that Employee Navigator or Hosting Service are infringing upon your Copyright or other intellectual property rights, you must notify Employee Navigator's Designated Agent. Your notice must comply with Section 512(c) of the U.S. Copyright Act. Notices not compliant with the Copyright Act will be discarded. You are entitled to provide notification via e-mail; take note that e-mail content or formats which may be confused for spam (when filtered electronically) may be subject to auto-rejection by our mail server. The Designated Agent for Notices to: Employee Navigator, LLC, 7979 Old Georgetown Road Suite 300 Bethesda, MD 20814 Fax: 301-742-8990 Email: info@employeenavigator.com

Accept and Continue


After selecting Accept and Continue, they will be logged into their Employee Navigator account.


Employee Navigator


Home Profile Benefits Required Tasks Resources


Hello, Atul!


It's good to see you.

**View Profile**

**Document Library**

**Enrollment Summary**

**Change Benefits**

**Total Compensation Statement**

Compliance Documents
No new documents to show

Quick Links
[Web MD](#)
[The Mayo Clinic](#)
[National Institute Of Health](#)
[Walt Disney World](#)

News & Articles
Nothing new to read here!

Employees have the ability to update their Profile in Employee Navigator. See the ["Employee Navigator Benefits Integration: Syncing" on page 23](#) section of this user guide for more information on the fields that are synched bi-directionally, uni-directionally, which fields are supported, and which ones aren't.

Employee Navigator Benefits Integration: FAQs

Employee Navigator - UKG Ready Resellers

I do not have a partnership with Employee Navigator, who should I contact?

UKG Ready Resellers should reach out to their Partner Success team contact to facilitate engagement with Employee Navigator's Sales Team.

Is Employee Navigator Benefits Integration (Admin) product applicable for Direct Customers?

No, this is something that should already be configured for all direct customers.

Do all Partner clients see the Employee Navigator Connector in Solutions Exchange by default?

No, partner clients can see Employee Navigator in Solutions Exchange only after the Partner Admin turns on the Employee Navigator (Admin) product. Additionally, partners will also need to go to "Solutions Exchange Product Settings" page and edit "Employee Navigator Benefits Integration" and then assign a Billing Service and check "Enable for Clients" - then it will be visible to their clients.

Employee Navigator for Ready Customers

Is the Employee Navigator integration available for markets other than US?

The Employee Navigator integration is only available for US Market.

What if a customer has another benefits integration - can they still use Employee Navigator?

Yes, but first they will need to deactivate their existing benefits integration before enabling Employee Navigator.

How can customers cancel if they decide not to use the integration?

They will need to end their participation, i.e. cancel their subscription on Employee Navigator and once completed, they will have to uninstall the app from Solutions Exchange.

How do customers purchase Employee Navigator?

The Employee Navigator platform is exclusively sold by brokers.

Will customers need to purchase UKG Ready Benefits to enable this integration?

No, they do not need to purchase UKG Ready Benefits. Benefits will be managed in Employee Navigator, including benefit plans, employee enrollments and approvals.

If a customer wants to use Employee Navigator, where will they manage Benefits Administration?

When the connector is fully activated, benefits administration and enrollment will happen in Employee Navigator. Employee benefit enrollments and required approvals will be managed within Employee Navigator.

Will customers be able to use UKG Ready ACA Manager if they are using Employee Navigator to manage benefits?

Because benefit enrollment data will be stored in Employee Navigator, use of UKG Ready ACA Manager would become a manual process and therefore customers should use the native ACA filing capabilities of Employee Navigator.

Which modules must be enabled in UKG Ready to use the Employee Navigator Connector?

UKG Ready Payroll is required for use of the Employee Navigator Connector.

What if a customer is not in contact with a broker that uses Employee Navigator?

Use of the UKG Ready Benefits module is the solution recommended by UKG for this scenario.

How can the connector be purchased?

The connector may be purchased directly from the UKG Ready in-app Solutions Exchange.

Does Employee Navigator support benefits outside of the US?

No

Is the connector bi-directional (360)?

Yes, the Employee Navigator connector is a bi-directional, event-based, real-time integration.

Where should customers manage employee demographic information?

UKG Ready is the system of record for demographic information. That said, employees, brokers and managers can still update demographic information in Employee Navigator, and it will be synced with UKG Ready. Note that some demographic information will not be exchanged bi-directionally such as hire and termination dates, birthday, job title and compensation. This data will only come from UKG Ready to Employee Navigator and not vice-versa.

Are there any demographic fields that must be configured as mandatory in Employee Information for this integration to work?

Yes. The following fields must be set as required on the employee profile:

- SSN, first name, last name, gender, DOB, address, phone number, email address, hire date, base and compensation details.

Will it be possible to enable SSO for this integration?

Yes, SSO will be available only for employee accounts to access the Employee Navigator home page and make demographic and employee changes. SSO will not be available for Ready users with 'HR User' (i.e., Admins and Managers). They will need to use their Employee Navigator credentials to log into Employee Navigator both to manage their employee benefits and their own.

If a person who is an 'HR User' in Employee Navigator tries to navigate to Employee Navigator from UKG Ready, an error will be generated stating that they need to use their employee account to login.

If an employee bookmarks the Employee Navigator URL, when they click on the link, they will be prompted to enter their UKG credentials first before being taken back to Employee Navigator. This will be the case when they are not logged into UKG Ready. If they are already logged into UKG Ready in another tab and they then open the Employee Navigator from the bookmark, they will be logged in directly.

A customer wants to set up this integration, but their enrollment period closes in 20 days, can they still proceed?

Integration cannot be started with having only 30 days before the enrollment closes or new policy year starts.

How will employees and administrators access 1095-C forms?

Employees and Administrators can access 1095-C forms via self-service through the Employee Navigator application. The broker manages the overall process.

Do employees have access to their benefits in the Employee Navigator?

Employees will be able to access their benefits in Employee Navigator by selecting the Employee Navigator menu item in Ready and using SSO to log in. Access to the menu item in Ready is controlled by the Employee Navigator security setting. Managers and Admins who need to have access to their employee's data in Employee Navigator will use separate credentials provided by their broker to log into Employee Navigator and manage their employee's data.

If a customer is already using UKG Ready Benefits to manage the employee benefits and wants to switch to Employee Navigator, will they still have access to past benefits data in UKG Ready?

Not in scope at this time.

Do all Direct customers see the Employee Navigator Connector in Solutions Exchange by default?

Yes, all direct customers can see Employee Navigator in Solutions Exchange by default.

Are retirement plans managed in Employee Navigator?

Employee Navigator doesn't manage retirement plans and the related deductions will not be exchanged.

Miscellaneous

What data fields are supported?

See: ["Employee Navigator Benefits Integration: Synching" on page 23](#) in the Employee Navigator User Guide.

How are changes to deductions handled after a payroll period is closed?

Changes to deduction amounts after a payroll period closes are not permitted.

How is it determined which admin(s) can see which employee(s)?

The broker can configure access control restrictions to certain types or classes of employees if needed.

What should I do if I am not able to access Employee Navigator related menu items?

On the Ready side, Employee Navigator permissions must be enabled for your users. Checking the setting gives your users access and enables the menu item under My Info > My Benefits > Employee Navigator.

- Employees: 'Employee Self Service' tab. Security level: Low

Is dependent information exchanged between Ready and Employee Navigator?

No, this will be manually managed in both systems.

If a customer hires an employee in UKG Ready, but does not see them in Employee Navigator, what could the reason for that be?

Some common reasons for the employee record not to synch with Employee Navigator are:

- Some of the required fields for the integration to work are missing. The following fields are required for the integration to work and need to be updated with valid data: First Name, Last Name, Birthday, SSN, an active base compensation record with effective date on or after Hired Date.
- An invalid SSN was entered in the employee record in Ready. See the criteria for invalid SSNs in [ssa.gov](#)

Once we enable the Employee Navigator integration, can we hire an employee in Employee Navigator and have the data flow to Ready?

No, hiring should still be done exclusively in Ready and that data will flow one-directionally to Employee Navigator.

Can I check who made changes to employee information in Employee Navigator?

Yes, Employee Navigator has an audit trail of API transmissions and payloads. Admins also have employee-level and company-level demographic/ deduction change reporting.

Will we have future benefit deduction amounts sent from Employee Navigator so that someone can see what their pay will be with the new enrollments?

Yes

Language Support: Will all languages supported in the Ready platform be available, or is it just English?

Employee Navigator connector is available only in US market. It's not available internationally or in Canada. So only English will be supported.