

Introduction

The associated update **MUST** be installed **BEFORE** you do your Year End as there are important changes.

1. RTI Submissions

- a. All Submissions need to be completed before you process the End of Tax Year for each Business. If you have any 'Recoverables' (e.g. SMP) to get back from HMRC then your Final Submission will be an 'Employer Payment Summary' otherwise it will be a 'Full Payment Submission'.

2. End of Tax Year

- a. This can only be done after all Submissions have been completed (see above). Its main purpose is to allow you to Print/Email P60s (via IRRTIdata) before doing a clear out of any Leavers imported and moving the Tax Year forward so that it can receive files for the 2018/19 Tax Year.
- b. When you are ready to do this, you go into 'Maintenance Routines' → 'End of Tax Year'. (See following Paydata End of Tax Year below)
- c. Table changes and any Tax Code changes for your Employees are be done in Paydata. (See: www.farmdata.co.uk/pdfs/pay2018-19tablesunix.pdf)

Installation

Ensure that you have an up-to-date backup of IRRTIdata.

1. If you run IRRTIdata on a single computer.

- a. From within IRRTIdata choose 'Help' → 'Download Latest Update'.
- b. Press 'Next' to proceed and 'Start to bring down and install the Update. After installation you should check that you are running Version 6.000 ('Help' → 'About IRRTIdata' will confirm).
- c. Process Complete

2. If you use the software on more than 1 computer.

- a. Go to <http://www.farmdata.co.uk/latest-version>
- b. Click on IRRTIdata and download the perint.exe file. Save it onto your server or a memory stick.
- c. Run the perinst.exe on each machine with IRRTIdata installed. After installation you should check that you are running Version 6.000 ('Help' → 'About IRRTIdata' will confirm).
- d. Process Complete.

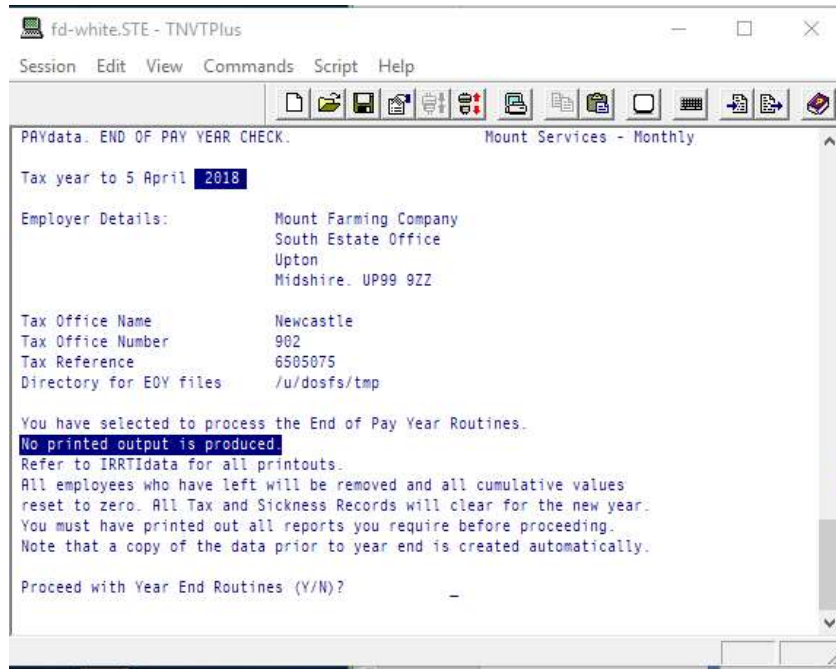
Paydata End of Tax Year

In Paydata, for each payroll:

Finish your last payroll run as normal.

Reports can be taken before the year end or from the copy payroll after the year end.

Go to option 3. End of Tax Year Routines.



No printouts will be produced.

Proceed with the year end routine.

Do this for all Payrolls.

The system will create Year End Files of data from each payroll to import into IRRdata (now part of IRRtidata) in order to produce Employees P60s and a copy of the P35 documents.

Before the first payroll run of the new year and after all payrolls have had their Year End run.

PAYE, NI & AE Tables

These need to be updated as per the March 2018 Table Changes Notice issued by Farmdata. See: www.farmdata.co.uk/pdfs/pay2018-19tablesunix.pdf

Update the Individual Employees' Tax Codes.

There is a block code change which is notified to you by the Tax Office on form P9X. The P9X may be found at: <https://www.gov.uk/government/publications/p9x-tax-codes>

See the March 2018 Table Changes Notice issued by Farmdata on how to do this.

You may also have had individual employee code change notices sent to you, these should be updated after the block change is applied.

In IRRdata

Submit your Full Payment Submissions (FPS) and Employer Payment Summaries (EPS) as normal.

On the Final Submission relating to 2017-2018 (either FPS or EPS) tick the 'Final Submission for the Year' option. Only one submission can be designated as a Final Submission. Some time limits apply to submissions. FPS should be submitted on or before the employee payment date. The last EPS must be submitted by 19th April 2018.

1. Complete the last payroll runs as normal in paydata.
2. Import the usual payroll run file into IRRdata.
 - a. No EPS to complete - Submit the final FPS with 'Final Submission for the Year' ticked.
 - b. EPS to complete - Submit FPS as Normal. Fill in EPS and submit with 'Final Submission for the Year'. **Leave the 'Claim Employment Allowance' ticked to maintain the claim.**

End of Tax Year

1. Go to Maintenance Routines → Run IRRdata

Go into an existing business.

Create a new business for 2017/18: Go to File → New Business.

Once in the new business (File → Change Business): Go to Tax Events → Import Payroll Details.

Browse to the file created by the Paydata Year End process and import. You can check the location in Paydata. (Payroll Parameters → General Parameters 2 → Directory for End of Year Files)

Where you have more than one payroll relating to the same Tax Office Reference Number, repeat this for each Paydata file that shares this number.

Go to Reports → End of Year reports. Print P60s for your employees and P35 summary and Continuation Sheets for your own records.

If you wish to email P60s you will need to setup the email parameters in IRRdata (Email → Email Settings).

2. Back in IRRdata, go to Maintenance → End of Tax Year. This resets Employee Records for the New Year. This will also create a copy business.

DISCLAIMER

Farmdata Limited assume no responsibility or liability for:

The results of any errors occurring during the update not notified immediately to ourselves. Users failure to implement previous updates or to incorporate any required NI/PAYE changes, whether notification was received from ourselves or not, and the results thereof. Users failure to keep adequate numbers of complete backup sets should it prove necessary, for whatever reason at whatever time, to resort to restoring a backup. Any work required on the part of Farmdata to 'rescue' data etc, is chargeable under these circumstances.