# TELUS Farm Payroll Migration Checklist

**Welcome to your migration journey**

This migration checklist will guide you through the process of transferring your data from Earnie to the new TELUS Farm Payroll system. Please progress through the steps in the tables below to complete the migration successfully.

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# Phase 1
## Pre-migration within Earnie

### Objective

Prepare your current Earnie system for migration by completing final processes and creating secure backups.

| Ref. | Task description | Help and guidance | Done |
|------|------------------|-------------------|------|
| 1.1 | Check payroll calendar is correct and completed in full for all schedules used. e.g. monthly, weekly, fortnightly | Go to **Company – Payroll Calendar** and refer to the guide for more help and guidance. Payroll dates and work periods start and end **must** not be blank for all periods of the current tax year. | |
| 1.2 | P45 any employees where this is the last payment. | This will enter their leaving date in their employee record which is required. | |
| 1.3 | Run payroll as normal, including sending BACs if required. | Complete this for each company being migrated. | |
| 1.4 | Send FPS and EPS, if required. | | |
| 1.5 | Complete **End of Year** in Earnie, if relevant. | Only relevant if migrating after running the final payroll of this tax year. | |
| 1.6 | Confirm the Earnie admin username and password. | Usually username (if requested) is "System" and password is "admin". | |
| 1.7 | Backup Earnie and store securely in line with legal requirements. (6 years minimum recommended) | Create secure backup for legal compliance. | |

# Phase 2
## Pre-migration – TELUS Farm Payroll setup

### Objective

Set up your new TELUS Farm Payroll system and install the migration tools.

| Ref. | Task description | Help and guidance | Done |
|------|------------------|-------------------|------|
| 2.1 | Create TELUS Farm Payroll account. | Create a TELUS Farm Payroll account. The upgrade tool will create the employer; it's recommended you start with demo data. | |
| 2.2 | Setup API Key. | API Key. | |
| 2.3 | Install **Migration Tool** on the same computer as Earnie. | Upgrade information for Earnie. | |
| 2.4 | Follow **Migration Tool** wizard to transfer data to TELUS Farm Payroll. | IRIS Earnie upgrade process. **Do not use the Staffology Payroll button built into the Migration Tool.** If the migration fails please check if a business has been created in TELUS Farm Payroll before repeating the transfer. If the company includes employee records then the upgrade has been successful and you can proceed. If there are no employees shown against the employer then the import has failed and we would recommend deleting the business before running the upgrade process again. | |

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# Phase 3
## Post-migration – TELUS Farm Payroll verification

### Objective

Verify that all data has migrated correctly and configure your new TELUS Farm Payroll system.

| Ref. | Task description | Help and guidance | Done |
|------|------------------|-------------------|------|
| 3.1 | Check the employees. | Check the employees. | |
| 3.2 | Check the pay schedules and next pay day. | Check the pay schedules and next pay day. | |
| 3.3 | Check open balances. | Check open balances. | |
| 3.4 | If payroll includes directors, check their allowances in opening balances. | Check directors' allowances. | |
| 3.5 | Check pay codes are correct, including attachment of earnings orders. | Check pay codes and attachment orders. | |
| 3.6 | Check pensions, including year to date figures on employee record. | Check pensions. | |
| 3.7 | Check miscellaneous items. | Check miscellaneous items. | |
| 3.8 | Input statutory sick pay (SSP) details. | Input statutory sick pay (SSP) details. | |
| 3.9 | Input holiday details. | Input holiday. | |
| 3.10 | If using Average Holiday Pay in Earnie, check the pay history as cumulative values may have migrated | Verify holiday pay calculations and history. Check for any duplicate entries. | |
| 3.11 | Complete the next payrun as a parallel run alongside Earnie. | Run a test payrun to verify accuracy. Compare results with Earnie before going live. Correct any discrepancies before your first RTI submissions from TELUS Farm Payroll. | |
| 3.12 | If using My ePay Window, contact us to configure the connection to TELUS Farm Payroll. | Email farmplansupport@telusagcg.com 7 days prior to your first live payrun in TELUS Farm Payroll for configuration. | |

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