



Finch allows employers to sign in once to unlock automated provider integrations.

Nova 401(k) Associates created NovaLink to work with Finch to lessen the administrative burden of submitting annual census data.

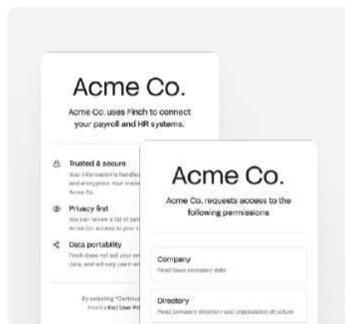
Finch creates a connection (*NovaLink*) between your payroll provider and Nova 401(k) Associates.

Trusted by hundreds of platforms: Finch helps hundreds of platforms access payroll data securely.



## How does it work?

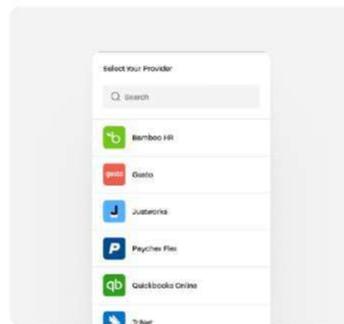
In just 3 steps, connect your payroll provider in 30 seconds or less.  
Finch only provides the data you consent to share.



### Step 1

#### Confirm Permissions

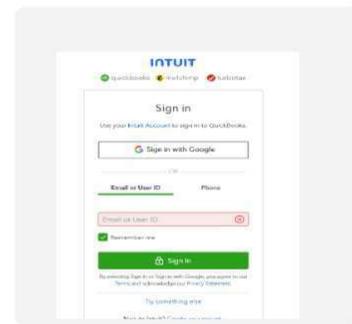
Review our data and privacy disclosures, and grant Finch permission to collect the data. We only share the data you approve.



### Step 2

#### Select a Provider

Select your payroll or HR system from Finch's list of 200+ integrations.



### Step 3

#### Authenticate Access

Follow the prompt to connect to the system using account credentials, API keys, or another 3rd party access method.

# NOVALINK FAQs

## ***What Payroll Providers are Supported?***

Current payroll providers NovaLink supports are listed below; however, we are continually adding new payroll providers to this list, so check with your Nova Account Manager to see if your payroll provider is supported.

- ADP Run
- ADP Workforce Now
- Gusto
- Paychex
- Paycom
- Paycor
- Paylocity
- Quickbooks Online

## ***What are the benefits of using NovaLink?***

NovaLink was designed to save you time and effort in pulling your payroll reports and completing annual and/or intermittent census files required for plan testing.

## ***What is the process to set up NovaLink?***

NovaLink is designed to reduce the work necessary on your annual or other intermittent census data for plan testing. It will take a little bit of work on your part to set it up. The process generally takes clients less than 30 minutes from start to finish.

1. Click the Sign-Up Link and sign the NovaLink service agreement, if applicable.
2. Once Nova receives the signed agreement, the Super User you identified in the sign-up process will receive an email with an authorization link to authorize the connection between your payroll company and Finch.
3. Once the authorization is complete, the Regular Payroll Contact you identified will receive an email with a link to complete the Paycode Mapping.
4. Once Paycode Mapping is complete, the Regular Payroll Contact will receive a test census file to review. If there are any discrepancies, adjustments can be made as needed.

## ***What is a Super User?***

This will be the person who controls access to your payroll system platform – the person who can add other users to your payroll provider's system. This person will be noted in PlanSponsorLink under the Contact Role "*NovaLink Super User.*"

## ***What is a Regular Payroll Contact?***

The person who processes the payroll and can define the payroll codes for NovaLink setup. This person will be noted in PlanSponsorLink under the Contact Role "*NovaLink Payroll Contact.*"

## ***Will Nova be able to make any changes to any data in the payroll system?***

No. When you authenticate access to establish a connection, it is secure and private. Employer credentials are encrypted and never made available to anyone – not even Nova. In addition, Finch prompts employers to review and consent to share any data requested by the platform.

***What is the cost to use this service?***

\$75 per quarter beginning the billing cycle that starts in October for the 1<sup>st</sup> Plan Year the service will be used (note, if started after October, the fee will be retroactively invoiced). This \$300 annual fee will pay for the NovaLink connection to Finch plus the completion of a sizable portion of the annual census file on your behalf.

***Does this mean I won't have to submit anything to Nova for the year-end data collection anymore?***

Once Nova pulls the census information, you will receive a notification to login to PlanSponsorLink to download, review and approve the census. Clients will still be required to complete the remainder of the year-end data collection, which includes the annual questionnaire.

***Will I have a chance to review the data you are pulling?***

Yes, this will be part of the process. Once Nova pulls the census information, you will receive a notification to login to PlanSponsorLink, download, review and approve the census.

***My payroll provider has limitations on the number of users that are allowed. What can I do?***

There are certain payroll providers that limit the number of users under its service tiers. If yours is one of them, talk to your payroll provider to see what you need to do to add an additional user.

***Will Nova be able to pull all fields on the census request template?***

Not all census template fields are available to be pulled from your payroll system; therefore, there may be some information you will need to add. Things such as ownership %, officers, employee type(s) if there are excluded employees under the plan, types of terminations, disability and death may need to be added after the data is pulled by NovaLink. Also, since different payroll systems list rehires differently, if your company has rehired employees, you may need to ensure the original date of hire, termination date, and rehire dates are all correct in the data that gets pulled.

***What if I move payroll providers during the year?***

If you had a different payroll provider for the first part of the year and now are using a provider that works with NovaLink, we may not be able to pull full-year data. It depends if the prior data was loaded to your new provider. If you change payroll providers during the year (after signing up with NovaLink) be sure to notify us in advance as it's possible we may no longer be able to offer this service and we want to be sure to stop invoicing your plan if NovaLink is no longer an option.

If you change providers and the new provider still works with Finch, we may not be able to pull full year data. It depends if the prior data was loaded to your new provider. You will be required to complete the authorization and mapping processes again for the new provider.

***What if I use different payroll providers for various locations/participating companies?***

Unfortunately, NovaLink will not be able to accommodate this type of arrangement – at least not at this time. Clients that use more than one payroll provider or different platforms within the same provider will not be able to utilize NovaLink.

***We exclude certain types of compensation from our plan. Will you be able to gather this information?***

The different types of compensation will be indicated using the Paycode Mapping File (more info on the Paycode Mapping File below). During the Paycode Mapping process, you will identify the pay codes as “included” or “excluded,” so that NovaLink can determine what is to be included in the plan’s compensation and what is excluded.

***What is a Paycode Mapping File?***

The Paycode Mapping File allows you to “map” the payroll codes used in your payroll system, so NovaLink knows what types of compensation and deductions each of your payroll codes refer to. This will allow NovaLink to pull the correct data into the correct columns of the census file each year.

***The Paycode Mapping File link does not appear to be a secure link. Should I still click it?***

Yes, there is no sensitive or confidential information being collected in this step.

***What if I make a mistake on my Paycode Mapping File?***

If you make a mistake, let your Nova Account Manager know so they can unlock the Paycode Mapping File for edits. Your Nova Account Manager will confirm when the mapping file is ready for you to update.

***Our plan excludes pre-entry compensation. Will you be able to gather this information?***

Yes. During testing, if it is determined that we need pre-entry compensation, we will be able to pull that information via NovaLink for you.

***Is NovaLink required?***

No. NovaLink is an optional service.

# FINCH FAQs

## ***Why connect my payroll data to another platform?***

Payroll systems house data that can be used to power other apps and services, such as data on employee count, employment status, income history, benefits enrollment, and more. Finch will specify what data the platform is requesting so that you can make an informed decision about what data you would like to share.

## ***Why do I need to authenticate using an admin account?***

Finch may require specific permissions to access the scope of data being requested from the platform. In order to consent to sharing certain types of data, admin privileges are required.

## ***Will I need to authenticate multiple times?***

Depending on the integration, you may need to re-authenticate to keep your connection active. Authentication requirements vary and are dependent upon security protocols and cookies expirations set by each payroll provider. Any integration, via Finch or otherwise, will be subject to similar requirements.

## ***How is my data stored?***

Finch utilizes best-in-class encryption protocols and compliance standards to keep your data safe. The Finch infrastructure enforces the use of TLS 1.2 to encrypt data in transit, and AES 256-bit encryption for data at rest. Data is backed up across our data stores each day, and all backups are also encrypted. Finch may also employ strict data retention policies and data is erased from the system when a connection is deactivated.

Finch is SOC 2 and CCPA compliant and seeks to protect personal data from unauthorized access, use and disclosure with physical, technical, organizational and administrative security measures based on the type of data and how it is being processed. SOC 2 is an independent audit report which details information and assurance regarding Finch's controls.

## ***Do you sell my data?***

Finch does not sell identifiable or anonymized employer or employee data.

## ***What data will Finch have access to?***

Finch prompts employers to review and consent to share any data requested by a platform. Finch also discloses data privacy practices before any connection is established, so you know how your data is transferred and stored.

## ***Why do platforms use Finch?***

Without Finch, platforms must ask employers to regularly update company and employee data in their system, usually through manual data uploads. The alternative is to build and maintain hundreds of integrations themselves, which limits their capacity to offer new services. With Finch, these platforms can offer a better user experience, support more integrations, and focus their engineering resources on building additional features and services.