



# Migration checklist

SmoothPay has a vast array of tools and the expertise to help you get up and running from your old payroll or manual system as quickly and accurately as possible.

If your data has been migrated with SmoothPay's assistance then you'll need to check that everything has come across correctly and amend where necessary (sometimes we don't have all the required data available or it's not possible to migrate it for you).

If you're migrating your own payroll information then this checklist will also provide you with tasks you need to accomplish.

## Migration checklist

Capture, check and revise your payroll migration in the following recommended sequence (you can revisit any step as often as you need):

- complete your **company settings** (*Configuration*) - note that getting the PAYDAY correct is critical for accurate reporting and taxation.
- check **payroll codes** (things like agencies and superannuation funds, allowance, deduction, time types, leave descriptions and accrual defaults, cost centres, departments etc) are as you would like to use them, then
- add your **employees** and set up their (*recommended order*):
  - Personal and tax details
  - Contract details
  - prepare a typical pay input (*as many entries as required for a normal pay including ordinary time, overtime (if usually worked), any allowances etc, then save as the employee's standard pay using the **Template** tool*)
  - check/set superannuation/retirement fund details correctly
  - check/set any agency payments (paying off debt, fines, fees etc)
  - check/set banking details correctly
- capture as much **pay history** as you need in each employee's history tab - we recommend capturing totals for every pay period if possible (*or at minimum you can capture totals per month - we do not recommend capturing a single lump sum, esp. for NZ*):
  - *NZ requires all data since anniversary or 1 April, whichever is earlier*
  - *Australia requires all data since 1 July*
  - *other countries requirements vary, but we'd suggest capturing as much data as possible so that your tax forms are produced correctly at year end.*
- capture **leave balances** by adding a take-on entry to the employee's Leave..History tab for each leave type:
  - *Australia: annual and sick leave balances are in hours accumulated up to date*

- *NZ annual leave is in weeks and the balance required is weeks remaining from accruals to last annual leave anniversary*
- *NZ sick leave is in days and the balance required is days remaining from accruals to last sick leave anniversary*
- *Other countries vary (see our Leave Management guide for details and tips for correct leave processing in each country)*

start paying your staff

Refer to our **Pay Process** guide for a quick overview and suggested procedure for each pay period.

Thanks for choosing SmoothPay as your payroll solution! And remember - if you need help - please email or call and we'll get you going in no time.