

IRIS Upgrade Tool

**Guide to upgrading data
to Staffology from
Kashflow Payroll**

July 2025

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Introduction

This guide explains how to upgrade your data to Staffology Payroll using the Kashflow Payroll Migration Tool; it details information included in the upgrade and what is not; it describes how to resolve some of the issues that may arise from running the upgrade program.

Please read this entire guide before beginning the upgrade.

What does the upgrade include?

- Employer Details
- Employee Details
- Next Pay Day
- Year-to-Date amounts
- Pay Codes, Pensions, and Attachment Orders
- Car & Fuel Benefits
- Automatic Enrolment Details
- Holiday Leave Settings
- Employment Allowance indicator
- HMRC values
- Apprenticeship Levy indicator
- Apprenticeship Levy Allowance

What does the upgrade not include?

- SSP Payments
- NEST Employer Reference
- NEST Username and Password
- Kashflow Accounting login details
- Nominal Ledger Codes

What to do in Kashflow Payroll before upgrading your data

When running the final payroll for each company that you are upgrading:

1. For any employees where this is the last payment, enter their Leaving Date; you will not be able to process any further pay for employees with a Leaving Date once you have upgraded
2. Enter pay elements
3. Create and Approve Payslips
4. Finalise the pay period and submit FPS/EPS
5. Send BACS file, if required

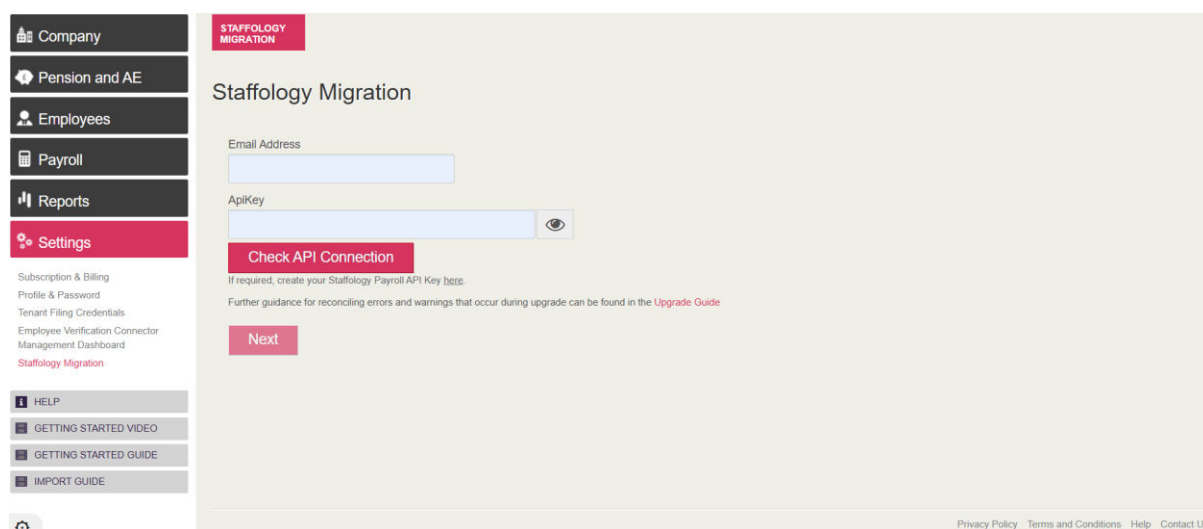
6. Finalise the pay period
7. Ensure you have created a Staffology Payroll account. To find out more information about creating a Staffology Payroll account, click [here](#).
8. Follow the IRIS Upgrade Tool guide

How to upgrade the payroll data

In Kashflow Payroll, ensure you have finalised the pay period for every pay frequency in each company you wish to upgrade BEFORE attempting to run the upgrade process.

Once you have finalised all payrolls and are ready to start upgrading your companies:

1. From Kashflow Payroll, click onto the Settings menu, and select Staffology Migration

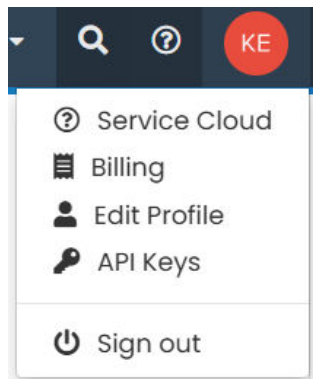


The screenshot shows the 'Staffology Migration' interface. On the left is a sidebar menu with options: Company, Pension and AE, Employees, Payroll, Reports, and Settings (highlighted in red). Below Settings are links for Subscription & Billing, Profile & Password, Tenant Filing Credentials, Employee Verification Connector, Management Dashboard, and Staffology Migration. At the bottom of the sidebar are HELP, GETTING STARTED VIDEO, GETTING STARTED GUIDE, and IMPORT GUIDE. The main content area is titled 'STAFFOLOGY MIGRATION' and 'Staffology Migration'. It contains an 'Email Address' input field, an 'ApiKey' input field with a toggle icon, a 'Check API Connection' button, and a 'Next' button. Text below the fields states: 'If required, create your Staffology Payroll API Key [here](#). Further guidance for reconciling errors and warnings that occur during upgrade can be found in the [Upgrade Guide](#)'. At the bottom right of the page are links for Privacy Policy, Terms and Conditions, Help, and Contact Us.

2. The screen displayed asks you to enter your email address and API key.

From this screen you can also view the Privacy Policy, Terms & Conditions, along with links to the Upgrade Tool guide, Kashflow Payroll's Knowledgebase and Contact Us page.

- a. In the Email Address field, enter the email address associated with your Staffology Payroll account. If you have not yet created an account, click [here](#) to find out more.
- b. In the API Key field, enter the API Key from Staffology Payroll. This can be found by clicking on your profile icon and then selecting API Keys:



API Keys

Warning: API Keys give full access to your account. Treat them with the same respect as you would your username and password.

Your Name *****_****_****_****_*****

[Create Key](#)

- Click on the API Key to reveal the details; you can then right click to copy the key.
 Back in the Staffology Migration screen, paste the key into the API Key field.
- Click the **Check API Connection** button to ensure that the tool recognises the Email Address and API Key entered
 - Click **Next** to begin the Upgrade process

STAFFOLOGY MIGRATION

Staffology Migration

Tax Year « 2025/2026

Select one or more companies

☐ Show companies with un-finalised period

☐	No	CID	Company Name	Employee Count	Ceased Trading	Periods Finalised	Upgraded	Status	Details	View in Staffology
☐	1	21371	2025/2026	1		Yes	Yes	100% - Successful		view

Further guidance for reconciling errors and warnings that occur during upgrade can be found in the [Upgrade Guide](#)

[Migrate Data](#)
[Refresh](#)
[Staffology Payroll](#)

3. The **Staffology Migration** screen displays a list of your existing companies along with:

- Company Number
- Company ID
- Company Name
- Employee Count
- Ceased Trading status

- Period Finalised status
 - Upgraded status
 - View details about companies that you have previously upgraded, or attempted to upgrade
 - Link to open the company in Staffology Payroll once it has been upgraded
 - Option to show or hide companies that have not been finalised in payroll (you can only migrate companies where payroll is finalised)
 - Option to select the tax year (you can upgrade companies that are in the current or previous tax year)
 - Button to open Staffology Payroll's Dashboard; this will display the list of companies you have migrated or created in Staffology Payroll
4. To select the companies you want to upgrade, click either the 'select all' box or choose the relevant boxes in the first column. The 'select all' option will only select the companies available to be upgraded, but you can manually choose previously upgraded companies if required.
 5. Once you have selected the companies you want to upgrade, click the Migrate Data button. This begins the upgrade process.
 6. You will see progress indicators and the status of each company as the upgrade process performs; the advancement of each company's upgrade shows in the **Status** column. Click the **Refresh** button to update the progress status.
 7. Once upgrade is complete, each of your selected companies will show a status of 100% along with the outcome of the upgrade:
 - a. 100% - Successful: The company has fully upgraded with no errors or warnings
 - b. 100% - Completed with warnings: The company has upgraded but some data may have not transferred to Staffology Payroll and will require amendment
 - c. 100% - Failed: The upgrade process failed for the company
 8. Click the **view** link in the **Details** column for companies that completed with warnings or failed for further information about what caused the warnings/errors. You can export the list of warnings/errors by clicking the **Export Options** menu. Click **Back to list** to return to the **Staffology Migration** screen

STAFFOLOGY MIGRATION			
Staffology Migration			
Warning and Error Messages for: STAT MIGRATION TEST Export Options			
☒ All ☐ Warning ☐ Error			
No	Company	Type	Errors & Warnings
1	STAT MIGRATION TEST	Warning	Employee [43731] is using holiday accrual which works differently in Staffology. Please check accrual calculations on your next payroll run.
« Back to list			

9. Where the company has upgraded, either because it was **Successful** or **Completed with Warnings**, click the **View** link in the **View in Staffology** column open the company in Staffology Payroll. Alternatively, click the **Staffology Payroll** button to open Staffology Payroll's dashboard, where you can view all upgraded companies.

What you need to do now in Staffology Payroll

Important checks after the upgrade

After completing the upgrade, open Staffology Payroll and make the following checks:

- Check the employees
- Create new employee records in Staffology Payroll, if required
- Check employee To-date values
- Check the Pay Schedules and Next Pay Day
- Check Pay Codes have upgraded correctly, including Attachment of Earnings Orders. If you pay benefits to employees make sure that the 'Is Notional' indicator is set for the Benefit Pay Codes.
- Check Pensions
- Check miscellaneous items
- Check Opening Balances
- Input Statutory Sick Pay (SSP) details
- Check Statutory Payments (SMP/SPP/ShPP/SAP/SPBP) details. For ongoing statutory absences, make sure that the 'Add Existing Payments Made' option is selected in the Absence screen, along with the value of the Statutory Payment that has already been paid to the employee
- Check Holiday details. If you use an Accrual method of processing holiday leave make sure they are configured correctly
- Parallel run the next payroll with Kashflow Payroll

Step 1 Check the employees

In Staffology Payroll, click on the **Reports | Employees** menu, choose **Employee Export**, then **Download CSV**.

In Kashflow Payroll, print **Employee** reports by clicking on the **Reports** menu and select **Employee**. From here there are a range of employee reports you can print: we suggest using the Contact Details, Authority Details, Absences and YTD reports. Click on the **Export Options** menu to create the report in Excel format.

Compare your Kashflow Payroll reports with Staffology Payroll's Employee Export to check that all your employees transferred correctly.

Step 2 Add new employees

If you have new employees that were not added to Kashflow Payroll prior to the upgrade to Staffology Payroll you can set up their record by clicking on the **Employees** menu and then the **Add New** button. You will be then guided through a series of screens where you can enter details for the new employee.

Step 3 Check the Pay Schedules and Next Pay Day

Check that the **Pay Schedules** and **Next Pay Day** are correct for each pay frequency: in Staffology Payroll, click on the **Employer Name** in the top right-hand corner and select **Settings | Pay Schedules**.

In Kashflow Payroll, click on the **Company** menu and select **Setup Details** to view the pay dates for each pay frequency in the **Payroll Control Settings** tab.

Step 4 Check random employees for correct to-date figures

In Staffology Payroll, click on the **Employees** menu, select an employee in the list to open the employee details, and select **More | Opening Balances** to check the figures.

In Kashflow Payroll, click on the **Employee | Opening Balances** screen to view the year-to-date figures.

Step 5 Check Pay Codes and Attachment Orders

In Staffology Payroll, click on the **Employer Name** in the top right-hand corner and select **Settings | Pay Codes** to view the **Pay Codes**, including **Attachment Orders**. These screens will contain all pay codes and attachments that have been transferred from Kashflow Payroll.

To check individual employee pay codes and attachments, click onto the **Employee** menu and select the employee. In the **Pay Options** tab you can view the **Additions and Deductions** migrated for the employee.

In the **Attachment Orders** tab you can view Attachment of Earnings orders migrated for the employee.

If you process any notional Benefit payments in payroll check that these have been upgraded accurately. Click on the **Employer Name** in the top right-hand corner, select **Edit Details**, then

choose **Pay Codes**. In this list, look for any benefit pay codes you have configured. Select each one and click **Advanced Settings**. Ensure that the **Is Notional indicator** is set for the benefit.

Step 6 Check Pensions

To view the **Pension Details** upgraded from Kashflow Payroll, click on the **Employer Name** in the top right-hand corner, select **Edit Details**, then choose the **Pension** tab.

Click on the **Pensions** menu to access information regarding the pension schemes in use. Amend or enter additional data where required.

Please Note: If the pension provider is not available Staffology Payroll after the upgrade is complete, PAPDIS selects automatically in the Pensions | Scheme – choose pension scheme | Provide | CSV Format screen.

To check the pension details for each employee, click on the **Employees** menu and select an employee in the list to open the employee details. Amend or enter additional information on the **Pension** tab if required.

Step 7 Check miscellaneous items

Due to minor differences between Kashflow Payroll and Staffology Payroll, you should check that some information has transferred as expected.

Click on the **Employer Name** in the top right-hand corner, select **Settings**, choose the **Departments** option, then check and amend the **Code** and **Name** of the **Department** if required.

Click on the **Employer Name** in the top right-hand corner, select **Settings**, and choose the **Working Patterns** option, then check and amend the **Working Patterns** if required.

Step 8 Check Opening Balances

To view the Statutory Payment Recovered and Compensation; and CIS Deductions Suffered values where applicable. Click on the **Employer Name** in the top right-hand corner, select **Edit Details**, and choose **Opening Balances** from the **More** menu.

Step 9 Input Statutory Sick Pay (SSP) details

Create any SSP payments manually.

If an employee had an ongoing SSP absence in Kashflow Payroll, you must enter the absence details into Staffology Payroll.

Click on the **Employees** menu and select an employee in the list to open the employee details, then select the **Leave** tab.

Click **Add Leave** and choose **Type – Sick Leave** on the displayed screen and input the first day of the current period of sickness in the **From** field and the last day of the sickness period in the **To** field and 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.

The amount of SSP shown may be incorrect if you have already paid some of it in Kashflow Payroll; 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 and tick the **Override the calculated value** box to alter the amount displayed in the **New Value** field.

Step 10 Check Statutory Payment (SMP/SPP/ShPP/SAP/SPBP) details

We recommend that if you are currently paying an employee **Statutory Maternity Pay** (SMP), **Statutory Paternity Pay** (SPP), **Shared Parental Pay** (ShPP), **Statutory Adoption Pay** (SAP), **Statutory Parental Bereavement Pay** (SPBP) or **Statutory Neonatal Care Pay** (SNCP) in Kashflow Payroll, check the details in the relevant **Employee | Leave** screen to ensure all fields are populated accordingly.

Click on the **Employees** menu and select an employee in the list to open the employee details, then select the **Leave** tab to view the Statutory Payments.

Pay special attention to the **Add existing payments made** indicator. If the employee has an ongoing absence and was already receiving payment prior to upgrading the indicator should be set, and the amount of statutory payment received so far should be populated in the **Statutory Pay** field. If the indicator is unticked and the Statutory Pay field is blank, you can enter these details yourself.

Due to the differences in how Kashflow Payroll and Staffology Payroll calculate the payments, the amount of the Statutory Payment shown may be slightly different. If you wish to adjust the amount of the Statutory Payment 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 Statutory Payment row and tick the **Override the calculated value** box to alter the amount displayed in the **New Value** field.

Please Note: 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.

Step 11 Input Holiday Leave details

Employee Holiday Leave Setup

Click on the **Employees** menu, select an employee to open the employee details screen and click on the **Leave** tab; select **Leave Settings** and enter the information where required.

Default Holiday Leave Setup

You can also enter default holiday information into Staffology 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, select **Edit Details** and click the **Leave** tab.

Please Note: We strongly advise that you check the Allowance Resets on date in the Leave tab in the Employer's details to ensure the holiday leave year updates correctly.

Step 12 Parallel run the next payroll along with IRIS Payroll

Check the correct amounts calculated in Staffology Payroll.

We strongly recommend that you parallel run Staffology Payroll with Kashflow Payroll for at least one payroll period after the upgrade. If this is not possible, check the first period's figures thoroughly.

Errors and Warnings

Errors

If the upgrade has failed due to errors occurring during the process, you will need to return to Kashflow Payroll and make the required amendments. Once you have actioned the necessary adjustments, you can process the upgrade again.

Warnings

Where a company upgrades but warnings are present, you can either make the amendments in Staffology Payroll or return to Kashflow Payroll and update the data before attempting to upgrade again.

Should you decide to make the amendments in Kashflow Payroll to perform the upgrade again, you must delete the originally upgraded company from Staffology Payroll. To delete a company:

Click on the **Employer Name** in the top right-hand corner, select **Edit Details**, then choose **More | Delete Employer**.

Due to some minor differences between Kashflow Payroll and Staffology Payroll, some warnings must be dealt with in Staffology Payroll, as they cannot be dealt with in Kashflow Payroll, including but not limited to:

- You must input the **NEST Employer Reference**, **NEST Username**, and **Password** in IRIS

Next Gen if the pension provider is NEST and you want to connect directly.

- One pension deduction per employee will transfer, and any employees with multiple pension deductions in Kashflow Payroll; must be manually amended in Staffology Payroll. The pension with the lowest ID number will transfer to Staffology Payroll.
- If the employee and employer pensions have different pension types in Kashflow Payroll, the employee's **Pension Rule** will apply for both pensions in Staffology Payroll.
- Where multiple absences exist, e.g., Statutory Maternity Leave (SMP), that overlap in the same pay period, only one will transfer, and you must make the required amendments manually.
- Staffology Payroll does not support specific **Pay Codes**, e.g., SSP Contra, Student Loan Refunds, Net to Gross, etc. You must check your employees' pay is processed accurately if using unsupported pay codes.
- If using overtime factors, e.g., double time, to ensure that your employees are processed accurately, check that the employee's **Base Hourly Rate** is correct.
- Half-day holidays for employees will transfer to Kashflow Payroll as mornings and can be updated if required.