carta

HRIS Integrations

Set up efficient workflows to better manage stakeholder updates and terminations with Carta's HRIS integrations.

View salary and equity data in one place

Eliminate double entry

Win time back, and gain a single source of truth for critical employee information like terminations or addresses as changes in your HR system are reflected in Carta.

Make reconciliation effortless

With payroll and equity data synced, your information is always ready to take action on. If there is ever a discrepancy, Carta will flag it and make it easy for you to reconcile.

Calculate taxes with ease

Employees' tax impact has never been easier to understand with salary, location, and equity information complete in one place. Carta can help inform employee tax liability for taxable equity events.
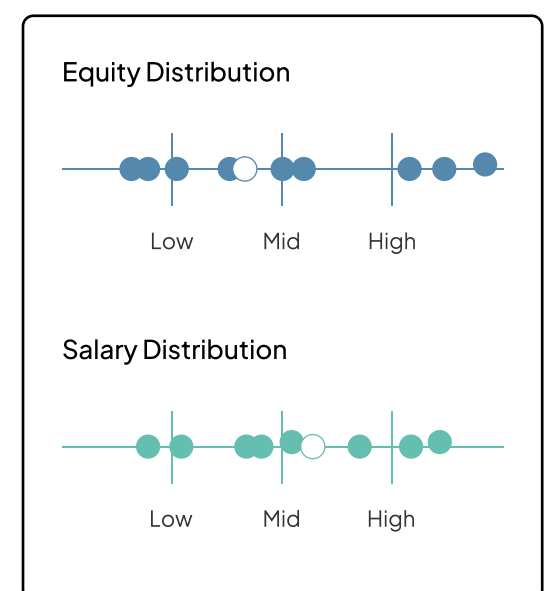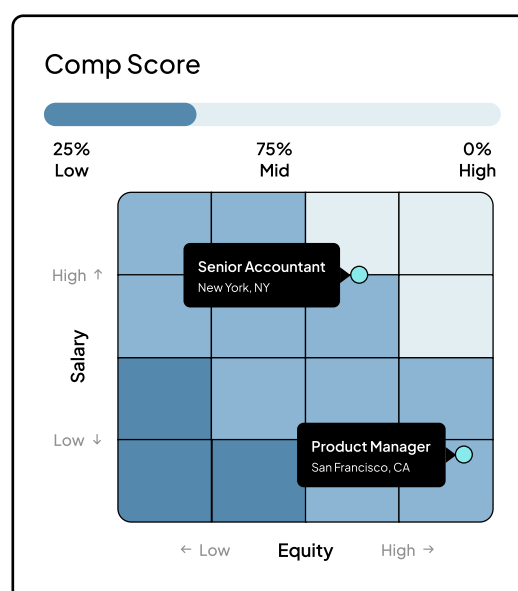
IMPROVE YOUR PEOPLE OPERATIONS

Optimize workforce planning

Employee ownership enables the labor force to share in the profits they help produce and enjoy the unbounded and transformative upside of asset growth. This will create a more sustainable economic model for the worker and help erode income inequality. It also aligns the workforce with the broader mission and creates more productive outcomes.

Investor ownership focuses on appropriately expanding access to private markets. Our goal is to make private markets more transparent and accessible, so that a larger universe of sophisticated investors benefit from that growth while funding the innovation economy.

Report Card
Benchmark Group: $1M - $10M Market Cap companies

Name	Area	Level	Tenure	Equity CR	Salary CR
Zachary Smith	Product	IC 3	2.00	3.63	0.77
Emily Wilson	Engineering	IC 1	2.17	9.08	0.73
Michele Colenta	Product	IC 3	2.08	1.92	0.57
James Tien	Engineering	EX 1	3.75	3.53	0.99
Nora Miao	Engineering	IC 3	1.33	5.81	0.97

Comp Score

25% Low — 75% Mid — 0% High

Senior Accountant
New York, NY

Product Manager
San Francisco, CA

Salary — High ↑ / Low ↓

← Low   Equity   High →

Equity Distribution

Low   Mid   High

Salary Distribution

Low   Mid   High

FAQ

How do I set up my HRIS Integration?

Authorizing your HRIS integration with Carta is only a few clicks away and can require zero engineering or IT support. Visit this link and login to your account to complete the process. In addition, please visit our HRIS integrations Support Article to find information specific to your HRIS provider.

I have integrated my HRIS integration with Carta. What are the next steps?

After you integrate your HRIS, you will have to reconcile employee records coming from your HR system to stakeholder records on Carta. Our Employee Matching tool makes it easy to complete this process in a few quick steps. Once you have completed Employee Matching, the data will flow into Pending Terminations and Stakeholder Updates. You can use these modules to replace the manual steps previously required to terminate employees and update demographic fields for your stakeholders.

How often is the updated data from my HRIS reflected in Carta?

Carta's systems perform automatic daily synchronization and reflect pending employee updates. If your integration was completed via Finch Assisted Connect, the data will be updated once per week. Admins may also trigger on-demand synchronization and Carta will check for and display updates.