Insightpay New Client – Initial Data Upload Made Easy - July 2021
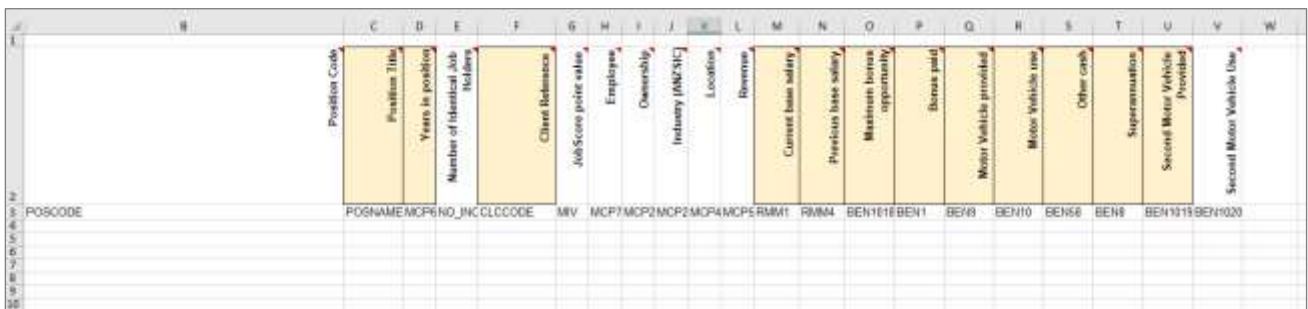
We have found for new subscribers the greatest concern is the time it might take for the Initial Data Set-up. So based on this feedback, Insightpay has reworked this process to make it much simpler and faster.

Step by Step – how the majority of the initial data set-up work is done for new clients by Insightpay

Ref	Who Does It	Data Load Stage	What's Involved
1	HR Manager	Decide the Job Roles To Submit	Usually The Executive , Senior Officers, Middle Management, Coordinators/Supervisors (on the E/A borderline). Most EA Roles are not loaded.
2	Payroll Person	Populates the Insightpay Excel Template	See file snip (below) – Load data from your HR System & sends it back to us (Gold columns only). We can instruct, or assist Payroll (via a 10 min call)
3	Insightpay	Job Matching Done for You	We match your roles to our Salary Survey roles & highlight any we are unsure of. Draft #1 about 75% done sent to you.
4	HR Consultant	Update Any Matching Gaps	Quickly checks Draft # 1 to update roles Insightpay has highlighted. Draft #2 is about 90-95% done & sends it to you.
5	HR Manager	Final Check	Check Draft #2 to be sure it is OK & update the final 5-10% of queries. Final Spreadsheet 100% done. Send it to Insightpay.
6	Insightpay	Upload Final Spreadsheet	We then upload the Final Data to the Insightpay Rem Portal & Your 2021 comparative salary data is ready to go.
7	HR Team	Annual Updates	Only need to enter salary updates & job changes once a year. That's it.

Insightpay Excel Template – here is a sample of the spreadsheet that you would receive

Only the Gold Columns are required. Please do not reformat the spreadsheet as it must remain in this format to upload into our Insightpay Rem Portal (survey system).

Every Column Header also has Instructions. Just click the red triangle to see the detailed notes.