

Gold Payroll

Post-Migration Guide



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1. INTRODUCTION

This short guide provides detail of points to be aware of once migrated to Gold Payroll. It contains a series of checks to perform after the migration and guidance on how to manage any discrepancies.

2. AFTER YOU UPGRADE TO GOLD PAYROLL

We strongly recommend that you parallel run Gold Payroll with your existing payroll provider for at least one payroll period after the upgrade. If this is not possible, check the first period's figures thoroughly. It is important that you only submit your FPS, EPS and any other submissions via the active payroll.

After completing the upgrade, open Gold Payroll and make the checks from the following sections.

2.1 Check Employees

This check is to ensure all employees have upgraded successfully. It is important you check the employee year to date figures carefully, the payroll software works differently in the background and the upgrade tool will use the most common scenarios to transfer the data.

Follow the steps below to check the opening balances.

- In Gold Payroll, go to [Reports](#) > [Employees](#) > [Employee Export](#) > [Download CSV](#).



Did you know?

You can easily [create employees](#) in Gold Payroll and make any [amendments](#).

2.2 Check Pay Schedules and Next Day Pay

This check looks at the pay period for each pay frequency.

- In Gold Payroll, select the [Employer Name](#) in the top right-hand corner > [Settings](#) > [Pay Schedules](#).

Make amendments to the [Pay Schedules](#) as required.

2.3 Check Opening Balances

Follow the steps below to view the Statutory Payment Recovered and Compensation; and CIS Deductions Suffered values where applicable in Gold Payroll.

Click on the **Employer Name** in the top right-hand corner > **Edit Details** > choose **Opening Balances** from the **More** menu

2.4. Before Your First Pay Run

- Any YTD pension figures not present in your previous payroll can be entered into Gold Payroll manually, however, this must be prior to your first pay run.
- Manual adjustments are prohibited once a pay run has occurred.

2.5 Perform a Random Employee Year to Date (YTD) Check

Choose a few employees and perform a random check.

It is important you check the employee year to date figures carefully. The payroll software works differently in the background and the upgrade tool will use the most common scenarios to transfer the data. Check the opening balances in Section 3.3.

- In Gold Payroll, click on the **Employees** menu > an **employee** in the list to open the employee details > **More** > **Opening Balances** to check the figures.

Contact our support team to make any changes.

2.6 Check Pay Codes and Attachment Orders

After the check, a spring clean is recommended.

- In Gold Payroll, click on the **Employer Name** in the top right-hand corner > **Settings** > **Pay Codes** to view the Pay Codes, including Attachment Orders.

Not upgraded?

- Where the company deducts an Admin charge for attachment from employees when processing Attachment Orders, you must apply this manually in Gold Payroll. To do this, go to **Employees** > **Attachment Orders** > select the relevant **Attachment Order** > tick the **Admin Fee** box.
- For employees who have either an **Attachment of Earnings Order (priority)** or **Attachment of Earnings Order (non-priority)** deduction, you must manually create these deductions in Gold Payroll. To do this, go to **Employees** > **Pay Options** > **Loans**, select **Add Loan** > enter the relevant information.

- The bank details associated with the Attachment of Earnings Order will not be transferred to Gold Payroll, you must input these details manually. In Gold Payroll, click on the **Employer Name** in the top right-hand corner > **Settings** > select **Payees** > **Add Payee** > enter the required information. Once saved, you can select this Payee for the relevant Attachment Order in the **Employee | Attachment Orders** screen.
- **Hourly rates and rate factors** such as time and a half (1.5) or double time (2.0), cannot be transferred to Gold Payroll. You must create these manually in Gold Payroll.
- All pay elements will be transferred to Gold Payroll as Payments. You will need to create Deductions manually.



Did you know?

Employees who have a standard amount set up for a **Pay Element** in the **Employee Information | Pay Elements** screen, the Pay Element will transfer to Gold Payroll.

Click on the **Employees menu** and select an employee in the list to open the employee details. Click on **Pay Options | Additions & Deductions** to view the Pay Elements created for an employee; the employee's base hourly rate is on the Regular Pay screen if present.

2.7 Check Pensions

Follow the steps below to [check pensions](#) and automatic enrolment in Gold Payroll. Here you can access information regarding the pension schemes in use and amend or enter additional data where required.

Click on the **Employer Name** in the top right-hand corner > select **Edit Details** > **Pension** tab

Pension provider not available?

If the pension provider is not available in Gold Payroll after the upgrade is complete, select **Pensions** at the top of the screen > **Add New** > **Create Your Scheme**. This can then be applied to your employees.

2.8 Check Miscellaneous Items

Gold Payroll has a few differences behind the scenes including Departments and Working Patterns.

- Follow the steps to check and amend the Code and Name of the Department (if required) in Gold Payroll. Select the **Employer Name** in the top right-hand corner > **Settings** > **Departments**.
- Follow the steps to check and amend the Working Pattern in Gold Payroll. Select the **Employer Name** in the top right-hand corner > **Settings** > **Working Patterns**.

2.9 Input Statutory Sick Pay (SSP) Details

Follow the steps below to check the pay period for each pay frequency.

1. Create any **SSP payments** manually.
2. If paying an employee **SSP in Key time Payroll**, you must enter the absence into Gold Payroll.
3. Select the **Employees menu** > an **employee** in the list to open the [employee details](#) > [Leave tab](#).
4. Click **Add Leave** > choose **Type – Sick Leave** > input the first day of the current period of sickness in the **From field** > input the last day of the sickness period in the **To field** > change **Payment to Statutory Pay**. If you wish to pay the employee their regular pay, leave Payment as Pay as usual and amend the **Average Weekly Earnings** if required.

2.10 Check Statutory Payment Details

This check is for the other statutory payments (SMP/SPP/ShPP/SAP/SPBP).

- In Gold Payroll, click on the **Employer Name** in the top right-hand corner > **Settings** > [Pay Schedules](#).



Did you know?

The amount of SSP shown may be incorrect if you have already paid some of it in your previous software product. You will need to adjust the amount of SSP the next time you process payroll.

Pick the relevant **employee** in the list displayed on the **Payroll | Payslips screen** to view a summary of their current payroll > select the **SSP** row > tick the **Override the calculated value box** to alter the amount displayed in the New Value field.

If you amend the Statutory Payment amount, you will need to ensure that you enter the correct value each pay period to ensure that the employee's payment is accurate.

2.11 Input Holiday

This check is for both employees holidays and default allowances.

Employee Holiday Leave Setup

Each employee's allowance, accrued amount, and balance should transfer from your previous software product where applicable; other Holiday Leave fields must be entered manually.

Click on the **Employees menu** > select an **employee** > click on the **Leave tab** > select **Leave Settings** > enter additional information where required

Default Holiday Leave Setup

You can also enter default holiday information into Gold Payroll so that when you create a new employee, the system will enter the holiday entitlement.

Click on the **Employer Name** in the top right-hand corner > **Edit Details** > **Leave tab**

3. THINGS TO NOTE

3.1 Company Directors Upgraded Part Way Through The Year

The director will receive the full allowance again unless a setting is changed in Gold Payroll. This must be done before the first payroll.

Follow these steps after the upgrade and before running the first payroll.

1. Open **Gold Payroll**.
2. Open the required **company**.
3. Go to **Employees** and select the required employee.
4. Select **More > Opening Balances**.
5. Go to the end of the page and select **Edit NIC Table Summaries**.

NIC Table Summaries						
Table	Gross	To LEL	LEL to PT	PT to UEL	Employer NICs Paid	Employee NICs Paid
A	0.00	0.00	0.00	0.00	0.00	0.00

Edit NIC Table Summaries

6. Select the current **NI Table letter**.
7. Select **Director Employee was a Director at the time this NI was paid**.
8. Select **Update** then **Save Changes**.

Edit NIC Table Summary

Table & Gross Earnings	Employer NIC Paid	Employee NIC Paid
A 122	£ 25	£ 30
GROSS EARNINGS BREAKDOWN		
Earnings to LEL	Earnings from LEL to PT	Earnings from PT to UEL
£ 122	£ 233	£ 211
<input checked="" type="checkbox"/> Director Employee was a Director at the time this NI was paid.		
		<div>Cancel Update</div>

3.2 Average Holiday Calculation

The upgrade tool brings across the cumulative values however this is not enough to calculate the average holiday rate. In order for the system to do this you will need to add in pay history.

1. Open the required **company**.
2. Go to **Employees**.
3. Select the required **employee**.
4. Go to **Settings** and select **Pay History for Average Holiday**. As the payroll is processed, the pay history will be populated.

2022/23 Import Back

Period	Pay for Average Holiday	Hours Worked	Statutory Pay Only	Pay Date
5	£380.00	150.00	No	31/12/2022
6	£380.00	150.00	No	26/11/2022
7	£380.00	150.00	No	29/10/2022

Update Employee

5. Select the **year** required.

Basic Details Employment Pay Options Attachment Orders Bank Account **Leave** Pension Notes More

2020/21 Import Back

6. Select **Back** to leave the history or if you are transferring from another payroll provider, you can import historic average earnings by selecting **Import**.

7. If you selected **Import**, select **CSV File** and drag the required file or click to browse.

Import History for Average Holiday Pay



CSV File

Import historic pay for average holiday pay calculation from a CSV file.

Download a Blank CSV File here: [Blank - Average Holiday Pay History Import.csv](#)

Download a CSV file with example data here: [Example - Average Holiday Pay History Import.csv](#)

Below is a table with descriptions on the different sections of the CSV file.

Column	Name	Description
A	Payroll Code	Employee payroll code
B	Pay Date	Employee pay date
C	Tax Year	Tax year in full (Example: 2021)
D	Tax Period	Tax period (Example: 1-12 monthly 1-53 weekly)
E	Frequency	Monthly, Weekly, 2-week, 4-week
F	Pay for Average Holiday Pay	Amount with no commas
G	Hours for Average Holiday pay	Hours. Minutes* must be expressed as decimals (i.e. 32 minutes would be 1 / 60 x 32 = 0.53)
H	SXP only	TRUE / FALSE If someone was on maternity leave for the period, you would enter TRUE here as that week would then be skipped by the average calculation

*Minutes are 1/60th of an hour expressed as a decimal. 2h 15m = 2.25. 3h 30m = 3.50. 4h 40m = 4.67 etc.

NOTE: Importing the data multiple times will add to history, not overwrite.

3.3 Pension Year to Dates

If your pension YTD figures were not present, these can be added in manually before the first pay run. Follow the steps below to do so.

Employee record > Pension > Click Edit pension > Pension YTDs > Edit Opening Balances

4. USEFUL INFORMATION



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