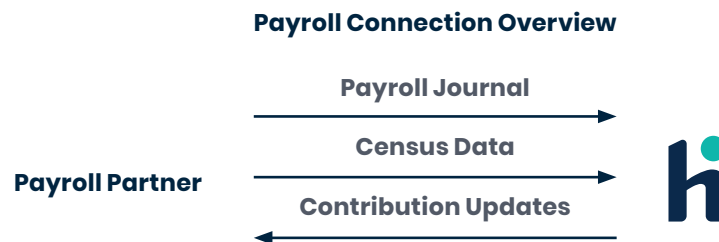# Human Interest Payroll Connection Guide: Apex

• Introduction

This is a guide for payroll providers who use Apex to set up a payroll connection with Human Interest. The document includes information on how to set up the payroll connection in Apex, how to onboard clients onto the connection, how to submit support requests to Human Interest, and what data is shared within the payroll connection. If you have any feedback on the contents of this document, please contact the Human Interest Integration team.

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• Apex Payroll Connection Setup

Human Interest has a prebuilt connection with Apex that automates the sharing of payroll, census, deduction, and YTD data. Payroll data will be shared by Apex to Human Interest within 3 business days of the payroll being run, census data will be shared on a daily basis, and deduction data will be shared within 1 business day of an employee changing their contribution rates on their Human Interest employee portal.

Payroll Connection Overview

Payroll Partner → Payroll Journal → h

Payroll Partner → Census Data → h

Payroll Partner ← Contribution Updates ← h

• Connection Setup

Apex Connection – System Setup

1. Complete the Amendment to Master Services Agreement and Additional Order: Human Interest Integration Service via Docusign.

2. Once the above amendment has been completed, an Apex HCM support case will be automatically created to activate the Human Interest Integration.

3. The Apex HCM support team will activate the Bit Flag on the backend that will allow the Human Interest setup items to be completed within the Employer On Demand application.

    i. The SLA for this is driven by the case 'Priority' which can be set by the payroll partner once the case has been created. All cases default to 'Medium' with an SLA of 24-48 hours.

    ii. The process for activating the Bit Flag is seamless and takes less than a minute.

Apex Connection – Client Onboarding

Prior to client onboarding, Human Interest's engineering team will work on configuring the payroll connection into our system. Once this has been completed, Human Interest's Onboarding Team will send a kickoff email including plan information for each new client to the payroll partner. If the payroll partner has not received a kickoff email within 2 weeks of the expected plan launch, **contact** Human Interest for assistance.

Human Interest

Client Onboarding Process Overview

1. Human Interest's Onboarding Team will meet with a client to finalize their plan documents.

2. Human Interest's Onboarding Team will send a kickoff email to the designated point of contact(s) on the payroll partner's team to notify them we have a new client and to begin enabling the connection.

3. The payroll partner will complete the setup below for each relevant plan in Apex:

   a. Enable the automated payroll connection.

   b. Set up deduction codes.

4. In the event that Human Interest will need to manually support plans, the payroll partner will provision Human Interest access for the items below:

   a. Employer on Demand (EOD) – allows Human Interest to access client's census and payroll reports.

   b. Employer on the Go (EOG) – allows Human Interest access to set deductions manually.

5. The payroll partner will reply to the kickoff email to confirm the connection setup for the client has been completed.

6. Human Interest's Onboarding Team will reply to the email to confirm that we have access to support this client on our connection and will work directly with the client to launch the plan.

7. Human Interest will use the connection to pull our client's census data and load it into Human Interest for the initial census sync. Once complete, eligible employees will be able to enroll in their retirement account, access their Human Interest portal, and set deductions rates in Human Interest.

8. Human Interest will send enrolled employees' deductions via an automated file transfer with Apex before the first check date.

9. If there are any issues with Step 8, Human Interest's Onboarding Team will be in touch with you, the payroll partner.

Payroll Partner Setup Steps

The payroll partner will follow the steps below to onboard each unique client onto the Human Interest Payroll Connection with Apex:

Human Interest

Enable the Automated Payroll Connection

1. In Apex, navigate to the Company Information > Banking/Workers Comp Tab > Electronic Providers setup area:

a. Company Information

b. Banking/Workers Comp Tab

c. Electronic Providers:

   i. Retirement Provider drop down should be set to HI401K

   ii. Retirement Status drop down should be set to Active

   iii. Retirement Effective Date field

       1. Integration data will be available to send the first payroll processed after the effective date.

       2. Set the Effective Date to 2 weeks prior to the first payroll date with Human Interest so the census can be synced and employees can sign up in Human Interest and set deferral rates prior to the first check date.

IMPORTANT: If HI401K is not available in the dropdown, please reach out to your dedicated Apex point of contact and request to make the Human Interest 401k provider available.

Set up Deductions

2. In Apex, navigate to Company > Deductions:

    a. Deduction ID must be set up with the following:

        i. 401K

        ii. 403B (if a plan is a 403b)

        iii. 4Roth

        iv. 401KLoan

    b. Interface Type/Qualifier drop down must be set up with the following:

        i. HI401K

    c. **If the client has a match**, the Qualifier drop down must be set up with the following:

        i. Match = Employer Match

        ii. Loan code for any loan payment codes

    d. **If the client does not have a match**, the Qualifier drop down must be set up with the following:

        i. Deferral = 401k and 403b deductions

        ii. Roth = 401k Roth

        iii. Loan code(s) for any loan payment codes

    e. Set HI deduction IDs as "Company Default" to allow codes to be added to new employee profiles. Under Defaults:

    i. Click on the "Use As Company Default" checkbox

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f. W2 Category drop down must be set up with the following:

    i. 401k Deduction = 401k Deferrals

    ii. 403b Deduction = 403b Deferrals

    iii. 4Roth Deduction = Roth Contributions to a 401K Plan

g. Set HI deduction IDs manually for each existing employee:

    i. 401K

    ii. 403B (if a plan is a 403b)

    iii. 4Roth

    iv. 401KLoan

IMPORTANT: In order for our connection to work as expected, each employee will need their plan's deferral codes applied to their record in Apex. For each client, ensure that the deferral codes are manually applied to **each existing active employee**. New employees will have codes automatically applied as long as the "Use As Company Default" checkbox has been enabled (see screenshot above under "Defaults" section for deductions).

Provision Human Interest Access to Employee on Demand (EOD)
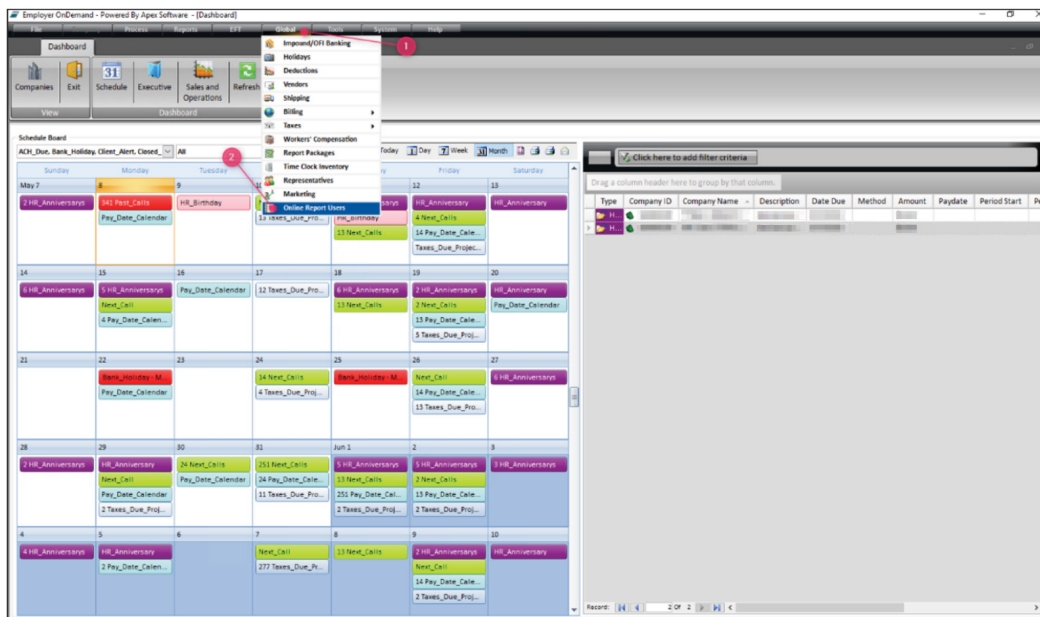
3. Create the Human Interest User

a. In Employer on Demand, navigate to Global > Online Report Users

b. In the Ribbon, select Add, then complete the fields below to create the user:

    i. Username (use a generic username)

    ii. Password

    iii. First and Last Name (use Human as first name and Interest as last name)

    iv. Email address: **payroll@humaninterest.com**

    v. Phone Number: (415) 494-7228

c. Select Active as the user status

d. Save the user

e. Email the credentials to **payroll@humaninterest.com**

4. Provision the Human Interest Access

a. Select the desired company on the right-hand side that the Human Interest User should have access to:

		Company ID	Company Name ▲
▶	☑	03112019	007 Animal Hospital
	☐	00000022	Accruals
	☐	00000012	California Special Inc
	☐	00000610	Georgia Peaches

b. Leave IP Address fields blank.

5. Add the Human Interest Online Reports

a. Navigate to the company and add online reports to attach them to the Human Interest environment. Please make sure to attach the following Human Interest files

i. Payroll Reports (2):

1. Human Interest Payroll Report with YTD information which runs every pay period. Change the "Period" of the report from "Current Pay Period" to "Year to Date."

2. Human Interest Payroll Report with Current Pay Period information which runs every Pay Period

ii. Census Reports (1):

1. Human Interest Census Report with YTD information which runs every pay period. Change the "Period" of the report from "Current Pay Period" to "Year to Date."

6. In the screenshot above, "Online Reports" box must be enabled to ensure these are reflected in both the company list and Employer on Demand.

Provision Human Interest Access to Employee on the GO (EOG)

7. Create the Human Interest User

    a. In Employer on the GO, navigate to Security Center

    b. In the Ribbon, select Add User, then complete the fields below to create the user:

        i. Primary User Type as "Payroll Client"

        ii. Ensure "Employer on the GO" checkbox is enabled

        iii. First and Last Name (use Human as first name and Interest as last name)

        iv. Username (use a generic username)

        v. Password

        vi. Email address: **payroll@humaninterest.com**

        vii. Phone Number: (415) 494-7228

    c. Select Active as the user status

    d. Save the user

8. Provision the Human Interest Access

    a. In the Ribbon, navigate to Company Access

    b. Select the desired company on the right-hand side that the Human Interest User should have access to:
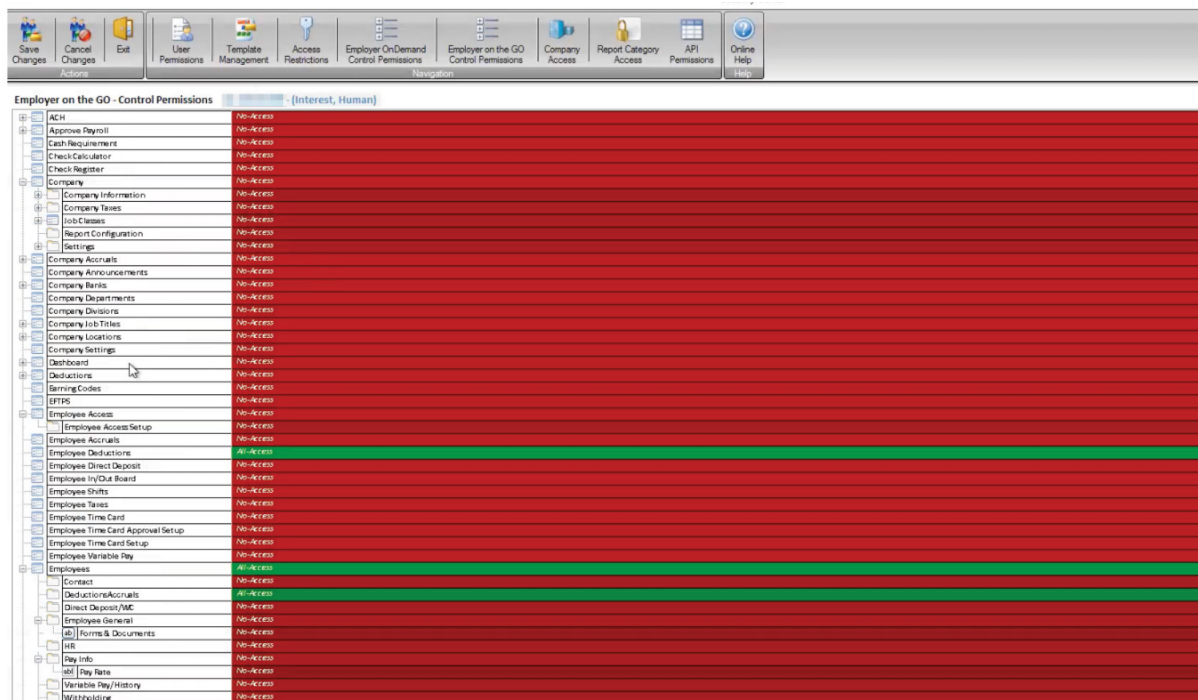

    c. Save changes

Human Interest

d. In the Ribbon, navigate to Employer on the GO Control Permissions

i. Select "All Access" in the dropdown menu for each of the following permissions:

    1. Employee Deductions

    2. Employees > Deductions Accruals

ii. Ensure "No Access" has been selected in the dropdown menu for all other permissions

iii. Save changes

• What Data Do We Collect?

In order to support your clients on the Human Interest payroll connection, the connection will share the following data regularly for all current employees and employees terminated within the current calendar year, whether they participate in the Human Interest plan.

Item	Data Collected	Frequency
Census	• Employee First Name • Employee Last Name • SSN • Pay Type • Annual Salary • Hourly Rate • Personal Email • Cell Phone • Address • City • State • Zip Code • Birth Date • Hire Date • Rehire Date • Termination Date	Human Interest will collect the census information from your Apex system on a **daily basis** to ensure that we have up-to-date employment information to track plan eligibility for all employee.
Payroll	• Pay Date • Employee First Name • Employee Last Name • SSN • 401(k) Current Eligible Wages • Retirement Hours Current Hours • 401(k) Current Dollars • 401(k) Roth Current Dollars • 401(k) ER Match Current Dollars • 401(k) Loan Current Dollars	Human Interest will collect the payroll information from your Apex system on a **per-payroll basis** to ensure we have the correct employee and employer contribution data. Human Interest will process contribution data and get funds traded within seven business days.
Year-To-Date Payroll	• Pay Date • Employee First Name • Employee Last Name • SSN • 401(k) YTD Eligible Wages • Retirement Hours YTD Hours • 401(k) YTD Dollars • 401(k) Roth YTD Dollars • 401(k) ER Match YTD Dollars • 401(k) Loan YTD Dollars	Human Interest will collect the year-to-date (YTD) payroll information from your Apex system per the client's payroll frequency to ensure we have the correct employee and employer contribution data for the current calendar year. Human Interest will use this data to ensure clients stay compliant with regulations and reduce administrative overhead when completing end-of-year testing. If Human Interest notices a discrepancy between the YTD totals in Human Interest and the YTD file we receive, we will reach out to you to resolve the discrepancy.

For more information, contact Human Interest Integrations at
integration-support@humaninterest.com.

Human Interest

Deduction Rate Changes

From Human Interest to Apex

Whenever an employee updates their contribution rate in their Human Interest account, our connection will update their contribution rate in your Apex system. For our connection, Human Interest will be the source of truth for any contribution rate changes. We will educate our clients to update their contribution rates in Human Interest, and the connection will sync their updates in your Apex system within 24 hours.

Loan Updates

Our connection does not support automated loan updates. If a shared client's plan allows employees to take out loans against their 401(k), the Human Interest team will work with the client to process these loans and update the relevant loan rates in the Apex system manually.

Additional Information

Our mutual clients can manually exclude employees from the Human Interest website via admin's account that will prevent enrollment into the plan. Should the employee's status change during their employment, our mutual clients will need to manually include the employee on our website in order for that employee to enroll into the plan.

How to reach out to us

If you run into any issues or have any questions, we are here to help. Below is an overview of who to contact based on the questions you may have.

Contact Information	
Integrations Support	**integration-support@humaninterest.com**
Questions on Client Launch	**hipayroll@humaninterest.com**
Leads and Escalation outside of payroll integration	Your Local Partner Account Manager
Customer Support	855-622-7824 **support.humaninterest.com/s/contactsupport**
Online Support for Employees and Employers	**support.humaninterest.com/s**

For more information, contact Human Interest Integrations at integration-support@humaninterest.com.

Human Interest