PLANSOURCE®

BambooHR Integration

Client Companion Guide

Version 5, 2/6/2017

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Overview

PlanSource has created an Application Program Interface (API) plugin for the PlanSource benefit administration system that allows a direct integration with the BambooHR platform. This document will be used to gather all the necessary information required for the integration between the Plansource and BambooHR systems. Please read and follow this companion guide to begin the integration process.

Background

How does the integration work?

Once the plugin is configured and activated a wide range of feature become available:

- An automated employee demographic data sync that occurs 4x daily.
  - o Once active, every 4 hours starting at 4am.
  - o Alleviates necessity to manually maintain demographic data in two systems.
- One-Directional sync from BambooHR to PlanSource.
- Customizable field mapping between BambooHR & PlanSource.
- Employee Single-Sign On from the BambooHR system.
  - o Improves employee experience by requiring them to only login to BambooHR where they can access PlanSource and their benefits via a link without the need to direct login again to the PlanSource system.
- Full import history of all data sync'd and a ticket management system in the event of any data discrepancies.
- Full control over which employees sync to PlanSource from BambooHR and which don't.

What are the requirements to utilize this integration?

- All employees must have compensation data stored in BambooHR. The following fields are required for all employees:
  - o PayType – Hourly or Salary ONLY. All other PayTypes are unsupported.
  - o PayRate – Hourly rate or annual salary based on PayType set.
  - o PayPeriod – Used to identify the Payroll Schedule.
  - o StandardHoursPerWeek – This field will be enabled during integration process if it is not currently available.
- Marital Status – PlanSource accepts Single, Married, or Unreported/Unknown status ONLY.

What does this integration not support currently?

- Data sync back to BambooHR. Data flows one direction from BambooHR to Plansource only.
- Integration with BambooHR's new payroll module.
- Foreign employee addresses (USA & Canada Only)
- Foreign currency (USD only)
- Administrator Single Sign-On.

Required Information

The following table will need to be completed and returned to Plansource via **SECURE EMAIL**
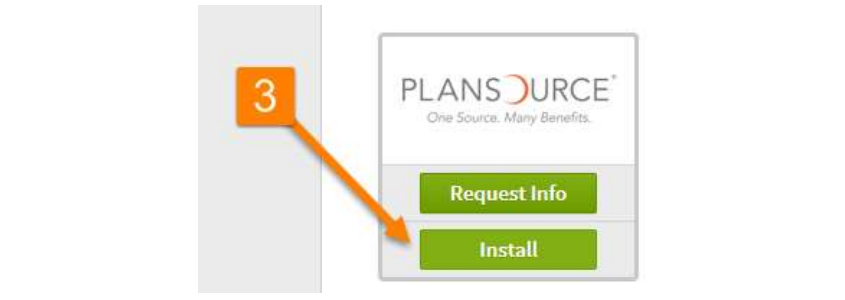
Information Table

Connection Information	
Items Required	**Client Information**
PlanSource RelayState:	PlanSource to Provide
1. Has PlanSource Been Enabled in BambooHR Apps (Yes/No)?	
2. BambooHR API Key:	
3. BambooHR Company Subdomain Name:	
Payroll Schedule Mapping	
4. Which of the Following Payroll Schedules Are Used?	
PlanSource Payroll Schedule	**BambooHR Payroll Schedule**
Monthly (12)	
Semi-Monthly (24)	
Bi-Weekly (25 per year)	
Bi-Weekly (26 per year)	
Bi-Weekly (27 per year)	
Weekly (52)	
Data Configuration	
5. Should List Validated Fields Use Underscores (Yes/No)?	
6. Are Additional Forms of Compensation Stored at BambooHR (Yes/No)?	

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SSO Configuration & Application Setup

7. Allow Employee Direct Access to PlanSource (Yes/No/Disable SSO)?	
8. BambooHR x.509 Certificate:	

Steps & Processes

Enable PlanSource Application
This section details how to enable the PlanSource application via the Apps menu in BambooHR.

1. Once logged into BambooHR, click on the [Cloud+] icon to access BambooHR Apps page. 2. Then click on the tile for [PlanSource] under Benefits Management.	
3. Click on [Install] on the PlanSource App page.	
4. Paste the PlanSource relay state provided in the SSO configuration table above. 5. Click [Save Changes].	 Plansource RelayState * https://benefits.plansource.com/sso/employee/saml2/post/
Please click here to be returned to the required information table.	

The PlanSource application is now installed on BambooHR. This process will do the following:

- Prepare the SSO connection from the BambooHR platform.
- Enable the field "StandardHoursPerWeek" under the job tab for all employees.
- Enable the field "SyncEmployeetoPlanSource" under the job tab for all employees.
- Disable the benefit tab from BambooHR.

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BambooHR API Keys

This section will detail how to create and maintain API keys in BambooHR.

1. Login as a BambooHR Administrator. 2. Click on the [circle portrait/initials] in the upper right to access the API key. 3. Click on [API Keys].	**2** Change Language Change My Password **3** → API Keys Log Out hi. ×
4. Click on [+ Add a New Key] to create a new API key for PlanSource.	**4** → + Add a New Key
5. A new API key will be created, Click on [Show] to see the full key.	**Valid API Keys** Created Key **5** 08/05/2016 ●●● Show (bfaf...2365) 08/29/2017 ●●● Show (c1ae...8871)
6. Highlight the entire API key, copy it, navigate to the information table here and paste the key in the column for item number 2.	**Valid API Keys** Created Key **6** 08/05/2016 ●●● Show (bfaf...2365) 08/29/2017 c1aefd9a8c48fa5ad2728deeb85d3c1
Please click here to be returned to the required information table and enter API key.	
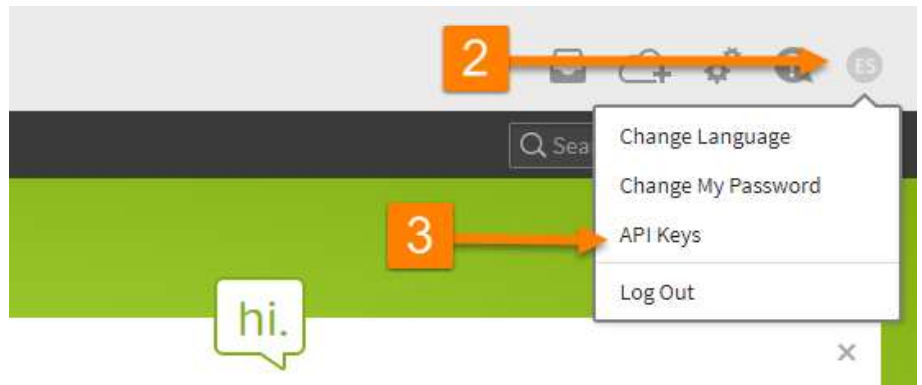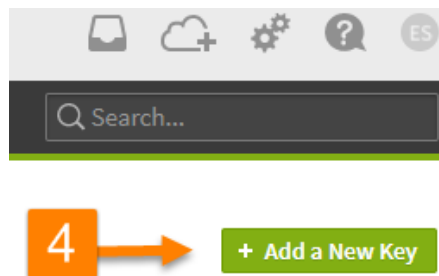
BambooHR Subdomain Name

This section will detail how to obtain what your BambooHR Subdomain name is.

1. Login to BambooHR in your browser.

2. PlanSource requires the subdomain name for your companies BambooHR site.

3. Please provide everything between https:// and .bamboohr.com

4. Please copy and paste the subdomain name in the information table column for item number 3.

Example:

My client name is PlanSource Hardware. My BambooHR domain is at:

https://plansourcehardware.bamboohr.com

My BambooHR subdomain name that I need to provide PlanSource is the part in blue. In this case I would copy: *"plansourcehardware"* and paste it in the information table.

Payroll Schedule Mapping

This section will detail how to find and provide the payroll schedule mapping.

PlanSource stores payroll schedules differently than BambooHR. A payroll schedule mapping is necessary in order to determine how PlanSource should map an employee's PayPeriod in BambooHR to the Payroll Schedule in PlanSource. Use the table below to fill out the information table with the mapping of PayPeriods used in BambooHR. Please ensure that any and all PayPeriods used at BambooHR have a mapping to exactly one unique Payroll Schedule in PlanSource. **A BambooHR PayPeriod can only map to ONE PlanSource Payroll Schedule**

Available PlanSource Payroll Schedules		Available BambooHR PayPeriods
Monthly (12)		Daily
Semi-Monthly (24)		Weekly
Bi-Weekly (25 per year)		Every other week
Bi-Weekly (26 per year)		Twice a month
Bi-Weekly (27 per year)		Monthly
Weekly (52)		Quarterly
		Twice a year
		Yearly

Example: PlanSource Hardware has employees with PayPeriods of "Every other week", "Twice a month", and "Weekly." They may fill out the information table as follows based on how they would like employees PayPeriods mapped to the Payroll Schedules in PlanSource:

PlanSource Default Payroll Schedules		BambooHR PayPeriods Mapping per Example
Monthly (12)		
Semi-Monthly (24)		Twice a month
Bi-Weekly (25 per year)		
Bi-Weekly (26 per year)		Every other week
Bi-Weekly (27 per year)		
Weekly (52)		Weekly

Please click here to be returned to the required information table and enter the mapping.

List Validated Fields and Underscores

This section will detail how PlanSource uses list validated employee fields

A list validated field in PlanSource is a field that accepts a predefined set of information for an employee. PlanSource list validated fields are:

Class, Department, Division, Location, & **Employment Level**

In BambooHR, these are considered "Employee Fields." The function remains the same in that in BambooHR these fields have a list of acceptable data entered for them and when creating or editing an employee the employee can only be set to one of the presets for those fields. The purpose of a list validated field is to ensure that when an employee syncs from BambooHR to PlanSource they are in the correct class, department, etc. as these fields typically drive benefit eligibility.

PlanSource restrictions for list validated fields	1. Data in a list validated field cannot contain any commas or hyphens
	2. Data sync'd to a PlanSource listed validated field must match the data list contained within the mapped employee field in BambooHR.
1.	Data in a list validated field in PlanSource are listed in a comma separated, alpha-numeric format with the possibility of underscores. **Any employee fields from BambooHR that contain commas and/or hyphens will automatically be stripped in the process.** As an organization you have the option of replacing these commas/hyphens with either spaces or underscores. The choice simply affects how data is stored at PlanSource and how that data flows to a carrier. By default this option will be set to No.

Example: PlanSource Hardware has a location of Orlando, Florida and an employment level of Part-time. They must decide if they would like commas/hyphens in list validated fields to be replaced with spaces or underscores.

Data Stored at BambooHR	Should List Fields Use Underscores	Resulting Data Stored in Plansource
Orlando, Florida	No	ORLANDO FLORIDA
Orlando, Florida	Yes	ORLANDO_FLORIDA
Part-time	No	PART TIME
Part-time	Yes	PART_TIME

2.	In order for data to validate, the list validated fields must match 100% between both PlanSource and BambooHR. Please consult the below scenarios for more information.
New Client to PlanSource?	No additional configuration is necessary. List validated data will be gathered during implementation
Existing Client at PlanSource?	The implementation analyst will gather the list validated data being used for benefit eligibility from the PlanSource system and compare it to the Employee Fields in BambooHR. If there is a mismatch, these discrepancies will need to be corrected. Depending on the impact in PlanSource vs BambooHR, one system will become the "System of Record" and the other system will need to be updated. This ensures that when employees are sync'd later, they do not fail to sync due to being in a department, location, etc. that does not exist in PlanSource.

Please click here to be returned to the required information table and enter how list validated fields should be handled.

Benefit Salaries

This section will detail how benefit salaries at PlanSource work.

At PlanSource, volume based benefits are typically driven based on an employee's salary. This requirement is why PlanSource needs compensation data directly from the BambooHR system. Below are how calculations are made to store a salary at PlanSource during a sync from BambooHR. An employee's PayType drives which formula is used. If additional compensation is stored at BambooHR such as bonuses, commissions, etc. and those values should be a part of the calculated yearly salary then benefit salaries may be required to store these additional compensation amounts. From there a benefit volume can be calculated based on current salary and any benefit salaries used. Please mark "Yes" if any additional compensation types are used and discuss with the implementation analyst

BambooHR PayType	PlanSource Calculation
1. Hourly	PlanSource Current_Salary = PayRate * StandardHoursPerWeek * 52
2. Salary	PlanSource Current_Salary = PayRate

Please click here to be returned to the required information table and enter if benefit salaries should be utilized.

Employee Single Sign-On (SSO)

This section will detail how SSO from BambooHR to PlanSource works.

Single Sign-On is the ability for an employee to access their benefit administration page at PlanSource directly from their BambooHR profile without being required to login a second time to the PlanSource system.

PlanSource allows for three options for SSO:

1. Not Allowed: Employees cannot SSO while this is set

2. SSO Only: Employees can only access the self-service enrollment page in PlanSource via SSO

3. SSO & Direct Access: Employees can access the PlanSource enrollment page via SSO or via direct login with username and password to the PlanSource system as if SSO was not available.

Please click here to be returned to the required informaiton table and enter if employees should have direct login access.

Single Sign-On x.509 Certificate

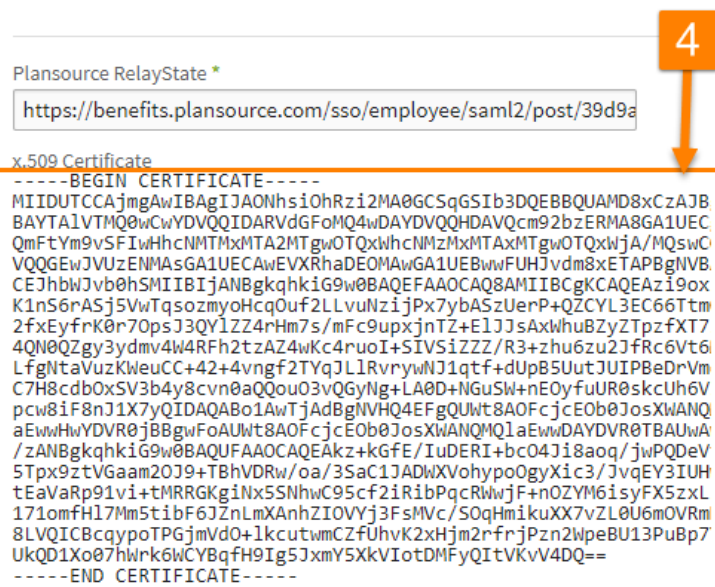*This section details how to obtain the x.509 certificate.*

1. Click on the [Cloud+] icon to access BambooHR Apps page.

2. Then click on the tile for [PlanSource] under Benefits Management.
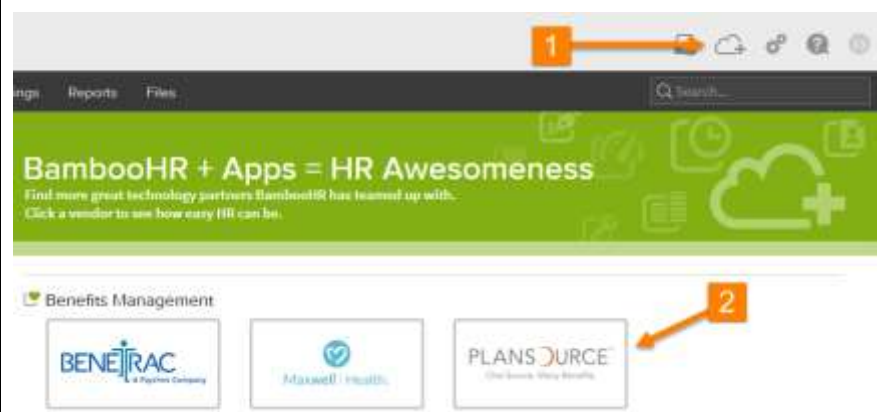
3. Click on [Manage] on the PlanSource App page.

4. Copy the entire x.509 certificate and paste this in the information table.

Plansource RelayState *

https://benefits.plansource.com/sso/employee/saml2/post/39d9a

x.509 Certificate

-----BEGIN CERTIFICATE-----
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UkQD1Xo07hWrk6WCYBqfH9Ig5JxmY5XkVIotDMFyQItVKvV4DQ==
-----END CERTIFICATE-----

Please click here to be returned to the required information table to paste the x.509.

www.plansource.com

Additional Steps

The information table should be completely filled out at point and this document can be returned to PlanSource via SECURE EMAIL. The following steps provide help configuring BambooHR to sync employee information to PlanSource and are required to be completed before employee data can sync.

How to Enable an Employee to Sync to PlanSource

This section details how enable an employee to sync to PlanSource.

1. Click on the [Job] tab while on an employee profile.

2. Check the Sync to PlanSource checkbox near the bottom of the employee job tab.

3. Click on [Save].

This will cause the employee to sync anytime the job runs.

Typically only employees who will be benefit eligible or who are being tracked by ACA should be sync'd.

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How to Update Multiple Employees to Sync to PlanSource or Set PlanSource Required Values

This section provides instructions on how to utilize Power Edit to perform a mass update in BambooHR.

1. Utilize the instructions provided in the PowerEdit BambooHR Support PDF document.

2. Locate the fields you want to mass update on employees to meet the requirements of integration to sync employees to PlanSource.

3. Common fields and their locations within the power edit tool:

    a. Job Section

        i. Sync Employee to PlanSource

        ii. Job Information (Location, Division, Department, etc.)

        iii. Compensation (PayRate, PayType, etc.)

        iv. StandardHoursPerWeek

Power Edit
BambooHR Support

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Validate Employee Data in BambooHR	
This section provides instructions on what fields are needed in BambooHR for the integration to work.	
1. Social Security Number	All employees should have an SSN in BambooHR
2. Marital Status	PlanSource accepts S – Single, M – Married, or U – Unreported/Unknown
3. StandardHoursPerWeek	All employees are required to have a value in BambooHR for StandardHoursPerWeek. This value is used to calculate an employee's current salary in the event their PayType is Hourly. This is explained in the Benefit Salary section.
4. PayType	All employees are required to have a PayType set. PayType can only be Hourly or Salary. Any employee in a PayType outside of Hourly or Salary will fail to import and does not fit within this integration.
5. PayRate	All employees are required to have a PayRate set. The value for PayRate is dependent on the PayType. If the PayType is Hourly, the PayRate for the employee should be their hourly rate. If the PayType is Salary, the PayRate should be their yearly salary.
6. PayPeriod	All employees are required to have a PayPeriod set. This PayPeriod directly corresponds to the Payroll schedule in PlanSource.
7. List Validated Fields	Department, Division, Location, Class, & Employment Level are all list validated fields in PlanSource. These fields are typically used to drive benefit eligibility in the PlanSource system. Note that while these fields in BambooHR can map to a different field in PlanSource such as BambooHR Location -> PlanSource Division, the list of available data within them must 100% match between BambooHR & PlanSource. What this means is that if in BambooHR the Location contains: Florida, California, Georgia, New York. The field in PlanSource that location maps to must have the exact same list, in this case the 4 states of Florida, California, Georgia, and New York. Please work with your implementation analyst to ensure these fields match.

BambooHR to PlanSource Standard Field Mapping

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This is the standard mapping between BambooHR & PlanSource.	
Bamboo HR Client Mapped Fields	**PlanSource Available Fields**
firstName	First Name
lastName	Last Name
middleName	Middle Name
address1	Address 1
address2	Address 2
city	City
stateCode	State/Province
zipcode	Zip/Postal Code
country	Country
homePhone	Home Phone
workPhone	Office
mobilePhone	Cell
gender	Gender
hireDate	Hire Date
dateOfBirth	Birthdate
ssn	SSN
terminationDate	Termination Date
terminationReason ID Code	Termination Reason
terminationType ID Code	Termination Type
jobTitle	Business Title
employmentHistoryStatus	Employment Level
payRate	Pay Rate
payType	Pay Type
maritalStatus	Marital Status
division	Division
location	Location
department	Department
employeeNumber	Employee Number
id	API-SSO Lookup Code
payRateEffectiveDate	Current Salary Effective On
payRate	Current Salary (This field is not configurable. The system automatically calculates current salary based on pay type sent.)
status	Employment Status
workEmail	E-mail
homeEmail	Alternate E-mail

standardHoursPerWeek	Hours Per Week
county	County
payPeriod	Payroll Schedule