How to Sync Employee Information to Payroll Relief

Steps to Sync Employee Information to Payroll Relief

1. Ensure Payroll Relief Integration is Complete

Before exporting employee information, confirm that your Payroll Relief integration is successfully connected. If you're unsure how to do this, refer to our integration setup guide.

2. Check Employee Eligibility for Export

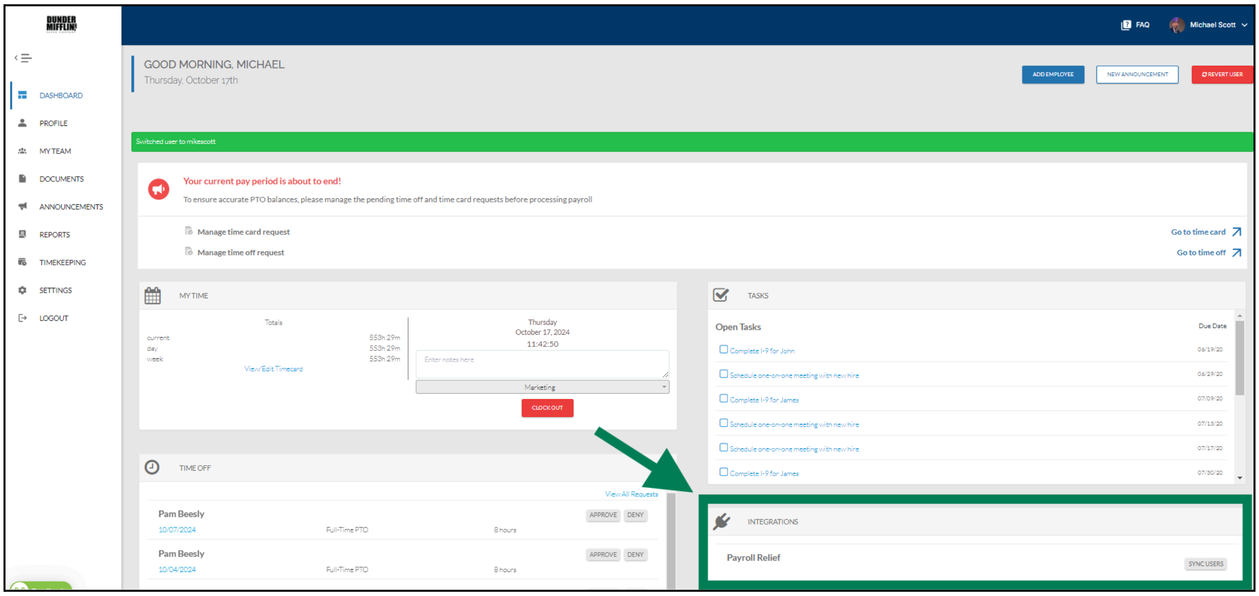
Only employees with the following required fields can be exported:

- First Name
- Last Name
- Email Address
- Employee Number
- Phone Number
- Social Security Number
- Zip Code
- State
- Employment Type (full-time or part-time)
- Compensation Type (salary or hourly)
- Status (currently active or onboarding)

If an employee doesn't meet these requirements, they won't appear in the export list.

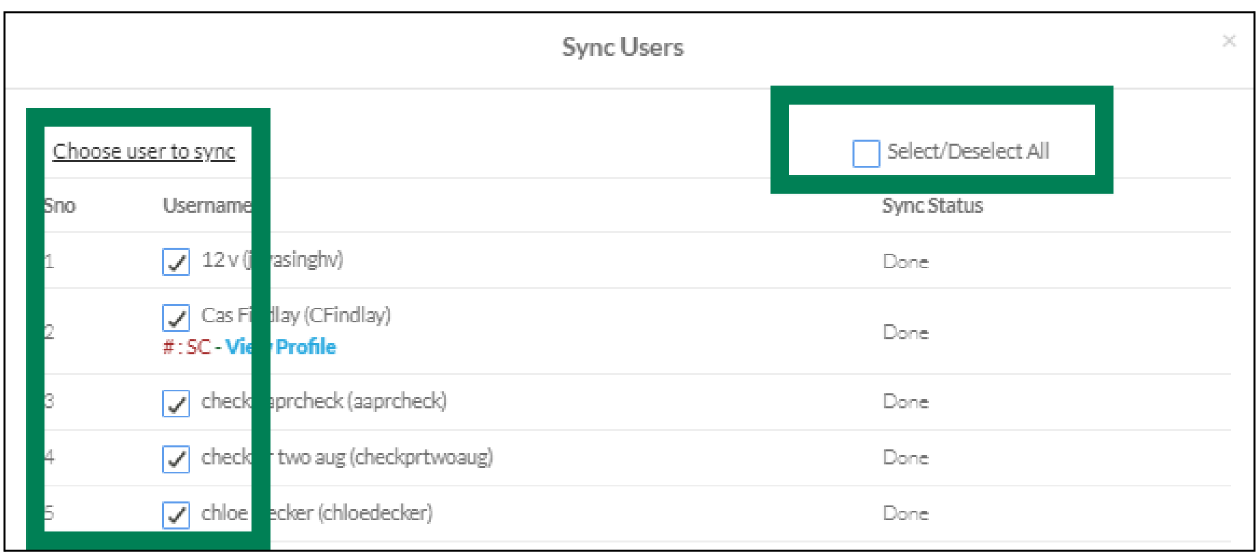
3. Exporting Users to Payroll Relief

- Log in to your guHRoo account as a **client-admin**.
- In the **client-admin dashboard**, locate the **Integrations card** (see screenshot below for reference).
  Note: If you don't see this card, ensure the following:
    - You are logged in as a client-admin.
    - Your API key was successfully saved during the connection process.

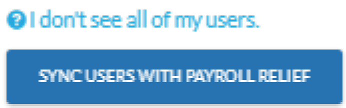


- Click the **Sync Users** button to open the export form.

- Review the list of employees eligible for export. If you don't see certain users, verify that their information meets the required criteria.
- Select the users you wish to send to Payroll Relief.



- Click the **Sync Users with Payroll Relief** button to start the export process.
    - *Note: The process may take a few moments depending on the size of the data being sent.*



4. Confirm Export Success or Address Errors

- Once the export is complete, a confirmation message will appear.
- If the export fails due to incorrect or incomplete employee data, you'll receive an error spreadsheet. Use this to fix any errors and try the export again.

5. Handling Export Failures

- If the error isn't related to employee data (for example, an API connection issue), consult the Payroll Relief setup guide for troubleshooting tips.

Troubleshooting:

- **Missing Integrations Card**: Ensure you're logged in as a client-admin and that the API key was correctly saved.
- **Users Not Appearing for Export**: Check that all required employee details (listed above) are complete.
- **Export Fails**: Review the error spreadsheet for any incorrect or missing employee data and correct it before trying again.
- **API or Connection Issues**: Refer to the setup guide for troubleshooting any integration problems.

Full List of Employee Information Sent During Export:

When employees are exported to Payroll Relief, the following data is included:

- Employee Number
- Social Security Number
- First Name, Middle Initial, Last Name
- Address 1, Address 2, City, State, Zip
- Gender
- Date Of Birth
- Email
- Employment Status (active/onboarding)

- Salaried (True/False)
- Full-time (True/False)
- Exempt (True/False)
- Hire Date, Termination Date (if applicable)
- W-4 Date, I-9 Date
- Salary Amount, Regular Rate Amount (hourly employees)
- Federal Filing Status, Federal Exemptions, Federal Additional Withholding
- W-4 Step 2 (True/False)
- Dependents Claim Amount, Other Income, Other Deductions
- Phone Number
- Job Title
- Direct Deposit Information (account nickname, account number, routing number, percentages/amounts, pay orders, and type)

Related Resources/Links:

- How to Integrate Payroll Relief with guHRoo