Paydata End of Tax Year - Step by Step Guide, Windows version.   **March, 2018**

If you have not already done so, install the Paydata 12 update as per SRN23. This was notified by email earlier in March. The SRN is available at: http://www.farmdata.co.uk/pdfs/paysrn23.pdf.

In Paydata, for each active payroll:

1. Finish your last payroll run as normal

2. Make the final RTI submissions

a. No Employer Payment Submission (EPS) to complete
Submit the Full Payment Submission (FPS) with "Final Submission for the Tax Year" ticked. Note that, where there are multiple payrolls under the same Tax Reference Number only the last FPS submitted for that Tax Reference Number should be ticked as "Final Submission of the Tax Year".

b. EPS to complete
Submit the FPS as normal. Fill in the EPS and submit it with "Final Submission for the Tax Year" ticked. Ensure "Claim Employment Allowance" is ticked if you have claimed the Employment Allowance this year.

Only one submission can be designated as a Final Submission. Some time limits apply to submissions. The FPS should be submitted on or before the employee payment date. The last EPS of a Tax Year must be submitted by 19th April 2018.

3. Reports

Reports can be taken before the year end is processed or from the copy payroll afterwards.

4. Process the End of Tax Year

This is found in Maintenance Routines → End of Tax Year. There are three stages which you need to do in order:

1. Produce P35 Continuation Sheets and P60s. Print Employees' P60s and distribute them to your employees. Print P35 documents for your records. No submissions are sent to HMRC at this stage as they get the P14 and P35 information from the final FPS submission.
2. Email P60s to Employees. Where employees are set to receive payslips by email this option can be used to email P60s in the same way.
3. Reset Employee's Records for the New Tax Year. This will create a copy business and clear the data from this business for the new tax year.

Repeat steps 1 to 4 for each active payroll.

5. Update the Tax and NI tables

After all Year-Ends have been run and before the first Payroll Run of the New Year, update the Tax and NI tables as per the March 2018 Table Changes Notice issued by Farmdata. This can be found at: http://www.farmdata.co.uk/pdfs/pay2018-19tableswin.pdf

6. Individual Employee Tax Codes need to be updated

The option to apply block changes is found in Maintenance Routines → Automatic Update of Tax Codes. Each active payroll on your system needs to be processed individually. The block changes are notified to you by the Tax Office on form P9X along with general instructions on the tax codes to use. This is found at: https://www.gov.uk/government/publications/p9x-tax-codes

You may also have had individual employee code change notices sent to you, these should be updated after the block change has been made using Individual Employee Records.