



Solutions For Accounting and CRM

Payroll Year End Checklist

CHECKLIST



Prepare for Year End

1.1. Install your Year End software – Click Help, then click About. Your version number should begin V30.

1.2. Pay your employees for the last time for 2023/2024 tax year – If you pay on Thursday 4th or Friday 5th of April you may have an extra pay run called Week 53. If you process on any other day, or if your employees are monthly paid, you will not have a week 53.

1.3. Process Leavers who have left on or before 05/04/2024.

1.4. Ensure submissions have been done for final week/month – Check last FPS date column in payroll list and check e-Submissions log via e-Submission then e-Submission Log to ensure these have both been sent.

1.5. Backup your data – Go to File – Backup and follow steps to backup your data.



Process your Year End

2.1. Set your process date – Click Payroll – Change Process Date and set to 05/04/2024.

2.2. Click Payroll Year End on left of Payroll.

2.3. Click “Choose Tax Year” and ensure set to 2023/2024 and “Reports Date” is set to 05/04/2024.

➤ **Internet Submissions**

3.1. Click "Internet Submissions" to send last submission of this tax year.

➤ **Produce P60's**

4.1. Press P60's button.

4.2. If uploading to Online Payslips Portal press Upload.

4.3. If printing or e-mailing press Print/Email.

➤ **Backup Data**

5.1. Press option to Backup Data.

➤ **Complete Year End**

6.1. Press option to Complete Year End – If you keep mileage records press Yes to next message, if you don't press No.

➤ **Distribute Year End Returns**

7.1. Press Complete Year End Returns to see what the latest dates are for submitting to HMRC.



Get Ready for New Tax Year

8.1. Check program version in help – about. This should start with 30.XX

8.2. Update tax codes and clear week 1/month 1 flags – check for any individual changes in:

E-Submissions – IR Secure Mailbox – New Mail.

8.3. Apply for employment Allowance (if eligible). Go to Company – Settings – Apply for EA and submit EPS.

8.4. Claim small employers relief (if eligible). Go to Company – Settings and tick box for Small Employers Relief.