

How Corient Resolved a QuickBooks SMP Processing Challenge with a Strategic Payroll Rollback Solution

Highlights

- 1 Successfully **rolled back** historical **payroll** in QuickBooks
- 2 **Processed Statutory Maternity Pay (SMP)** for a past tax year
- 3 **Overcame QuickBooks' limitations** using expert manual intervention
- 4 **Restored payroll compliance** and **data accuracy**

Introduction

A business using **QuickBooks for payroll management** faced a critical issue: they needed to **roll back pay runs** from the previous tax year and **process Statutory Maternity Pay (SMP)**. Despite their best efforts, QuickBooks wouldn't allow these backdated actions. Realising the complexity, they turned to **Corient** for a solution.

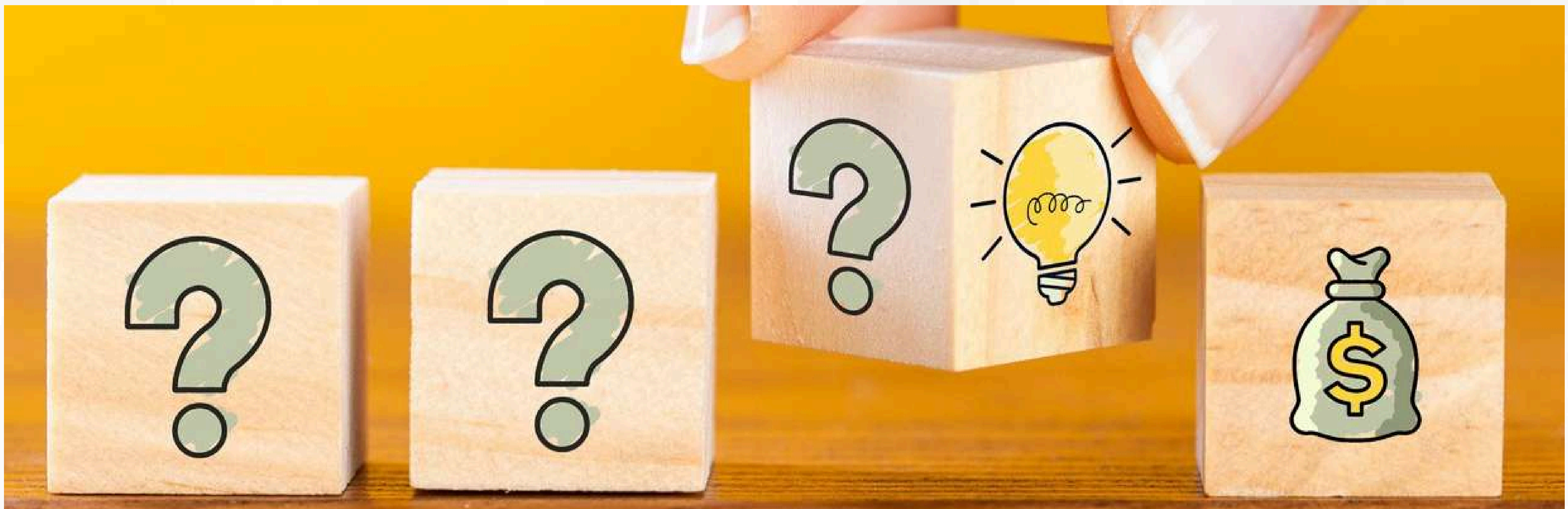


The Initial Problem: What Went Wrong?

The client was unable to adjust payroll for previous periods or apply statutory maternity pay (SMP). **QuickBooks restricts retroactive payroll modifications**, leaving the internal team without options. The situation risked non-compliance and financial inaccuracy, placing pressure on both operations and HR.

Corient's First Solution: The Fix

Corient's experts proposed an initial solution involving **EYU adjustments and manual deletion of payroll payments**. This aimed to open access to past data and prepare the system for changes. While this cleared some barriers, **SMP still couldn't be applied** to the necessary timeframe—QuickBooks wouldn't cooperate.



The New Problem: A Surprise Roadblock

Despite initial progress, the team encountered a significant setback. Even with payments removed, **QuickBooks still blocked SMP processing** for historical dates. This unexpected limitation required a new plan—fast.

Corient's Second Solution: Fixing the New Problem

When the initial strategy didn't resolve the SMP issue due to **QuickBooks' limitations**, the Corient team designed a custom workaround based on in-depth system knowledge and research. Here's how the issue was finally resolved:

Step 1: Identify and delete historical Payments

All the payroll payments from the weeks that needed to be rolled back were carefully located and deleted. This cleared the path to modify the past periods.

Step 2: Created a New Pay Calendar

A new pay calendar was established, providing greater flexibility in assigning employees and adjusting dates without disrupting the original payroll structure.

Step 3: Re-added the Employee to the New Calendar

The affected employee was manually added to the new pay calendar to isolate their payroll entries and enable backdated processing.

Step 4: Selected the Correct Historical Pay Period

The specific old pay period, where SMP was supposed to begin, was selected within the new setup. This step ensured that the SMP would align with the required timeline.

Step 5: Manually Processed SMP in the Chosen Period

SMP was added directly to the chosen backdated week. With the new structure in place, QuickBooks accepted the entry without further errors.

This meticulous step-by-step intervention allowed SMP processing to be completed successfully, even in a system that doesn't naturally allow it. For more payroll problem-solving insights, explore how we manage payroll errors with precision.

OUTCOME



The Final Outcome: A Success Story

With these steps, the issue was entirely resolved. SMP was processed, payroll data aligned correctly, and compliance was restored. The client was relieved and impressed with the precision and speed of Corient's support.

What the Client Said



"We thought this problem couldn't be solved inside QuickBooks. Corient not only fixed it—they did it with complete clarity and confidence."

Key Takeaways: Why This Matters for Businesses

- **Payroll software limitations** don't have to be dealbreakers
- Specialist **expertise is essential for complex payroll issues**
- **Strategic manual workarounds can restore compliance** and peace of mind

For expert help with payroll challenges, explore our [payroll outsourcing services](#). Even the most challenging payroll problems can be solved with the right expertise.