



# BerniePortal

## ADP Integration

### Guide

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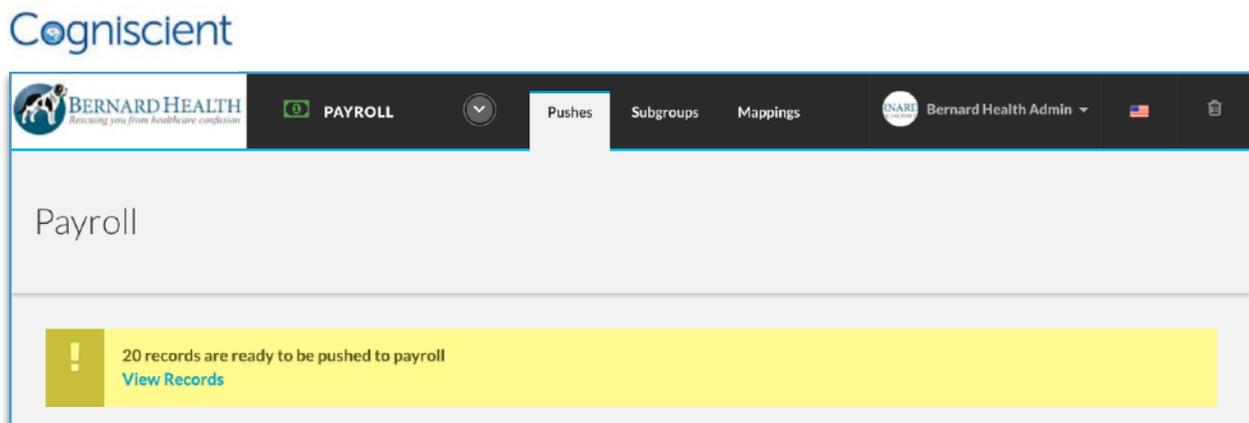
# INTRODUCTION

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.



*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 | 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.*

The screenshot shows the Cogniscent Admin interface. The top navigation bar includes the Cogniscent logo, a menu icon, and the user's name 'Cogniscent Admin'. The main content area is titled 'Employer Profile'. On the left, there is a sidebar menu with options like 'Account', 'Logo', 'Employee Questionnaire', 'Subgroups', 'Feature admins', 'Integrations', 'Documents', and 'Email'. The 'Subgroups' option is highlighted. In the center, there is a table of subgroups under the heading 'BENEFITS:'. The table has three columns: subgroup name, ID, and a settings gear icon. The subgroups listed are 'Non-managers' (PYJJ58HDH5), 'Managers' (1N1311W21F), 'TOS Test' (YHT0EKXH4G), 'COBRA Subgroup' (FFB165EF56D0DD3), and 'TOS Test - copy' (07F6952B6A024CC). Below this table is a 'PAYROLL:' section with one entry: 'All Employees' (GKZVWXU54I). On the right side of the page, there are sections for 'PTO:', 'Salary', 'Hourly', 'Accrual Bank', 'NOTICES:', and 'BILLING-PRIMARY:'. A dropdown menu is open in the top right corner, showing options for 'Employer profile', 'Switch to employee account', and 'Logout'. A blue button labeled 'ADD NEW SUBGROUP' is visible at the bottom right. Red arrows and a text box with numbered instructions (1-4) point to the 'Subgroups' menu item, the dropdown menu, and the 'ADD NEW SUBGROUP' button.

BENEFITS:		
Non-managers	PYJJ58HDH5	⚙️
Managers	1N1311W21F	⚙️
TOS Test	YHT0EKXH4G	⚙️
COBRA Subgroup	FFB165EF56D0DD3	⚙️
TOS Test - copy	07F6952B6A024CC	⚙️

PAYROLL:		
All Employees	GKZVWXU54I	⚙️

PTO:		
Salary	S6NZT3H70D	⚙️
Hourly	6A6Y46J2X9	⚙️
Accrual Bank	9EC4084316C183A	⚙️

NOTICES:		
Virginia	I55AKDL3E9	⚙️
Tennessee	3GP3PNBJ34	⚙️

BILLING-PRIMARY:		
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## 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.

The “Subgroups” to which an employee belongs are found at the bottom of each employee’s record in BerniePortal. If an employee is in the wrong payroll subgroup, change them to the correct one by clicking “Change subgroup.”

When you do so, it will ask you the effective date of the change. Make it today’s date.

TYPE	SUBGROUP	
Benefits	Managers	⚙
PTO	Salary	⚙
Payroll	All Employees	⚙
Notices	Tennessee	
Benefit Timeframes	Non-managers - TF	⚙
Billing-Primary	None	⚙
1094-C ALE	All employees	⚙

SAVE

BERNIEPORTAL A Bernard Health Production Privacy Policy | Terms of Use

#### 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.

Deductions

JD [Employee ID] Hire Date: 09/14/2016 Status: Active Employee Search: [SEARCH RESULTS]

All Deductions Goals Arrears You want this to say "N". If it does not, call your ADP service center to make it say "N".

12/27/2016 Q FIND Show Inactive

CODE	DESCRIPTION	AMOUNT	PERCENTAGE	CATEGORY	GOAL #	GOAL LIMIT	MANAGED BY BENEFITS	EFFECTIVE DATE
<input type="checkbox"/>	D Dental-Ee	3.72		Other			Y	10/01/2016
<input type="checkbox"/>	H Health-Ee	124.07		Other			Y	10/01/2016
<input type="checkbox"/>	VIS Vision	4.17		Other			Y	10/01/2016
<input type="checkbox"/>	X Checking	0.00		Deposit			N	09/14/2016

## 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”**

- In BerniePortal, go to Employer Profile | Integrations and scroll down to “Payroll”
- Hover over the Actions Gear next to each ADP company “Account Name” and click “Subgroups”

Account Name	Client ID	Client Secret	Group Code
ADP - Bernard Health	1e64dcd4-32b6-4386-b2b4-7a62b60594f1	*****	QKZ

- Click “add” for any BerniePortal payroll subgroups that should be mapped to that ADP company “Account Name”

Account Name	Client ID	Client Secret	Group Code
ADP - Bernard Health	1e64dcd4-32b6-4386-b2b4-7a62b60594f1	*****	QKZ

Subgroup Name	Action
Salaried Team Members	Remove
Hourly Team Members	Add

## 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.

Once you have matched your payroll subgroups with the appropriate ADP company, click to refresh the mappings for that company.

Account Name	Client ID	Client Secret	Group Code	
ADP - Bernard Health	1e64dcc4-32b6-4386-b2b4-7a62b60594f1	*****	QKZ	

- Verify
- Subgroups
- Security Questions
- Refresh Mappings
- Remove

SUBGROUPS

- Salaried Team Members
- Hourly Team Members

## Step 3 - Map BerniePortal fields to ADP fields

- Go to Payroll I Mappings

Go to Payroll I Mappings

BENEFIT	MAPPING
Health	None
Ancillary Pre Tax	None
Ancillary Post Tax	None

SUBMIT CANCEL CHANGES

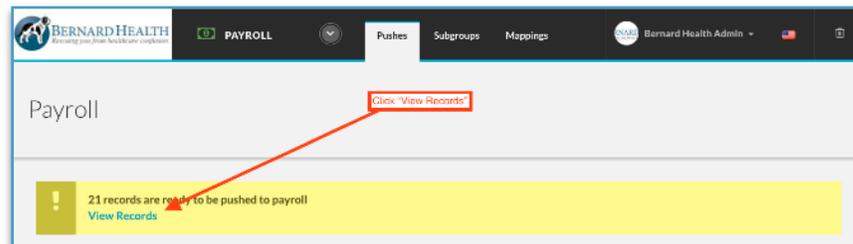
- Use the dropdowns under the “Mapping” heading to indicate which BerniePortal fields should map to which ADP fields. Specifically, map Plan elections in BerniePortal to the appropriate ADP deduction code and map Direct Deposit elections in BerniePortal to the appropriate ADP withholding code. When finished, 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 I Pushes and click “View Records”.



## STEP 2 - Push a record to confirm correct configuration

- 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.
- 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.

CURRENT DATA AWAITING SYNC				
EMPLOYEE NAME	DATA TYPE	DATE	ACTIONS	
Hanna Yuhava	Benefit Deductions	01/12/2017 - 7:33 pm	⚙️	
Olivia Flood	Onboarding	01/12/2017 - 11:32 pm	➡️ Push This Action	
James CarMichael	Demographics	01/13/2017 - 1:33 pm	📅 Schedule For Tomorrow	
Michelle Caderette	Demographics	01/13/2017 - 1:42 pm	➖ Remove	

- 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.

PUSH HISTORY				
DATE	STATUS	SUCCESSFUL PUSHES	ACTIONS	
01/11/2017 - 2:17 pm	Failed	0 of 1	🔗 Hide	
01/10/2017 - 6:18 pm	Success	1 of 1	🔗 Hide	

### **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 as of the date that the new benefit deductions are supposed to take affect. You do this by adjusting the date field on your employee's deduction screen.

The screenshot shows the 'Deductions' screen for an employee. At the top, there's a header with the employee's initials 'JD' and a search bar. Below that, there's a row of employee information: Tax ID (SSN) XXX-XX-2094, Position ID 615011357, Hire Date 09/14/2016, and Status Active. There's also an 'Employee Search' button and a 'REFRESH' button. Below this, there are tabs for 'All Deductions', 'Goals', and 'Arrears'. A date field is set to '12/27/2016', with a red box and arrow pointing to it and a note: 'Make sure this date is reflecting the date as of which (or later) that the new deductions should be showing.' Below the date field is a 'Q FIND' button and a 'Show Inactive' checkbox. At the bottom, there's a table with columns: CODE, DESCRIPTION, AMOUNT, PERCENTAGE, CATEGORY, GOAL #, GOAL LIMIT, MANAGED BY BENEFITS, and EFFECTIVE DATE. The table contains four rows of deductions: D (Dental-Ee, 3.72, Other, Y, 10/01/2016), H (Health-Ee, 124.07, Other, Y, 10/01/2016), VIS (Vision, 4.17, Other, Y, 10/01/2016), and X (Checking, 0.00, Deposit, N, 09/14/2016).

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.