Switching from Employment Hero: checklist

RosterElf · rosterelf.com/support/knowledge-base/getting-started/switching-from-employment-hero-to-rosterelf · Updated 8 Nov 2026

Before you cancel: check your agreement

- [ ] Find your Employment Hero agreement: any minimum term, your renewal date and minimum users.
- [ ] Diarise the cancellation deadline: under Employment Hero's General Terms (from 15 June 2026) you cancel at least 30 days before your renewal date. Your agreement can differ.
- [ ] Plan to export everything before your end date: Employment Hero may delete your data from the date of termination.
- [ ] Pick a go-live date at the start of a pay period, after your current term allows it.

Week 1: export everything

- [ ] Employee records: names, contact details, start dates, employment type, positions, locations.
- [ ] Award or enterprise agreement classification per employee, with any above-award rates.
- [ ] Leave balances (annual, personal/carer's, long service) as at your last pay run.
- [ ] Year-to-date payroll figures per employee, if payroll is moving too.
- [ ] STP finalisation status, or how YTD will carry over to the new payroll.
- [ ] Contracts, policies, signed acknowledgements, licences and certificates.
- [ ] Timesheet and roster history (keep 7 years under Fair Work record-keeping rules).
- [ ] Bank, super fund and TFN declaration details, if payroll is moving too.

Week 2: set up RosterElf

- [ ] Import staff from your export (CSV).
- [ ] Set up locations, positions and pay templates from your award or enterprise agreement.
- [ ] Connect Xero Payroll, or set up the MYOB file export, and map pay items.
- [ ] Build a test roster for the next pay period, but don't publish it yet: publishing notifies staff.
- [ ] Invite staff to the mobile app once their first roster is ready; set availability and leave.

Week 3: one parallel pay run

- [ ] Run one pay period in both systems.
- [ ] Compare gross pay per employee, penalty rates, overtime and leave accruals line by line.
- [ ] Fix any pay rule that differs, then re-check that employee.

Week 4: go live

- [ ] Publish rosters and approve timesheets only in RosterElf.
- [ ] Lodge STP and pay super from your payroll system (Payday Super, from 1 July 2026: within 7 days of payday).
- [ ] Store your Employment Hero exports somewhere you control before access ends.

General information only, not legal or payroll advice. Check obligations with the Fair Work Ombudsman and the ATO.