

Moving your client to Wagepoint 2.0 checklist

This checklist will guide you through each step of the migration process so you can help your clients transition smoothly from Wagepoint 1.0 to 2.0 – without missing a beat.

A little preparation goes a long way. With everything in place before you click “Upgrade,” you’ll save time, reduce back-and-forth, and keep payroll running seamlessly on the new platform.

Before you click upgrade

Decide on the best time to upgrade.

So payroll transitions smoothly without interrupting pay runs.

You'll want to find a time that accounts for these two factors:

You can only migrate a client in between payroll runs: The best time to move a client is shortly after all payrolls are finalized. You'll want to make sure you leave time to set up the new account and enter year-to-date data.

You'll need your client to accept our Terms of Service and e-sign the Pre-authorized debit (PAD) agreement and Business Attestation form before a payroll can be run in 2.0: Our legal relationship is with your client, so we need the client to consent and agree to our ToS, PAD, and Business Attestation so that we're all compliant from a legal perspective. We highly recommend you plan ahead and set aside some time to do this together, so that there are no delays once you're inside 2.0.

Review your client's account.

Double-check employee and admin details to ensure a clean, accurate migration.

Ensure any employees that aren't actively receiving payroll are terminated, and that all employees have SIN numbers and a date of birth.

Gather account owner, authorized signatory, and other admin details.

Having the right contacts and permissions ready helps speed up setup.

Account owner's name and email address

NOTE: An account owner is in charge of the entire account's operation.

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Authorized signatory's name, date of birth, address, and email address.

NOTE: The authorized signatory (also known as the authorized signing officer) is the person who can do banking and sign the company's cheques. You may or may not have an authorized signatory assigned in your 1.0 account, but this is required in 2.0. It can be the same person as the Account owner.

Other administrators' names and email addresses.

NOTE: Administrators must have an email and enabled status to be moved over to your 2.0 account. You must enter an administrator's email as their username in order for them to be moved over. This email will be their username when they log into Wagepoint 2.0. The existing report administrators will be moved over as Reports administrators in 2.0. The rest of your administrators will be added as Payroll administrators in your 2.0 account.

After you click upgrade

Migrate company information.

Ensure your client's legal and banking details carry over without interruption.

Legal business name

Doing Business As (DBA) name

Company address

Phone number registered with the CRA

CRA payroll account number and remittance frequency

Banking information

Guide your client to create their Wagepoint account.

Get your client set up on 2.0.

Account owner must create account and agree to terms of service.

Review and/or set up pay groups.

Keep pay periods consistent by verifying or rebuilding pay group schedules.

Some pay group frequencies will be automatically migrated. Semi-monthly and non-standard pay groups [will need to be created](#).

This is a good opportunity to take note of the pay period dates assigned to your pay groups and ensure they are correct.

Add business details.

As part of FINTRAC compliance requirements, we need to confirm a few details about your client.

Business details such as business number, business type, incorporation type, industry subsector, and main business activity
Names of any company directors
Names, addresses, and ownership percentages for anyone who owns 25%+ of the company (beneficial owners)
A copy of an authorized signatory's valid government issued photo ID (front and back)
The pre-authorized debit (PAD) agreement, business attestation form, and terms of service document signed by an Authorized signatory*

Review income, deduction, and benefit codes.

Accurate codes mean taxes, benefits, and deductions calculate correctly every time.

The following income type codes are already set up and available in 2.0 for you to use:

Advance	Salary continuance
Bonus (discretionary)	Self-employed commission
Bonus (work related)	Severance
Call-in pay	Shift premium
Commission	Standby pay
Contractor pay	Status Indian (CPP and non-CPP)
Director's fees	Status Indian retiring allowance
Double overtime	Statutory holiday
Expense reimbursement	Statutory holiday (worked)
Maternity leave top-up	Tips/Gratuities (controlled)
Overtime	Tips/Gratuities (direct)
Pay in lieu of notice	Top-up
Retiring allowance eligible	Vacation pay (dollars)
Retiring allowance non-eligible	Vacation pay (hours)

The following deduction type codes are already set up and available in 2.0 for you to use:

AD&D (employee)	Long-term disability (employee)
Advance deduction	Medical (employee)
Critical illness (employee)	Other deduction
Dental (employee)	RRSP (employee)
Dependent life insurance (employee)	Short-term disability (employee)
Garnishment	TFSA (employee)
Life insurance (employee)	Union dues

The following benefit type codes are already set up and available in 2.0 for you to use:

AD&D (employer)	Life insurance (employer)
Car allowance (cash or non-cash)	Long-term disability (employer)
Cell & internet (cash or non-cash)	Medical (employer)
Clergy housing benefit (cash or non-cash)	Parking (cash or non-cash)
Clergy utilities benefit (cash or non-cash)	Professional dues (cash or non-cash)
Critical illness (employer)	RRSP (employer)
Dental (employer)	Security options
Dependant life insurance (employer)	Short-term disability (employer)
Gifts & awards (cash or non-cash)	Subsidized meals
Housing allowance (cash or non-cash)	TFSA (employer)
	Tuition fees (cash or non-cash)
	Utilities allowance (cash or non-cash)

Set up any additional custom codes.

Custom codes let you handle unique pay items while staying compliant.

If you require a code that does not appear on the lists above, you can [create a custom code](#). You are responsible for the accuracy of any custom codes. Ensure you have set up the taxes and reporting requirements to be compliant with government regulations.

You must create any required custom codes before prior payroll data can be entered.

For income codes:

Type of income code:

Hours with calculated amount (\$) (hours x rate) coefficient. For this option, you'll also need to indicate the type of hours associated with the code and the co-efficient.

Amount (\$) only.

Amount (\$) with hours (no calculation).

Federal tax requirements

Provincial tax requirements for each province and/or territory

Indicate any T4 or T4A boxes the code should report to

Indicate insurable hours (Block 15a), insurable earnings (block 15b and 15c)

and if the code should be included in block 17c

For deduction codes:

Contribution type: Dollar amount or percentage of income

Select income codes that apply

Indicate if the deduction will receive a tax break at source

Indicate any T4 or T4A boxes that the code should report to

For benefit codes:

Contribution type: Dollar amount or percentage of income

Select income codes that apply

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Indicate any T4 or T4A boxes the code should report to

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Enter employee and contractor prior payroll data.

Bringing over year-to-date figures keeps reports and records complete.

Enter year-to-date values for each employee and contractor from within their people profile. You'll find the information needed in the client's Payroll invoice and Year-to-date reports in 1.O.

This data is moved:

First and last name

Preferred and middle name

Birthdate

Hire date

Social Insurance Number (SIN)

Address and phone number

Province of residence

Email address (for access to the online employee portal)

Paid time off (PTO) balances

Vacation accrual and percentages (if they differ from the standard) or if vacation is paid out

TD1 form (Provincial and Federal)

Banking info – voided cheque or direct deposit form with transit, institution and account numbers (to pay by direct deposit)

Emergency contact

Here's what you'll need to enter:

Gross earnings

Deductions

Incomes

EI – employee and employer

CPP – employee and employer

Income tax – federal and provincial

Assign any recurring IDB codes.

Pre-assigning recurring items saves time and prevents missed payments later.

You can always assign IDB codes from within the payroll processing workflow. But if you'd prefer to assign recurring codes now, you can do that either:

[For an individual](#): People profile > Income, deduction, benefits tab

[In bulk](#): From the people list

Before you run payroll

This section contains some optional suggestions for setting up and customizing your client's 2.0 account.

Invite employees to access their paystubs and year-end forms in the employee portal.

Give your client's team secure, self-serve access to their payroll information.

[Invite employees and contractors](#) to access their paystubs and year-end forms in their 2.0 Employee portal.

[This guide for employees and contractors](#) goes over the ins and outs of the employee portal. Consider sharing with your client so they can proactively address their employees' questions and concerns.

Select a calculation method for statutory holidays.

Choose the best calculation method to handle holiday pay with accuracy.

Wagepoint provides three statutory pay calculation methods — select the best option for your client. By default, it is set to Manual calculation, but you can [change the pay method](#) under Payroll Settings.

Manual calculation: Statutory holidays are tracked and calculated outside of Wagepoint. You can still add statutory holiday pay to payroll manually using an income code.

Daily wage method: This method calculates statutory holiday pay for hourly employees by using their hourly rate multiplied by the assigned hours for the holiday. Statutory holidays are pre-loaded in the Company Settings based on the employee's work location and you can edit the number of assigned hours for each holiday.

Federal calculation method: This method is for federally-regulated industries/ workplaces that fall under the [Canada Labour Code](#). This method uses 1/20th of wages earned in the four weeks immediately before the holiday. Applicable holidays will be assigned according to the employee's work location.

NOTE: That you will not be able to select the federal calculation method for the first four weeks of using 2.0. During this time, you'll need to use manual calculations.

Set up any integrations.

Reconnect linked apps like Time, QBO, or Xero to keep workflows seamless.

You'll need to reconnect any integrations that were set up in 1.0, like [Time by Wagepoint](#), [QBO](#), and [Xero](#).

Wagepoint 2.0 integrates with Freshbooks and People by Wagepoint, too.

Enable two-step approval.

Add a second review step to strengthen payroll accuracy and security.

If you want to enable two-step approval for this client, you can do so following [these steps](#).

Set up auto-run for any eligible pay groups.

Automating recurring runs helps payroll go out on time, every time.

The first payroll in 2.0 will need to be run manually. After that, set up auto-run for any eligible pay groups following [the steps here](#).

Remittance and reporting capabilities within Wagepoint vary by location. To submit ROEs, proper authorization must be granted.

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