



Partner Integration

Setup and Payroll Integration Options

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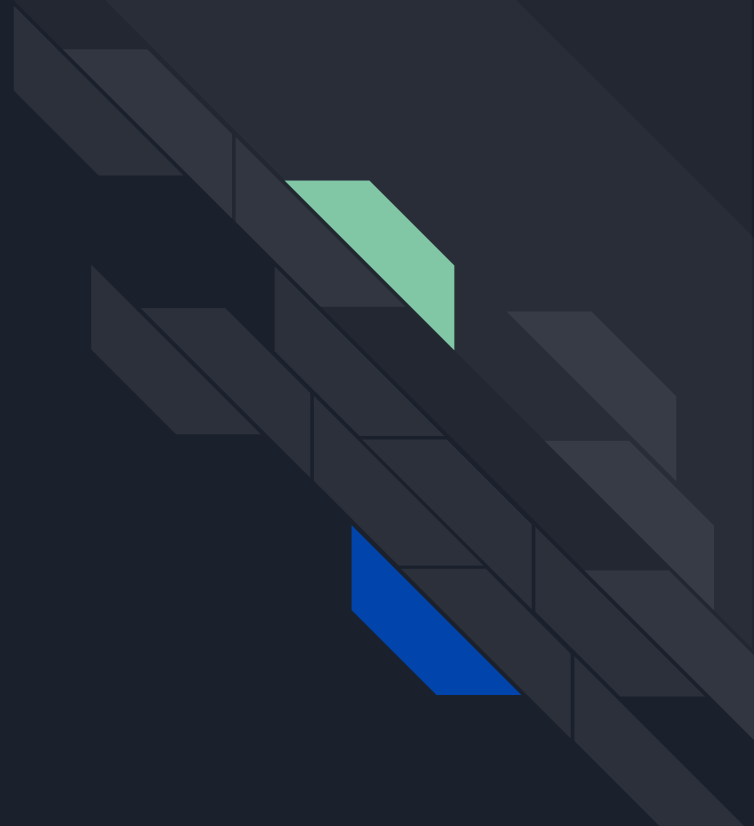
Introduction

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Introduction

Ephibian provides software development and technical support to the ECOMP platform. This includes multiple integrations with insurance carriers, payroll partners and other software solutions (e.g EPIC and Salesforce)

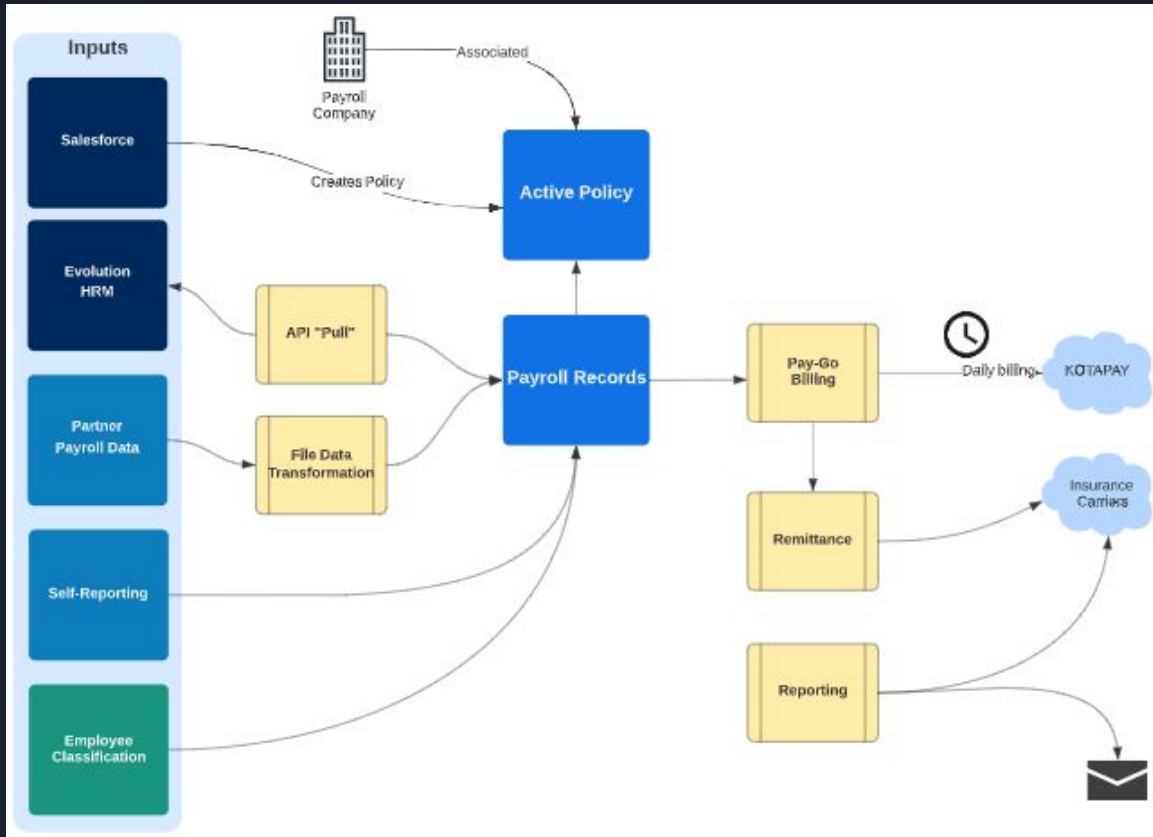


ephibian



Granite
INSURANCE BROKERS

ECOMP Overview



Pay-Go billing requires complete and timely payroll for all active policies.



Partner Setup

New Partners

Reference: <https://www.goecomp.com/partner-integration>

Setup

Salesforce -> ECOMP

- Auto-creates SFTP account

Administrator within ECOMP to:

- Add “Primary Email” - Creates portal account user
- Primary Payroll Software
- Payroll Format

Partner Setup - ECOMP Portal Account



Welcome Vinny Consulting Services dba Payroll Vault #172.

When you visit the portal for the first time, you'll create your account. Your username is your company's FEIN (federal employer identification number).

Create New Account

Your username is:
842628021

Next steps

After creating your account on the partner portal, you'll be able to manage companies and employees, and view commission and billing statements.

FAQs

How do I manage my companies?

Once your online account is setup in our partner portal, you'll be able to log in and click the companies link in the top banner. Select a company and edit the company's employees, billing information or payroll worksheet. You'll also be able to update your

Automated email to primary account.

Portal highlights:

- Access to upload payroll files
- Access to setup/view SFTP account
- Access to payroll history
- Demonstration of portal



Partner Setup - Payroll Software

Implications of selection:

Primarily informational only, except for:

APEX & CYBERPAY

- Triggers automated Consent/Setup
- Inclusion of policy in payroll feed
- Payroll processing logic



Payroll Company Info

Primary/Moving To Software Co.: KRONOS

Partner Setup - Payroll Format

Payroll delivery mechanism selection

Controls related logic changes specific to the format. Examples:

- Ignore calculation checks
- Forcing use of certain values
- Setup cutoff date for payroll

* Payroll Format: Standard (csv) ▼

Payroll Processing Configuration

Attribute	Value	
PAYROLL_USE_ADJUSTED_GROSS_ONLY	<input type="checkbox"/>	Remove
PAYROLL_IGNORE_EXEMPT	<input type="checkbox"/>	Remove
PAYROLL_IGNORE_ADJUSTED_GROSS	<input type="checkbox"/>	Remove

Add New Attribute Save Attributes



Payroll Delivery Options

Integrated “PULL” Solution

- Evolution HCM

PROS

- ❑ Reliable delivery
- ❑ Consistent data
- ❑ Minimum setup*

CONS

- ❑ Initial development cost
- ❑ Complex troubleshooting
- ❑ Narrow market

File Delivery “PUSH”

- SFTP
- HTTPS

- ❑ Easy setup**
- ❑ Easy to explain/understand
- ❑ Any market
- ❑ Multiple formats

- ❑ Error prone
- ❑ Inconsistent delivery
- ❑ Inconsistent by partner



SFTP Scheduled Delivery Setup

Reference: https://winscp.net/eng/docs/guide_schedule

Before starting you should:

- [Have WinSCP installed](#);
- [Know how to connect to your FTP/SFTP account](#);

Scheduling on Windows 10, Windows 8 and Windows 7

- Open *Task Scheduler*:
 - Windows 10: Go to *Windows Start Menu* > *Settings*. In *Find a setting* box type "Task Scheduler".
 - Windows 8.1: Right click *Windows Start* button and select *Control Panel*. In *Control Panel*, go to *System and Security* > *Administrative Tools* > *Schedule Tasks*.
 - Windows 7: Go to *Windows Start Menu* > *Control Panel*. In *Control Panel*, go to *System and Security* > *Administrative Tools* > *Schedule Tasks*.
- In the *Task Scheduler* menu go to *Action* > *Create Basic Task*.
- Give your task a name and click *Next*.
- Choose when the task should be run and click *Next*.
- For task action, select *Start a program* and click *Next*.
- Browse for WinSCP.exe [executable](#).
- In *Add arguments* add appropriate WinSCP [command-line](#) parameters to execute the [scripting commands](#) you need (typically you will use `/script` or `/command` parameters).
- You should also add `/log` parameter to turn on [session logging to file](#).
- The resulting arguments may look like:
`/log=c:\path\winscp.log /command "open sftp://user:password@example.com/" "put d:\examplefile.txt /home/user/" "exit"`
Note that the command-line parameter `/console` was not specified, what makes WinSCP.exe not show the console window, not to disturb you while you are using your workstation.
You can have WinSCP [generate the command-line template](#) for you.
- If your script uses local paths relative to the script path or WinSCP executable path, specify the respective path in *Start in* field.
- When done, click *Next*, review your options and confirm with *Finish*.



File Delivery formats:

XML (Proprietary - APEX/CYBERPAY)

- Hartford Xpress (e.g. payroll.xml)

CSV (Standard - No derivatives)

- 24-column
- 23-column
- 21-column
- 13-column
- 14-column

CSV (Proprietary)

- Accountant's World
- Gusto (e.g. gusto-123456789)

Excel (2003 - xls)

- Intuit (e.g. intuit.xls)

Excel (2010 -xlsx)

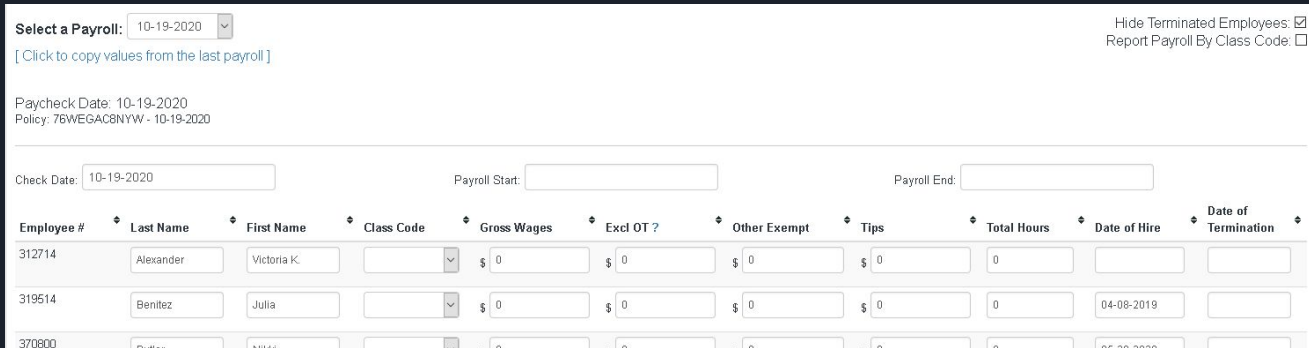
- Paycom (extension + content)
- Paysoft (extension + content)
- Paychex (e.g. paychex-123456789.xlsx)

Self-Reporting

Small company or sole proprietor

Manual entry by:

- Employee
- Class code



Select a Payroll: 10-19-2020

[Click to copy values from the last payroll]

Paycheck Date: 10-19-2020
Policy: 76WEGAC8NYW - 10-19-2020

Hide Terminated Employees: ☒
Report Payroll By Class Code: ☐

Check Date: 10-19-2020 Payroll Start: Payroll End:

Employee #	Last Name	First Name	Class Code	Gross Wages	Excl OT ?	Other Exempt	Tips	Total Hours	Date of Hire	Date of Termination
312714	Alexander	Victoria K.		\$ 0	\$ 0	\$ 0	\$ 0	0		
319514	Benitez	Julia		\$ 0	\$ 0	\$ 0	\$ 0	0	04-08-2019	
370800	Butler	Alex		\$ 0	\$ 0	\$ 0	\$ 0	0	06-20-2020	



Thank you!

Questions??

