Excel migration guide

This guide provides a list of the fields that are understood by the migration process (not all are necessary and may or may not be contained in the migration spreadsheet template), along with any pertinent comments.

The spreadsheet template is available here: https://gopayroll.net/man/migrate.xlsx

Staff records

Each row should contain as much data as possible for each employee:

employeeID/Badge #	[compulsory]
firstname	
surname	
or First+Last name	
or Last + First name	
address	
town	
state	
postcode	
country	
DOB	
Tax#	
Tax code	NZ tax code, e.g. M, MSL, WT etc
taxrate	Expressed as cents per dollar (e.g. 0.2=20%) Only required if the employee is paying a flat percentage rather than automatically calculated tax based on their tax code (e.g. contractor/agent only)
startdate	dd/mm/yyyy or yyyy-mm-dd
finishdate	
phone	
email	
bankname	

bankaccount	Must be complete: NZ format is typically nn-nnnn-nnnnnnn-nnn Other countries typically BSB+Account, nnnnnn-nnnnnnnnn
superfund	Australia only
superref (member #)	All countries except NZ
paypoint	department name or code
occupation	occupation or position
employment	F,P,C for Fulltime, Part time, Casual
payrate	
salary	
paycycle	W,F,M,4,H for Weekly, Fortnightly, Monthly, 4-weekly, Half-monthly
NZ ESCT rate	NZ taxes employer contributions (*bizarre right*)! Enter percentage as 17.5 for 17.5% and so on.
NZ Employee super %	e.g. 3.0=3% (*must be one of 3, 4, 6, 8, 10*)
NZ Employer super %	e.g. 3.0=3% (*can be any %*)

There should be ONE employee record per row and the data can be in any column order (though the above is preferred). The only mandatory field is the employee's badge number.

Pay history records

The same EmployeeID/Badge# must identify every history record required to be imported.

employeeID/Badge #	[compulsory]
batch#	optional
periodEnd	optional: dd/mm/yyyy or yyyy-mm-dd
payday	[compulsory] dd/mm/yyyy or yyyy-mm-dd
payrate	No $ sign or commas, e.g. 17.123456
numberOfPayPeriods	(e.g. 1 for 1 week if paid weekly, or 1 for 1 fortnight if paid fortnightly - if multiple periods are paid in a single pay then the number of normal pay cycles included)

periodType	(W,F,M,4,H for Weekly, Fortnightly, Monthly, 4-weekly, Half-monthly)
OTE	superable income
hours	
timeEarnings	
taxableAllowances	
nonTaxable	
TaxCode	NZ only
Tax	
Student Loan (NZ)	
SLCIR (NZ)	
SLBOR (NZ)	
Child support (NZ)	
superEmployee	Employee superannuation deduction
otherDeductions	
superEmployer	Employer super contribution (*NZ: incl ESCT*)
ESCT content (NZ)	ESCT content of employer superannuation contribution (if known)
netPay	
daysPaid	NZ only [compulsory]
comment	

This should be presented in a single excel sheet (*not 1 sheet per employee as it increases the time required incrementally*)

NZ: Requires 52 weeks of pay history, one row per pay per employee

All other countries: typically require pay history either
• per pay period per employee, or
• a single take-on total per employee since the start of the tax year (*e.g. July onwards for Australia, Jan onwards for most others*)

If you have any questions please feel free to call.