



GoCo Migration Guide

Welcome! We're excited to welcome you to your GoCo migration!

This guide is your go-to resource to understand what's happening behind the scenes, what's expected from you, and how to stay aligned with your implementation timeline.

You should have received:

✓ **GoCo System Invite** from messages@goco.io (for secure.goco.io)

✓ **GoCo Academy Invite** (for learn.goco.io)

Use these to log in and begin your training modules — they'll help you follow along while we build and configure your system.

Thank you, and welcome to your GoCo journey!

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Meet Your Migration Team

Throughout your migration, you'll interact with a few different team members:

Migration Specialist

Your primary contact, managing system setup, document migration, and employee data import.

Payroll Specialist

Responsible for configuring payroll, reconciling year-to-date data, and preparing for your first GoCo pay run.

Benefits Specialist

(if applicable)

Handles benefit plan migration, coordinates with Ameriflex (if used), and supports enrollment readiness.

 *Note: Your Migration Specialist is your main point of contact throughout the entire implementation, even if others reach out for specific components.*

How We Communicate

- All migration-related emails should be sent to: **transition@goco.io**
- We do not offer any 1:1 training during migration, you'll have access to schedule 1:1 time with a trainer after you've completed your assigned training in the GoCo Academy.
- Your Migration Specialist will reach out to introduce themselves, answer questions you may have, and provide guidance on what's next in Migration.



Migration Timeline & Milestones

The migration process typically spans 3–6 weeks, depending on complexity. We'll notify you by email as each milestone is completed and the next one begins.

Milestone	Focus	What We're Doing	What You Should Be Doing
1: Foundation Build	System setup & data migration	Audit TriNet, build workflows, migrate employee profiles	Submit admin info, complete trainings, provide voided check
2: Employee Launch	Team onboarding & benefits launch	Finalize employee docs, enable benefits module	Invite employees, confirm benefit readiness, finish onboarding
3: Payroll Prep	Final setup before first pay run	Final config, payroll call, QA review	Complete trainings, ensure employees are onboarded
Final: Transition	Move to long-term support	Wrap up migration, activate support team	Receive support info, complete follow-ups, survey



Ongoing Tasks (Apply Across All Milestones)

- ☐ Complete all GoCo Academy trainings — especially payroll courses before your First Pay Run
- ☐ Invite employees to GoCo once data is migrated.
If no confirmation is received, we may launch to stay on schedule
- ☐ Confirm benefits readiness after your review email. No response = launch assumed
- ☐ Respond promptly to questions from your specialists
- ☐ Ask employees to check spam folders for GoCo invites from messages@goco.io



Milestone 1:

Foundation Build



Goal: Set up your GoCo system, migrate key TriNet data, and build the base for onboarding, payroll, and benefits.

Why This Matters

We replicate your TriNet setup — workflows, policies, and employee data — to build a foundation for onboarding, payroll, and benefits. You'll review the **Employee Census Report** next milestone to verify accuracy.

Your To-Do List

- ☐ Provide a voided check
 - Should happen within your first week, no later than 21 days prior to your first check date in GoCo
 - When you first login to GoCo you will have a task to complete to upload the voided check or Bank Letter
- ☐ Share Full Access Admin contacts
 - If you know who needs to be in the system and needs training let us know ASAP! The more help you have the better
- ☐ Watch for benefits emails, especially for COBRA/HSA/FSA *coming within the first 2 weeks.*
- ☐ Respond to clarifications from your specialist

You Should Be Working On

- Login to GoCo Academy
- Begin LMS courses:
 - Hiring & Onboarding
 - Magic Documents
 - Permission Profiles & Reporting
 - Embedded Payroll
- Get familiar with your system layout

Behind the Scenes

- Auditing TriNet setup
- Migrating workflows, policies, employee profiles, documents
- Starting payroll and benefits configuration
- Creating your Employee Census Report
- COBRA and/or Flexible Spending Setup (COBRA, HSA, FSA, Commuter)
 - If you used TriNet for these, GoCo transitions you to **Ameriflex**
 - You will receive an email from GoCo on what benefits you currently have that will be transitioning from Trinet with instructions on your responsibilities during this transition. The email will provide you with a link with instructions to sign in to Ameriflex. You will then need to accept your terms and conditions and enter your banking information.
 - Once you have completed your tasks, you will receive an introduction email from Ameriflex with a link to schedule a call to complete all of your steps for implementation.
 -  *FSA balances won't transfer until TriNet deactivates. Expect a two week blackout. TriNet FSA cards remain active until the plan with Trinet ends.*
 -  *Ameriflex invoices you directly — these costs are no longer part of your GoCo billing. Pricing for Ameriflex can be found [here](#).*
- **Background Checks**
 - If you used TriNet, GoCo integrates with **Checkr**. If you're interested in setting this integration up, check out this [quick guide](#).

Milestone 1 FAQs

Q: Can I make changes to workflows and settings later?

A: Absolutely. We start with your TriNet structure as a baseline, but you'll be able to refine and customize workflows throughout your migration and beyond. Some of this is covered in your required GoCo Academy courses, and we also offer a full library of optional content in learn.goco.io that goes deeper into the power of workflows and how to get the most value out of them.

Q: What is the Employee Census Report and what do I do with it?

A: It's a summary of all the employee data we've imported. You'll review it in the next milestone to confirm accuracy before we invite employees to the platform.

Q: What if I miss something in this phase?

A: That's okay. Just keep your specialist updated — we can adjust timelines as needed to keep things on track.



Milestone 2:

Employee Launch



Goal: Complete employee onboarding, finalize benefits setup, and prepare your team to begin using GoCo.



Why This Matters

This is when employees are invited and begin using GoCo. They'll confirm personal details, tax elections, and direct deposit. Accuracy at this stage is key.



Your To-Do List

- ☐ Confirm the Employee Census Report
- ☐ Invite employees to GoCo
- ☐ Confirm receipt of benefits review email
- ☐ Respond to questions from your specialist
- ☐ Sign all required payroll documents



You Should Be Working On

- Ensure employees are invited and onboarding
- Confirm benefits setup using checklist
- Finish remaining LMS trainings
- Monitor employee invite acceptance



Behind the Scenes

- Finalizing document migration and time-off balances
- Completing benefits setup + sending benefits review email
- Continuing payroll configuration + sending instructions to sign payroll documents
- Finalizing COBRA and/or Flex Benefit setup with Ameriflex, if applicable

- New HSA/FSA cards should be received within 7-10 business days after the set up is complete.
- Your blackout period does not begin until set up has been completed.

Reminders

- Benefits won't be visible until after benefits sign off
- Payroll module appears shortly before your First Pay Run
- If we don't receive confirmation on employee invites or benefit launch, we may move forward to avoid delays.

? Milestone 2 FAQs

Q: What is onboarding from the employee's perspective?

A: After being invited, employees will log in to GoCo, review and update their personal info, confirm tax withholdings, and submit direct deposit details. This ensures everything is accurate before payroll begins.

Q: What if employees don't receive their invite?

A: Invites come from messages@goco.io — ask them to check their spam or junk folder. You can also resend invites from your Admin dashboard.

Q: Can I delay employee invites if I'm not ready?

A: Yes, but be aware this may impact later milestones like benefits enrollment and payroll. If we haven't received confirmation after a certain point, we may proceed to avoid delays.

Q: How do I know benefits are set up correctly before launch?

A: Your Benefits Specialist will send a review email and final checklist. You'll use this to confirm plan details and settings before employees can enroll.

Q: Why am I receiving payroll notifications but can't access payroll yet?

A: That's normal during setup. The Payroll module becomes visible once Terms of Service are signed and configuration is finalized.



Milestone 3:

Payroll Preparation



Goal: Finalize payroll setup and process your first pay run in GoCo.



Why This Matters

You'll process your first GoCo pay run with your Payroll Specialist. This is a working session — not a training — so all LMS courses should be completed beforehand.



Your To-Do List

- ☐ Ensure employees are fully onboarded
- ☐ Complete all Embedded Payroll trainings
- ☐ Sign the Payroll TOS and set permissions
- ☐ Be available for your scheduled call



You Should Be Working On

- Confirm employee wages and assignments
- Review any flagged items
- Use training to walk through payroll preview ahead of the call



Behind the Scenes

- Final payroll QA
- Verifying direct deposit + pay data
- Scheduling your First Pay Run

Reminders

- The First Pay Run is not a walkthrough — come prepared
- Incomplete trainings may delay payroll
- Payroll module is now active

This milestone is complete once:

 All employees are onboarded

 Benefits are launched

 First payroll is processed

Milestone 3 FAQs

Q: What happens during the First Pay Run?

A: You and your Payroll Specialist will process your first pay run together using your live data. The goal is to walk through actual payroll, not to teach the system — that's what your GoCo Academy courses are for.

Q: What if not all employees are onboarded yet?

A: All employees must be fully onboarded to be included in payroll. Delays here can push your payroll timeline.

Q: Where do I find and complete the Payroll training?

A: Log in to learn.goco.io — your required courses were assigned at the beginning of the migration. Reach out to your specialist if you need a reminder of which ones apply.

Q: What if something looks wrong in the payroll preview?

A: That's exactly what the First Pay Run is for! We'll review the draft together and address any issues before submission.



Final Milestone:

Transition to Long-Term Support



Goal: Complete your migration and begin working with your dedicated Client Success Manager.

Why This Matters

Now that your setup and first payroll are complete, you'll move to long-term support. Your CSM helps you get strategic value from GoCo — support@goco.io handles product questions.

What Happens Next

- Handoff email introducing your CSM
- CSM will help you:
 - Align GoCo with your goals and priorities
 - Track progress and identify growth opportunities
 - Guide product adoption and share best practices
- You'll unlock access to post-migration 1:1 trainings
- Completion of your EDI file with Ameriflex if applicable
 - You will receive an email once the EDI set up has been completed
 - Your employees should be receiving cards for Flex/HSA in a plain with envelope from Ameriflex
 - Current COBRA participants should be receiving their COBRA packet with coupons from Ameriflex

COBRA, HSA, FSA, and Commuter Benefits

These benefits are now managed by **Ameriflex**. GoCo handles deductions only. Questions regarding account balances, claims payments, or other COBRA/FSA related items should be directed to Ameriflex after your transition is complete.

 Billing Reminder: Ameriflex invoices you directly — these costs are no longer bundled under GoCo.  If you haven't heard from Ameriflex yet, contact support@goco.io.

Important Communication Update



Stop using transition@goco.io
This was for migration only



Email support@goco.io for
product support



Your CSM is not for support tickets,
they're your strategic partner

Resource Center

Training & Guides:

- [Admin Intro Video](#)
- [Manage Employees in GoCo Video](#)
- [Setup Time Off Policies](#)
- [Magic Documents Guide](#)
- [Onboarding and Hiring](#)
- [Custom Fields and how to add them to onboarding](#)
- [How to manage Time Tracking](#)
- [Reports](#) and [Permissions](#)
- [What are Quick Links?](#)

Employee Resources:

- [Employee Welcome Video](#)
- [How to request time off](#)
- [How to update information](#)
- [How to clock in or add time](#)

System Differences & Tools

GoCo vs. TriNet: Quick Facts

- GoCo's features (like custom fields and documents) can be used independently or added to workflows such as onboarding.
- Onboarding doesn't stop once an employee starts! You can assign follow-up tasks for 30, 60, or 90 days post-start date.
- Each employee has a single profile in GoCo with layered permissions, allowing you to customize access for different roles.
- The GoCo Marketplace makes it easy to discover API integrations and custom triggers (e.g., Google Drive, Slack) to streamline operations.

Time Off

- From an employee and manager perspective, the experience is similar to TriNet.

- Admin differences to note:
 - Zero-accrual policies are not supported.
 - Blackout dates can't be set directly within the Time Off module.
 - For policies with tenure-based unlimited PTO (e.g., unlimited after 10 years), a separate policy is required.

Time Tracking

- Unlike TriNet, you don't need to customize settings for each employee one by one. Instead, you can create different time tracking policies and then assign employees to the policy that applies to them.
- Geo-fencing and geo-alerts are customizable by location or policy.
- A live dashboard provides real-time clock-in data for visibility.

Reports, Messaging & Announcements

- Announcements appear on the GoCo homepage and can be customized for different audiences.
- Essentials plan users can still use messages to share key updates with their team.
- Reports are dynamic. No need to recreate or redownload them constantly.
- You can preview reports in GoCo before downloading.
- Schedule recurring reports to send out automatically at your chosen frequency.

Background Checks via Checkr

- GoCo integrates directly with Checkr for background checks.
- Once connected, you can initiate checks directly from the onboarding workflow.

Need help?

- [How To Connect](#)
- [How to initiate BGC](#)