



# Using ADP's **BerniePortal** Integration

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# INTRODUCTION

ADP's BerniePortal integration allows certain data that is added or changed in BerniePortal to appear in real-time in ADP Workforce Now. Better yet, it allows you to have full control over seeing which categories of data for which employees will sync and when.

If you're reading this you've already configured your integration, and you're now ready to actually start using it!

One thing we'd recommend that you do before reading this guide is to watch this short video of a sync happening between BerniePortal and ADP. Watching this video will give you great context for how this works, which will be helpful to have as you read about it.

[Watch Video](#)

**The rest of this guide covers the following:**

- 1 Categories of information included in the integration
- 2 How to know when data is able to synced
- 3 How to sync data

# CATEGORIES OF INFORMATION INCLUDED IN THE INTEGRATION

When using the integration, it is helpful to start with an understanding of the general categories of data that are included in the integration. There are three categories of information that are included in the integration: Onboarding; Benefit Deductions; and Direct Deposit.

Let's dive into each of these categories separately.

## ONBOARDING:

The "Onboarding" category includes most of the data related to a new hire. Indeed, syncing this category of data will actually create the new hire's record in ADP. Yes, that is right - you will not need to create a new employee in ADP from scratch anymore.

When you see an employee who is listed as having "Onboarding" data to be pushed, you should expect to see that when you approve that sync in BerniePortal that the new employee's record will be created in ADP Workforce Now and that the following data will automatically populate for that employee:

Items that <i>will</i> sync:		Items that will <i>not</i> sync:
First Name	Gender	Salary
Last Name	Street Address	Federal withholding information
Hire Date	City	State withholding information
SSN	State	Job Title
Direct deposit information	Zip	Employee Type (full/part time)
Birthdate		Overtime Exempt (yes/no)
		Overtime Factor
		Expected hours per week
		Hire type (W-2 / 1099)
		Email
		Phone number

**Note:** after you sync the data and create the new hire's record in BerniePortal, you will need to login to ADP to input their salary as well as their federal / state / county / school district withholding data and any other data as appropriate. Also, bear in mind the ADP does not allow you to create a new employee record in its system earlier than the employee's hire date.

## BENEFIT DEDUCTIONS:

The “Benefit Deductions” category includes the pay deduction data recorded in BerniePortal. Indeed, syncing this category of data will actually create/change the pay deduction that is recorded for the employee in ADP. Yes, that is right - you will not need to login to ADP to change an employee’s benefit deduction anymore.

When you see an employee who is listed as having “Benefit Deductions” data to be synced, you should expect to see that when you approve that sync in BerniePortal that the deduction will get created/changed as of the benefit’s effective date. You can go ahead and sync the data before the benefit’s effective date - the deduction will get logged in ADP as of the effective date of the benefit, not the date that you sync. You can confirm this after you sync by using the “Show as of” field in the deductions area of the employee’s record in ADP.

## DIRECT DEPOSIT:

The “Direct Deposit” category is employee direct deposit information - where they want their paycheck deposited. It comes into play when employees have changes to that data. For example, an employee changes banks and updates their direct deposit info in BerniePortal. Yes, that is right - you will not need to login to ADP to update direct deposit info anymore.

# HOW TO KNOW WHEN DATA IS ABLE TO BE SYNCED

There are a few different ways that you can manage this. One approach is that you can set up email notifications in BerniePortal to alert you to when an employee makes changes to their data. That way, you'll know immediately when information can be synced.

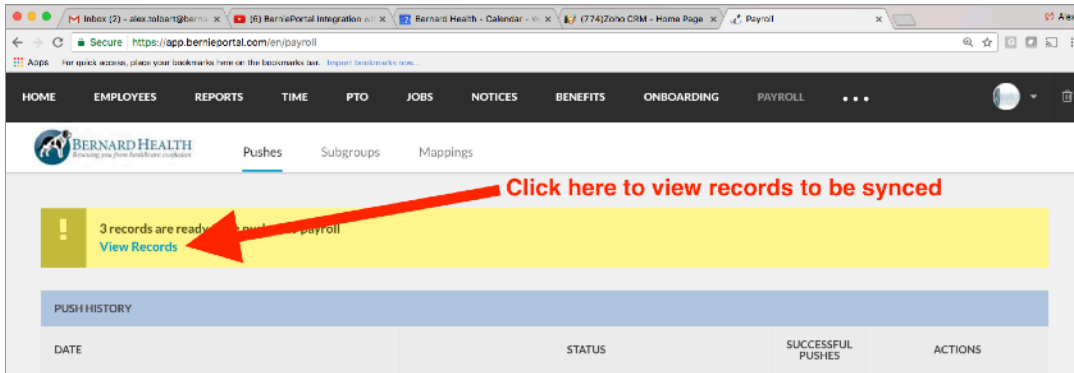
Another approach is to keep an eye on your BerniePortal dashboard. The payroll indicator will let you know when there is data ready to be synced. Many employers simply make part of their workflow when running payroll to check to see if any data is ready to sync.

The screenshot shows the BerniePortal dashboard with a navigation bar at the top containing: HOME, EMPLOYEES, REPORTS, TIME, PTO, JOBS, NOTICES, BENEFITS, ONBOARDING, PAYROLL, and a user profile icon. Below the navigation bar is the Bernard Health logo and the text "Welcome back, Bernard Health!". A red box highlights the text "Payroll indicator alerts you when data is ready to be synced" with a red arrow pointing to the "Payroll" item in the "ACTIONS" list. The "ACTIONS" list includes: PTO requests (4), Notices (9), CO-2 Certifications (1), Onboarding paperwork (1), Payroll (3), Pending EOI (4), Outstanding benefit enrollment (27), and Time (34). The "STATS" section shows "Current enrollment" with tabs for Onboarding, Notices, Turnover, and Time. Below this are "Total enrollment" statistics for various categories: HEALTH (34), DENTAL (34), VISION (24), LIFE (46), VOLUNTARY LIFE (26), SHORT TERM DISABILITY (46), LONG TERM DISABILITY (46), HSA (34), and DEPENDENT FSA (4).

# HOW TO SYNC DATA

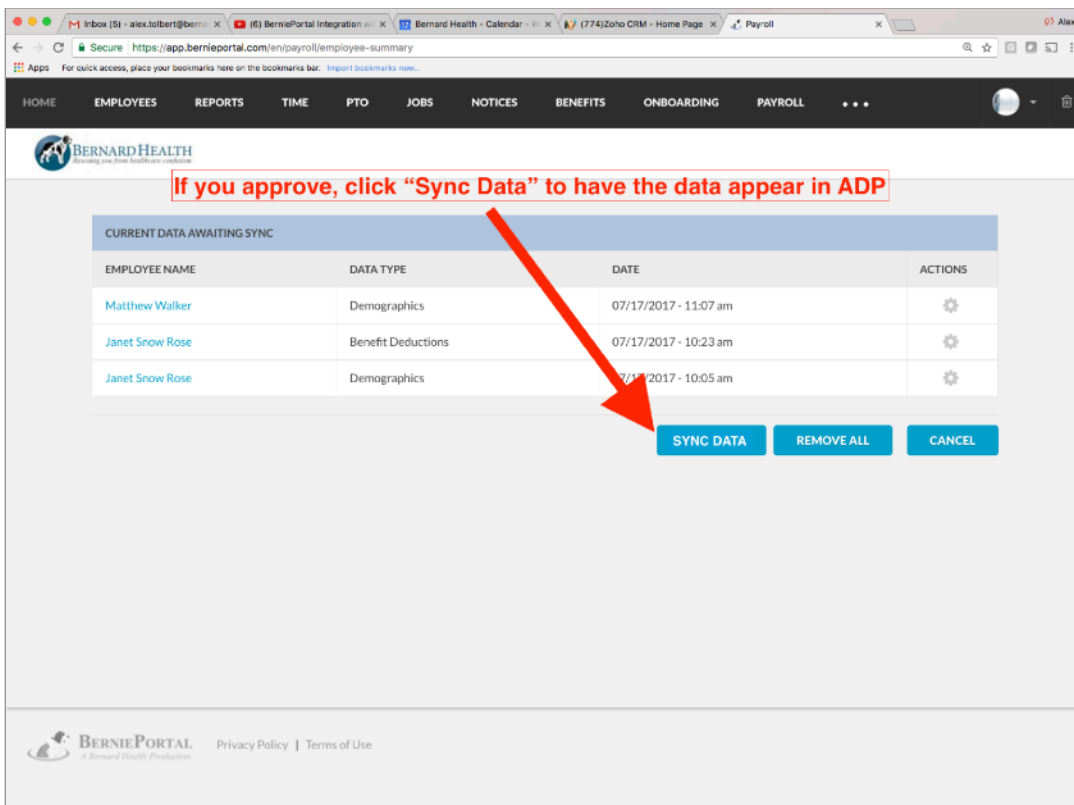
## GETTING WHERE YOU NEED TO GO:

To sync data, click on the Dashboard's payroll indicator and then click on the verbiage telling you how many records are ready to be synced. You'll see a page that looks like the below screenshot, and you'll want to click on "View Records."



## SYNCING THE DATA:

Once you click that link, you'll see a list of all of the data that is available to be synced. If you approve the data, click the button "Sync Data" to have the data appear in ADP.



## GETTING VERIFICATION THAT THE DATA SYNCED SUCCESSFULLY:

Click on “Pushes” in the secondary navigation area. You’ll see a list of all of your prior syncs with a status indicator showing whether all of the data went through correctly, if it failed, or if some went through but some failed. If data is still in transit, the status will simply say “Pending.” You should allow about 15 seconds per record for any data that you sync to appear in ADP. So if it is just one employee’s changes, it should only take 15 seconds. If you just had open enrollment and synced 100 employees’ benefit deductions, it may take 20 minutes or so before the status changes from “Pending.”

3 records are ready to be pushed to payroll  
[View Records](#)

Shows number of records that succeeded

Status column

DATE	STATUS	SUCCESSFUL PUSHES	ACTIONS
07/17/2017 - 10:03 am	Completed with Failures	61 of 64	<a href="#">Hide</a>
06/30/2017 - 12:02 pm	Completed with Failures	20 of 26	<a href="#">Hide</a>
06/20/2017 - 11:00 am	Completed with Failures	18 of 32	<a href="#">Hide</a>
06/20/2017 - 11:00 am	Success	1 of 1	<a href="#">Hide</a>
06/06/2017 - 10:30 am	Success	5 of 5	<a href="#">Hide</a>
05/24/2017 - 12:41 pm	Success	1 of 1	<a href="#">Hide</a>
05/24/2017 - 12:40 pm	Success	1 of 1	<a href="#">Hide</a>
05/24/2017 - 12:40 pm	Success	1 of 1	<a href="#">Hide</a>
05/22/2017 - 10:54 am	Success	2 of 2	<a href="#">Hide</a>
05/18/2017 - 1:58 pm	Completed with Failures	1 of 4	<a href="#">Hide</a>
05/12/2017 - 11:15 am	Completed with Failures	2 of 4	<a href="#">Hide</a>
05/04/2017 - 12:34 pm	Completed with Failures	5 of 7	<a href="#">Hide</a>

## MANAGING RECORDS THAT “FAILED”:

If you had a record fail to appear in ADP, BerniePortal will tell you that. It will also show you the reason ADP gave for the failure. The ADP reason will be the exact error message ADP would give you if you had typed the information into ADP yourself.

Let’s look at a few reasons you might get a failure and what to do about them.



### ***Failed: addressType is invalid***

Employee Name	Demographics	Failed: addressType is invalid.	07/06/2017 - 12:30 pm	
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Here you can see the error as “Failed: addressType is invalid.” This is indicating that the employee entered his/her email address in BerniePortal in a way that ADP does not accept. In this case, we’d recommend clicking on the employee’s name, seeing if you can adjust his/her address into a different format, and then syncing again.

### ***Failed: Employee SSN not found in ADP***

Employee Name	Benefit Deductions	Failed: Employee SSN not found in ADP	07/15/2017 - 10:54 am	
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Here you can see the error as “Failed: Employee SSN not found in ADP.” This could be the case for a variety of reasons. In this particular example the individual in question is paid via K-1, not W-2 or 1099. As a result, he is not paid via ADP at all and so is not in the ADP system. He is eligible for company benefits, though, and so he enrolls in BerniePortal. It is entirely appropriate that deductions should not be pushed into ADP for him, and so this error would be ignored.

If you receive an error and can’t figure out the reason, please reach out to your broker and/or BerniePortal’s Client Success Team and we’ll work to troubleshoot it with you. Also note that you can always just go ahead and make the necessary adjustment directly in ADP Workforce Now if time is of the essence.