BerniePortal

ADP Integration

Guide

TABLE OF CONTENTS

INTRODUCTION

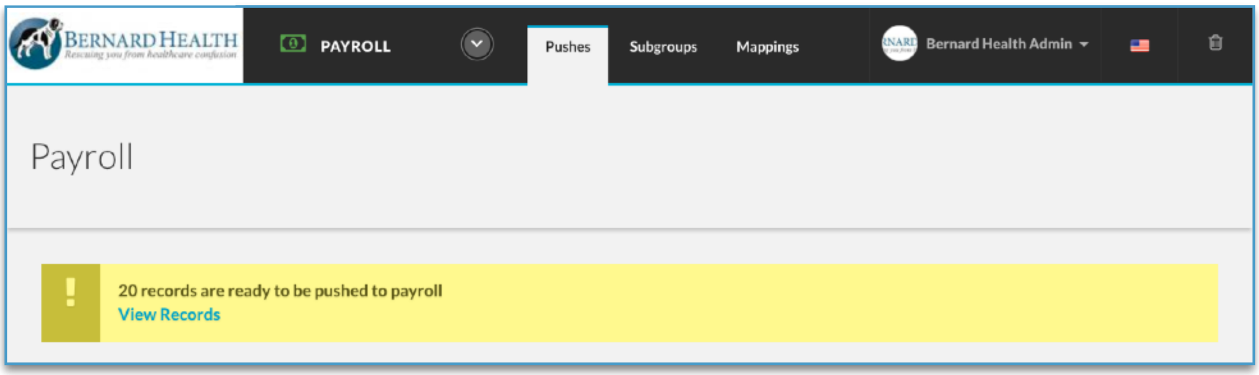
Going live with ADP's BerniePortal Connector involves the following stages:

STAGE 1: Organize - Sign up for the Connector, and then make sure that you have your employees organized in BerniePortal's payroll subgroups the way you have them organized in ADP. Make sure your ADP deductions are not managed by ADP's own benefits module.

STAGE 2: Configure - In BerniePortal, match your BerniePortal "payroll subgroups" with your ADP "companies." Refresh the mappings between the two systems and then map your BerniePortal benefit types with your ADP benefit deduction codes.

STAGE 3: Do a test push - Push your first record across and then verify that it shows up as you expected in ADP.

Cognisient



Each stage of these stages is explained in more detail in the pages to come. Also - don't forget to review "FAQs" at the end for answers to frequently asked questions.

STAGE 1: ORGANIZE

1

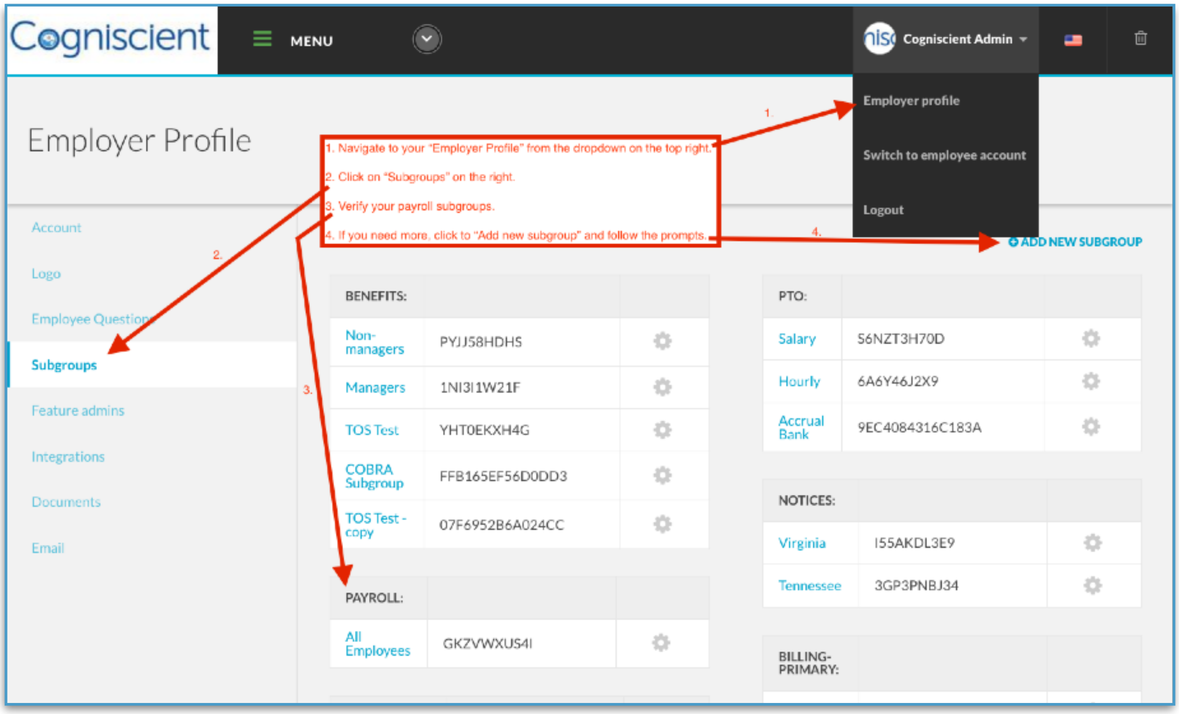
Step 1 - Sign up for the BerniePortal Connector on the ADP Marketplace

How to do this is outlined in the accompanying guide “12 steps to sign up for BerniePortal’s ADP Connector.”

Step 2 - Verify BerniePortal payroll subgroups

a. You can segment employees by payroll subgroup in BerniePortal. If you divide your employees into separate “companies” with ADP, then they need to be segmented that way in BerniePortal with payroll subgroups.

b. Go to Employer Profile I Subgroups to view your payroll subgroups. The default is to have just one payroll subgroup called “All employees”. If it is appropriate for you to have additional payroll subgroups, add them using the “Add new subgroup” link. *Pro tip: if you have multiple payroll subgroups, re-name the “All employees” subgroup to be the name of the payroll subgroup in which most of your employees belong. You’ll understand why soon.*



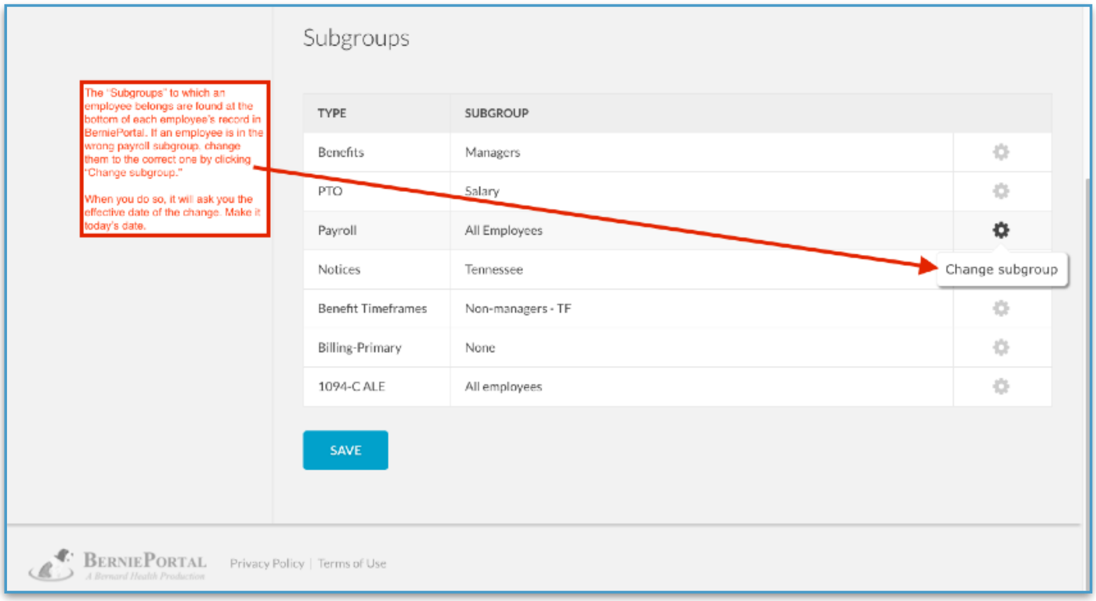
Step 3 - Verify employees in correct BerniePortal payroll subgroups

a. Once you have verified your BerniePortal payroll subgroups, verify that your employees are in the correct BerniePortal subgroups. There are two ways to do this:

   i. Run an “all data” report and use the Excel spreadsheet that is emailed to you to review which payroll subgroup each employee is in

ii. Use the “filter” dropdown in the Employees area to sort by each payroll subgroup and verify that employees are in the correct one

b. If an employee is in the incorrect payroll subgroup, go into their employee record, scroll to the bottom, and put them in the correct one.

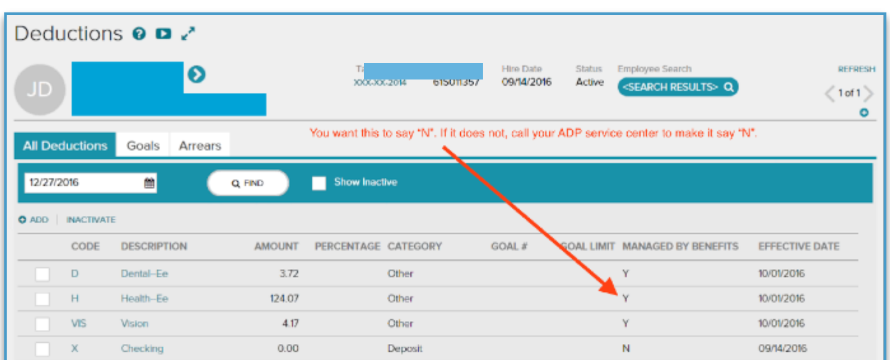


Step 4 - Verify ADP deduction codes are not “managed by benefits”

a. If you have historically used ADP’s “HRB” or “benefits module”, certain of your benefit deductions may be configured to be managed by ADP’s “benefits module.” You do not want this anymore, as they are now being managed by BerniePortal.

b. You can tell whether they are “managed by benefits” by looking at an employee’s deductions record and looking at the column that says “Managed by Benefits.” If it says “N” or if that column is not there at all, you’re good to go. If it says “Y”, then you need to make changes.

c. To make changes, call your ADP service center. Ask to speak to someone on their benefits team and then ask them to “suspend the deduction” for any deduction that has a “Y” in the “Managed by Benefits” column. Once they’ve done that, when you refresh the page you should see the “Y” turn into an “N” and you’re good to go.



STAGE 2: CONFIGURE

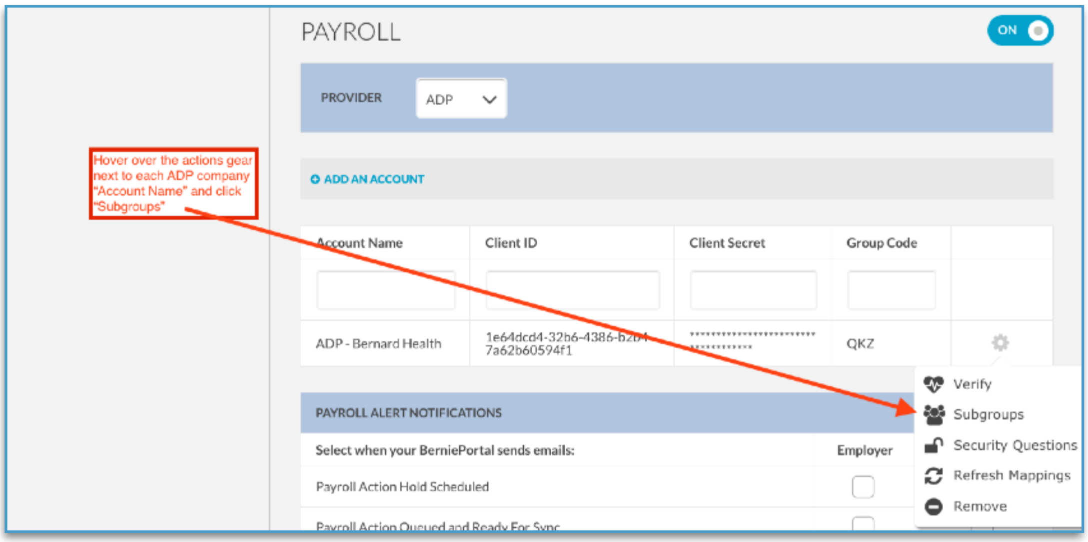
2

Once you have completed the organization stage, it is time to configure BerniePortal so that your BerniePortal payroll subgroups are mapped to the appropriate ADP companies and your BerniePortal benefit types are mapped to the appropriate ADP deduction codes.

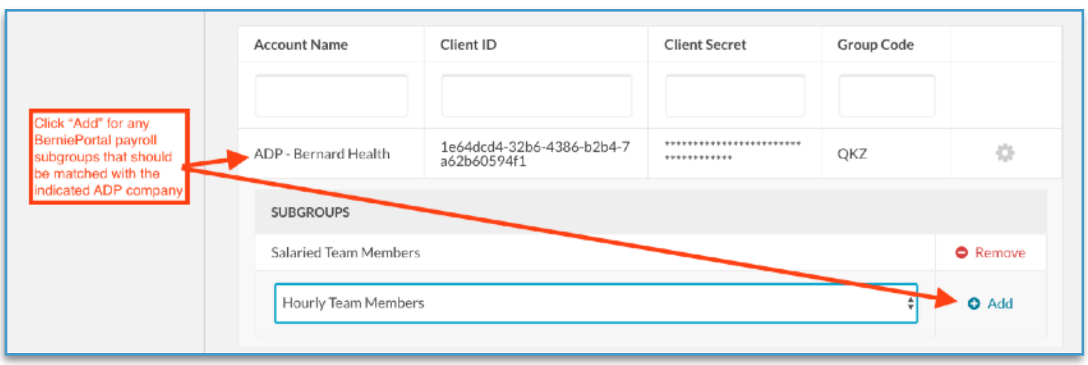
Step 1 - Match BerniePortal payroll subgroups with ADP "companies"

a. In BerniePortal, go to Employer Profile l Integrations and scroll down to "Payroll"

b. Hover over the Actions Gear next to each ADP company "Account Name" and click "Subgroups"

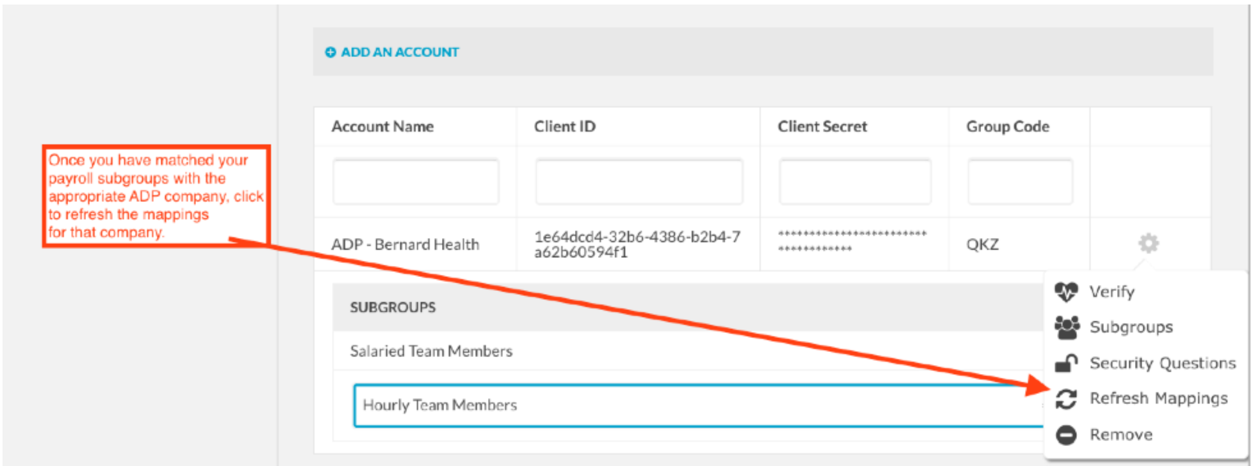


c. Click "add" for any BerniePortal payroll subgroups that should be mapped to that ADP company "Account Name"



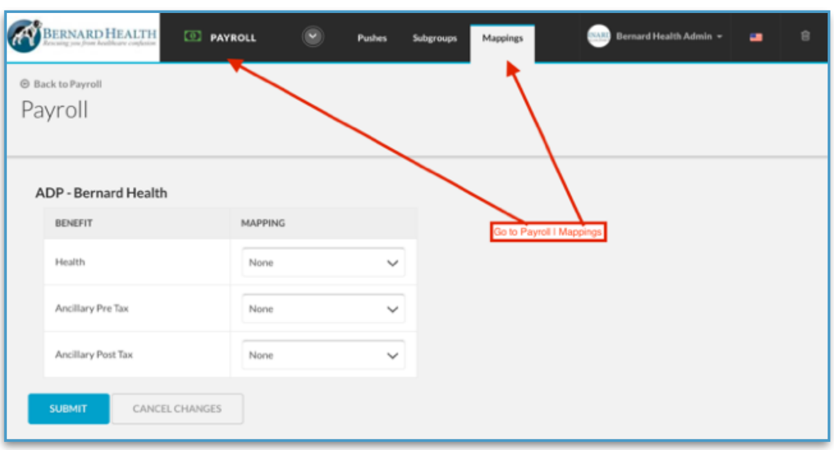
Step 2 - Refresh mappings

Once you have matched your BerniePortal payroll subgroups with your ADP companies, hover over the actions gear next to the ADP company and click to “Refresh Mappings.” This causes the two systems to sync as it relates to your organization’s deduction codes.



Step 3 - Map BerniePortal fields to ADP fields

a. Go to Payroll I Mappings



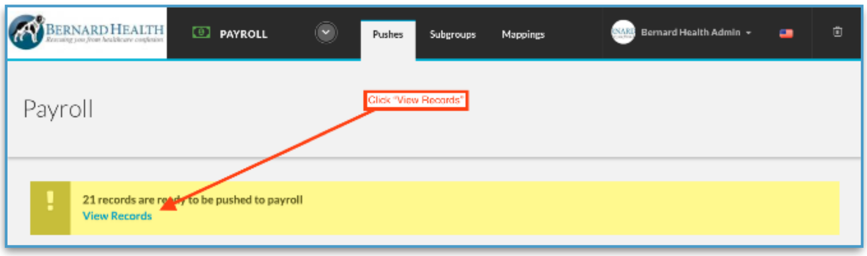
b. Use the dropdowns under the “Mapping” heading to indicate which BerniePortal fields should map to which ADP fields. Specifically, map Plan elections in BerniePortal to the appropriate ADP deduction code and map Direct Deposit elections in BerniePortal to the appropriate ADP withholding code. When finished, click the “Submit” button at the bottom of the page.

STAGE 3: DO A TEST PUSH

3

STEP 1 - View records ready to be pushed

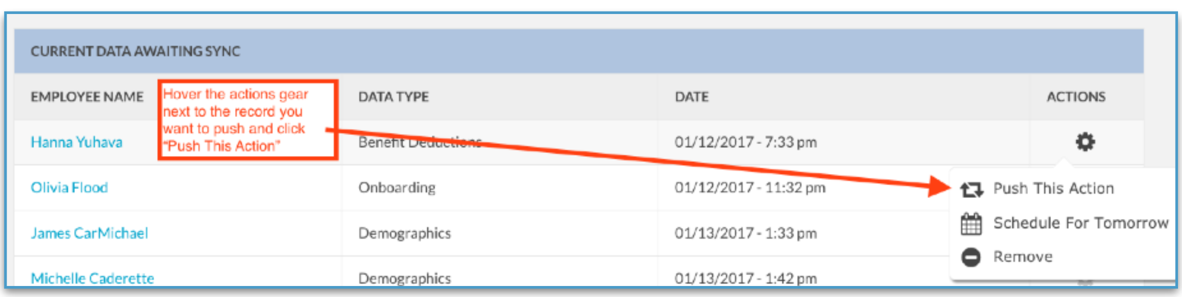
Go to Payroll l Pushes and click “View Records”.



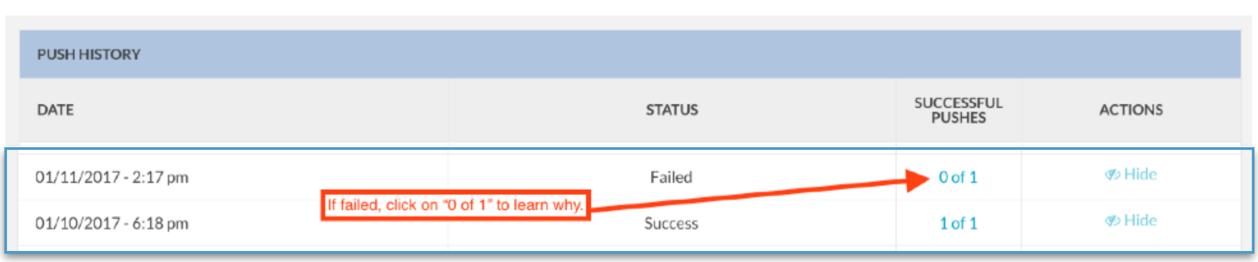
STEP 2 - Push a record to confirm correct configuration

a. Choose a record to push individually. Note that a button at the bottom of the screen allows you to push them all at the same time. For now, just push one by hovering over the actions gear next to the record you want to push and push that one record.

b. Don’t have any records to push yet? Go change something on your own employee record (e.g. change “Avenue” in your address to “Ave”). It will then appear as a record ready to be pushed.



c. Once you’ve pushed a record, wait 30 seconds and then click on “Pushes” at the top of the screen. You will see the “Push History” list and messaging indicating if your push was successful or not. If not, click on the “0 of 1” hyperlink to see why. Then, fix the issue and go back and re-push the record whose push had failed.



BERNIEPORTAL
A Bernard Health Production

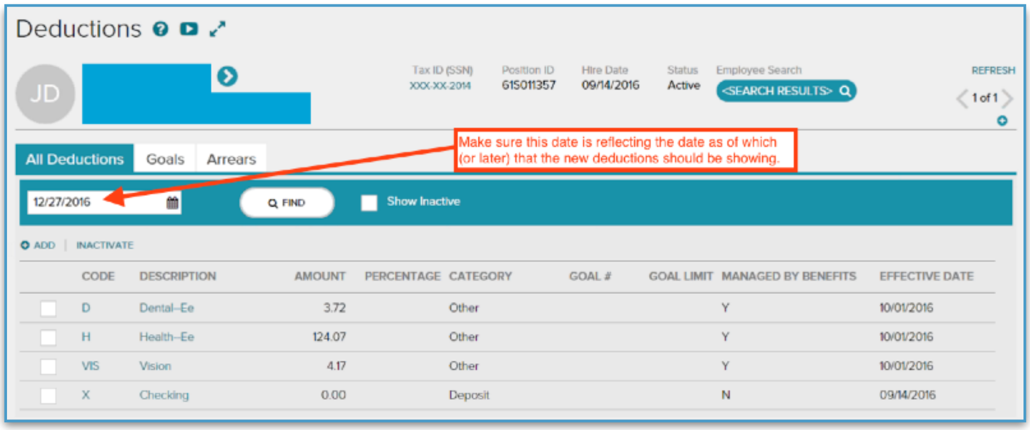
STEP 3 - Verify in ADP

Check in ADP to confirm that the push went across as you expected that it would. You should plan to audit pushes to ensure accuracy for a period of time after implementation. If you discover issues, your BerniePortal Client Success Team Member is here to help.

FAQs

1. My employee's deductions aren't showing up, even though BerniePortal says the push was successful. Why not?

Make sure that you're looking at the ADP deduction record for your employee <u>as of the date</u> that the new benefit deductions are supposed to take affect. You do this by adjusting the date field on your employee's deduction screen.



2. I'm getting a strange error for an onboarding push. What do I do?

ADP cannot accept onboarding pushes made before the employee's actual date of hire. Re-schedule the push for that date and then push it then.

3. I'm getting an error saying that the employee's street address / phone number is invalid. What do I do?

ADP does not accept fake phone numbers like 111-111-1111 or really long addresses. ADP doesn't accept these when entered manually in their system nor when BerniePortal sends them. Check what your employee put in these fields in BerniePortal and adjust as necessary, and then re-push.

4. I'm getting an error saying that ADP can't find the employee's SSN in their system. What do I do?

You likely have a situation where ADP has one SSN for a given employee, but BerniePortal has a different SSN in its system. Depending on the situation, you may want to check with the employee to verify their SSN. Once you are confident that you have the correct SSN, manually correct it in whichever of the two systems had it wrong and re-push.

5. Does it really only take 30 seconds for a record to appear in ADP once I push it from BerniePortal?

Yes, that is how long it takes for one record. The records are sent one at a time, however, even if you push 100 at the same time. As a result, when you push 100 (for example, after open enrollment), it may take about an hour for all of the pushes to come across. You can navigate away from the Payroll area of BerniePortal and do something else while that is taking place.

6. BerniePortal shows terminations as being ready to push, but when I push them they fail.

While BerniePortal is ready to send termination pushes, ADP is not quite ready to accept termination pushes yet. So, for now, you will need to process terminations in both systems manually. When you have a termination record in BerniePortal, click to remove it.

7. How can I see what information is going to change when there is a deductions push?

Click on the employee's name and then click on "Sheets." You will see a list of their most recent elections PDFs. Open the two most recent and compare them.