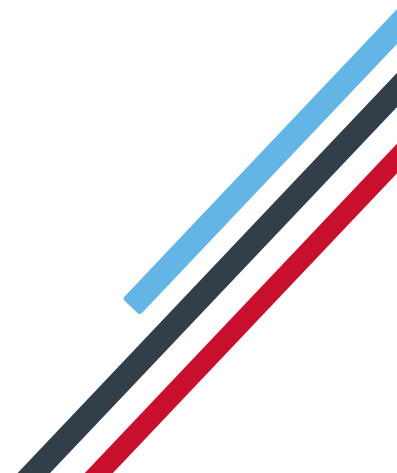




# **Year-end Guide**

**IRIS Payroll Professional**

April 2018



## Dear Customer

Welcome to your guide to completing payroll year-end procedures for 2017/2018.

The guide contains:

- [Year-end preparation](#) - what you need to do before starting year-end procedures
- [Year-end help](#) - step by step instructions for completing and submitting your final Full Payment Submission/Employer Payment Summary for the Tax Year and moving your companies into the new tax year
- [Company checklist](#) - you can print a checklist for EACH of your companies and use it along with the year-end guide, ticking each step as you complete it

HMRC's Gateway is ready now for your submissions - you do not need to wait until the 6 April to file your Final FPS/EPS. The **Full Payment Submission** should always be submitted on or before the pay date, no later than 19 April

Remember to install the year-end update of IRIS Payroll Professional, v**1.30.61** first.

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## Year-end preparation

Before you start year-end procedures, there are some important checks to make.

### Order Year-end forms

Have you got enough year-end forms? You need to print P60s for your all current employees; you do not need forms for employees who have left.

If you use the IRIS OpenPayslips element of the IRIS AE Suite™ you can publish P60s to the cloud and omit the need for stationery altogether. Contact us on 0344 8155677 for further details.

IRIS has produced forms designed for your software. Please contact us for details on 0344 815 5677 or go to <http://www.iris.co.uk/store/stationery> to order your stationery online. You can also email us at [stationery@iris.co.uk](mailto:stationery@iris.co.uk).

For IRIS stationery:

- Go to **Reports | Library Selection | Miscellaneous**. Select **P60 IRIS Laser Single Sheet**

Alternatively, print the P60s on plain A4 paper using the **Plain Paper Laser P60** report:

- Go to **Reports | Library Selection | Miscellaneous**. Select **Plain Paper Laser P60**

You can also order P60 forms from HMRC - order **P60 Single Sheet forms for 2017/2018**. For HMRC stationery:

- Go to **Reports | Library Selection | Miscellaneous**. Select **P60 HMRC Laser Single Sheet**

Forms must be **PORTRAIT LASER** style. Remember to order well in advance

## Download and install the year-end update

The version number in the title bar along the top of the screen should read **1.30.61**

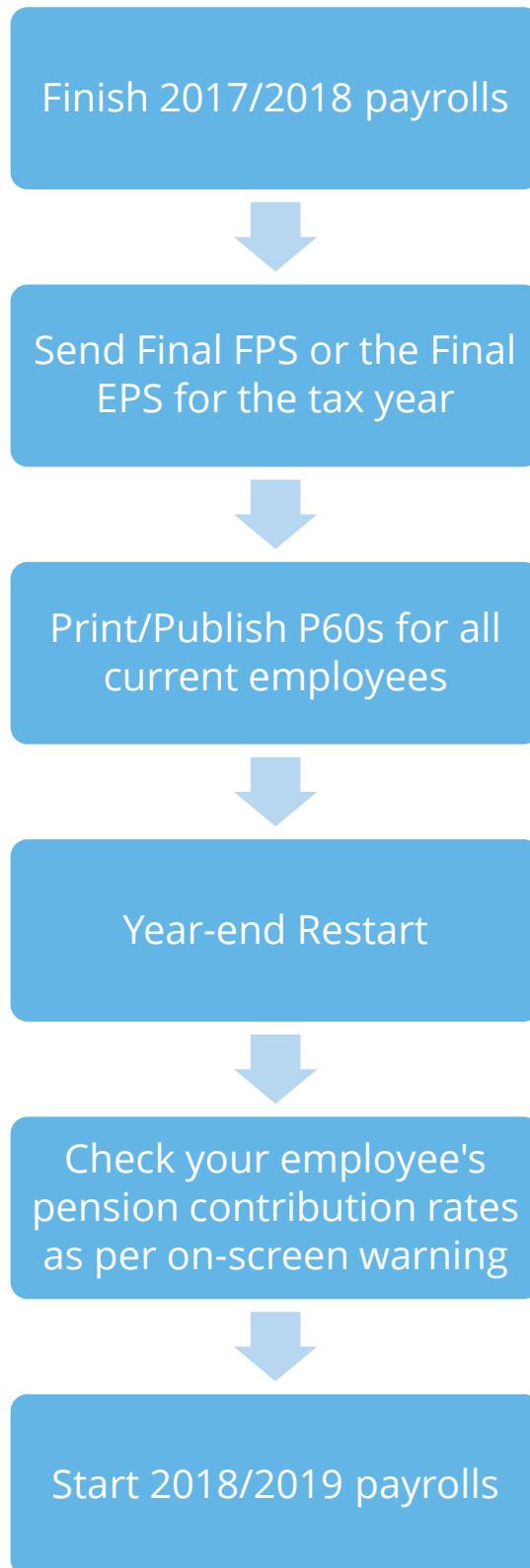
### Read the Year-end Guide

Familiarise yourself with the year-end process before you start.

### Be ready to back up your data

Make sure you know your back up procedure.

## Year-end overview



## Checklist – Complete year end and start 2018/2019 tax year

Use this checklist if you plan to send your final submissions before you start running payrolls in the 2018/2019 tax year.

|                       |  |
|-----------------------|--|
| <b>Company name</b>   |  |
| <b>Company number</b> |  |
| <b>Completed by</b>   |  |
| <b>Date</b>           |  |

Before you start make sure you have downloaded and installed version **1.30.61** of IRIS Payroll Professional

- Step 1** Complete payrolls up to the end of 2017/2018
- Step 2** Issue outstanding P45s for 2017/2018
- Step 3** Check year-to-date NI for Directors if you started using IRIS Payroll Professional part way through the tax year
- Step 4** Back up your 2017/2018 data. Use the space below to keep a record of where you saved it and when you did this: 
  - Back up details**
  - Location/filename \_\_\_\_\_
  - Date/Time \_\_\_\_\_
- Step 5** Submit your **FPS**. If an **EPS** is NOT required for March, tick **Final Submission for Year**
- Step 6** Submit your **Final Employer Payment Summary for Year**, if required, to HMRC (Tick **Final Employer Payment Summary for Tax Year**)
- Step 7** Print or publish **P60s** and give to your employees by 31 May 2018
- Step 8** From the **Year-end** menu run the **Year-end Restart**  
**Check your employee's pension contribution rates as per on-screen warning**
- Step 9** If your company newly qualifies as a small employer, tick the **Small Employer Relief** box

Make sure you know about changes to the software and payroll legislation – click on **Help** and select **Update Notes**.

## Final Submission of the tax year

Carry out steps 1 to 9 for each company you have in IRIS Payroll Professional.

Before you start, make sure you have installed version 1.30.61 of IRIS Payroll Professional, the April update

### Step 1

Complete payrolls up to the end of the 2017/2018 tax year.

#### Do I need to run a week 53/54/56?

- Weekly payroll with a pay date of 5<sup>th</sup> April should be week 53
- 2-weekly payroll with a pay date of 5<sup>th</sup> April should be week 54
- 4-weekly payroll with a pay date of 5<sup>th</sup> April should be week 56

For week 53, 54 and 56 payrolls IRIS Payroll Professional will automatically apply the week 1 tax basis as outlined by HMRC. You do **NOT** have to make any changes.

### Step 2

Issue P45s for employees you do not intend to pay in the 2018/2019 tax year.

### Step 3

If you started using IRIS Payroll Professional part way through the 2017/2018 tax year AND imported your data from another payroll system, check year-to-date NI calculations for Directors. Follow HMRC leaflet **CA44 National Insurance for company directors** or use the Director's National Insurance contributions calculator listed on their website [here](#).

### Step 4

Back up 2017/2018 data. Go to **File | Backup & Restore** or follow your standard back up routine.

## Step 5

If no EPS needs to be sent for March - send final FPS for the tax year

If you need to send an EPS for March to indicate adjustments made due to Statutory Payments reclaimed/recovered or no employees have been paid, **go to Step 6**

1. Go to **Online Services | Send Full Payment Submission**, tick **Final Submission for Year** and click **Next**
2. Check the figures on the **Full Payment Submission – Final Confirmation** screen. Click **Print Summary** and/or **Print Details** to print a copy for your records
3. Click **Send** to submit the **Full Payment Submission**. Now go to **Step 7**

## Step 6

Send FPS followed by a final EPS for the tax year

Complete this step if you need to send a **Final Employer Payment Summary for year** to indicate adjustments due to Statutory Payments reclaimed/recovered in the final pay period or if no employees have been paid in this month:

1. Following your usual procedures, send an FPS for your final pay period without ticking **Final Submission for year**
2. Go to **Online Services | Send Employer Payment Summary**, tick **Final Employer Payment Summary for Tax Year** then click **Next**
3. Check the figures on the **Employer Payment Summary Values** screen and amend them if necessary
  - For example, you may pay some employees via IRIS Payroll Professional and some via another payroll system, and the company has the same PAYE tax reference in each, in which case the EPS values must be combined before submitting
4. Click **Next**
5. Check the values on the **Employer Payment Summary – Year to Date Values** section. Click **Print** if you require an EPS Confirmation report
6. Click **Send** to submit to HMRC



## Step 7

### Print or Publish P60 year-end forms

If you are using pre-printed P60 forms, make sure your printer is loaded with forms designed for the **current tax year**, then go to **Year-end | Print Year-end Forms**.

If you have difficulty aligning your forms, try using the HP LaserJet 2100 printer driver with your printer. You can install it via Windows. You could also adjust the report margins using the **Margins** button on the **Print Report** screen. Remember to set these back to their original values when you have finished printing the P60s.

#### If you need to start running payrolls before printing P60s:

If you need to start running payrolls in the new tax year, before printing P60s, perform the **Year-end Restart** and then run payrolls in the new tax year as normal.

When you perform the **Year-end Restart** the company is copied automatically.

**Remember, your final FPS, must be sent before 19 April 2018. After this ANY changes from the previous tax year must be submitted via the Earlier Year Update.**

When you are ready to print your P60s:

1. From the **Year-end** menu, select **Use Last Year's Company Data**. This restores the data to what it was before the **Year-end Restart**
2. A confirmation message is displayed. When the previous year's data is in use, the tax year is displayed in the title bar after the company name
3. Print P60s as described in the **Final Submission of the tax year** section of this guide

Once finished, return to your current data by again selecting **Use Last Year's Company Data** from the **Year-end** menu. **Do not** perform a second **Year-end Restart** when you are using last year's data.

The Last Year copy is **NOT** a substitute for your end of year back up. When IRIS Payroll Professional makes the automatic copy during the **Year-end Restart**, data already stored in the **Last Year** folder for the current company is overwritten. This happens every time a **Year-end Restart** is done for that company; consequently, only the previous tax year's copy is ever available.

## Step 8

1. Go to **Year-end | Year-end Restart**. The **Year-end Restart** clears all to-date information for the 2017/2018 tax year
2. Select **Yes** to start
3. **Check your employee's pension contribution rates as per on-screen warning**
4. **Pay Rate** and **Payment/Deduction** annual totals are now cleared:
  - Ticked items are set to zero
  - Un-tick those you do not wish to clear
  - Any items with a reducing balance should NOT be cleared
5. Do you wish to clear any History, Diary or Costing records for previous tax years? Alter the tax year to clear the figures or leave them set to **None**, then click **OK**
6. Click **OK** on the next screen to confirm the new tax year is 2018/2019. Employee tax codes will be updated automatically if required
7. If the company qualified for Small Employer Relief in 2017/2018, you are asked if you need to un-tick the **Small Employer Relief** box for the new tax year. If you respond **Yes**, IRIS Payroll Professional automatically removes the tick for you
8. Click **OK** to complete the process

## Step 9

If your company NEWLY qualifies as a small employer for the 2018/2019 tax year, go to **Company | Alter Company Options**, tick the **Small Employer Relief** box and click **OK**.

The definition of a small employer for tax year 2018/2019 is one who paid, or was liable to pay, total gross employees' plus employer's Class 1 National Insurance contributions of £45,000 or less during the 2017/2018 tax year. Companies who qualify for small employer relief can claim extra compensation for SMP, SPP, ShPP and SAP payments

## Step 10

Go to **Reports | Library Selection** and reselect any reports you use regularly (unless they are bespoke) to make sure you have the latest versions.

## Step 11

Read **Help | Update Notes** to learn about changes to the software.

## Additional Software and Services Available

### IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary contributions, produce files in the right format for your pension provider\* and generate the necessary employee communications.

### IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

### IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

### Useful numbers

| HMRC online service helpdesk    | HMRC employer helpline            |
|---------------------------------|-----------------------------------|
| Tel: 0300 200 3600              | Tel: 0300 200 3200                |
| Fax: 0844 366 7828              | Tel: 0300 200 3211 (new business) |
| Email: helpdesk@ir-efile.gov.uk |                                   |

### Contact Sales (including stationery sales)

| For IRIS Payrolls       | For Earnie™ Payrolls          |
|-------------------------|-------------------------------|
| Tel: 0344 815 5700      | Tel: 0344 815 5677            |
| Email: sales@iris.co.uk | Email: earniesales@iris.co.uk |

### Contact support

| Your Product              | Phone         | E-mail                  |
|---------------------------|---------------|-------------------------|
| IRIS PAYE-Master          | 0344 815 5661 | payroll@iris.co.uk      |
| IRIS Payroll Business     | 0344 815 5661 | ipsupport@iris.co.uk    |
| IRIS Bureau Payroll       | 0344 815 5661 | ipsupport@iris.co.uk    |
| IRIS Payroll Professional | 0344 815 5671 | payrollpro@iris.co.uk   |
| IRIS GP Payroll           | 0344 815 5681 | support@gppayroll.co.uk |
| IRIS GP Accounts          | 0344 815 5681 | gpaccsupport@iris.co.uk |
| Earnie™ or Earnie™ IQ     | 0344 815 5671 | support@earnie.co.uk    |