




Solutions
for Accounting

Payroll Year End Checklist



Sage Business Partner

1. Prepare for Year End

- 1.1.** Install your Year End software – Click Help, then click About. Your version number should begin V32.
- 1.2.** Pay your employees for the last time for the 2025/2026 tax year. If you pay on Sunday 5th of April, you may have an extra pay run called Week 53. If you process on any other day, you will not have a Week 53.
- 1.3.** Process leavers who have left on or before 05/04/2026.
- 1.4.** Ensure submissions have been done for the final week/month. Check the last FPS date column in the payroll list and check the e-Submissions Log (via e-Submission, then the e-Submission Log) to ensure these have both been sent.
- 1.5.** Backup your data – Go to File – Backup and follow the steps to backup your data.

2. Process your Year End

- 2.1.** Set your process date – Click Payroll – Change Process Date and set to 05/04/2026.
- 2.2.** Click Payroll Year End on the left of Payroll.
- 2.3.** Click “Choose Tax Year” and ensure it’s set to 2025/2026, and “Reports Date” is set to 05/04/2026.

3. Internet submissions

- 3.1.** Click “Internet Submissions” to send the last submission of this tax year.



4. Produce P60's

- 4.1. Press P60's button.
- 4.2. If uploading to the Online Payslips Portal, press Upload.
- 4.3. If printing or emailing, press Print/Email.



5. Backup Data

- 5.1. Press option to Backup Data.



6. Complete Year End

- 6.1. Press option to Complete Year End – Press yes to the message to update the mileage log for the employee's record.

7. Distribute Year End Returns

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

8. Get ready for the new tax year

- 8.1.** Check program version in Help – About. This should start with 32.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 the box for Small Employers Relief.

Important dates

Final submission for the year and final PAYE/NI Payments must be with the HMRC no later than the 19th of April 2026.

P60's must be with your employees by 31st of May 2026.



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