zenefits

What to expect during your Zenefits implementation

If you've already purchased Zenefits, we're excited to have you! If you're still considering us, we hope you'll come on board soon.

This document describes what you can expect during your Zenefits implementation, including roles and responsibilities, timing, and some document and information prerequisites to get your account up and running.

Your Implementation Team will provide more detailed information on your initial kickoff call, but this overview can help you to prepare for the implementation process.

This resource covers the following topics:

- Key players
- Timeline and estimated customer commitment
- Training types and sources
- Documents and information requirements

Key players

ZENEFITS

Your implementation team will guide you through the setup process, diving in to understand your business, and configuring your account to suit your needs.

CUSTOMER

You know your company better than anyone, and to set up your account Zenefits will need your help to learn about your business by collecting vital information and documents. You will also be asked to perform some simple setup tasks from your Zenefits dashboard.

PARTNERS

If you work with any partners, like an insurance broker, an HR consultant, or an accountant, Zenefits can partner with them to get you up and running in no time.

Timeline & customer commitment[1]

The setup process typically takes around 4 weeks. Here's how you can expect that timeline to look:

Week	Stage	Customer tasks	Estimated admin time
1	Document collection	• Attend Kickoff Call • Review Online Trainings • Collect Documents & Information	3–5 hours
2	Account setup	• Complete Basic Setup Tasks • Attend Basic Training Call	3–5 hours
3	Account setup	• Attend Advanced Training Call • Additional Feature Setup • Begin using Zenefits for HR Tasks	2–3 hours
4	Account review	• Attend Final Go-Live Training • Review and Approve Account Setup • Meet Your Post-Implementation Team	2–3 hours

Training

You've got great resources available to ensure you get the most from Zenefits during setup and beyond.

ONLINE TRAINING

No matter which package you choose, we have an onboarding learning path to get you up and running—standard or advanced.

IMPLEMENTATION TEAM

You'll have a series of trainings with the team to dive deep and ask questions.

ZENEFITS SUPPORT

Whenever you have questions, the Zenefits support team is here to keep your business moving forward.

[1] *Timelines are estimated based on a 50 employee customer who has purchased Advanced, Ben Connect, and Zenefits Payroll.*

Documents & information

Whichever Zenefits products you're planning to set up, we'll need some information to get things going.

HR[2]

We'll need to know a bit about your **company** to get things started:

- ☐ Legal name
- ☐ Address
- ☐ EIN
- ☐ Banking information
- ☐ Phone number

The heart of any business is its **employees**. We'll need the following for each member of your team in order to build their Zenefits profiles:

- ☐ Full name
- ☐ Email address
- ☐ Date of birth
- ☐ Gender
- ☐ Full address
- ☐ Hire date
- ☐ Personal address
- ☐ Work location
- ☐ Department
- ☐ Job title
- ☐ Social Security Number
- ☐ Compensation type (hourly, salaried)
- ☐ Compensation (annual/hourly rate)
- ☐ Employment type (full or part time)

PAYROLL[3]

If you've purchased Zenefits Payroll, your implementation team will need some additional info about your **company**:

- ☐ FEIN
- ☐ NAICS code
- ☐ Bank account info for payroll
- ☐ State tax ID numbers
- ☐ Pay items (earnings, deductions)
- ☐ All work locations

In order to pay your **employees**, we'll need the following for each member of your team:

- ☐ Federal filing status
- ☐ Federal withholding allowance
- ☐ Additional federal withholding
- ☐ State filing status
- ☐ State withholding allowance
- ☐ Additional state withholding
- ☐ Payment method (check or direct deposit)
- ☐ Bank account type (checking or savings)
- ☐ Bank account number & routing number

If you're switching payroll providers mid-year, we'll need a collection of documents that you can get from your current provider. We need these to ensure that your taxes are calculated properly in Zenefits.

BENEFITS[4]

If you're setting up your **company's** Benefits with Zenefits, we'll need the following information and document for each plan you offer to employees:

- ☐ Plan name(s)
- ☐ Summary of Benefits & Coverage (SBC)
- ☐ Rate sheet
- ☐ Recent invoice(s)
- ☐ Waiting period for new hires
- ☐ Termination policy for employees
- ☐ Employer contribution (employee & dependent)
- ☐ Enrollment census (incl. dependent names, gender, DOB)
- ☐ Class codes (if applicable)

---

[2] *For additional information, see Employee Demographic Information Required for Initial Zenefits Setup*

[3] *For a complete list of information and documents required, see Zenefits Payroll Setup Checklist*

[4] *For additional information, see Information Required for Initial Benefits Setup*

190130