



Switching from HMRC Tools and Sage 50 Payroll How to Edit RTI Payroll ID to match old record

- 1) Within the Employee Wizard click on the "Edit" button once you reach this screen:

The screenshot shows the 'Employee Wizard' form. The 'RTI Payroll ID' field contains the value '34C275F37FDBE78D'. The 'Edit' button next to this field is circled in green, and a green arrow points to it from above. Other fields include 'Employee Start Date *' (10/05/2017), 'Job Title', 'Have you conducted a Right To Work check? *' (Yes), 'Non-UK Worker', 'Disabled', 'Apprentice', 'Nationality', and 'Ethnic Origin'. Navigation buttons at the bottom include 'Cancel', '< Back', 'Next >', and 'Finish'.

- 2) You can then manually type over the ID to ensure it matches the previously assigned RTI ID.

The screenshot shows the 'Edit RTI Payroll ID' dialog box. It has two input fields: 'RTI Payroll ID' with the value '34C275F37FDBE78D' and 'Old Payroll ID' which is empty. Both fields have a green question mark icon to their right. At the bottom right, there are 'OK' and 'Cancel' buttons.

Helpful Hints



- 3) You will see the following message if you click on the “?”

34C275F37FDBE78D

Old Payroll ID

OK Cancel

If you're switching from another payroll system, use these options to specify whether their payroll ID is the same as before, you don't think they had one, or you don't know what it was. This helps HMRC to match the employee to their existing employment record.

- 4) From Old Payroll ID drop down menu – please now select “As above”

gy374bjk7748999d35

Old Payroll ID

As above

As above

Not set

Unknown

OK Cancel

- 5) Then click on ‘OK’

Disclaimer: The information in this article was correct at time of publishing. Please note legislation is subject to change by HMRC. Information sources used in this article include Sage 50 Payroll and the HMRC.