Alternative ways to import

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Three options

If you cannot use the recommended importer, with an FPS and a CSV (FPS Import Guide), there are three alternative ways to import:

- From only an FPS XML, with no employee CSV file.
- From only a connected HR or time and attendance (T&A) system, with no FPS.
- From only an employee CSV from your previous payroll system, with no FPS.

Continue the employment, or start a new one

HMRC records an employment for each employee. The employment starts on their start date and ends on their end date.

When you import, each employment can continue, or a new employment can start with HMRC:

	Continue existing employment	**Start a new employment**
At HMRC	The same employment continues	The old employment ends, and a new one starts
Employees are	Existing employees, not starters	P45 starters
Previous payroll system	Nothing changes	Each employee becomes a P45 leaver
Year-to-date values	Imported from an FPS, or zero at the start of the tax year	Zero, plus the P45 values
When (from an FPS)	At any time	Not used
When (from an HR or T&A system or an employee CSV)	Only at the start of the tax year	At any time

From an HR or T&A system or an employee CSV, every employee is a new starter unless you set them as an **Existing employee**.

The preferred way to start is to import an FPS, because payroll then continues from each employee's year-to-date values.

Missing information

With each option, some information will be missing:

Information	From an FPS	From an HR or T&A system, or an employee CSV
Start date	Not in the FPS	Uploaded
Auto-enrolment Pay Item status (**Migrated status** and **Migrated date**)	Not in the FPS	Not in the system
Email address and username	The importer creates fake ones	Uploaded
Bank details, if used	Not in the FPS	Uploaded
Previous pay and **Previous tax**	The importer sets these to zero	Zero. If you start a new employment, each employee is a P45 starter, and the P45 values are not imported: tax code, week 1 or month 1, leaving date, total pay to date, total tax to date, and student and postgraduate loans.
Student loan plans	Only if deductions were made	Not in the system
Pay Definitions	Some added by the FPS import; others must be added, for example Shifts	Must be added
Report Definitions	The importer creates most	From the copied company
Recoverables	Not in the FPS	Not in the system

Information	From an FPS	From an HR or T&A system, or an employee CSV
Apprenticeship Levy	Not in the FPS	Not in the system
Director status	Not in the FPS	Not in the system
Employment Allowance used this tax year	Not in the FPS	Not in the system

Before you start

Continue or start a new employment

Decide if each employment continues, or if a new employment starts with HMRC. See "Continue the employment, or start a new one" above.

P45 leavers

If you start a new employment, every employee starts in paiyroll® as a P45 starter. So you must first set each employee as a P45 leaver in your previous payroll system.

Works IDs

If you upload from an HR or T&A system, the works ID of each employee must be the same in paiyroll® and in the HR or T&A system. Works IDs can be numeric or alphanumeric.

Pension file

If your pension provider is NEST, NOW: Pensions or The People's Pension, get the employee file from your provider: see Get the employee file from your pension provider. You use it in "Auto-enrolment status" below.

If your provider is not one of these, download from your provider, or prepare, a spreadsheet of the auto-enrolment status of all your employees. You use it in "Auto-enrolment status" below.

Import an FPS with no CSV

Import

1. Import the FPS, as in FPS Import Guide.

Employee details

1. Click **Employees**, then **Update** for an employee.
2. In the **Main** tab, enter the **Start date**.
3. In the **Main** tab, enter the real **Email address** and **Username**.
4. If you pay by bank, in the **Bank** tab, enter the **Account name**, **Sort code** and **Account number**.
5. Click **Update**.
6. Repeat steps 1 to 5 for each employee.

Directors

Do these steps only if the company has directors.

1. Click **Employees**, then **Update** for a director.
2. In the **Tax** tab, select **Director**, and enter **Director from**. If you do not know the date, enter 6 April of the current tax year.
3. If the director has cumulative NI, select **Director NI cumulative**.
4. Click **Update**.
5. Repeat steps 1 to 4 for each director.

Auto-enrolment status

Do these steps only if your pension provider is NEST, NOW: Pensions or The People's Pension. You then do not enter the status of each employee yourself.

1. Click **Setup** > **All Tools** > **Company update AE Pay Items**.
2. For **Company**, select the company.
3. For **Active or All workers**, select the file from your pension provider.
4. If your provider is NEST and you also have a file of inactive employees, select it for **Inactive workers**.
5. Click **Upload**.
6. On the next page, clear **Dry run**.

The **AE** Pay Item of each employee then has the **Migrated status** and **Migrated date** from the file.

If your provider is not one of these, use your spreadsheet in one of these ways:

- Upload the **Migrated status** and **Migrated date** of all employees with a Pay Item workbook: see Pay Item workbook upload/edit/download.
- Enter them for each employee, in step 2 of "Pay Items" below.

Pay Items

1. Click **Pay Item editor**, then select an employee.
2. If you did not upload the auto-enrolment status, in the **AE** Pay Item, enter the **Migrated status** and **Migrated date**. If you cannot see them, click **more**.
3. Click **Show statutory Pay Items**.
4. In the **PAYE** Pay Item, enter the **Previous pay** and **Previous tax**.
5. Repeat steps 1 to 4 for each employee.

Company

1. Click **Setup** > **Pay Definitions**, and create the Pay Definitions that you need, for example bonus or hours.
2. Click **Setup** > **Report Definitions**, and check each Report Definition, for example the RTI credentials.
3. If you pay by bank, add a bank file Report Definition, as in Add a bank file.
4. If you recovered statutory parental pay (SMP, SPP, SAP, ShPP, SPBP, SPBPNIRE or SNCP), enter it: see "Enter a recovered SMP value" in Updating state. Use the same steps for each parental pay, for example, **"SPP"**.
5. If you pay the Apprenticeship Levy, enter it: see "Enter an Apprenticeship Levy value" in Updating state.
6. If you claim Employment Allowance, check that it is claimed: see "Employment Allowance" in Set up a company after an import.
7. Do the steps in Set up a company after an import.

The company is then ready for its first pay run.

Upload from an HR or T&A system, or an employee CSV, with no FPS

Upload from an HR or T&A system

1. Click **Setup** > **All Tools** > **Company create or copy**, and copy a company.
2. Click **Setup** > **Report Definitions**, and add the integration for your HR or T&A system.
3. In the integration, for **Add from**, select the test employee of the copied company. Each new employee then gets the standard Pay Items of the test employee. Do not delete the test employee: it gives its Pay Items to each new starter after the upload too.
4. Bring in the employees through the integration with your HR or T&A system.

Upload from an employee CSV

1. Export an employee CSV from your previous payroll system.
2. Click **Setup** > **All Tools** > **Company create or copy**, and copy a company.
3. Add the **GB Upload workers from CSV** Data feed, and set its **Columns** to match the columns in your employee CSV: see Uploading workers with a data-feed.
4. For **Add from**, select the test employee of the copied company. Do not delete the test employee: it gives its Pay Items to each new starter after the upload too.
5. If you continue the employment, in **Columns**, add **"existing_employee": "True"**.
6. Click **Add**.
7. Click **Data feeds**, then **Upload...** for the Data feed, and select the employee CSV.

Existing employees

Do these steps only if you continue the employment from an HR or T&A system. An HR or T&A integration cannot set **existing_employee**, so you set it after the last run of the integration, and before you approve the first pay run.

1. Click **Setup** > **Report Definitions**, then **Update** for the integration.
2. Select **Dry run**, and click **Update**. The integration then cannot change the employees.
3. Create a file with a **works_id** column and an **existing_employee** column. Enter **True** for each employee.
4. Upload the file with **Employee bulk edit**: see Employee bulk edit.

5. In **Pay runs**, click **Redo** on the running pay run.
6. After you approve the first pay run, clear **Dry run** in the integration. The integration can then bring in new starters and changes again.

Add the missing information

1. If the company has directors, do the steps in "Directors" above.
2. Do the steps in "Auto-enrolment status" above. (If your provider is not one of those, enter the status as in step 2 of "Pay Items" above.)
3. If you start a new employment, enter the P45 of each employee, as in "P45 details" below.
4. Do the steps in "Company" above.

P45 details

1. Click **Employees**, then **Update** for an employee.
2. Click the **Tax** tab.
3. Enter the **P45 tax code**.
4. If the P45 shows week 1 or month 1, select **P45 week1 month1**.
5. Enter the **P45 leaving date**.
6. Enter the **P45 total pay to date**.
7. Enter the **P45 total tax to date**.
8. If the P45 shows a student loan, for **P45 continue student loan**, select the plan.
9. If the P45 shows a postgraduate loan, for **P45 continue postgraduate loan**, select **Yes**.
10. Click **Update**.
11. Repeat steps 1 to 10 for each employee.

Sometimes the **GB HMRC DPS** data feed supplies these values: see "Tax codes" in Set up a company after an import.

The company is then ready for its first pay run.

Next steps

- Import FAQ and Errors