

## BambooHR Integration with VisionLink Direct

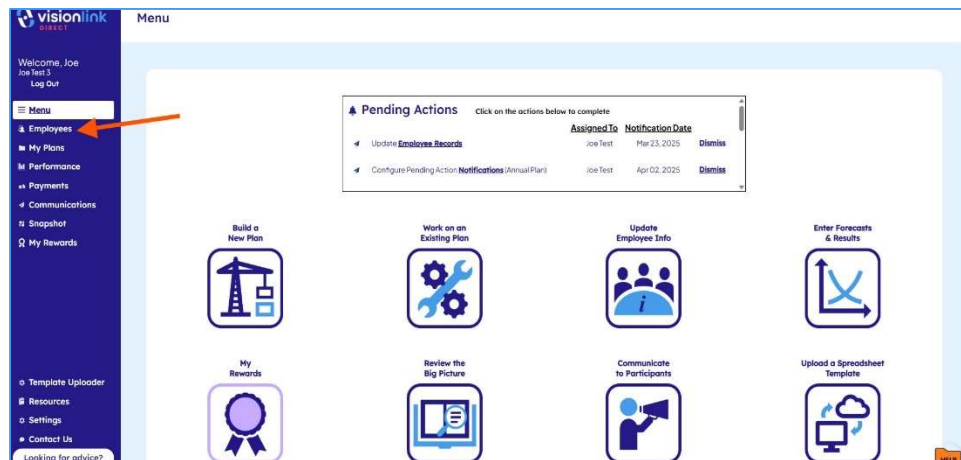
This guide will walk you through the process of integrating your VisionLink Direct account with BambooHR. This integration allows for seamless synchronization of employee data from BambooHR to your VisionLink Direct account, including position information, base pay, and employment status (terminations/new hires).

**Note:** You must have administrator access to both VisionLink Direct and BambooHR to complete this integration.

### Integration Steps

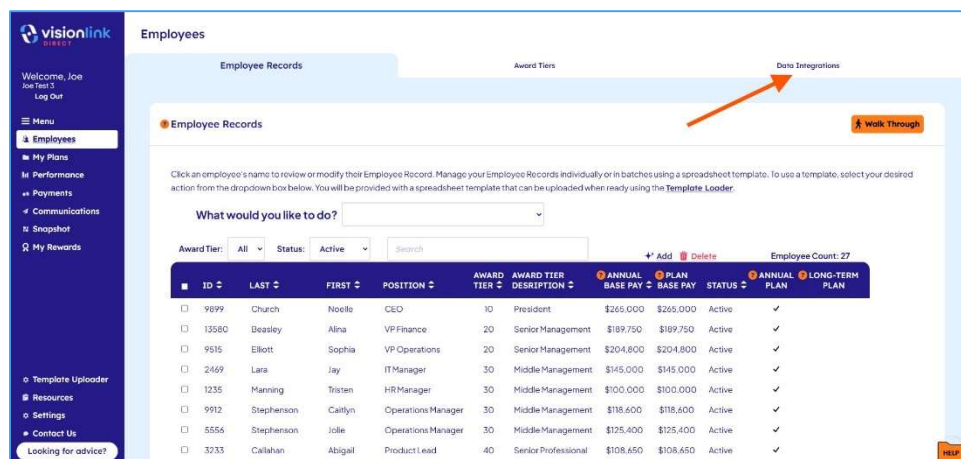
#### 1. Access the Employees Section

After logging into VisionLink Direct, click on **Employees** from the side menu.



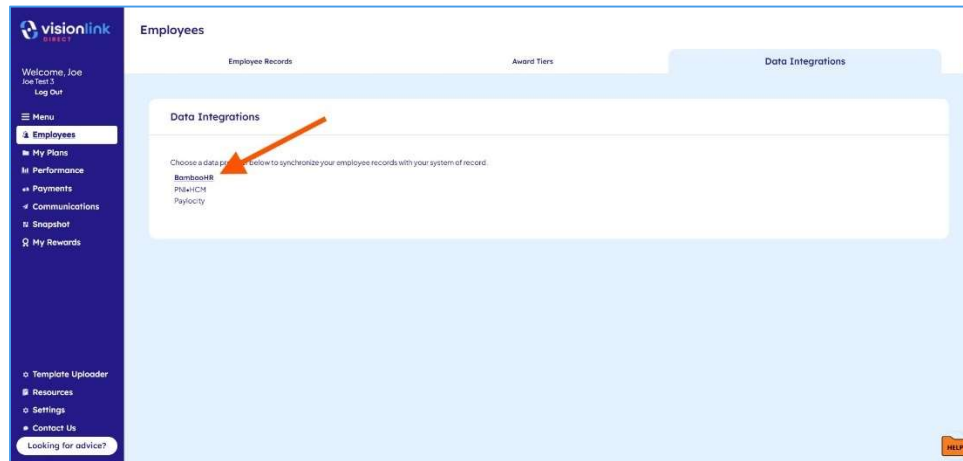
#### 2. Navigate to Data Integrations

Click on the **Data Integrations** tab at the top of the page.



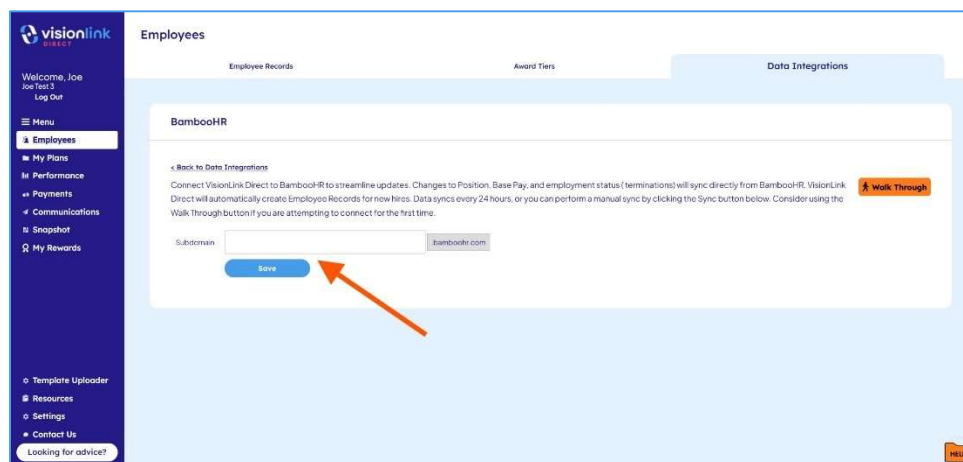
### 3. Click on the BambooHR Link

In the Data Integrations section, locate and click on the **BambooHR** link.



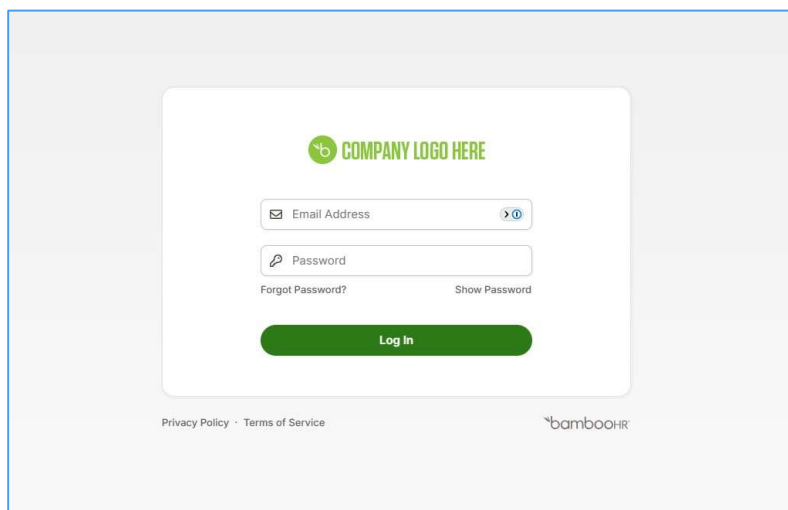
### 4. Enter BambooHR Subdomain

Enter your BambooHR subdomain name in the text box and click **Save**.



### 5. Log in to your BambooHR account

A BambooHR login screen will open in another window. Enter your login credentials to BambooHR to connect the two systems.

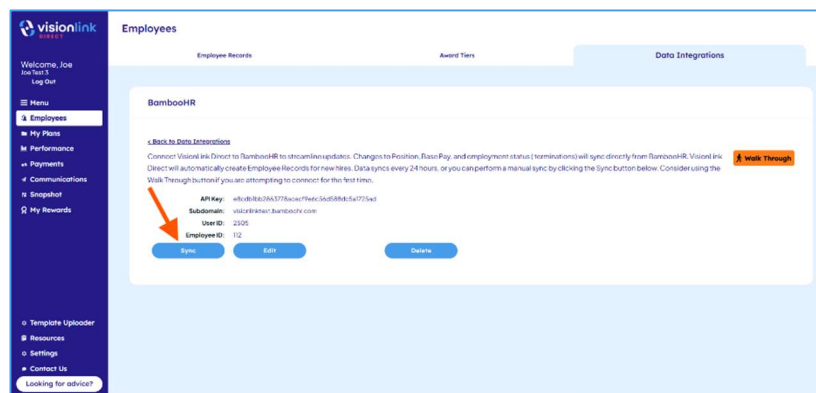
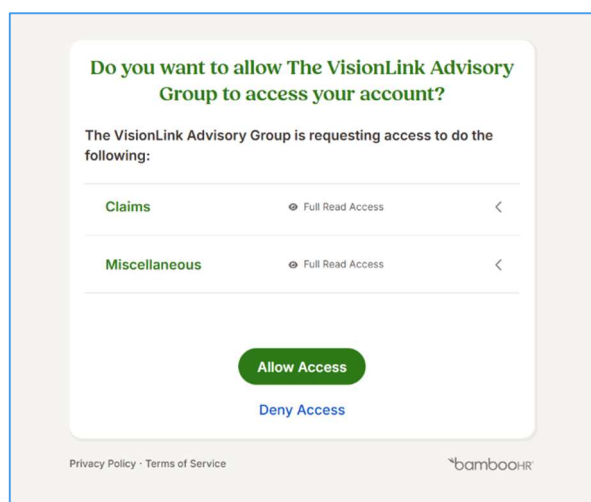


A BambooHR login screen will open in another window. Enter your login credentials to BambooHR to connect the two systems.

*Please note that if your company has established single sign-on capability with BambooHR you may not have to enter your password in this step.*

## 6. Grant Access to VisionLink Direct

Click on the Allow Access button. You will then be returned back to VisionLink Direct. Clicking the sync button at the bottom of the Data Integrations page will begin building your Employee Records.



## 7. Review Employee Records

Once the initial sync is complete, the system will create a Pending Action reminding you to audit the synced data. For plans with a future start date, this should be a quick review. For a backdated plan (e.g., you're building it in March but will be backdating it to begin effective January 1st), you may need to add records for missing historical data. Refer to "Does the synchronization include historical data?" in Frequently Asked Questions for more information.

## Troubleshooting

If you encounter any issues during the integration process:

- Check that your company subdomain is entered correctly
- Ensure you have administrator privileges in both systems
- Contact VisionLink Direct support if issues persist

## Frequently Asked Questions

### Is the data synchronization between BambooHR and VisionLink automatic?

Yes. Once the initial connection is established, data synchronizes automatically. You can also sync manually at any time:

#### Automatic Synchronization

VisionLink Direct automatically syncs employee data changes from BambooHR every 24 hours, with the first sync occurring immediately after initial connection. Position, Base Pay, and employment status changes (including terminations) transfer directly from BambooHR. When new hires are recognized, VisionLink Direct automatically creates Employee Records that can be manually or automatically assigned to your plans.

To receive email notifications of all employee data updates, adjust your preferences under Settings > Notifications in VisionLink Direct.

#### Manual Synchronization

Clicking the **Sync** button on the same page (Employees > Data Integrations > BambooHR) to perform an immediate synchronization of your employee data. If you notice employee data errors in VisionLink Direct it is recommended that you correct the data in BambooHR first and then press the **Sync** button to refresh the data.

## What Data Syncs between VisionLink Direct and BambooHR?

BambooHR Field	Sync Direction	VisionLink Direct Field
dateOfBirth	→	birth_date
employmentHistoryStatus	→	current_employment_status
bestEmail	→	email
firstName	→	first_name
hireDate	→	hire_date
lastName	→	last_name
jobTitle	→	position_description
employeeNumber	→	refid
terminationDate	→	term_date

**NOTE:** Other data is fetched from certain BambooHR fields in order to estimate participant wages (payFrequency, payRate, standardHoursPerWeek, etc.) but not directly stored in a corresponding field in VisionLink Direct.

## What if there is an issue with the data sync?

When logging in, VisionLink Direct will alert users about any missing BambooHR data (such as Position or Base Pay) through a Pending Action notification. This notification directs users to the Data Integration page, which displays a list of employees and their specific missing data fields. After updating the required information in BambooHR, users can resolve these issues by clicking the Sync button at the bottom of the Data Integration page.

## Does the synchronization include historical data?

No. Employee Records in VisionLink Direct reflect information as of the integration date. This means VisionLink Direct does not include any Position Changes or Base Pay changes that occurred prior to your first sync. This may pose challenges when creating an Annual plan for the current year. To make Position and Base Pay adjustments that occurred before the integration, you must manually update Employee Records in VisionLink Direct (either individually or using a spreadsheet template).

**How are part-time employees handled?**

You can modify the estimated weekly work hours for all employees. VisionLink Direct defaults to 40 hours per week when creating Employee Records. Update these hours by either editing individual Employee Records manually or using a spreadsheet template for multiple employees. Accurate weekly hours ensure precise calculations in your Annual Plan.

**What if I need help or assistance?**

Your dedicated Plan Coach can answer your questions and help connect you to BambooHR. Log in to VisionLink Direct (<https://direct.visionlink.co/#/>) and click on **Contact Us** to send a message to your Plan Coach or send an email to [VLDirectCoach@visionlink.co](mailto:VLDirectCoach@visionlink.co).