BenefitElect Integration

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BenefitElect Integration

BenefitElect is a benefits package program for temporary employees within the staffing industry. With this integration, employee adjustments are setup with automatic communication between BenefitElect and Enterprise. This document will walk users through the processes and responsibilities when working with BenefitElect as well as TempWorks.

This article covers:

- 1. Integration Setup
- 2. Enterprise Setup
- 3. Logging Report

Integration Setup

A majority of the setup process will be handled by TempWorks. This includes the addition of the integration along with the creation and automatic execution of the import/export files. Users will be responsible for setting up the initial adjustments and ensuring the BenefitElect adjustment mappings are setup correctly.

Note The initial process to begin utilizing BenefitElect will be done by working with BenefitElect, your TempWorks Account Manager, and the TempWorks Implementation team.

By working with the TempWorks Implementation team, the following will be completed:

- BenefitElect integration will be added within your system.
- Ability to map adjustments within Enterprise to BenefitElect will be added.
- Import/export files will be added and setup to automatically run the night in which the week has been closed.
- BenefitElect logging report will be added.

Note It is recommended that you have your initial adjustments setup within Enterprise > All Options > Administration > Adjustments prior to the setup of the BenefitElect integration as they will be used for the mapping to the BenefitElect tiers.

When setting up adjustments for use with BenefitElect, the category should never be set to 'Benefit'.

For more information on setting up adjustments within Enterprise, please see the following article.

Enterprise Setup

Once the integration has been added within your system, and the initial adjustments have been added within Enterprise, those adjustments will need to be mapped to BenefitElect tiers to ensure they are being utilized as intended.

Note In order to access the mapping section of Enterprise, you will need a Security Role that provides access to Enterprise > All Options > Administration > Dropdowns. In the event you do not have access to this area within Enterprise, please reach out to TempWorks Support.

 To begin the adjustment mapping process, navigate to Enterprise > All Options > Administration > Dropdowns and select 'BenefitElect Adj Mappings'.

Administration			▶ tasks appointments social email	Currently viewing 0 of 986 tasks. View more + ▼ ᢗ →
accruals adjustment assessment packages branch business code types custom data dop downs custom data dop downs custom data dop downs evaluations external services geo loc gl allocation cle account man employee customer	Find a drop down Accrual Automatic Balance Deplet Benefit Etc.4 (Mappings Candidate Statuses Check Delwery Codes Commission Percentages Customer Yypes Hoy Neard Of Options Order Statuses Order Types Overtime Plans Pay Codes Performance Codes Required Documents Catégories Service Levels	drop down data	► tasks appointments social email	+ * © + *
order assignment contact pay / bill calendar reports all options				

2. Select the '+' icon at the top right to add a drop down data entry.

1	drop c	lown data				+ ×
	ld	Hierarchy	Plan Name	Tier	Adjustment Type	▲
	0	System	Advantage	EO	@test	

- Within this new line, you will see the following columns:
 - ID: An identification number used only on the TempWorks side.
 - Hierarchy: The hierarchy in which the adjustment/mapping is set to. This is automatically set as

the hierarchy in which the integration was added within your system.

Note that if the hierarchy is attempted to be modified, the line is unable to be saved as shown via the red box within the following screenshot:

op down data	1 13			
Hierarchy	Plan Name	l Tier	Adjustment Type	
1 Downey	 Advantage 	EESP	ADVEE+S	
3 System	Advantage	EO	ADVEE	
4 System	Advantage	EECH+	ADVEE+C	
5 System	Advantage	EEFAM	ADVEE+F	
10 System	Dental	EO	DENTALEE	
11 System	Dental	EECH+	DENTALEE+C	
12 System	Dental	EESP	DENTALEE+S	
13 System	Dental	EEFAM	DENTALEE+F	
6 System	Limited Benefit Health Plan	EO	LTDBUYEE	
7 System	Limited Benefit Health Plan	EECH+	LTDBUYEE+C	
8 System	Limited Benefit Health Plan	EESP	LTDBUYEE+S	
9 System	Limited Benefit Health Plan	EEFAM	LTDBUYEE+F	
16 System	Voluntary Child Life	EECH+	VOLIFE+C	
14 System	Voluntary Life	EO	VOLIFE+EE	
15 System	Voluntary Spouse Life	SPO	VOLIFE+S	
17 System	MEC High	EO	MECHEE	
18 System	MEC High	EECH+	MECHEE+C	
19 System	MEC High	EESP	MECHEE+S	
20 System	MEC High	EEFAM	MECHEE+F	

- Plan Name: The type of coverage the employee will be receiving (dental, vision, etc.).
- Tier: Who the plan will be covering (employee, employee + spouse, etc.).
- Adjustment Type: Corresponds to an adjustment currently setup within Enterprise.
- 3. Using the information you have received from BenefitElect, modify the Plan Name, Tier, and Adjustment

Type to fit the requirements of that adjustment mapping to BenefitElect.

- *Note* You cannot have more than one line item with the same Plan Name, Tier, and Adjustment Type.
- 4. Continue to add lines using the '+' icon and modifying the Plan Name, Tier, and Adjustment Type to fit the requirements of the adjustment mappings to BenefitElect.

dr	rop down data				+ ×
ld	Hierarchy	Pian Name	Tier	I Adjustment Type	-
	1 System	Advantage	EESP	ADVEE+S	
	3 System	Advantage	EO	ADVEE	
	4 System	Advantage	EECH+	ADVEE+C	
	5 System	Advantage	EEFAM	ADVEE+F	
	10 System	Dental	EO	DENTALEE	
	11 System	Dental	EECH+	DENTALEE+C	
	12 System	Dental	EESP	DENTALEE+S	
	13 System	Dental	EEFAM	DENTALEE+F	
	6 System	Limited Benefit Health Plar	EO	LTDBUYEE	
	7 System	Limited Benefit Health Plar	EECH+	LTDBUYEE+C	
	8 System	Limited Benefit Health Plar	EESP	LTDBUYEE+S	
	9 System	Limited Benefit Health Plar	EEFAM	LTDBUYEE+F	
	16 System	Voluntary Child Life	EECH+	VOLIFE+C	
	14 System	Voluntary Life	EO	VOLIFE+EE	
	15 System	Voluntary Spouse Life	SPO	VOLIFE+S	
	17 System	MEC High	EO	MECHEE	
	18 System	MEC High	EECH+	MECHEE+C	
	19 System	MEC High	EESP	MECHEE+S	
	20 System	MEC High	EEFAM	MECHEE+F	

5. After all of the adjustment mappings have been added and configured correctly, select the icon at the top left to save your changes.

Once the mappings are saved, the import/export of information between TempWorks and BenefitElect will run automatically every night in which the week has been closed.

Logging Report

A report has been added to show you when the status of the import/export process, along with the changes to employee adjustments (if any).

1. To run the report, navigate to Enterprise > Reports > All > Search > Benefit Elect Log



2. Click on the q icon to view the report and you will be presented with the following parameters:

🕒 Report Viewer - Benefit Elect Log							
Date Filter	Log Date	\sim	Start Date				
End Date			Group By	Run ID	~		

- Date Filter (Defaults to Log Date): Either the logging date of the import/export or the Weekend Bill
- Start Date: The start date of the 'Date Filter' selected
- End Date: The end date of the 'Date Filter' selected
- **Group By (Defaults to Run ID)**: How the information is grouped by within the report (Run ID, Weekend Bill, Import/Export Type, Hierarchy, or No Grouping)
- 3. Modify the parameters to to fit the criteria you need and select 'View Report' to see the changes made.

🕼 Report V	/iewer - Benefit Elec	t Log							
Start Date	2/1/2021		End Date	2/2/2021					
Date Filter	Log Date	~	Group By	Run ID	~				
∢ ∢ 1	of 1 ▶ ▶	🗧 🛞 🚱 🖨 [I 💷 🔍 -	100%	•	Fi	nd Next		
Benefit System	Elect Log						SubSystem Lev	rel (Hierld 52)	empworks
Hierarchy	,	Import/Export Nam	ie	Weekend Bill	Log Date		Import/Export Status	SFTP Upload Status	
Run ID: 7									
3 System		Benefit Elect Import		1/24/2021	2/1/2021 9:12:00	AM	Success	Success	
Aident	First Name	Last Name	Plan Type	Tier Type	TW Mapped ADJ	Amount	Action	Message	
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		2
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		
			MEC High	EO	AdjID 57: MECHEE	\$0.00	Adjustment deactivated		

- 4. Once the report is run, you will be able to see the following baseline information:
 - Hierarchy: The hierarchy of the run (the hierarchy the integration was setup at)
 - Import/Export Name: The name of the import/export that had been run
 - Weekend Bill: The weekend bill date for the information
 - Log Date: The date of the information being logged
 - Import/Export Status & SFTP Upload Status: The status of the import/export and whether or not they had been successful

5. By expanding the Run ID, you will be able to see the following employee information:

- Aident: Employee ID
- First Name: First name of the employee
- Last Name: Last name of the employee
- Plan Type: The type of coverage for the employee
- Tier Type: The BenefitElect mapping of the adjustment
- TW Mapped Adj: The adjustment within Enterprise that is mapped to a Tier for BenefitElect
- Amount: The amount in which the adjustment has been changed for the employee
- Action: The action that was taken for the adjustment on the employee
- Message: The message added (if necessary) for the action taken

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