Start of Year Guide 2024

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 2024?

2. Have you restarted all 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? E.g. hours, employment status, funding source, leave, annualisation or allowances?

4. Do you need to onboard any new staff in 2024?

5. Do you need to terminate any jobs?

4 December 2023	Start of Year opens in EdPay
5pm 1 March 2024	Start of Year closes in EdPay

Get more help

- Start of Year toolbox (EdPay.govt.nz)

- Your payroll advisor: support@novopay.govt.nz or phone 0508 668 6729

- EdPay training guides and videos (EdPay.govt.nz)

- Start of Year actions tool (EdPay.govt.nz)

> ⚠️ Check your principal and other authorised users can access EdPay.
> Use the 'Forgot my password' link on the EdPay log in screen.
> To add or remove EdPay authorised users submit an EP5 or EP5c form.

Start of Year checklist

1. Download your Start of Year report (page 3)

2. Update your term dates for 2024 (page 4)

3. Restart any fixed-term teachers or term-time-only non-teachers returning in 2024 (page 5–7)

4. Make employee's pay detail changes e.g. hours of work, employment status, funding source, leave, annualisation or allowances (pages 8–12)

5. Terminate any jobs for staff who are not returning in 2024? (page 12)

6. Set up new employees or new jobs for existing employees (page 13)

7. Download a final copy of the Start of Year report and check all information has been entered correctly for 2024. Keep a copy of the report for your school records. Education Payroll doesn't need a copy of this report.

> ⚡ You can making changes in the Start of Year screen until 5pm, 1 March 2024.
> Any changes after this period need to be completed using EdPay or a form.
> You can make other changes in EdPay while Start of Year is still open.

EdPay login and Start of Year screen

EdPay

The payroll system where you complete the Start of Year processes.

Go to http://www.edpay.nz/ and log in with your username (7-digit MOE number) and password, and click Accept & Login.

Start of Year screen

The EdPay screen where you will enter some of your Start of Year information.

Go to EdPay > My Employees > Start of Year

Download your Start of Year report

This report shows the Start of Year information we have about your employees. You can download the report as many times as you need and it will show the Start of Year information you have entered so far. The report is only available from 4 December 2023 until 1 March 2024.

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.

Check each row is accurately reflecting their pay information for 2024.

1. Go to EdPay > My Employees > Start of Year screen > Summary Tab

2. Select 'Download SOY Report' 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

MoE#	First Name	Surname	Job#	Employment Status	Start Date	End Date	Hours
4729761	George	Burton	04	N/Teach Fixed-Term Part-Time Term-Time 5+ - Auto	26/02/2023	14/12/2023	24:60
5388577	Demo	Admin5	01	N/Teach Permanent Full-Time 5+ - Auto	02/06/2022		40:00
4361500	Travis	Casey	02	N/Teach Permanent Part-Time Annualised - Auto	23/07/2023	30/01/2024	17:00
4361500	Travis	Casey	03	N/Teach Permanent Part-Time Annualised - Auto	31/01/2023	30/01/2024	07:00

For more information see our website: EdPay | How to | Start of Year

Close · · · ● · Download SOY Report

When your employees have been restarted correctly, they will have two or more lines in the Start of Year report. A line for the occupancy ending in the 2023 school year, a second line starting in the 2024 school year, and additional lines for allowances.

Example of a Start of Year report

2024 Start Of Year Report - School: 53886 - This report is for your school use only. Do not send this report to the School Account Team.
Testing to show the contentful tile on the SoY Summary csv file extract

MoE#	Surname	First Name	Job #	Employme	Job Title	Start Date	End Date	Hours (HH	Pay Code	Allowance Sta	Allowance En	Rate Type	Rate of All	Fund	Departme	Percentage
4729761	Burton	George	4	N/Teach F	Non-Teach	26/02/2023	14/12/2023	2460	Salary					11010	48032	100
4729761	Burton	George	4	N/Teach F	Non-Teach	26/02/2023	14/12/2023	2460	National C	26/02/2023	14/12/2023	HOURLY	0.29	11010	48032	100
4729761	Burton	George	4	N/Teach F	Non-Teach	26/02/2023	14/12/2023	2460	National C	26/02/2023	14/12/2023	HOURLY	0.29	11010	48032	100
5388577	Admin5	Demo	1	N/Teach P	Non-Teach	2/06/2022		4000	Salary					11010	46860	100
4361500	Casey	Travis	2	N/Teach P	Non-Teach	23/07/2023	30/01/2024	1700	Salary					11010	26600	100
4361500	Casey	Travis	2	N/Teach P	Non-Teach	23/07/2023	30/01/2024	1700	National C	23/07/2023	30/01/2024	HOURLY	0.29	11010	26600	100
4361500	Casey	Travis	2	N/Teach P	Non-Teach	23/07/2023	30/01/2024	1700	National C	23/07/2023	30/01/2024	HOURLY	0.29	11010	26600	100
4361500	Casey	Travis	3	N/Teach P	Non-Teach	31/01/2023	30/01/2024	700	Salary					11010	26700	100
4361500	Casey	Travis	3	N/Teach P	Non-Teach	31/01/2023	30/01/2024	700	National C	31/01/2023	30/01/2024	HOURLY	0.29	11010	26700	100
4361500	Casey	Travis	3	N/Teach P	Non-Teach	31/01/2023	30/01/2024	700	National C	31/01/2023	30/01/2024	HOURLY	0.29	11010	26700	100
4570752	Jimenez	Kathryn	1	N/Teach P	Non-Teach	2/03/2023	30/01/2024	1630	Salary					11010	26600	100
4712144	Webb	Marilyn	1	N/Teach P	Non-Teach	26/07/2023	30/01/2024	1460	Salary					11010	46860	100
4712144	Webb	Marilyn	1	N/Teach P	Non-Teach	26/07/2023	30/01/2024	1460	First Aid A	26/07/2023	30/01/2024	HOURLY	0.35	11010	46860	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 whose role has not yet been terminated.

1. Go to EdPay > Reports > Pay Ending report

2. Download CSV

If the report shows employees who:	Then:
are returning to your school in 2024	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 2024	terminate their role in EdPay.
have already left your school	terminate their role in EdPay to do a retrospective termination. This generates any termination pay they are due.

Update your school's term dates

In the School Term Dates tab enter your 2024 term 1 start date and your 2024 term 4 end date so that employees are paid correctly in 2024. These are the dates your school opens and closes for instruction. If you don't enter your school's term dates we will use the Ministry of Education's published dates.

	2024 term 1 start date	2024 term 4 end date
Ministry published term dates	29 January 2024	20 December 2024 (this is a Friday, so will need to entered as 22 December 2024.

School term 4 dates that fall on a Friday should be entered as the following Sunday. If your school's 2024 term 4 end date is on Friday 6, 13 or 20 December, enter the following **Sunday** 8, 15 or 22 December as your term 4 end date.

The term dates will auto-save.

You cannot change your term 1 2024 start date after the Start of Year screen closes on 1 March. But your term 4 2024 end date can be changed in the End of Year screen when it opens in term 4 2024.

1. Go to EdPay > My Employees > Start of Year screen > School Term Dates tab

2. Enter your school's term 1 2024 start date.

3. Enter your school's term 4 2024 end date.

Restarting employees

Restart **fixed-term teachers** and **term-time-only non-teachers** who are returning to your school in 2024 in the Restart Job tab. They must be restarted before you can make other pay details changes.

Permanent part-time teachers do not need to be restarted.

This page **does not** auto-save. If you leave the page before submitting, your changes will be lost.

Use the Start of Year report to determine who is returning, and submit the details in small batches, in case of interruptions.

1. Go to EdPay > Start of Year screen > Restart employees tab.

2. In the search box, enter the employee's MoE number or name, and select them from the dropdown box. Only eligible employees will appear.

3. Enter their start date and expected end date for 2024.

·   **Permanent term-time-only non-teachers** only need a start date. Their end date will not be editable.

·   **Fixed-term teachers** only need an end date, their start date is always 28/01/2024.

·   For fixed-term teachers, who started after 7 February and therefore did not meet the full-year test you will also need to choose a Reason for Restart (Pg 6).

4. Repeat for any other eligible employees then SUBMIT.

> If your fixed-term teacher is becoming permanent in the 2024 school year then do not restart them in the Restart Job tab. Instead, restart them as permanent from 28/01/2024 in the employee's Job screen.

> A counter along the bottom of this tab shows the number of employees' jobs that are still to be restarted. Your counter should be zero when the Start of Year screen closes. If an employee has multiple jobs that they are returning to at your school, please restart all jobs separately.
>
>

Restarting employees

Fixed-term teachers

You will need to choose a Reason for Restart for fixed-term teachers who started after 7 February 2023 (and therefore do not meet the full-year test). When restarting these employees you will need to select either:

Continuing/extending existing contract – their current contract is continuing in 2024 or the employee has signed a contract to extend the fixed term end date of the same position.

E.g. a fixed-term teacher has a contract covering a parental leave period. Their 1-year contract was from the start of term 3, 2023 until end of term 2, 2024. When they are restarted, this is considered to be continuing/extending existing contract, so no new documentation is signed for 2024.

OR

New contract – the employee has signed a new contract for 2024 (different position).

Holiday pay may be adjusted based on the Restart reason chosen.

If a fixed-term teacher is...	Then...
starting between 28 January and 7 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 2024.
a part-time teacher, who **will** work all their regular hours in the week starting 5 February and they are starting after the first gazetted day of term 1 (on or after 7 February)	their start date in the Start of Year screen will be 28 January. This cannot be changed. Enter their end date only. As the teacher will work all their regular days for the week starting 5 February (e.g. if they only work on Friday), no action is needed. Their pay will backdated to 28 January 2024.
a teacher who **will not** work all their regular hours in the week starting 5 February and they are starting after the first gazetted day of term 1 (on or after 7 February)	if the teacher **hasn't** 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.

Restarting employees

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 pay period 19 Staff Usage & Expenditure (SUE) report to see the end date of their annual leave.

Enter the day **after** the annual leave ends as their start date. Then submit a timesheet for the hours that were worked before the employee's entered start date.

Possible errors and their meanings

Any errors will need to be resolved before the changes can be submitted. Here are some possible errors and how they can be resolved.

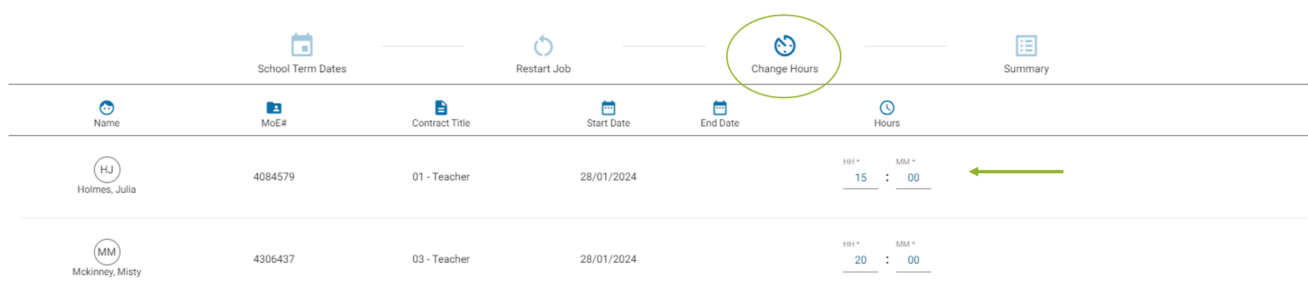| Error message	Explanation
Duplicate job selected	The employee has more than one job at your school, but the same job number has been entered twice.
Occup term date must be greater than commence date	The end date is before the start date. Re-enter the start date and/or end date correctly.
This employee 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 the 2024 calendar and change the end date so that it isn't a public holiday.
End date cannot fall on a Friday or Saturday for a teacher. the immediately following Sunday	Teachers working their full week need to have their job end date on a Sunday so 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 27/01/2025 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 tab

Some part-time teachers and term-time-only non-teachers can have their 2024 hours changed in the Change Hours tab. Employees will only show on this tab if:

- they have been restarted for 2024 in the Restart Job tab **or** they are a permanent part-time teacher

- do not have a work pattern in EdPay.

New hours will be effective from the employee's start date in term 1 2024.

1. Go to EdPay > Start of Year screen > Change Hours tab

2. Enter in the new **average weekly hours** for the employee for the 2024 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 2024 school year. Changes after this date will need to be made in the employee's Job screen.

Changing hours: possible errors and their meanings

Any errors will need to be resolved before the changes will auto-save. Here are some possible errors and how they can be resolved.

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, complete a pay details change in the employee's Job screen.
There are no employees eligible for a change of hours at your school	Your employee's pay details will need to be changed in the employee's Job screen.
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 in the employee's Job 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, complete a pay details change in the employee's Job screen.
Minutes must be between 00 and 59	Hours and minutes must be entered in the 00:00 format.

Pay details changes outside of the Start of Year screen

Pay details changes for these employees will need to be made in the employee's Job screen (not in the Start of Year screen):

- term-time-only employees with a work pattern loaded in EdPay

- people changing from part-time to full-time

- people changing from fixed-term to permanent

- non-teacher changes to grade, step or pay rate

- employees that have been restarted but are not showing in the Change Hours tab.

1. Go to EdPay > My Employees > select the employee's name.

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 select SEND.

You will be able to see the details of the pay details change request in your activity history screen. Some changes may show immediately.

If the change requested is effective from the beginning of the 2024 school year, for teachers use 28 January 2024, and for non-teachers use their 2024 start date as the effective date.

Pay details changes outside of the Start of Year screen

Principals and authorised EdPay users

Changes for principals need to be made by sending in the appropriate form to support@novopay.govt.nz.

Changes for other authorised EdPay users can be made by the principal either in EdPay or by sending in the appropriate form. **Their changes must be completed before they start in 2024**, or they will not be able to access EdPay to complete Start of Year processing for the school's employees.

Annualised employees

Annualisation is the process of spreading out the earnings of support staff who work during term-time only, into equal fortnightly pays throughout the year (including during school holidays).

Pay details changes for annualised employees need to be provided on their EP23nt Annualisation form.

For employees who wish to be annualised from 2024, a completed EP23nt form will need to be sent to support@novopay.govt.nz by 29 January 2024.

Employees need to apply for annualisation each year with a new EP23nt, even if they were annualised the year before.

Annualisation for 2024 starts on 31 January. For more info go to Annualisation (EdPay.govt.nz):

To check whether different changes need to be made in the Start of Year screen or in the employee's Job screen use the Start of Year actions tool (EdPay.govt.nz)

EdPay.govt > How to > Start of Year

Start of Year actions tool

Use this tool to decide whether to make your Start of Year changes in EdPay or by form.

Type of Employee	52-Week non-teacher
Type of Change	Allowances
Tasks	Add, change, remove allowances

EXPLANATION

Allowances

Allowances may be eligible to employees in their employment agreement. Check the employee has been restarted and their job start and end dates have been entered correctly before making any allowance changes.

Use the Start of Year report to gather the following info **for each employee**:

- Do they have any allowances to add or remove?

- Do they have an any current allowances that need to be updated e.g. rates, number of units or job start and end dates?

- Are any employees missing allowances?

Allowance dates must fall **within** the employee's job start and end dates, but do not have to be the same as their job start and end dates.

1. Go to EdPay > My Employees > select the employee's name.

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 will often be 28 January 2024).

6. Press Continue. Check the details. Press SUBMIT.

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

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.

For allowances that automatically renew when an employee is restarted in the Start of Year screen, check the Start of Year allowance information (EdPay.govt.nz)

Funding or department code change

Before making changes to an employee's funding or department code for 2024, please make sure they have been restarted in the Start of Year screen.

1. Go to EdPay > My Employees > select the employee's name

2. Press the pencil icon beside Job Funding.

3. Enter in the start date of the change (for the 2024 school year, enter 28/01/2024 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 select SEND.

Terminating jobs

If you have employees that you know are not going to be returning in 2024, please 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.

Salary assessment

Teachers in the NZ state sector need to apply for a salary assessment if they are:

- are starting their first teaching job e.g. new graduates, moving to NZ or have only worked in private schools
- are returning to teaching after a break of two years or more
- have new qualifications or relevant work experience that hasn't been assessed.

The salary assessment application portal is the easiest way for teachers to apply for a salary assessment.

Principals will need to log in to the portal to verify the application before it sent to Education Payroll for processing.

School's payroll administrators can log in to the portal to check the application's progress and to complete an optional review to check that the application is complete before it's sent to the principal.

Principals will need to assign themselves the role of a Taku Authorised Payroll User in ESL, before they can access the portal. They also need to assign the same role to the school administrator so that they can access the portal and complete the optional review. For instructions on how to do this go to Adding salary assessment permissions to an Education Sector Logon (PDF, 295KB)

Once these permissions have been set up, you will be able to log into the portal using just your ESL username and password.

Find more info and links to the portal go to salary assessments on EdPay.govt.nz

Set up new employees at your school

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

1. Go to EdPay > My Employees > Add an 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 the status of the ticket is either 'successful' or 'submitted'. If the status is 'draft' then the Add new employee hasn't been completed. Reopen the draft, check for errors in each tab, press 'next' and then SUBMIT. Check activity history again.

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.

This is the end of the Start of Year Guide.
See our website for more assistance Start of Year 2024 (EdPay.govt.nz)