Spark Workday Integration: Payroll Implementation Guide

Spark allows your employees to make charitable donations in Spark that will come directly off their pay checks, and issues tax receipts and donation acknowledgments based on your program set up. Not only is this an efficient and easy way to donate, but it's also the most cost-effective donation method for the Causes receiving the donations! Users can set up one-time or recurring payroll donations in Spark, and the communication between Spark and your payroll system is completed through the exchange of payroll files that we will build together.

Objectives

There are three main deliverables of a successful Payroll implementation through the Workday Integration:
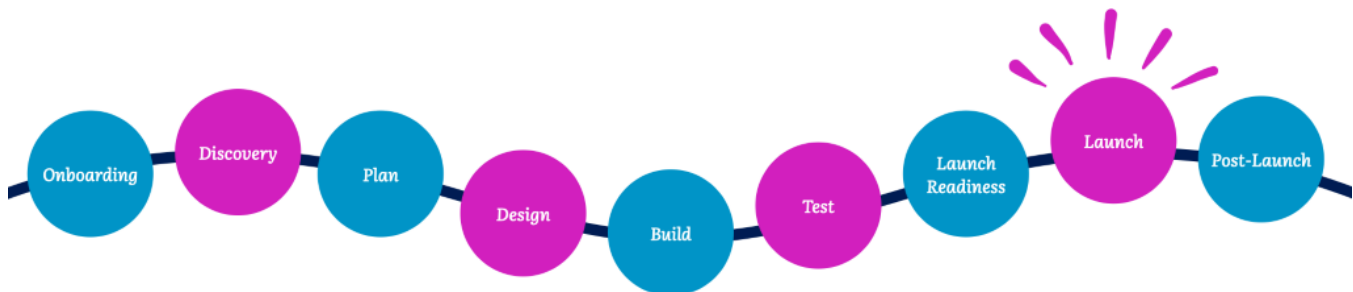
- **ISU Setup**: covered under the Initial Setup Guide establishing a connection between Benevity and your Workday Tenant (testing and production) is a necessary precursor to implementing payroll.
- **Payroll Setup:** your payroll team will need to set up a deduction code (a.k.a. "pay code") in line with Spark's requirements, to ensure an error-free process for processing the deductions. Please note that multiple codes can be used if you are deploying payroll for multiple countries, or in the UK or Australia (where two codes may be required to differentiate between Pre & Post Tax deductions).
- **Payroll Calendars:** since pay periods generally close in Spark before your internal pay periods end, in order to deposit deduction data into your Workday tenant in time for processing, Benevity will need to know how far in advance this data should be delivered to ensure error free processing.

Additional Considerations:

- **Success file format**: please note that if you are processing payroll using a third-party provider, Benevity can only go so far as to deposit data into your tenant. A separate integration must be set up between your company and payroll provider, after which they will send us a success file (confirmation data) in order to provide Benevity with actuals of what should be withheld, from whom.
- **Demographic file additions/alterations**: if the "Worker Data" Workday Integration is not to be utilized, paygroup eligibility data will need to be provided to Benevity via the demographic file. In order to accomplish this, the client demographic data will need to include a value for all pay groups that should be eligible for payroll giving.

Who to involve

To set up Spark payroll through the Workday Integration, you will need to involve a few teams and people on your end to complete activities during different phases of the Implementation. A summary is below, along with the typical effort required, and which Implementation Phases they can expect to be involved in. To learn more about the project phases, check out the Implementation Overview.

Role	Responsibilities	Effort	Involvement
Program Owner	• Confirm user eligibility • Provide oversight	Low	• Discovery • Design • Test • Launch Readiness
Project Manager	• Coordinate resources • Ensure task completion	Medium	• Entire project duration
Technical Representative, Payroll	• Configure Workday testing tenant to receive and process payroll deductions • Complete payroll testing activities • Understands payroll processes and determines approach for managing Spark payroll donations • Understands Workday, and is able to open/close pay periods, set up pay codes, and troubleshoot issues if/when they arise	High	• Discovery • Plan • Design • Build • Test • Post-Launch
Financial Representative	• Confirm the ability to hold deducted funds until DR Payment	Low	• Discovery
Additional Resources			
Technical Representative, Demographic Data	*If the "Worker Data" Integration (for Benevity to retrieve demographic data from your Workday tenant on your behalf) is not to be utilized:* • Configure the demographic data to contain required information to map employees to their Spark Payroll group.	Low	• Discovery • Build
Technical Representative, 3rd Party Payroll Provider	*If payroll is not processed in Workday and data is ultimately sent to a 3rd party"* • Set up the connection required in order to have deduction data sent to external payroll software • Set up an integration in order to send a success file (confirmation data) to Benevity	High	• Discovery • Plan • Design • Build • Test • Post-Launch

Tips and tricks

	Get a head start! This will indicate what you and your team can do to get a head start on the implementation activities.

Implementation Activities

Program Owner

Phase & Tips	Activities & Considerations

Discovery	• Confirm user eligibility for the program and payroll donation capabilities Special Considerations Users can only make Spark payroll donations if they are paid in the same currency as their Localized Experience. Consider this when determining which groups are eligible to make Spark payroll donations.
Design	• Make decisions about how Spark will reconcile discrepancies if/when they occur • Work with your Communications Representative to ensure your users know that payroll is an option
Test	• Assist the Technical Representative with testing and validation
Launch Readiness	• Approve the Spark Payroll Sign-off, confirming that testing went well and we are ready to enable payroll in your Spark site

Project Manager

Phase & Tips	Activities & Considerations
Onboarding	• Assign Technical Representatives to support and complete the Implementations Activities • Share the Functional Guides with designated Technical Representatives Special Considerations If utilizing a third party payroll provider, talk to your Payroll provider as soon as possible to ensure they have a team ready to help with the design and implementation of the new payroll workflow. If you currently have a payroll deduction file for payroll donation processing in another system, share this file with Benevity for consideration.
All	• Help us stay on track and engage the right people throughout the Implementation.

Recommendations

We find that our clients have the best post-launch experience when they consider Benevity's best practices and recommendations. Here are some related to demographic data:

- Confirm which users will be eligible for payroll, as soon as you can! The Program Owner, Payroll team, (and Demographic Data team, if the Worker Data integration is not deployed) should all be involved in this conversation.
- Let us know as soon as possible if you have more than one payroll system. This may mean we will need to complete all steps for each payroll system and engage multiple payroll teams.
- Give your payroll provider a heads up! They may need to assign someone to work with Benevity directly, or they may have file requirements they can share in advance.
- Encourage your payroll team to accept Benevity's best practices and recommendations; this will make for a smoother and error-prone payroll process post-launch.
- If you have a current program that's enabling payroll donations, let us know as soon as possible so we can plan accordingly.
- Work with your Communications Representative to make sure the payroll functionality, and its benefits, are clearly communicated to your employees.

Next Steps

Now that you understand Spark payroll and how we can enable it in your Spark site, please share your program information and the Spark Workday Integration: Payroll Technical Guide with the Technical Representatives listed above to get started.