Human Interest Payroll Connection Guide: isolved

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

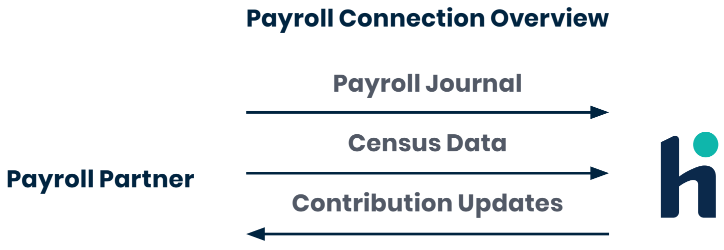
Introduction

This is a guide for payroll providers who use isolved to set up a payroll connection with Human Interest. The document includes information on how to set up the payroll connection in isolved, 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.

isolved Payroll Connection Setup

Human Interest has a prebuilt connection with isolved that helps automate the sharing of payroll, census, and deduction data. Payroll data will be shared on a per-payroll basis, census data will be shared on a daily basis, and deduction data will be shared in near-real time whenever employees change their contribution rates in the Human Interest portal.



Connection Setup

isolved Connection - Share information with Human Interest

Please fill out the **Human Interest: iSolved Payroll Connection Setup Questionnaire** with the required information to complete the connection setup.

isolved Connection - System Setup

Please ensure that the “isolved Certified Network Partner Add-On Service Agreement” has been signed and submitted to isolved. isolved will not be able to set up the system if this agreement is not in place.

Once the service agreement has been signed, follow the below steps to complete the isolved system setup for your connection.

1. File a ticket with isolved to request access to the isolved API in your isolved / Netsuite Portal
    a. Ticket type: Use the single ticket type that is available in Netsuite
    b. Ticket subject: ‘API Request - Human Interest’
    c. Include the form which is available on the partner portal in the case submission

2. The isolved Partner Support team will provision your isolved system with an API environment and share the credentials with Human Interest to add support to.
3. Human Interest will add support to your environment within two weeks and a Human Interest Integration Specialist will notify you so you can complete the client connection in isolved.

Once isolved enables the connection, they will share the necessary technical information with Human Interest. Once isolved shares this information, Human Interest will complete our payroll connection configuration and will be ready to onboard our first client within two weeks.

isolved Connection - Client Onboarding

Once our system-level payroll connection configuration is complete, we'll follow the below steps to enable each client on your connection. Human Interest will send you the plan information for each new client in the kickoff email. If you have not received a kickoff email within 2 weeks of the expected plan launch, **contact** Human Interest for assistance.

Process Overview

1. Human Interest will meet with the client to finalize their plan documents.
2. Human Interest will send a kickoff email to the designated point(s) of contact on your team to notify them that we have a new client and to request that they enable the connection.
3. You will complete the connection setups listed below for this client and reply to the kickoff email when complete.
4. Human Interest will reply to the email to confirm that we have access to support this client on our connection and will work with the client to launch the plan.
5. Human Interest will use the connection to pull your client's census data and load it into Human Interest. When complete, eligible employees will be able to enroll in their 401(k) plan and set deduction rates in Human Interest.
6. Human Interest will create our client's deduction codes and company memo calculations via our connection.
7. Human Interest will set enrolled employees' deductions via our connection in isolved before the first check date.

Payroll Partner Setup Steps

Complete the following steps to onboard each new client onto our connection.

Add the Client to the Human Interest Partner User

1. In isolved, navigate to **Security** and then **Partner Users**
2. In the Partner drop-down at the top of the page select isolved HCM REST API
    a. If you do not have access to the HCM REST API partner user please contact isolved Partner Support to have this added.
3. Click **Filter** and filter on username equal to "Human Interest"

4. **Select** the "Human Interest" user. If there isn't a Human Interest user then create one

5. Navigate to the **Client Access** Tab

    a. Click Add **New**

    b. Enter the client ID for the new client in the Client Code

    c. Click **Save**

Benefit Plan Setup

1. Set up the client's Benefit Plan in isolved to ensure there are Calculation Parameters that follow the below naming convention. If you have any concerns with the required naming convention please **contact** the Human Interest Integration team.

    a. 401k Traditional Percent

    b. 401k Traditional Amount

    c. 401k Roth Percent

    d. 401k Roth Amount

2. Create a 3rd party user in isolved named "Human Interest" and assign it to the Benefit Plan as the Provider.

    a. Navigate to **Client Management** then **Payroll** then **Third Parties**

    b. Add New

        i. Third Party name: Human Interest

        ii. Third Party Type : Benefits Provider

        iii. Third Party Code: Human Interest

3. Add the Deferred Comp Plan to all employees

    a. Navigate to **Client Management** then **Benefits** then **Deferred Comp**

    b. In the **Plans** tab click Edit

        i. Plan Name : 401(k)

        ii. Plan ID will be provided by Human Interest

        iii. Plan Provider : **Human Interest**

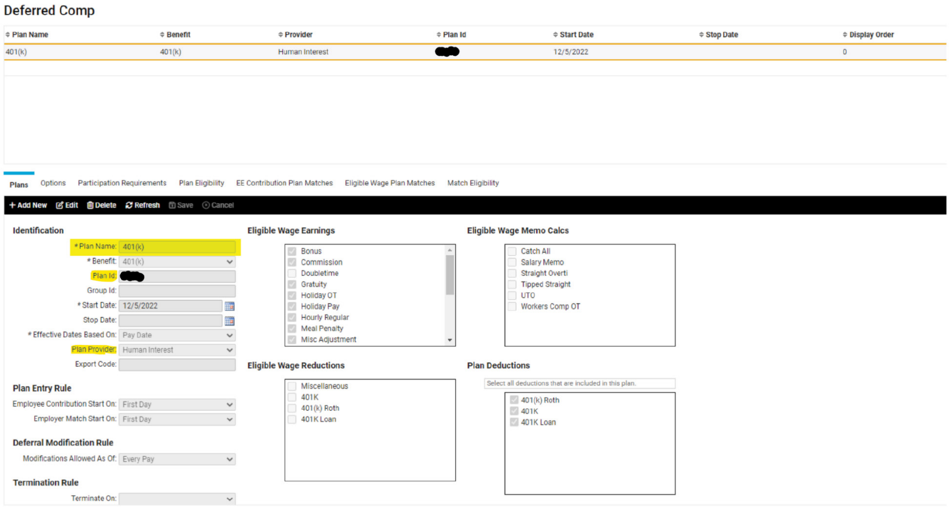
        iv. Start Date : Date the benefit plan is being entered into iSolved. Deduction updates will not process in over API until the date set here. This can cause plan interruptions if this date is set to the first payroll date, causing participants to miss deductions on the first payroll.

    c. In the **Options** tab click Edit

        i. Select Auto Enroll All Employees

        ii. Click Save

    d. Ensure all relevant tabs within **Deferred Comp** is set to the Human Interest Plan rules based on the plan details provided in the kickoff email



Setup the Company Match

If applicable, set the client's company match in isolved.

Enable Auto Enrollment

Enable auto enrollment for the plan in isolved.

Auto Enroll must be enabled in isolved for the Human Interest connection to support our clients to ensure that each client has the correct Human Interest Benefit Plans attached to their record. The connection is unable to add Benefit Plans to clients so we require that auto enroll be enabled in isolved to ensure that every new employee has the correct Benefit Plans linked to their record. Human Interest tracks eligibility so no participant will be able to set a deduction rate for their plan until they are eligible to participate.

IMPORTANT:

Setting a benefit plan for all employees does NOT imply a 401K plan auto enroll with a percentage, it is just enrolling the employee to be eligible to sign-up.

Ensure that benefit plans are manually set for EXISTING employees as Auto Enroll will automatically set benefit plans for NEW employees only. Start date for benefit plans should be set one week PRIOR to the first payroll date so Human Interest can set deductions in a timely manner.

• Connection Support

If you run into any issues with the connection setup or ongoing maintenance, please **contact** Human Interest for support.

• 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 of your clients' current employees and employees terminated within the current calendar year, whether or not 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 isolved 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 isolved 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 isolved 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.

Deduction Rate Changes

From Human Interest to isolved

Whenever an employee updates their contribution rate in their Human Interest account, our connection will update their contribution rate in your isolved 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 isolved system within 24 hours.

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 your isolved system manually. Once the loan rate is set in isolved, our connection will support processing the loan contribution amounts that are withheld on any given payroll so long as the loan amount is linked to the Human Interest category in isolved.

Additional Information

Our mutual clients can manually exclude employees from the Human Interest website that will prevent enrollment into the plan. Should the employee's status change during their employment, our mutual clients will have to remove the excluded employee from 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 Issues	**integration-support@humaninterest.com**
Questions on Client Launch	**hipayroll@humaninterest.com**
Leads and Escalation issues outside of 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.