

# Start of Year Guide 2023



**The purpose of Start of Year is to make sure all your employees are paid correctly from the beginning of the new school year.**

It comes down to five questions:

1. Are your school's term dates correct for 2023?
2. Do you need to restart any term-time-only auto-paid non-teachers or fixed-term teachers?
3. Do you need to make changes to your existing teacher and non-teachers' pay details, such as employment status, hours, allowances, funding source, leave or annualisation?
4. Do you have new staff in 2023?
5. Do you need to terminate any roles?



**7 December 2022**

Start of Year opens in EdPay

**24 February 2023**

Start of Year closes in EdPay



## Get more help

- Start of Year 2023 Tool Box: [EdPay | How to | Start of Year](#)
- Your payroll advisor: [support@novopay.govt.nz](mailto:support@novopay.govt.nz), 0508 668 6729
- Training guides and videos: [EdPay | Training](#)
- Start of Year actions tool: [EdPay | How to | Start of Year | Start of Year actions tool](#)



Check your principal and other authorised users can access EdPay. You can request a password reset through the EdPay login screen, or call your payroll advisor if needed. To add or remove authorised users you need to submit an EdPay5 or EdPay5c form.

## Checklist — Start of Year step-by-step process



**FOR YOUR RECORDS:** Check the job information we have for your employees by downloading your Start of Year report. Use this to identify any changes that need to be made for existing staff.

[EdPay>Start of Year screen> Summary screen > Download CSV](#)

You do not need to send this report to Education Payroll – it is to help you organise your Start of Year processing (page 3).



**1. Are your school's term dates correct for 2023?**

Check that your school's 2023 term 1 start date and term 4 end date are entered and correct. (page 5)

[EdPay > Start of Year screen> School Term Dates](#)



**2. Do you need to restart any term-time-only auto-paid non-teachers or fixed-term teachers?**

Restart the employees who worked at your school last year and need to be restarted for 2023. (page 6)

[EdPay > Start of Year screen > Restart Job](#)



**3. Do you need to make any changes to your existing teacher and non-teachers' pay details such as employment status, hours, allowances, funding source, leave or annualisation?**

To change an employee's hours for 2023 do this in the Start of Year screen (page 8). For all other changes do these in the employee's job details page or on a form (page 10). Use the [Start of Year actions tool](#) on our website for more assistance.

[EdPay > Start of Year screen > Change Hours](#)

[EdPay > My Employees > click employee's name > Edit Pay Details](#)



**4. Do you have new staff in 2023?**

Set up new staff in EdPay and submit teacher salary assessments if needed (NOVO7t). (page 12)

[EdPay > My Employees > add New Employee](#)



**5. Do you need to terminate any roles?**

Complete terminations for staff who are NOT returning in 2023 — you will process these in EdPay outside the Start of year screen. Do not terminate unless you are sure the staff member will not be returning. (page 12)

[EdPay > My Employees > click employee's name > Terminate Job](#)



**FOR YOUR RECORDS:** Download a final copy of the Start of Year report, and check that all your employee information has been entered and is correct for the 2023 school year.

[EdPay> Start of Year screen> Summary screen > Download CSV](#)

Retain a copy of the report for your school records.



You can making changes in the Start of Year screen until 24 February 2023 at 5pm. Any changes after this period need to be completed using your regular EdPay process or submission by forms.

You can make other changes in EdPay while Start of Year is still open.

## Start of Year screen

**EdPay** – access EdPay through <http://www.edpay.nz/>

Log in using your username (7-digit MOE number) and password, and click **Accept & Login**

**EdPay Start of Year screen** – this is the screen that you will be using to enter some of your Start of Year information.

To open the Start of Year screen, sign-in to EdPay, go to your 'My Employees' screen on the left-hand side. Once you are in the employee dashboard, click on the green 'Start of Year' button on the right-hand side. You can restart employees, and change hours for eligible employees here.

Demo School 6 (53886)

My School >

My Employees

Employees Dashboard

Reports

Timesheets

Leave

Employees: 44

All Employees Permanent Fixed Term Casual Reliever

Name MoE# Contract Title Tenure Status

<input type="checkbox"/>	AdminS, Demo	5388577	01 Admin - Executive/Clerical	Permanent	✓
<input type="checkbox"/>	AdminS, Demo	5497040	02 Principal	Permanent	✓

## Start of Year report

The Start of Year report is a tool to show you all of the Start of Year related data we hold for your employees.

The report may include multiple rows per employee, as it lists both the current and future job details that we hold, as well as individual rows for any allowances employees have. You will need to check each row is accurately reflecting their pay information for 2023.

### Download your Start of Year report in EdPay

1. Go to **EdPay > My Employees > Start of Year screen > Summary Tab**
2. Select 'Download CSV' to download your report.
3. Save the file to your computer and use it as a worksheet to note all the entries you need to make for your employees. This will make it easier to prepare and check during your Start of Year process.

School Term Dates Restart Job Change Hours Summary 1

MoE#	First Name	Surname	Job#	Employment Status	Start Date	End Date	Hours
4563222	Joshua	Warren	03	N/Teach Fixed-Term - T/Sheet	01/07/2022	14/12/2022	40:00
4221319	Ronald	Gomez	04	N/Teach Fixed-Term Part-Time Term-Time - Auto	02/05/2022	14/12/2022	16:30
4221319	Ronald	Gomez	05	N/Teach Fixed-Term Part-Time Term-Time - Auto	17/10/2022	14/12/2022	10:60
4729761	George	Burton	04	N/Teach Fixed-Term Part-Time Term-Time 5+ - Auto	09/03/2022	14/12/2022	24:60

Close 2 → Download SOY Report

The Start of Year report is available from 7 December 2022 to 24 February 2023



You can re-download the report CSV file at any time and it will show the up-to-date changes you have made as you enter employee information into the Start of Year screen. You can download regularly to track your changes.

## Example of a Start of Year report

When your employees have been restarted, you will see their occupancy show **twice** in the Start of Year report—one line for the occupancy ending in the 2022 school year, and a second line starting in the 2023 school year — this is how you know they have been restarted correctly.

There will also be additional lines for allowances. Use these to see if you need to restart their allowance in EdPay for 2023, for example fixed-term salary units or Māori immersion teaching allowance (MITA).

See our website for allowances that automatically restart when an employee is restarted in the Start of Year screen: [EdPay | How to | Start of Year | Start of Year preparation | Start of Year allowance summary](#)

Use your Start of Year report and Pay Ending report to determine what you need to do for your current employees in the Start of Year screen.

2023 Start Of Year Report - School: 53886 - This report is for your school use only. Do not send this report to the School Account Team.

MoE#	Surname	First Name	Job #	Employee Job Title	Start Date	End Date	Hours (HH)	Pay Code	Allowance Start	Allowance End	Rate Type	Rate of All	Fund	Departme	Percentage
4563222	Warren	Joshua	3	N/Teach F Learning A	1/07/2022	14/12/2022	4000	Salary					11010	26600	100
4221319	Gomez	Ronald	4	N/Teach F Non-Teach	2/05/2022	14/12/2022	1630	Salary					11010	26600	100
4221319	Gomez	Ronald	5	N/Teach F School Sec	17/10/2022	14/12/2022	1060	Salary					11010	58010	100
4729761	Burton	George	4	N/Teach F Non-Teach	9/03/2022	14/12/2022	2460	Salary					11010	48032	100
4729761	Burton	George	4	N/Teach F Non-Teach	9/03/2022	14/12/2022	2460	National C	9/03/2022	14/12/2022	HOURLY	0.29	11010	48032	100
4729761	Burton	George	4	N/Teach F Non-Teach	9/03/2022	14/12/2022	2460	National C	9/03/2022	14/12/2022	HOURLY	0.29	11010	48032	100
5388577	Admin5	Demo	1	N/Teach P Non-Teach	2/06/2022		4000	Salary					11010	46860	100
4712144	Webb	Marilyn	1	N/Teach P Non-Teach	2/06/2022	30/01/2023	1460	Salary					11010	46860	100
4712144	Webb	Marilyn	1	N/Teach P Non-Teach	2/06/2022	30/01/2023	1460	First Aid A	2/06/2022	30/01/2023	HOURLY	0.35	11010	46860	100
4712144	Webb	Marilyn	1	N/Teach P Non-Teach	2/06/2022	30/01/2023	1460	First Aid A	2/06/2022	30/01/2023	HOURLY	0.35	11010	46860	100
4361500	Casey	Travis	2	N/Teach P Non-Teach	23/07/2022	30/01/2023	1100	Salary					11010	26600	100
4361500	Casey	Travis	3	N/Teach P Non-Teach	31/01/2022	30/01/2023	1130	Salary					11010	26700	100
4570752	Jimenez	Kathryn	1	N/Teach P Non-Teach	25/08/2022	30/01/2023	2160	Salary					11010	26600	100
4884227	Joseph	Sadie	1	N/Teach P Non-Teach	24/07/2022	30/01/2023	2730	Salary					11010	26600	100
4729240	Mckenzie	Wm	1	N/Teach P Non-Teach	26/07/2022	30/01/2023	3000	Salary					11010	26700	100
4630321	Moss	Miguel	1	N/Teach P Non-Teach	31/01/2022	30/01/2023	2600	Salary					11010	33570	100
4670392	Quinn	Joey	1	N/Teach P Non-Teach	20/06/2022	30/01/2023	2430	Salary					11010	26800	100

## Pay Ending report

The Pay Ending report shows employees whose occupancy is due to end soon, and who will not be paid after those dates. It also shows employees who have already left your school, but who the school has not yet terminated.

1. Go to [EdPay > Reports > Select Pay Ending report](#)
2. Download CSV

If the report shows employees who:	Then:
are returning to your school in 2023	enter their start and end dates in the Start of Year screen in the Restart Employee tab.
are leaving your school and not returning in 2023	terminate them in EdPay.
have already left your school	terminate them in EdPay to do a retrospective termination. This generates any termination pay due.

## Update your school's term dates

Your school's term dates must be correct in EdPay so that staff are paid correctly in 2023.

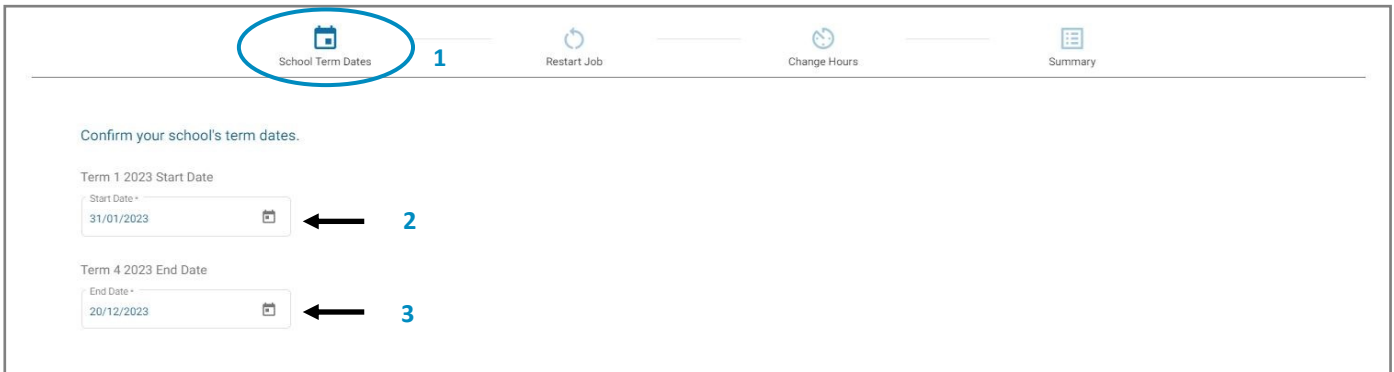
If your school's dates are different to the published Ministry dates you need to let us know.

**Note:** school term 4 dates that fall on a Friday should be entered in Start of Year screen as the following Sunday.

	2023 term 1 start date	2023 term 4 end date
Ministry published term dates	30 January 2023	20 December 2023

### To advise us of your school's term dates

1. EdPay > My Employees > Start of Year screen > School Term Dates tab
2. Enter your school's term 1 2023 start date.
3. Enter your school's term 4 2023 end date.



- Your school's term dates are the dates your school opens and closes for instruction. If you do not enter your school's 2023 term dates they will default to the Ministry's published dates above.
- The term dates will 'auto-save' in this tab, ready for your next steps.
- If your school's 2023 term 4 end date is on a Friday (1, 8 or 15 December 2023), please enter in the following Sunday as your term 4 end date (3, 10 or 17 December 2023 respectively).
- The 2023 term dates entered for your school will not make changes to your employees' individual start and end dates.



You **cannot** change your term 1 2023 start date after the Start of Year screen closes on 24 February.

Your term 4 2023 date **can** be amended in the End of Year screen when it opens in term 4 2023.

## Restart employees and set their start date

Restart **fixed-term teachers** and **term-time-only non-teachers** who are returning to your school in 2023.

Note: they must be restarted before you can change their hours in the Start of Year screen, or before you use EdPay to make other changes, such as adding allowances for 2023, changing funding or submitting leave without pay.



Your information will be lost if you navigate away from this tab without clicking submit. We recommend using your Start of Year report to determine who is returning, and submit them in small batches in case of interruptions.

### To restart your employees

1. Go to [EdPay > Start of Year screen > Restart employees tab](#).
2. Use the search box to select your returning employee. Use their MOE number, name or select from the dropdown box (only eligible employees will appear).
3. Enter in their start date for 2023 and their expected end date for 2023.
  - Permanent term-time-only employees only need a start date entered. Their end date will not be editable.
  - Fixed-term teachers will only need an end date entered, their start date is always 28/01/2023 (see blue box below for more information).
4. Repeat for any other eligible employees then **Submit**.

Once you have finished restarting all returning employees' jobs, you can use the staff counter and dropdown search box to confirm who needs to be terminated using your regular EdPay or forms process.



There is a counter at the bottom of the tab to show you how many employees' jobs are left to restart. It will update as you restart or terminate your employees.

Your counter should be zero when the Start of Year screen closes on 24 February 2023.

**If the employee has multiple jobs that they are returning to at your school, you will need to restart all jobs separately.**

### Fixed-term teachers

If a fixed-term teacher is:	Then:
starting between 28 January and 8 February	their start date in the Start of Year screen will be 28 January. This cannot be changed. Enter their end date only. Their pay will be backdated to 28 January 2023.
starting after the first gazetted day of term 1 (on or after 7 February) - a part-time teacher, who <b>will</b> work all their regular hours in the week starting 6 February	their start date in the Start of Year screen will be 28 January. This cannot be changed. Enter only their end date. As the teacher will work all their regular days for the week starting 6 February (eg if they only work on Friday), no action is needed. Their pay will backdated to 28 January 2023.
starting after the first gazetted day of term 1 (on or after 7 February) - a teacher who <b>will not</b> work all their regular hours in the week starting 6 February	if the teacher <b>hasn't</b> worked all their regular hours for the week of the 6 February, due to starting later, book leave without pay (LWOP) from 28 January to the day before they return. Their pay will begin the day after their LWOP ends.

## Term-time-only non-teachers

Enter start dates for all returning term-time-only auto-paid non-teachers that show in this tab. These employees will be paid from the start date that you enter.

**If their start date overlaps with annual leave**, check your PP19 SUE report to see the end date for their annual leave. Enter the day **after** the annual leave ends as their start date. Then submit a time sheet for the hours that were worked before the employee's entered start date.

## Possible errors and their meanings

If there are errors for any of the employees you are trying to restart, you will not be able to submit any of the employees that you have selected in this screen. You need to resolve the errors or remove that employee's selection before you can submit.

Here are some possible errors that can occur within the Restart Employees tab in the Start of Year screen, and explanations on how to resolve them:

Error	Explanation
Duplicate job selected	The employee has more than one job at your school, but the same job number has been entered
Occup term date must be greater than commence Date	The end date is before the start date. Re-enter the start date and/or end date correctly
This employee is restarting in a paid holiday pay period. Please restart them at the end of the paid leave period. Any hours worked prior to this start date process a timesheet using the Paycode TXTRA	This employee has a conflict between their annual leave booking and the requested start date. You will need to restart the employee after their annual leave booking has ended, then submit a timesheet for the unpaid hours during their annual leave booking
Start date must be on or before DD/MM/YYYY	You have restarted an employee too late in the school year. Please amend dates or speak to your payroll advisor
End date cannot fall on a public holiday for a teacher	Check 2023 calendar and amend the end date
End date cannot fall on a Friday or Saturday for a teacher. Please select the immediately following Sunday	Teachers working their full week need to be ended on a Sunday to ensure they are paid correctly. Enter the Sunday as their end date
End date cannot fall on the last day of term or during term break for a teacher. Please select the last day of term break	If a teacher is working until the end of term 4, select 27/01/2024 as their end date. If their end date is during the year, select the last day of term break, so the school holiday can be paid correctly

## Change hours for 2023 school year

Once your fixed-term teachers and term-time-only non-teachers have been restarted, you can make changes to their average weekly hours for the 2023 school year in the Start of Year screen.

Permanent part-time teachers do not need to be restarted, so their hours can be changed at any time.

You can make changes to their hours in this tab if they are remaining as part-time teachers or part-time term-time-only employees without a work pattern. Please do not change from part-time to full-time using this screen. You **cannot** make changes to term-time-only employee's hours if they already have a work pattern loaded in EdPay. These employees will not show in the Change Hours tab.

For permanent term-time-only non-teachers, you will only be able to enter in a start date. The end date is not editable in the Start of Year screen and will be left blank.

For all other changes in hours, please advise their new hours as a pay details change (page 10).



Use the [Start of Year actions tool](#) on our website if you need help to know where to make these changes.

Employees need to be restarted in the Restart Employees tab. If they do not show in the Change Hours tab, after you have restarted them, they are not eligible to have their hours changed in the Start of Year screen.

1. Go to [EdPay > Start of Year screen > Change Hours tab](#)
2. Enter in the new **average weekly hours** for the employee for the 2023 school year. The hours will auto-save in this tab. Changes can be made here until day 10 (the second Friday) of the **first pay period** that the employee is paid in, for the 2023 school year.  
Changes after this date will need to be made as a pay details change instead.

**Note:** the new hours entered in this tab are effective from the employee's start date in term 1 2023.

School Term Dates		Restart Job		Change Hours		Summary	
Name	MoE#	Contract Title	Start Date	End Date	Hours		
McKinney, Misty	4306437	03 - Teacher	28/01/2023		HH * 20	MM * 00	← 2
Sims, Darla	4694589	01 - Teacher	28/01/2023		HH * 20	MM * 00	

## Change hours tab: Possible errors and their meanings

There may be some errors that show up when you are changing hours for a part-time teacher or a term-time-only employee. The hours in the tab will only auto-save if the hours you have entered have passed all validations.

Here are some possible errors that can occur within this tab and some explanations to help resolve them. For more help, call your payroll advisor.

Error	Explanation
The position fraction is greater than 100	The employee's hours are more than full-time. Amend hours worked as per employee's agreement. To change an employee to full time, change the hours as a pay details change outside the Start of Year screen
There are no employees eligible for a change of hours at your school	You will need to make all changes to hours with a Pay Details change for your employees (they may all have work patterns)
The position fraction for a secondary/area school part-time job cannot be more than 90	Secondary/area school part-time teachers can't exceed 22:30 hours. If you are increasing a part-time teacher to full-time please complete a pay details change outside the Start of Year screen
Both hours and minutes cannot be 00	Amend hours and minutes. If you are wanting to change an employee to timesheet only and remove the auto-paid hours, you will need to make this change with a pay details change, outside the Start of Year screen
Minutes must be between 00 and 59	Hours and minutes must be entered in the 00:00 format

## Changes for returning employees

If you are unsure about where to make changes for your employees, use the [Start of Year actions tool](#) on our website. This will tell you if the changes need to be submitted through the Start of Year screen, using your regular EdPay processes or on a form.



You cannot use the Start of Year screen in EdPay to make changes for yourself, principals, annualised employees or other authorised users.

If changes are required for:

- the **principal**, complete the appropriate forms and send them to [support@novopay.govt.nz](mailto:support@novopay.govt.nz)
- **employees** who are continuing to have their pay annualised in 2023, or employees who wish to be annualised from 2023. They will need to have an EP23nt form completed and sent in by 30 January to ensure they are processed before the employee starts in 2023. Annualisation for 2023 starts on 31 January. See our website for more information on annualisation: [EdPay | Tools to help you | A-Z | A | Annualisation](#)
- **you and other authorised users**, ask your principal to enter details in the Start of Year screen or send the appropriate forms to [support@novopay.govt.nz](mailto:support@novopay.govt.nz)

Note: ensure Start of Year processing is completed for authorised users before they start in 2023, or they will not be able to access EdPay and complete Start of Year processing for your school's employees.

### Pay details change for returning employees

For changes to hours and FTE, work pattern, tenure, employment status, grade, step and pay rate.

For annualised employees please provide 2023 information on a EP23nt.

1. Go To [EdPay > My Employees > click the employee's name > go to the job details screen](#)
2. Look on the left-hand side under their name, to ensure you have the correct job number selected (for employees with more than one active job).
3. Press the pencil button (top right) beside their job information to edit their pay details.
4. Enter in the effective date for the changes.
5. Check the requested changes, then send.

You will be able to see the details of the pay details change request in your activity history screen.

**Note:** if the change requested is effective from the beginning of the 2023 school year, for teachers use 28 January 2023, and for non-teachers use their start date for 2023 as the effective date.



You will only be able to make one pay details change request at a time for each employee, (until processed) so if you need to change more than one detail, eg change hours AND tenure, please make these changes within one request.

## Allowances

Employees may be eligible for allowances, as specified in their employment agreement. Use the Start of Year report to gather the following allowance information **for each employee**:

- do they need any allowances to be added?
- do they need any allowances to be removed?
- do any current allowances need the rate or number of units updated?
- do any current allowances need to have start and end dates updated?
- is the employee missing any allowances?

The start and end dates of an allowance may differ from the employee's job start and end dates. Before making changes to an employee's allowance dates, ensure the employee has been restarted in the Start of Year screen and that job start and end dates have been entered correctly.

The allowance dates must fall within the employee's job start and end dates.

**Note:** some allowances (eg salary units (UFT), mentor/tutor teacher allowance (MTA/TTA) or Māori immersion teaching allowances (MITA) automatically stop at the end of each year.

1. Go to [EdPay > My Employees > click the employee name > go to their Job Details screen](#).
2. Check the allowance to be extended and note the end date (skip this step if new allowance).
3. Press the + button beside Allowance entitlements.
4. Select Add/Update for the required allowance, or send in a form as per on-screen instructions.
5. Enter in the details, such as start date/end date, allocation. To extend an allowance, start the allowance the day after the previous allowance finishes (for teachers this day will often be 27 January 2023).
6. Press Continue. Check the details. Press Submit.

**Note:** for salary units, the allocation you request is the **total** allocation you want this employee to have for the entered dates.

See our website for allowances that automatically restart when an employee is restarted in the Start of Year screen: [EdPay | How to | Start of Year | Start of Year preparation | Start of Year allowance summary](#)

## Job funding

**Funding/departments code change** — to make changes to an employee's funding or department code for 2022, please make sure they have been restarted for the year.

1. Go to [EdPay > My Employees > click the employee name > go to their Job Details screen](#).
2. Press the pencil icon beside Job Funding.
3. Enter in the start date of the change (for the 2023 school year, enter 28/01/2023 for teachers).
4. Enter in the funding source and department code with the percentage (100% if all the same funding code, or split the percentage if there is a split funding for the employee).
5. Check the details and press Send.

## Set up new staff

New employees or new jobs for existing employees should be set up in EdPay. This needs to be done as soon as possible so they are paid for their new role in the pay period they start their role. Please ensure the designation code you select is correct for the employee's role.

If your teacher is new to the state education service, has not worked in the state education service for more than two years, or has additional qualifications that have not yet been salary assessed, then please submit the relevant salary assessment form for them so that they can be paid correctly.

### To set up a new employee at your school

1. Go to [EdPay > My Employees > click + New Employee](#)
2. Make sure you have all the employee's details as per the checklist.
3. Provide the MOE number (if you have it) and IRD number (9 digits).  
Fill out the remainder of the required fields and Submit.
4. Go to your activity history and check that the status of the ticket is either 'successful' or 'submitted'. If the status is 'draft' then you have not completed the 'add employee' process. You need to reopen the draft, check for errors in each tab, press 'next' and then 'submit'. Check activity history again.

**Note:** if this is an employee who is brand new to the education sector, the request will show in your activity history as a New hire. If the employee is already in the education sector, and the IRD and MOE number have validated, they will show in your activity history as an Onboarding request. You will need to confirm their personal and financial details in EdPay once this request shows as successful.

## Salary assessment

Please see our website for guides and check lists to help you submit salary assessments: [EdPay | Tools to help you | A-Z | S | Salary assessment](#)

## Terminations

If you have employees that you know are not going to be returning in 2023, you need to terminate their job in EdPay.

Use the Start of Year report to confirm which employees are not returning. Make a note of their last day and the reason for ending the contract. Ensure you have their resignation letter or confirmation from the principal saved for your school records.

**Note:** when completing a teacher's termination, if they worked up until the end of term 4 2022, you should enter their termination date as 27/01/2023. If they are moving to a new school enter the termination reason as transfer to another school, so they can be paid for their new job from 28 January 2023. If you have questions about this, please call your payroll advisor.



This is the end of the Start of Year Guide

See our website for more assistance: [EdPay | Training](#)