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TriNet Integration With Employee Cycle

Product Usage Instructions

BambooHR Changes

1. Enter job information changes in BambooHR.
2. Changes will update in TriNet Employee Profile with assigned reason codes.
3. Always add a new row for every change made.

Compensation Changes

1. Enter compensation changes in BambooHR for US-based employees.
2. Changes will update in TriNet Employee Profile based on mapping information.
3. Always add a new row for every change made.

Employee Self-Service Changes

1. Employees or authorized HR personnel make changes in TriNet.
2. Changes are pushed to BambooHR.
3. Ensure personal information changes originate in TriNet for proper integration.

Overview

The integration between TriNet and BambooHR allows you to seamlessly transfer employee information between both platforms. While the integration is bi-directional each single type of update is performed in only one direction.
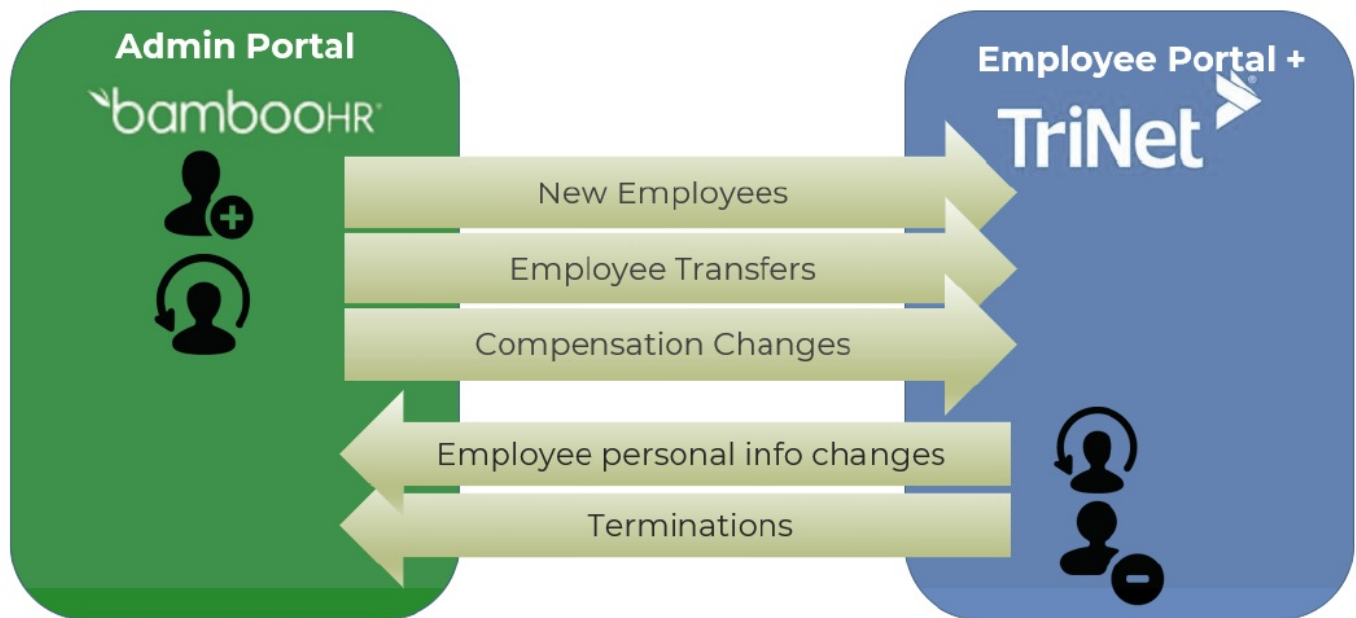
Important: Only information for US-based employees will be transferred between the systems. Please review the Pre-Integration Checklist carefully prior to enabling the integration. Not completing the checklist can result in errors, missing data or wrong employees being updated.

New Hires

1. When you are ready to hire an employee, proceed with hiring them in BambooHR. TriNet will pull the employee information from BambooHR as follows:
   - New hire employee must be a US-based full-time or part-time employee (no contractors or interns). Only employees with full or part time Employment Status in BambooHR will be considered for the update to TriNet.
   - New hire employee information must contain at least one of the following to be added to TriNet ahead of the hire date:
     - Social Security number
     - Address Line 1
2. Your TriNet Administrator will receive an email notification to log into TriNet and complete the New Hire Forms. These forms will pre-populate with the information entered into BambooHR if this option was selected during the setup.
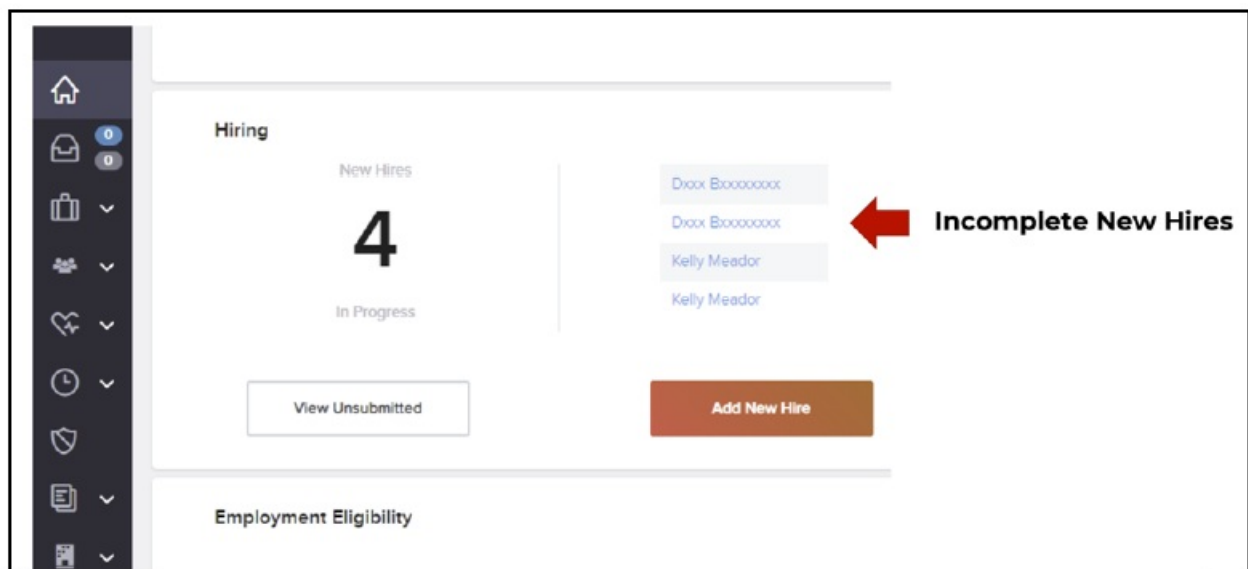
3. Complete and submit the forms online.

4. The employee will be onboarded in TriNet.

5. The TriNet Employee ID of the new hire will display in the BambooHR employee profile on their date of hire.

Employee Changes – Job Information

1. Enter any changes to an employee's job information into BambooHR.

BambooHR Change	TriNet's Event Type	Reason Code	Description
Only Job Title Changed	Job Reclassification	TLC	Job Title Change
Only Department Changed	Transfer	DEP	Change Department
Only Location Changed	Transfer	LOC	Change Location
Only Supervisor Changed	Transfer	ROR	Reorganization
More Than One Item Chang	e Transfer	ROR	Reorganization

These changes will update in TriNet and will display in the Employee Profile. The following reason codes will be assigned.

Important: While BambooHR allows for editing and removal of existing job information, it is required to always add a new row for every change made so the integration will function properly. Editing or deleting an existing row can cause misrepresentation of the information in TriNet. Transactions with an effective date of 14 days in the past or older will be ignored.

Employee Changes – Compensation Changes

1. Enter any changes to an employee's compensation in BambooHR. (only supports US-based employees with annual and hourly pay frequencies).

2. These changes will update in TriNet and will display in the Employee Profile. (Pay Change, Promotion, Demotion and reason code values are based on the mapping information provided during configuration)

   - **Important**: While BambooHR allows for editing and removal of existing job information, it is required to always add a new row for every change made so the integration will function properly. Editing or deleting an existing row can cause misrepresentation of the information in TriNet. Transactions with an effective date of 14 days in the past or older will be ignored.

Employee Self-Service Changes

These are changes made by an employee to their personal information within the self-service portal, i.e. home address, contact information, name, gender, ethnicity or marital status changes. These changes must be entered into TriNet.

1. Employees or authorized HR personnel make changes to personal information in TriNet.
2. These changes are pushed to BambooHR. (See "What Information is Exchanged"

for a complete list)

Important: For the integration to work properly, changes to personal information must originate in TriNet. If you allow your US employees (managed by TriNet) to access the BambooHR self-service portal, we recommend disabling the edit function for these users. Modify access levels for the individuals who have access to the BambooHR self-service portal. Please make sure the Basic Info, Address and Contact sections of the Personal tab are set to view only.

Terminated Employees

If an employee is terminated at TriNet, their user account will be deactivated from BambooHR if this preference was selected during the setup. The integration will add TriNet's termination reason code to BambooHR if necessary.

What Information is Exchanged

BambooHR API	Description	New Hire	Compensation Changes
address1	Employee's first address line	Y	
address2	Employee's second address line	Y	
city	Employee's city	Y	
country	Employee's country	Y	
date Of Birth	Employee's birthdate	Y	
department	Employee's CURRENT department. Either the department or the division is mapped to TriNet	Y	

division	Employee's CURRENT division. Either the department or the division is mapped to TriNet	Y	
ethnicity	Employee's ethnicity	Y	
firstName	Employee's first name	Y	
gender	Employee's gender (Male or Female)	Y	
hireDate	Employee's hire date	Y	
homeEmail	Employee's home email address	Y	
homePhone	Employee's home phone number	Y	
jobTitle	The CURRENT value of the employee's job title, updating this field will create a new row in the position history.	Y	
lastName	Employee's last name	Y	
location	Employee's CURRENT location	Y	
middleName	Employee's middle name	Y	
mobilePhone	Employee's mobile phone number		
payChangeReason	The reason for the employee's last pay rate change.		Y
payRate	Employee's CURRENT pay rate (i.e. $8.25).	Y	Y
payType	Employee's CURRENT pay type "Salary" or "Hourly".	Y	Y

ssn	Employee's Social Security number	Y
stateCode	The 2- character abbreviation for the employee's state (US only). Read only.	Y
supervisorId	The 'employeeNumber' of the employee's CURRENT supervisor. Read only.	Y
workEmail	Employee's work email address	Y
workPhone	Employee's work phone number, without extension.	
zipcode	Employee's ZIP code.	Y

Disclaimer

FAQs

- **What happens if I don't complete the Pre-Integration Checklist?**
  - Not completing the checklist can result in errors, missing data, or wrong employees being updated. It is crucial to review and complete the checklist before enabling the integration.
- **Can I edit or delete existing job information directly in BambooHR?**
  - While BambooHR allows editing and removal of existing job information, it is recommended to always add a new row for every change made to ensure proper integration. Editing or deleting an existing row can lead to misrepresentation of information in TriNet.
- **What should I do if a transaction has an effective date older than 14 days?**
  - Transactions with an effective date of 14 days in the past or older will be ignored. Ensure that all changes have relevant effective dates within the specified timeframe for proper processing.

Documents / Resources

trinet TriNet Integration With Employee Cycle [pdf] Installation Guide TriNet Integration With Employee Cycle, TriNet, Integration With Employee Cycle, Employee Cycle, Cycle

References

- User Manual

trinet Cycle, Employee Cycle, Integration With Employee Cycle, trinet, TriNet Integration With Employee Cycle

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