homebase

PAYROLL SIMPLIFIED

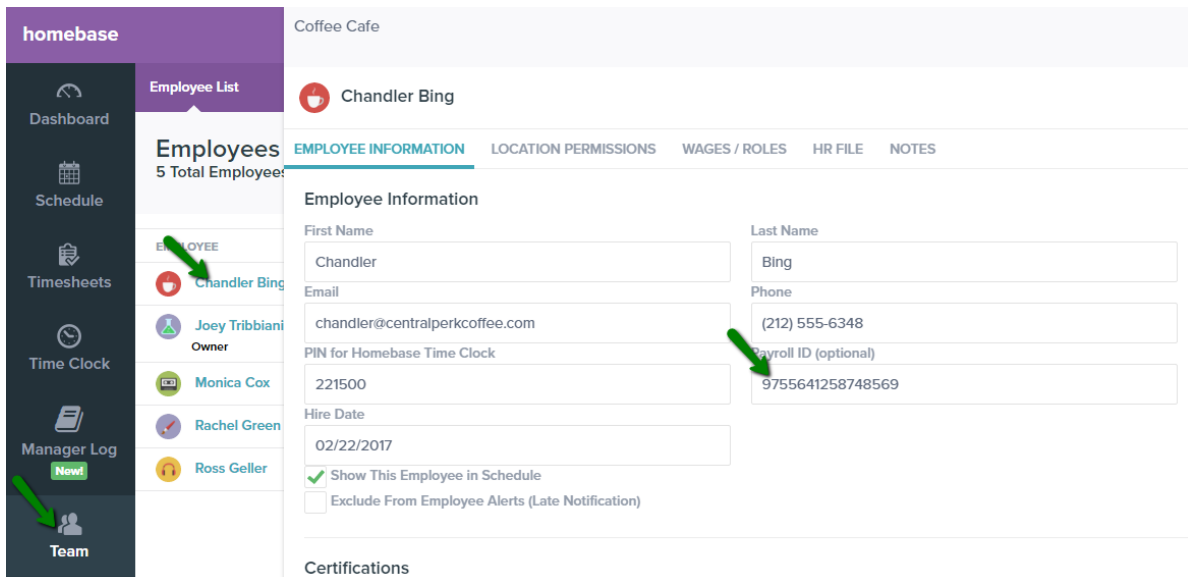## 1. Sign into Homebase and Set Payroll Preferences

❑ Sign in with the account owner's email address and password

❑ Click SETTINGS from the left menu and then "General" from the top menu bar

❑ Select "Gusto" and press "Yes" to confirm you want to change payroll providers

2. Authorize Homebase in Your Gusto Account

❑ You will be redirected to Gusto and will need to sign into your Gusto account

❑ Press "Authorize" to give Homebase permission to connect your two accounts

❑ Homebase will link your Gusto employee profiles to Homebase (allow 30-45 seconds)

3. View Your Team List and Confirm Payroll IDs

❑ Click TEAM from the left menu navigation

❑ Click an employee's name to view details and you should see a 16 digit Payroll ID

❑ *Note: If no Payroll ID is found, check to see if Homebase imported another employee from Gusto with a similar name; if we can't match the email or exact name from Gusto, we will add the profile from Gusto as a new employee. You can copy the Payroll ID from the new profile, find the 'original' employee and PASTE the Payroll ID. Once this completed, you can terminate the 'new' employee profile that was created. This will only remove this profile from Homebase and will NOT impact your Gusto account*

See More at https://joinhomebase.com/support/gusto-homebase-integration/

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4. Run Payroll

❑ Click on TIMESHEETS from the left menu and select the time period for your payroll

❑ Confirm the time cards seen in Homebase are accurate and ready to submit to Gusto

❑ Click Export from the top right corner and select Gusto to send over your hours

❑ Login to Gusto and verify the hours were transferred and continue your normal payroll steps within the Gusto application

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Getting Started Questions

What information is shared when I link my Homebase and Gusto accounts?

Homebase has access to your employee profiles in Gusto and is attempting to find the Gusto Payroll ID that matches your employees that are in Homebase. If we cannot find a match, we add the Gusto employee into Homebase (name, email, phone and their Payroll ID). We do not access wage rates or add that information to your Homebase account.

What data is linked to my Gusto account?

Homebase will send regular hours, overtime hours, double OT hours (if applicable) and PTO to Gusto. However, because Homebase does not transfer hours associated with individuals with multiple wage rates or break penalties at this time, you should enter these into Gusto yourself for any impacted employees

What magic happens after I click "Export" on the Timesheets section in Homebase?

Homebase connects to Gusto and sends over the hours! We send ALL hours associated with any payrolls that are in your date range in Homebase. If you are overlapping two payroll periods, we will send over the hours for both payroll periods. If you are short by three days and click export, we will send over the complete date range that matches Gusto

Not all of my employees hours transferred to Gusto. How do I fix it?

Homebase can only transfer hours for employees that we have in Homebase and where we have a Payroll ID on file (see Step 3). If the Payroll ID is missing for a specific employee, check your TEAM list in Homebase to see if an employee with a similar name was imported from Gusto. Follow the instructions on the bottom of Step 3 to resolve.

Where do I add new employees?

Please add your new employees to your Gusto account as Homebase does not create new employees in Gusto. Once added, you can go to your TEAM page in Homebase and click ADD EMPLOYEES. Select Gusto and we will match up any new employees in your Gusto account and create their profile in Homebase

Whoops, I made a mistake! What happens if I click "Export" again to send data again to Gusto?

We know mistakes can happen, but don't worry! Each time you press "Export" in Homebase, we will send over every employees hours from Homebase to Gusto and we'll automatically write over any prior hours information that is currently in Gusto. You can then double check the figures, make any tweaks you need, and run payroll as normal in Gusto.

See More at https://joinhomebase.com/support/gusto-homebase-integration/