Moving to Wagepoint 2.0 checklist.

Switching to Wagepoint 2.0 has never been easier.

This checklist will guide you through each step of the migration process so you can 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, and keep payroll running seamlessly on the new platform.

Before you click upgrade.

Decide on the best time to switch.

So payroll transitions smoothly without interrupting pay runs.

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

Review your 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
- [ ] An account owner is in charge of the entire account's operation.
- [ ] Authorized signatory's name 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 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

Create your Wagepoint account and sign the PAD agreement

This step confirms consent and activates payroll payments in 2.0.

- [ ] Account owner must create account and agree to terms of service
- [ ] Authorized signatory* must sign the pre-authorized debit (PAD) agreement
  *this may be the same person as account owner

This step must be completed before you can fully set up the account and run payroll.

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.

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

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

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

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

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

Review employee and contractor data.

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

Review the profile and year-to-date details for each of your employees and contractors within their people profile, and add any missing data. Be sure to check the individual code amounts, as well as totals.

You'll find the information needed in your [Payroll Invoice]() and [Year-to-date]() reports in 1.0. The [Annual payroll amounts]() report in 2.0 may also be helpful.

- [ ] 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)
- [ ] Social Insurance Number (SIN)
- [ ] Vacation accrual and percentages or if vacation is paid out (if they differ from the standard)
- [ ] Gross earnings
- [ ] Deductions
- [ ] Incomes
- [ ] 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
- [ ] Gross earnings
- [ ] Incomes
- [ ] Benefits and deductions
- [ ] EI – employee and employer
- [ ] CPP – employee and employer
- [ ] Income tax – federal and provincial
- [ ] EI – employee and employer
- [ ] CPP – employee and employer
- [ ] Income tax – federal and provincial

Review and add 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 2.0 account.

Invite employees to access their pay stubs and year-end forms.

Give your team secure, self-serve access to their payroll information through the Employee portal or My Wagepoint app.

- [ ] Invite employees and contractors to access their pay stubs and year-end forms in their 2.0 Employee portal.
- [ ] Get your team to download the My Wagepoint app through Google Play or the App Store for easy, on the go access to pay details.

This guide for employees and contractors goes over the ins and outs of the Employee portal.

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 company. By default, your Wagepoint account 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.