

ADP Integration Setup

A step-by-step guide to connect your ADP Workforce Now/Guideline integration.

Let's get started

• Guideline

Start the "Connect your payroll account" task on your dashboard →

! This step must be completed to progress through the setup

• ADP Marketplace

1. Download the Guideline 401(k) app →

• Guideline

2. Copy the Connection Token →

• ADP Marketplace

3. Review and accept terms of service →

• ADP Marketplace

4. Allow consent requests →

• **5. Setup deduction codes →**

Finish



Start the setup

From your administrator dashboard, start the “Connect your payroll account” task.



Already completed this step?
Skip to the next step.

Connect your payroll account.

Due Sep 8, 2022

[Start](#)

Step 1a

Follow the “Guideline 401k app” link to download the Guideline 401(k) App from the ADP Marketplace.



Note that you will return to this task screen in step 2a.

Connect Payroll ✕

Guideline provides a fully automated ADP Workforce Now experience. All you need to do is to add the Guideline 401k app from the ADP Marketplace.

What do we do with this access?

- We setup your benefit in ADP Workforce Now so you don't have to.
- We ensure your employee roster is in sync including salaries, employment status, and contact information.
- We automatically update employee contributions when changes are made via Guideline.
- We apply 401(k) contributions described in ADP Workforce Now's payroll activity.

Instructions to connect Guideline

- Go to the [Guideline 401k app](#) on the ADP Marketplace.
- Purchase the App (the app is free to use).
- Input the following «Connection Token» on the Product Settings page. (Copy)

Connection Token
 22J19007.2b.a267706e52e98218b0a0929d1d884dc5

- Press the Check button to verify the «Connection Token».
- Process with the order.
- You are done! Your Guideline account will now be automatically synced with ADP Workforce Now!

[OK](#)

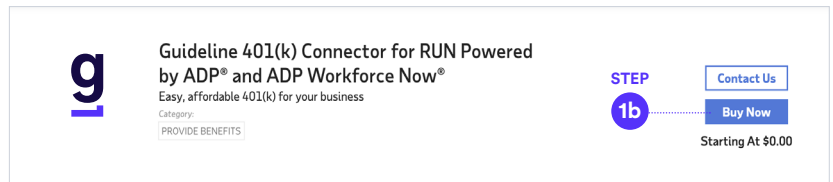
STEP
1a

Step 1b

Select "Buy Now" on the Guideline app to start the integration connection flow.



Ensure that you are logged into your ADP account within the ADP Marketplace.



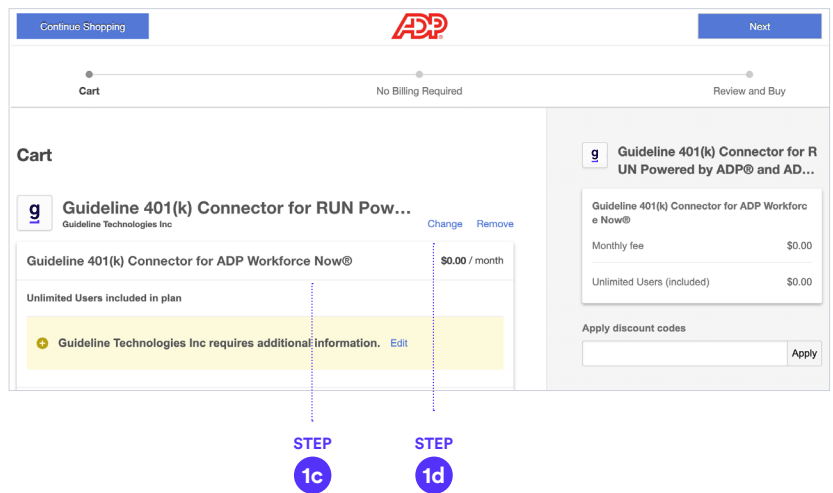
Step 1c

In the ADP cart, confirm that the connector is "Guideline 401(k) Connector for ADP Workforce Now."

If the connector is correct, proceed to Step 2a.



If you need to change the connector, follow steps 1d-1e.

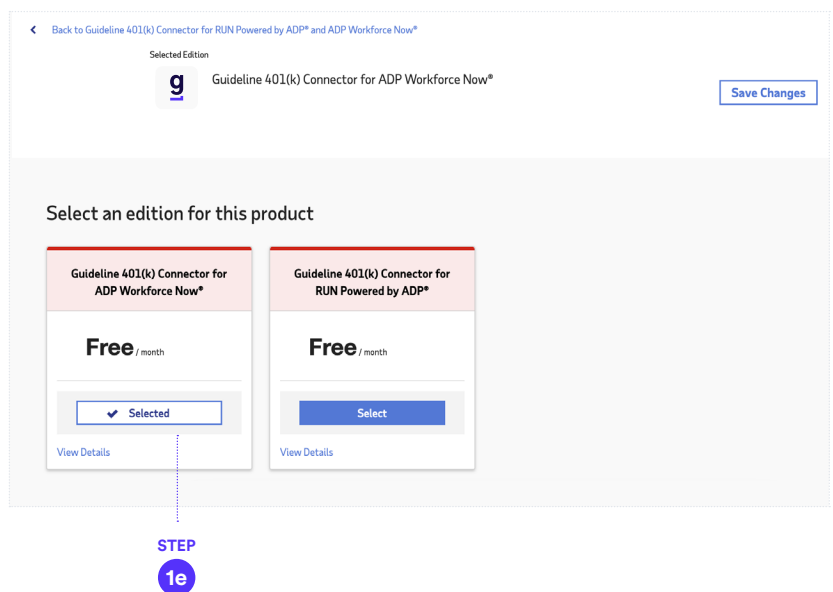


Step 1d

In the ADP cart click "Change" to switch the connector to ADP Workforce Now.

Step 1e

Click on "Select" to specify the connector for ADP WorkforceNow, and then click on "Save Changes."



Step 2a

For the next step, you'll need to return to the Guideline task screen.

Copy the Connection Token in Step 2.



The Connection Token is used to link your Guideline account to your ADP Account. This step is critical to successfully connecting the integration.

Connect Payroll

✕

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OK

STEP 2a

Step 2b

In the ADP Marketplace cart click on "Edit" to input the connection token copied from Guideline.

Guideline 401(k) Connector for RUN Pow...

Guideline Technologies Inc

[Change](#) [Remove](#)

Guideline 401(k) Connector for ADP Workforce Now®

\$0.00 / month

Unlimited Users included in plan

+ **Guideline Technologies Inc requires additional information.** [Edit](#)

STEP 2b

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Step 2c

In the text box paste the Connection Token you copied from Step 2a and click on "Save details" to continue.

Additional Information

Connect your Guideline Account

To connect your ADP Payroll Product to Guideline 401(k) please:

- 1) Sign up for a new account at <https://www.guideline.com>
- 2) Complete the following step-by-step guide, one for each integrated ADP Payroll Product (also published on the Guideline 401(k) App page in the ADP Marketplace) to get the your Connection Token: Guide to setup Guideline 401(k) for RUN Powered by ADP Guide to setup Guideline 401(k) for ADP Workforce Now.

Connection Token

The Connection Token is generated on your Guideline.com dashboard, in the "Connect your payroll account" section. If you need help, please contact a Guideline Team Member at clients@guideline.com

Save details
Cancel

STEP 2c

Step 2d

Once the connection token has been entered you should see "The additional information is complete" displayed.

Guideline 401(k) Connector for RUN Pow...

Guideline Technologies Inc

[Change](#) [Remove](#)

Guideline 401(k) Connector for ADP Workforce Now®

Unlimited Users included in plan

\$0.00 / month

✔
The additional information is complete. [Edit](#)

STEP 3a

Step 3a

Click on Next to proceed with the setup of the Guideline app in ADP.

Continue Shopping
Next

Cart

No Billing Required

Review and Buy

Guideline 401(k) Connector for RUN Pow...

Guideline Technologies Inc

[Change](#) [Remove](#)

Guideline 401(k) Connector for ADP Workforce Now®

Unlimited Users included in plan

\$0.00 / month

✔
The additional information is complete. [Edit](#)

Guideline 401(k) Connector for R UN Powered by ADP® and AD...

<small>Guideline 401(k) Connector for RUN Powered by ADP®</small>	<small>Monthly fee</small>	<small>\$0.00</small>
<small>Unlimited Users (included)</small>		<small>\$0.00</small>

Apply discount codes

Apply

Due now **\$0.00**

Price reflects one-time and prorated recurring charges, if

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Step 3b

Check the box agreeing to the Terms of Service and then complete the purchase.



Reminder that this app is free to use.

Products Change

g **Guideline 401(k) Connector for RUN Powered by ADP® and ADP Workforce Now®** [Terms of service](#)

Guideline 401(k) Connector for RUN Powered by ADP®	
Monthly fee	\$0.00
Unlimited Users (included)	\$0.00

Connect your Guideline Account

Connection Token
-

Referrer Email Referrer ID

Referrer Type

Apply discount codes

Apply

Due now	\$0.00
<small>Price reflects one-time and prorated recurring charges, if applicable.</small>	
Subtotal	\$0.00
Estimated tax	\$0.00

Estimated recurring charges

Due monthly (excluding tax)	\$0.00
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I have read and agree to the [ADP Marketplace Terms of Service](#) and the [Terms of Service](#) applicable to each application I am purchasing. I also agree that the services are provided by independent third parties and are not provided by ADP. I agree that I am entering into agreements with third parties and ADP is not responsible for such third parties' products or services.

[Complete Purchase](#)

STEP
3b

Step 4a

Approve consents for Guideline to access your account details.

From the post purchase page in the ADP Marketplace click on "Manage Consent."



Don't see this option?
Directly access the linked [Consent Manager](#).

What's next?

Before you can use your new app(s), you must provide consent for our partners to access your company's ADP data.

Manage Consent

STEP
4a

Step 4b

Accept all the consents.




There are two consents that give our integration the ability to:

1. Read employees' Statuses
2. Update their contribution rate
3. Collect any 401(k) contributions from payroll.

You **must** accept both to ensure your account is properly synced with Guideline.

Consent 1


Client Authorization



Guideline 401K API for WFN-RUN
by Guideline Technologies Inc

You hereby:

- Allow read access into ADP systems to retrieve payroll output details
- Allow read access to your worker profile that includes personal demographic information, tax IDs, personal address, personal communication mechanisms, employment/contracting information and compensation
- Allow write access into ADP systems to start, change, stop worker deductions, and read access to retrieve general deductions




Good job! This app is now connected to your ADP workforce data.

We've recorded your consent successfully. No further action is required.

CONTINUE

Consent 2

Client Authorization



Guideline Single Sign On
by Guideline Technologies Inc

You hereby:

- Allow read access to your basic contact information
- Allow read access to your unique identifier

By clicking 'Allow', you are authorizing ADP to provide your data to this application. You are authorizing the use of your data obtained from ADP in accordance with the application terms of service agreed to at time of purchase and with the privacy policy found on the application's web site.

You can always modify this setting and manage other account permissions at any time through the ADP Consent Manager. Note that any modifications made will not affect data you have previously authorized ADP to provide to this application.

ALLOW

DENY

Step 5a

Contact your ADP Workforce Now representative to request the following deduction codes be created in your ADP WFN instance.

ADP code	Deduction type
81	Pre-tax %
82	Roth %
K	Memo Code for Match
K	Traditional 401(k) flat \$
ROT	Roth Flat \$
IA IB	Loan Deduction Code

Step 5b

With your ADP Workforce Now representative, complete the answers to the following questionnaire for your WFN instance.

Step 5c

Email our team at benefits@guideline.com with your plan name and account ID in the subject line and attach the following:

- your questionnaire responses from Step 5b above
- any variations in deduction configuration different than that provided in the chart in Step 5a above

Questionnaire

1. Are there any company code(s)?—may also be referred to as “payroll group code(s)”
2. Do deduction codes automatically adjust the annual limit for catch-up eligible employees? (for example, if an employee is 50+, will their deduction automatically have the \$27,000 limit)?
3. Is bonus and commission pay included as 401(k)-eligible compensation by default?
4. Are 1099 contractors employed, and if so, how are they distinguished in WFN?
5. Is the ADP benefit eligibility class “non-benefit eligible” used?

If so, what are the criteria for using this classification (e.g. sometimes used for 1099 contractors, interns, or health insurance eligibility)?

Step 5d

Return to Guideline and complete the setup by pressing the “OK” button within the task.

Finish

Guideline will review the information provided and will contact you if anything additional is needed to complete your ADP Workforce Now/Guideline integration.

Connect Payroll
✕

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OK

STEP
5d

Having trouble?

Check out this [Article on the Help Center](#).

Still need help?

✉ clients@guideline.com

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