SagePayroll

Guide to Payroll Year End 2019

By

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Contents

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Page 2

Payroll Year End 2019 Check List

Print out this checklist and use it to work through the Payroll Year End

STAGE 1 MUST BE COMPLETE PRIOR TO PROCESSING THE FINAL PAY PERIOD FOR ALL THE 2019 PAYROLLS, IN ORDER TO ENSURE THAT ANY RELEVANT RECALCULATIONS TAKE PLACE

See our Full Year End Resource Page at: https://pimbrook.ie/knowledge-base/25210/

Stage 1: Running the Payroll Year End 2019 Update   **Completed?**

Step 1: Locate where your payroll is installed	Pg 4	
Step 2: Take a Full System Backup	Pg 5	
Things to Note Before Running the Payroll Year End Update	Pg 8	
Step 3: Run the Payroll Year End 2019 Update	Pg 9	

Note: Each of the items in Stage 1 only need to be done once in total (Not once per payroll.)

Stage 2: Completing 2019 Processing   **Completed?**

	Company	1	2	3	4	5
Things to Note Before Processing Final Pay in 2019	Pg 12					
Step 1: Process the Final Pay Period(s) of 2019	Pg 14					
Step 2: Compare the Control Summary and Employer Monthly Liability Report	Pg 15					
Step 3: View/Save Other Reports	Pg 17					
Step 4: Housekeeping Tasks (Validate Payroll)	Pg 22					

Note: Each of the items in Stage 2 typically need to be done once per payroll.

Stage 3: Starting the Tax Year 2020   **Completed?**

	Company	1	2	3	4	5
Things to Note Before Processing First Pay Period(s) in 2020	Pg 23					
Step 1: Creating Tax Year 2020	Pg 24					
Step 2: Opening Tax Year 2020	Pg 25					
Step 3: Setting up a New Payroll Calendar	Pg 27					
Step 4: Set up Additional Superannuation Contribution [ASC] (If Applicable)	Pg 28					

Note: Each of the items in Stage 3 typically need to be done once per payroll.

Stage 4: Accounting/Financial Year End   **Completed?**

	Company	1	2	3	4	5
*Step 1: Clear Cost Analysis	Pg 29					
*Step 2: Clear Payments	Pg 30					
*Step 3: Clear Deductions	Pg 31					

Note: Each of the items in Stage 4 typically need to be done once per payroll.

Stage 5: Set the First Period and Roll Forward the Holiday & Absence Year   **Completed?**

|	Company	1	2	3	4	5
Step 1: Set the First Period	Pg 33					
Step 2: Roll Forward Holiday & Absence Year	Pg 33					

Note: Each of the items in Stage 5 typically need to be done once per payroll.

*Items marked with an asterisk are optional, depending on when your Financial or Deduction Year ends.

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Page 3

Stage 1: Running the Payroll Year End 2019 Update

Step 1: Locate where your payroll is Installed

1. To locate this log into your payroll, select **Help** and then click **System Information:**
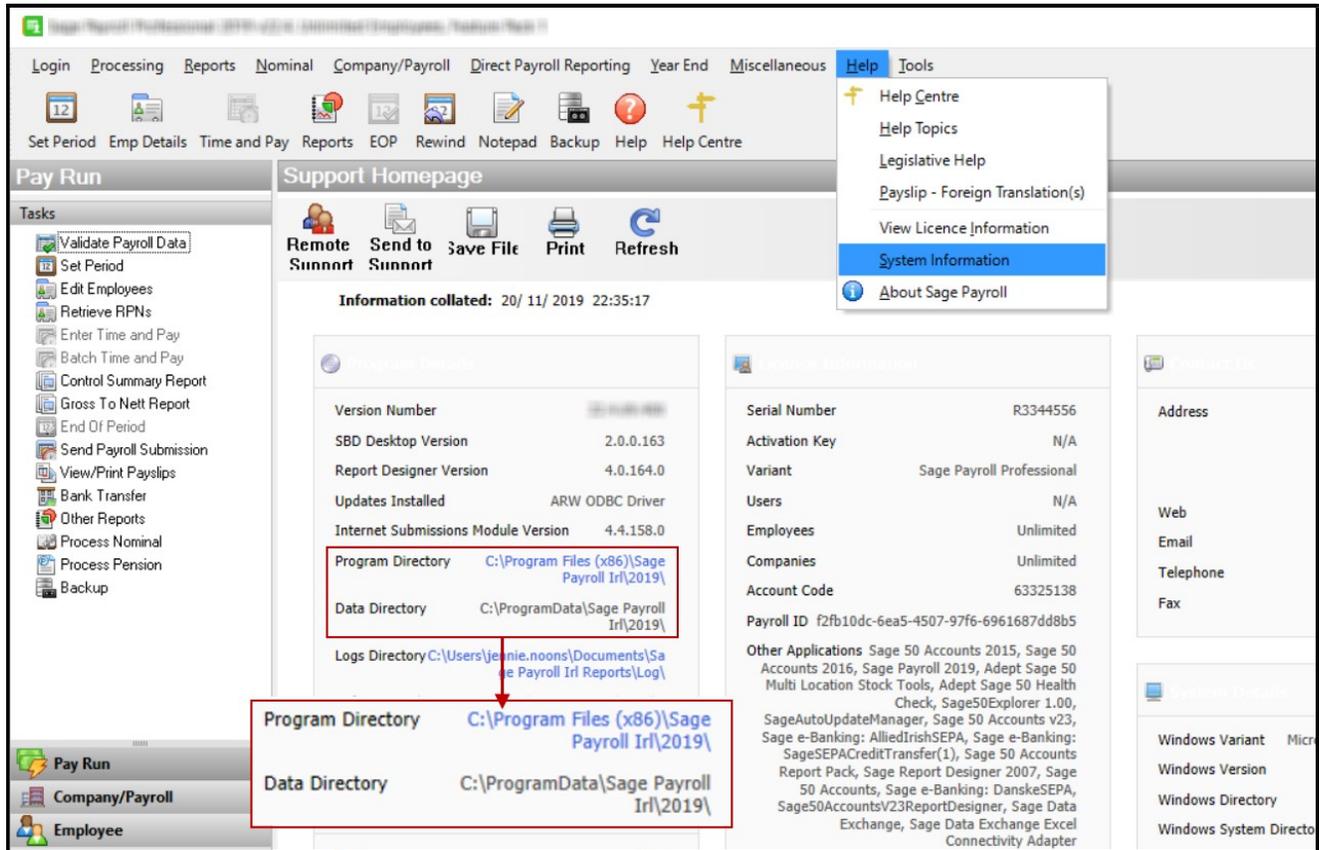
2. Before running any updates, please **fill in** the following information:

Step 2: Take a Full System Backup

Before installing the Payroll Year End 2019 Update, you must take a backup of the system files (programs) and payroll data.
*Note:* *If you have already updated your software, Pimbrook recommend taking this backup after all pay periods have been processed.*

This should be kept safe for the future as this helps you to minimise the possibility of ever having to re-create information manually. **The Revenue Commissioners require that you retain details of the payroll for at least six full tax years.**

1. Select **Login** and **Login to a Payroll**.
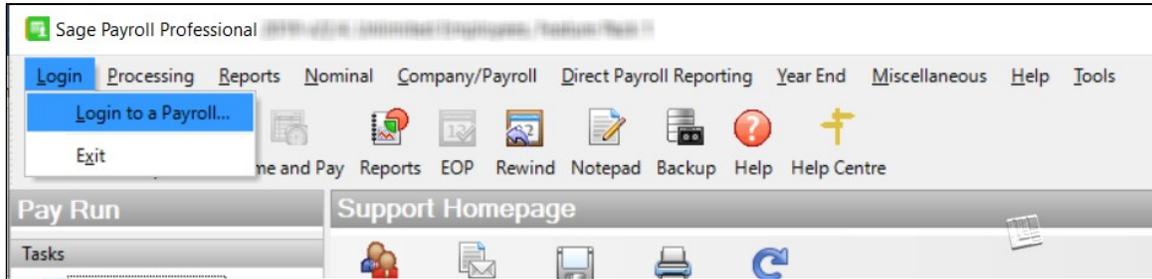
2. Login as the system administrator (with the user name **ADMIN**).
   The default password for ADMIN is **PASS**, but this may be different on your system. Click **OK** to proceed.

3. Select the **Miscellaneous - Backup** menu option at the top of the screen.
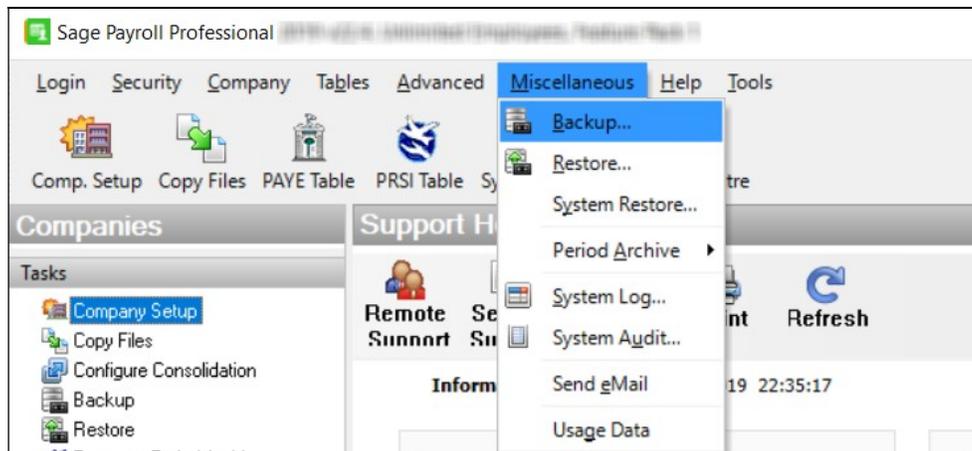
4. Click the **Select All** button or individually tick the relevant companies, and select the **Backup System Files** checkbox.
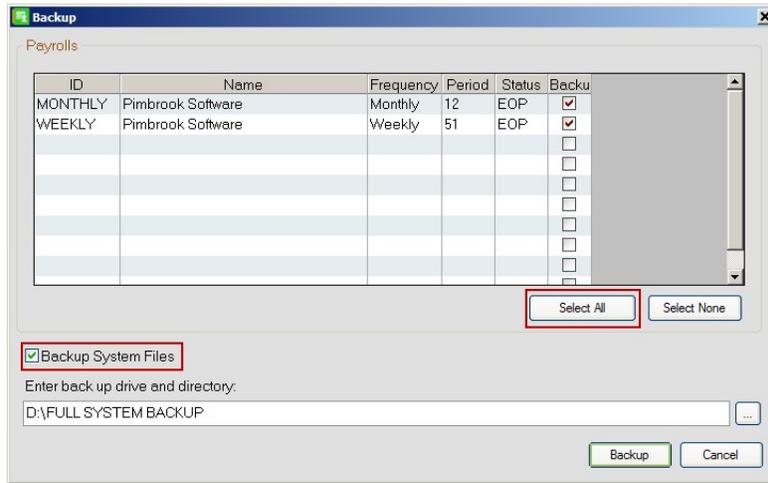
5. Ensure that the 'Enter back up drive and directory' field specifies the correct storage location for your backup.
- It's a good idea to create a folder especially for your year-end security backup.
- Name the new folder '*FULL SYSTEM BACKUP'.* Add the year if desired.
- You should use a reliable storage medium, such as a network drive or a memory stick.
- *Note: Payroll sizes vary, but the system backup may require up to 100MB of memory.*
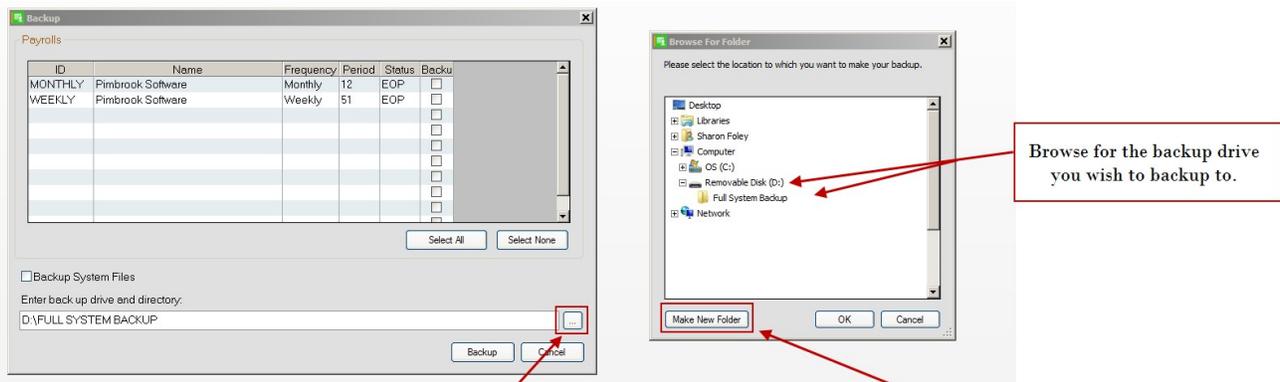
The easiest way to do this is to click the **Browse button** on the right and navigate to the relevant location and then click **Make New Folder** icon.

6. Click **Backup** to proceed.
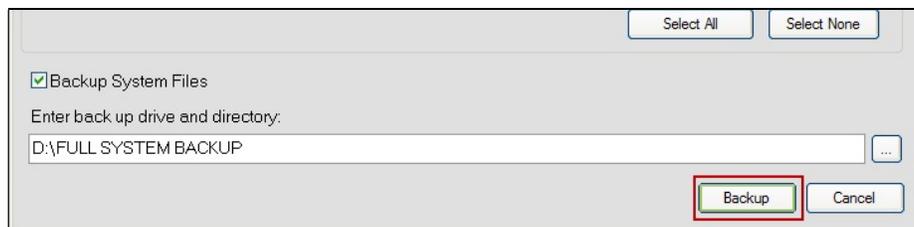
The backup is created at the specified location. Click **OK** in the confirmation dialogue box. The backup process is now complete.
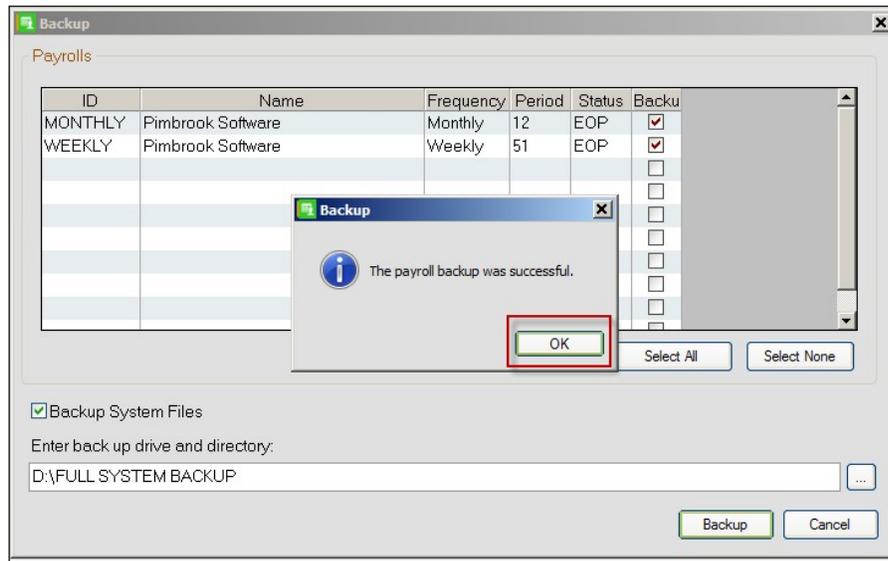
*Note: Backup Already Exists: If a backup already exists in your selected folder, you will be alerted by a message on screen. Click' **Backup to this Folder'** to overwrite the existing backup. Otherwise, click '**Choose another folder'** and specify a different location. You can do this by going into **My Computer** and creating a **New Folder** to back-up to.*

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Page 7
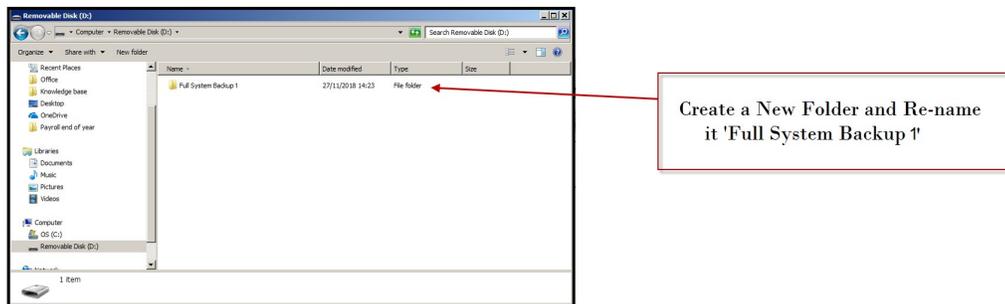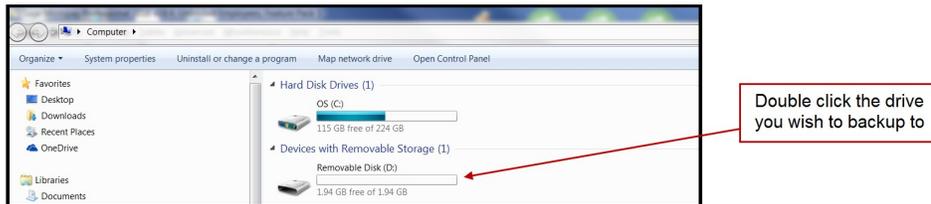
Things to Note Before Running the Payroll Year End Update

Administrative Rights:
- Depending on your operating system it may be necessary to have **administrator rights** on your computer.
- If you are unsure about this contact your IT Company.

Sage Payroll Version:
- To install the Payroll Year End 2019 Update, you must be using Sage Payroll 2019 V22.1 or above.

Payroll Status:
- Your Payroll must have a status of End Of Period (EOP) or Start Of Period (SOP).

Close Other Applications:
- Before proceeding, close any applications which are open on your PC, including Sage Payroll and any other Sage products.

End of Support for Windows 7, Service Pack 1:
- As you may already be aware, Microsoft will be ending support for Windows 7, Service Pack 1 on 14th January 2020. This will include the cessation of security updates.
- If you are installing the year end update on a Windows 7 PC, you will be presented with a notification during the installation process. You must acknowledge the notification before you can proceed with the update.
- When the notification is presented, tick the **'I acknowledge the above warning and want to proceed with the installation'** tickbox, and then click **'Next'.**
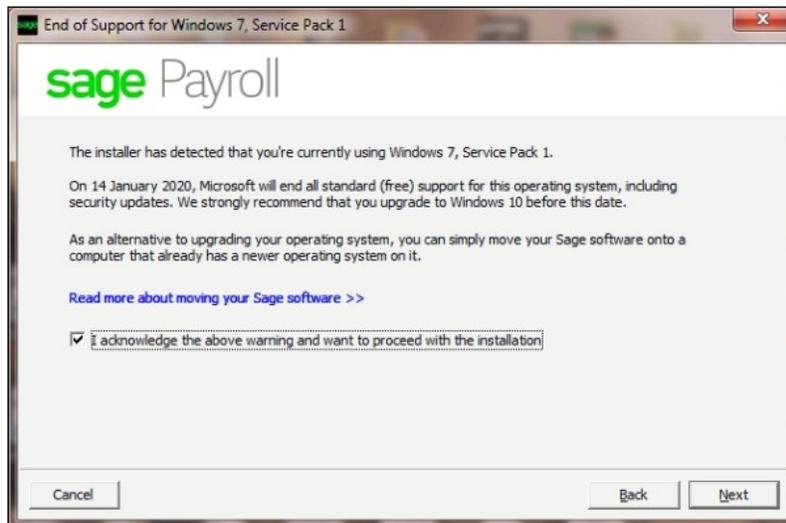

Downloading the Update:
- If your automatic news feeds is enabled, you will receive an automatic notification to download the PYE Update.
- If you don't get a notification, try clicking **'Help\Check For Updates'** at the top of the screen.
- Alternatively you can download the Payroll year end update from our website**:** https://pimbrook.ie/knowledge-base/25210/

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Page 8

Step 3: Run the Payroll Year End 2019 Update

1. Double click on the update file to run the update:
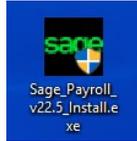
2. The system will start extracting the installer:
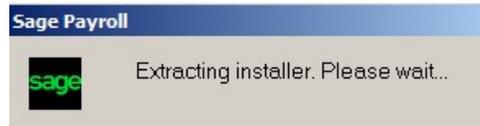
3. Read the Licence Agreement.
- Click the box 'I accept the terms of the licence agreement' and then click **Next.**

4. Specify whether you want to carry out a 'This Computer', 'Client' or 'Server' installation:

Note: If you have a Client Server setup of Sage Payroll at your office – make sure to run the <u>Server</u> Option FIRST! See Client/Server note below.

This Computer:
If your *Program Directory* and *Data Directory* are on the same computer/same drive (see Stage 1, Step 1) then use the 'This Computer' option.

Client:
If your *Program Directory* and *Data Directory* are in different locations you must install the client application on each computer using the payroll. *Please read Client/Server Note below.*

Server:
If your *Program Directory* and *Data Directory* are in different locations, you must run this option prior to running the client application. The server installation is run once only. *Please read Client/Server Note below.*
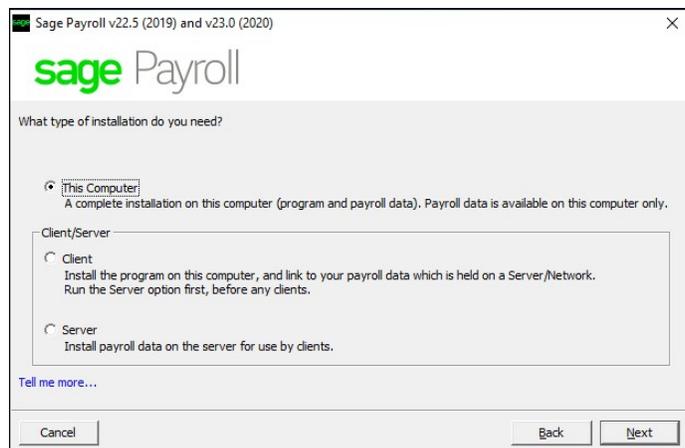
Client/Server Note:
- *By 'different locations' we mean 'on two different PCs'. **ie:** The Program Directory is on the client PC you are sitting at, and the Data Directory on a different PC/Server in your Network. If this is the case for you, you must run the 'Server' option FIRST.*
- *You only need to run the Server Option <u>ONCE</u>. **eg:** if you have 3 client PCs with Sage Payroll on them and the payroll data is on a server/PC in your network: Run the Server option FIRST from the first client PC. After that, run the client option on the first PC, then run the client option on the second PC and then run the client option on the third PC.*

5. Specify whether you want to use **'Typical'** setting or **'Custom'** Setting for your installation:

Typical:
A 'typical' installation will suggest to install to the locations you identified in Stage 1, Step 1.

Custom:
A 'custom' installation will suggest the locations identified in Stage 1, Step 1 – but will allow you to amend locations if you need to.

We recommend to choose 'Custom' and then click Next.
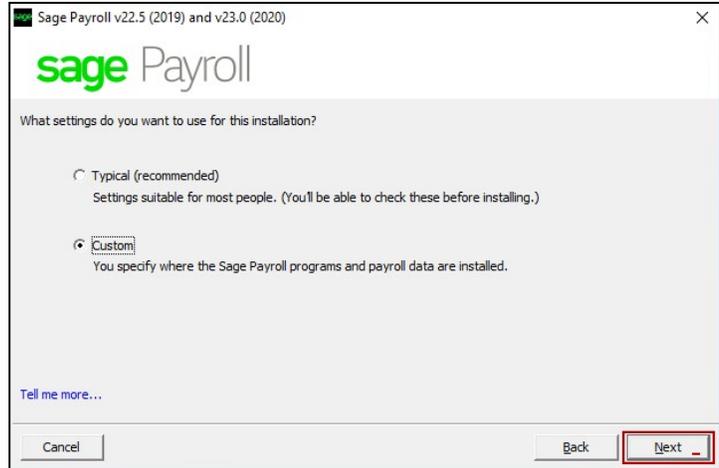
6. Check Locations
- Once you choose 'Custom' and click Next, the installer will display a new screen showing the locations it intends to use:

- The locations shown in the screen should be equal to the locations you identified in Stage1, Step 1.

- If either of the locations shown in the screen displayed don't match their respective locations which you identified in Stage1, Step1 then click on the relevant **'Browse'** button to correct it. [The browse buttons are only available if you chose a 'Custom' install on the previous screen.]
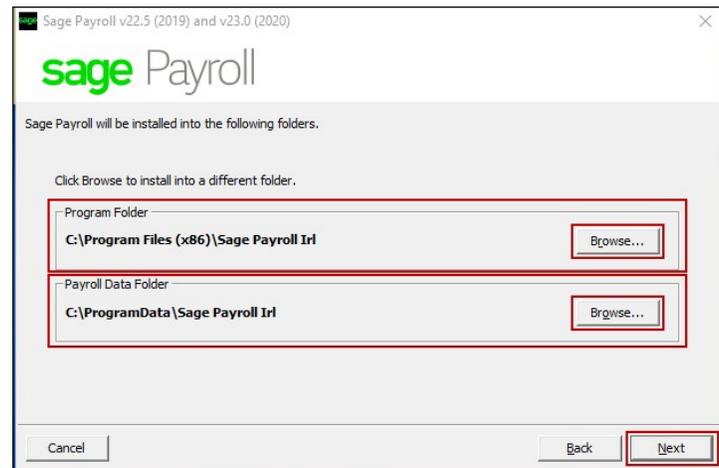
Once you are happy that the locations are correct, click Next to continue.

7. Install
- A screen prompting you to install will appear. This is the final screen before you commit to installing the update.

- It once again displays the locations, giving you one last chance to check if they are ok.

- If you are still happy that the locations match those that you identified in Stage1, Step 1 then click **Install**.
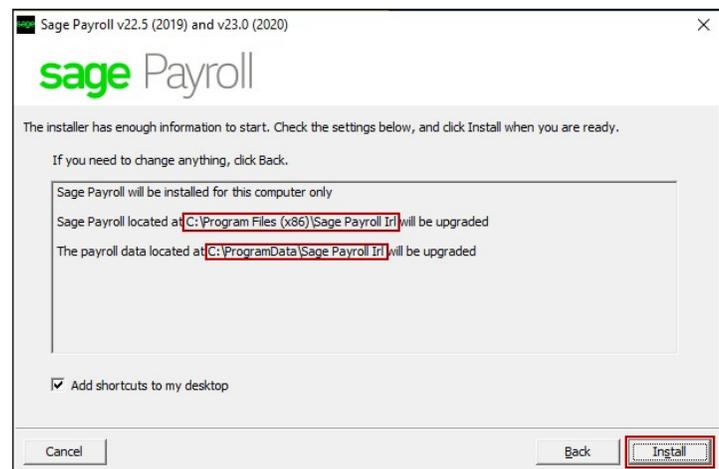
8. Once installation starts, it will take a few minutes to complete.
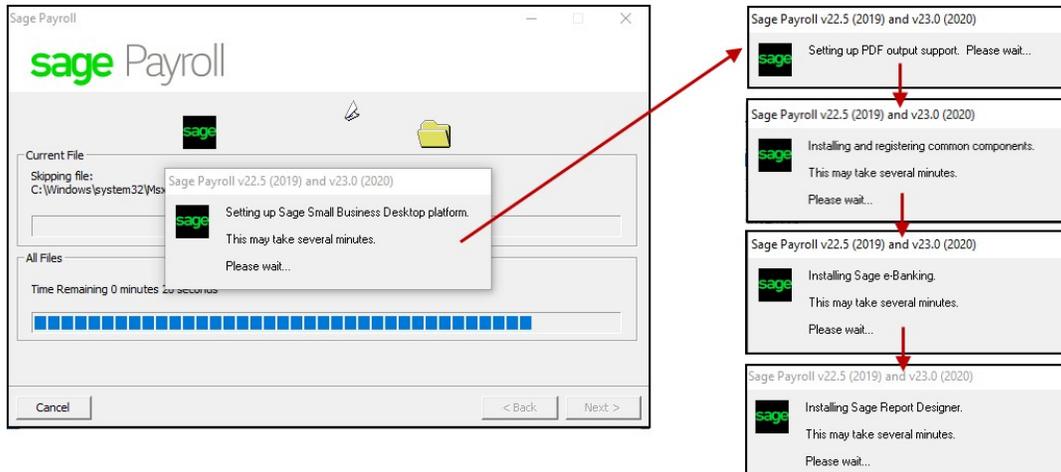
9. When the install process is complete, click **Finish.**
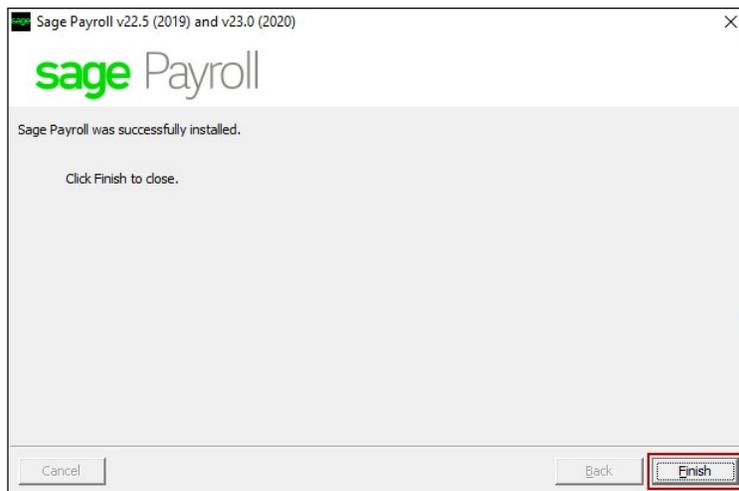
10. Launch Sage Payroll 2019 tax year for the first time since the upgrade
by double-clicking the **Sage Payroll 2019** desktop shortcut icon:

11. When you next login to your 2019 payroll, check the version number displayed for Sage Payroll 2019.
   The version number should now be **v22.5** This can be seen in the title bar at the top of the screen:
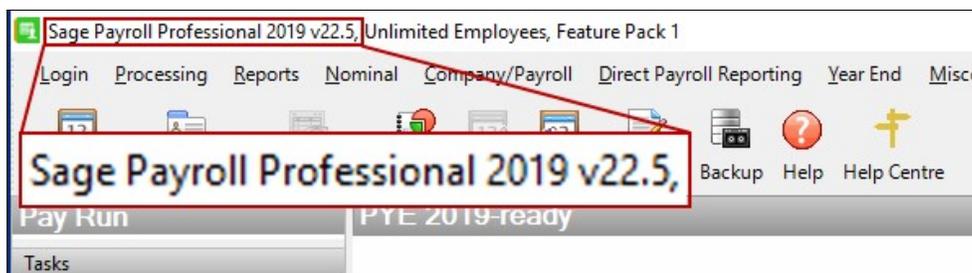
Stage 2: Completing 2019 Processing

Things to Note Before Processing Final Pay in 2019

Change to the Year End Process:
- The process for completing the tax year has changed due to PAYE modernisation.
- Because you have been doing real time period submissions to Revenue throughout the 2019 tax year, there is no longer any need to submit a year end return, run P35 or P60 reports and those reports are no longer available in the software.

*Employee 'End of Year Statement' – (Previously called P60's)*
- This year, for the first time, employees are required to log into their Revenue 'MyAccount' to retrieve their own 'End of Year Statement' for the tax year.
- This is the equivalent of the issuing of P60's in previous years.
- As the year end approaches, it might be a good idea to remind your employees of this new process.

Pay Dates & The Pay Date Rule:
- The pay date rule means that if the pay date for a period is a 2019 date, then the period belongs in the 2019 payroll and if the pay date is a 2020 date, then it belongs in the 2020 payroll.
- All scenarios are governed by the pay date rule.

Check If You Have an Extra Pay Period:
- Because the number of days in the tax year doesn't divide into a whole number of tax weeks, any remaining days are known as week 53.
- This year (2019), you only have a week 53 if you normally pay your employees on a Tuesday, and the pay date falls on 31st of December.
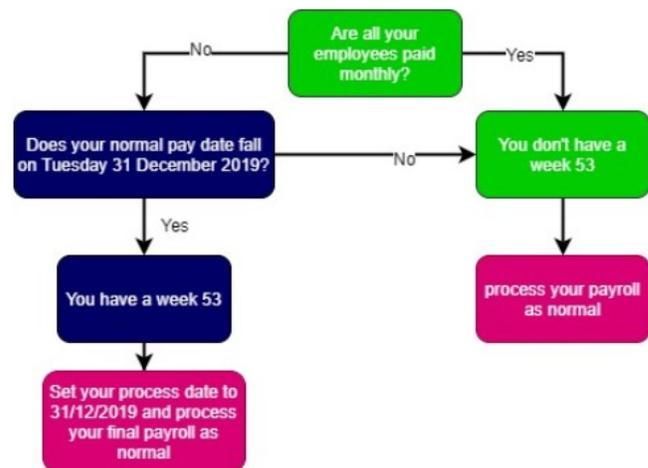
Things To Consider Regarding Dates at Year End:
- For weekly payrolls, payments to employees should be on the same day every week – including over Christmas.
- Holiday pay for days taken in 2019 need to be paid in the 2019 payroll.
- Holiday pay for days taken in 2020 (eg: 2nd/3rd Jan) need to be paid in the 2020 payroll.
- Where a company is going to run 3 weeks payroll, ie: Period 51, 52 and another period – the pay date rule applies: If the pay date of the 3rd week falls in 2019, then it should be included in the 2019 system. If the pay date of the 3rd week falls in 2020, then it should be included in the 2020 system.
- If the pay date of the 3rd week does fall in 2020, then this means you will need to run two payrolls (one in 2019 system and one in 2020 system). It will also mean two bank payments (if paying by bank transfer).
- All of this is irrespective of when the work was carried out.

See below Examples of Correct & Incorrect Year End 2019/Year Start 2020 Dates:

| Example 1: This Example is Correct				Example 2: This Example is Incorrect				Example 3: This Example is Also Incorrect			
Period	Day	Pay Date	Belongs in Payroll Year	Period	Day	Pay Date	Belongs in Payroll Year	Period	Day	Pay Date	Belongs in Payroll Year
50	Friday	13/12/2019	2019	50	Friday	13/12/2019	2019	50	Friday	13/12/2019	2019
51	Friday	20/12/2019	2019	51	Friday	20/12/2019	2019	51	Friday	20/12/2019	2019
52	Friday	27/12/2019	2019	52	Friday	27/12/2019	2019	52	Friday	27/12/2019	2019
1	Friday	03/01/2020	2020	53	Friday	03/01/2020	2019	53	Tuesday	31/12/2019	2019
2	Friday	10/01/2020	2020	1	Friday	10/01/2019	2020	1	Friday	10/01/2019	2020

ASC Re-Calculation (Previously Called PRD):

If you have employees in your payroll who pay an Additional Superannuation Contribution (ASC), then this applies to you:

- In the 2019 tax year, the system can automatically recalculate the Additional Superannuation Contribution (ASC) amounts for the year.
- If the employee is entitled to a refund arising from any of these recalculations, the refund amount will be incorporated into the employee's payslip.
- When entering in the Time and Pay on the final payroll, you can tick the 'ASC' box in the Recalculations section at the bottom left side of the screen, to instruct the program to carry out the recalculation for the employee:
- The recalculation section is only available in Sage Payroll V22.5, so be sure to run the Year End Update before processing your final pay period in 2019. (See Stage 1, Step 3 for more info.)
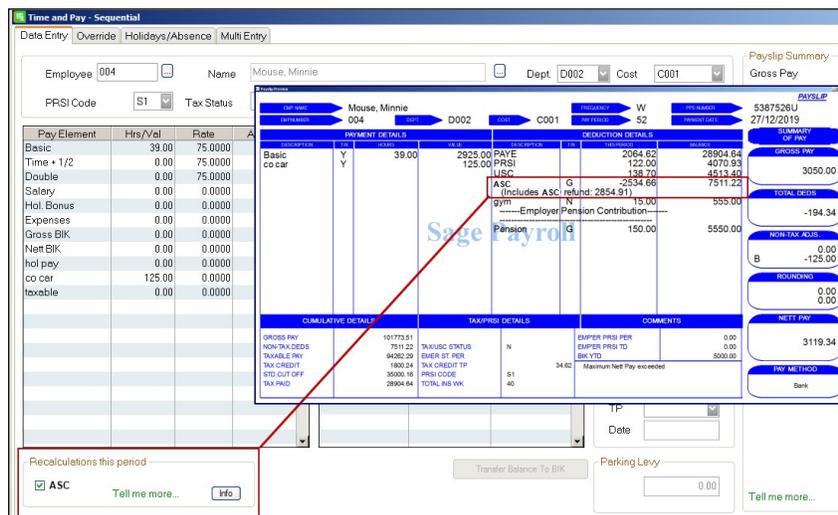
New 'Gift Card' Feature:

- If you purchase gift cards for your employees at year end (or any time of the year), then this new feature may be a welcome timesaver.
- This new feature is available in Version 22.5 (onwards).
- A new menu item has been added at the top of the screen for **'Gift Cards'**, with a sub item for **'One4all'**:

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Page 13
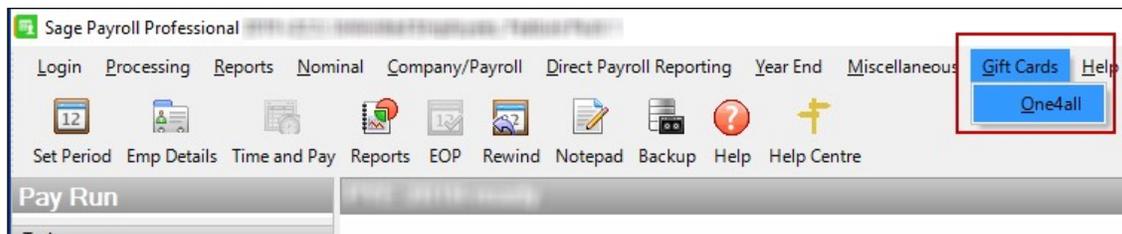
- When the One4All option is selected, the 'Purchase One4All Gift Cards' screen opens. This displays a list of all active employees. The user can enter a gift card amount of between €15 and €500:

- When the user clicks **'Purchase on One4All website'**, the One4All website is launched, showing the shopping cart, the employee names and the amounts of gift cards.

- The user must complete the purchase on the One4All website.

- Sage Payroll does not send or store any payment information, nor are the purchases passed into the timesheets.

Step1: Process the Final Pay Period(s) of 2019

Process the last pay period(s) of 2019 for your company payroll in the usual way.

- Normally, the last pay period is Week 52, Month 12 or Fortnight 26, but in some years [for non-monthly payrolls], you might have an extra pay period.
- If you are running a weekly payroll, it's ok to finish on week 51 if all employees are paid for a double week. (2 Tax Credits, 2 Insurable Weeks, 2 Weeks Worked etc…)
- In all scenarios, be sure to adhere to the 'Pay Date Rule'.

When your final payroll is complete, run end of period in the usual way.

Step 2: Compare the Control Summary and Employer Monthly Liability Reports

Before continuing, make sure that the payroll status is <mark>*End Of Period*</mark>*, so that all figures reported are up to date.*

1. Print the Control Summary:
- Select the **'Reports\Payroll Reports'** from the menu at the top of the screen. *(Alternatively select the 'Reports' button from the main screen).*


- When the Payroll Reports window is presented, select **Control Summary**, and then click **Print**:

- If you want to print a consolidated Control Summary Report, you will need to log into your Consolidated company to do this.

- If you do not yet have a consolidated company, you can create one by following the guide at the end of this booklet.
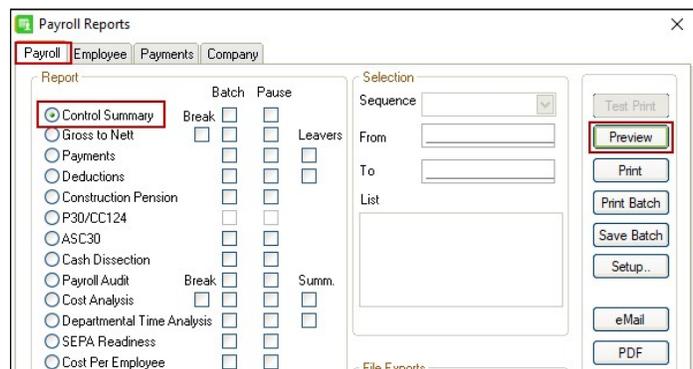
2. Print the Monthly Liability Report:
- In the Payroll Reports window, choose the **'Company'** tab at the top.

- Select the **'Employer Monthly Liability'** report option and click the '**Print**' button.

- A new screen is presented offering you a list of all your payrolls. Tick '**Include**' to select the payroll you're logged into and click '**Continue**' at the bottom of the screen.

- If you want to print a consolidated Liability Report, choose the relevant payrolls and click '**Continue**' at the bottom of the screen.

- When prompted to '**Show Quarterly Subtotals**', click '**No**'.
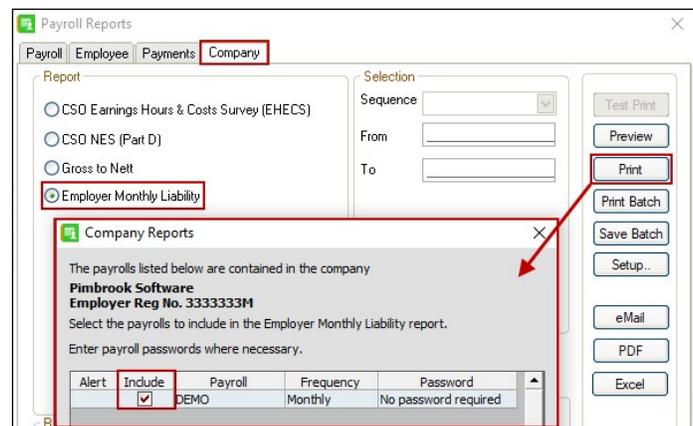
4. Compare the information on the two reports as follows:
- Make sure that the Control Summary data (specified in the table below - left column), matches the Employer Monthly Liability Report data (specified in the table below – right column). See example in image:

Control Summary (Cumulative Control Totals)	Employer Monthly Liability Report
Tax This Employment - C/Forward	Income Tax (Total at the Bottom)
USC This Employment - C/Forward	USC (Total at the Bottom)
PRSI Employee + PRSI Employer - C/Forward	PRSI (Total at the Bottom)
The LPT Value in the Monthly Liability Report will need to be compared to the Deduction report. See note below.	

Example:

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Page 16

Note: When printing Deduction reports ensure you tick the include leavers option, to ensure all values are included:
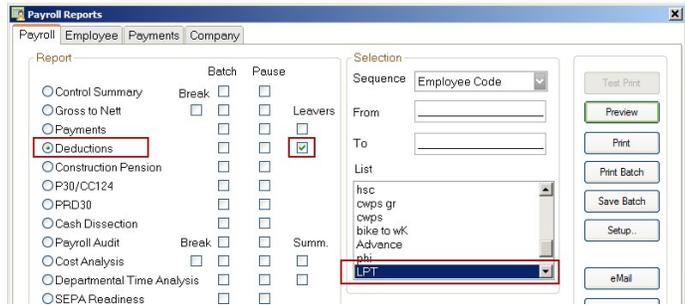
Step 3: View/Save Other Reports

While printing/saving some of the reports suggested below is optional, we think its good practice to finalise your payroll year by doing so. Saving them to PDF (or Excel) is a good idea as they can easily be passed on to your Auditors/Accountants. We recommend to print/save the following reports, but if you have a preference for other reports you can add to the list below:

1. Control Summary Report (Optional)
2. Employment Detail Summary Report (Optional)
3. Earnings Tax & PRSI (Optional)
4. ASC Reports (If Applicable To Your Payroll)

1.Print/Save Control Summary Report:
- Select the **'Reports\Payroll Reports'** from the menu at the top of the screen. *(Alternatively select the 'Reports' button from the main screen).*


- When the Payroll Reports window is presented, select '**Control Summary**'

- To print, click the '**Print'** button or if you prefer to save it as a PDF file, click the **'PDF'** button:
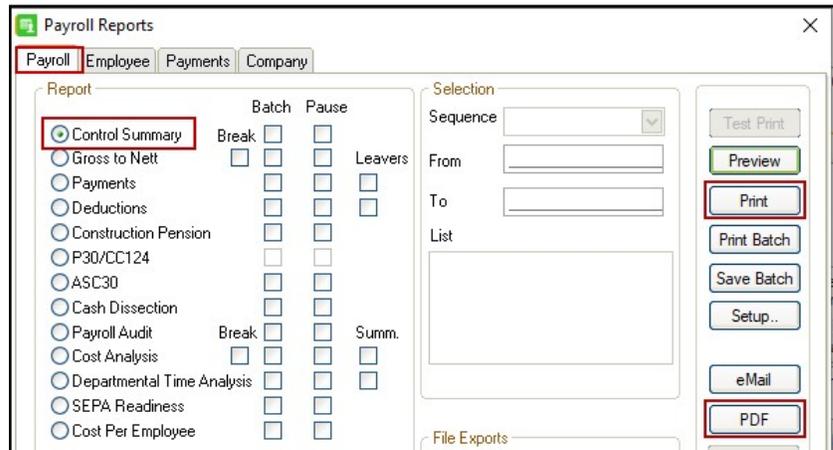
2.Print/Save Employment Detail Summary Report:
- Your Sage Payroll v22.5 software includes an Employment Detail Summary report.
- It shows Pay, Tax, USC, LPT and PRSI Information for every person employed by you during the current tax year.
- This report is for reference only and is not an official Revenue document.
- You are not required to hand this out to employees, but you can print or PDF it for your own reference if you so wish.
- If an employee asks you for a summary of their employment, this will be the report to give them.

- To access this report, click on the '**Year End'** menu item at the top of the screen, then choose '**Tax\Tax Year End Reports':**

- From the window that is presented, choose **'Employment Detail Summary'.** Choose to include leavers using the **'Include Leavers'** tickbox.

- To print click the '**Print'** button or if you prefer to save it as a PDF file, click the **'PDF'** button:

- You can select a single employee or a range of employees by choosing **Employee Code** in the Sequence listbox, and entering the relevant employee(s) in the **From** and **To** fields.

- The Employee Detail Summary Report looks like this:
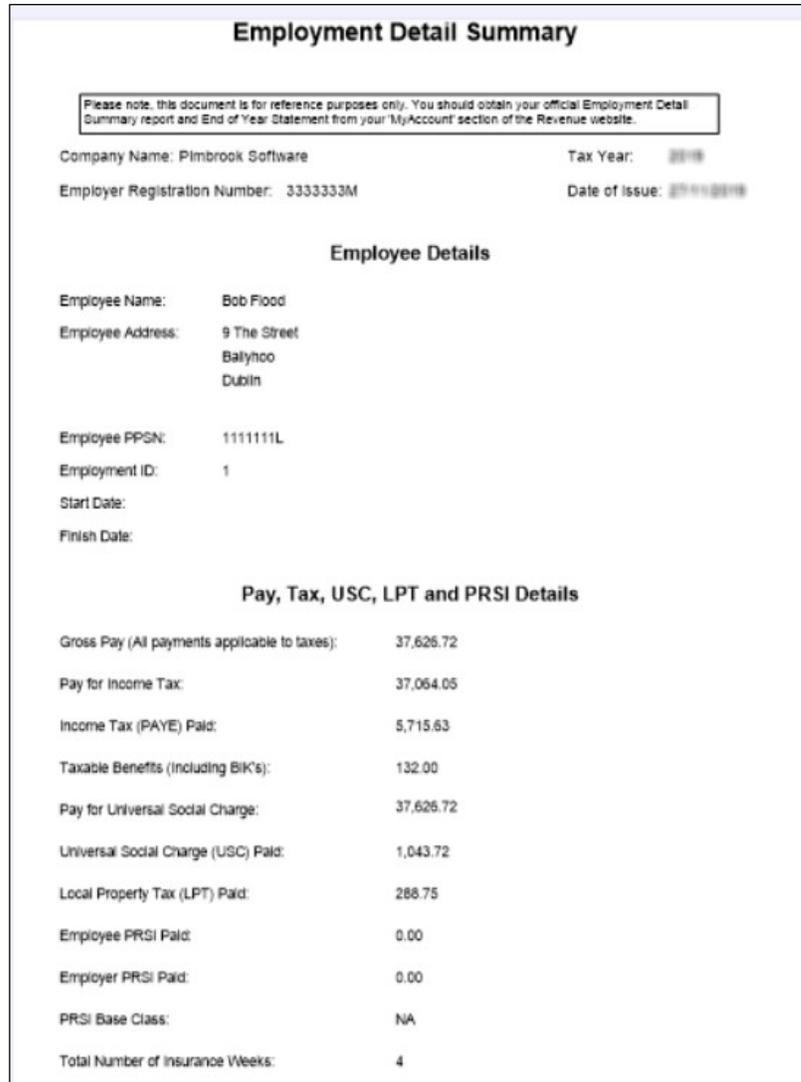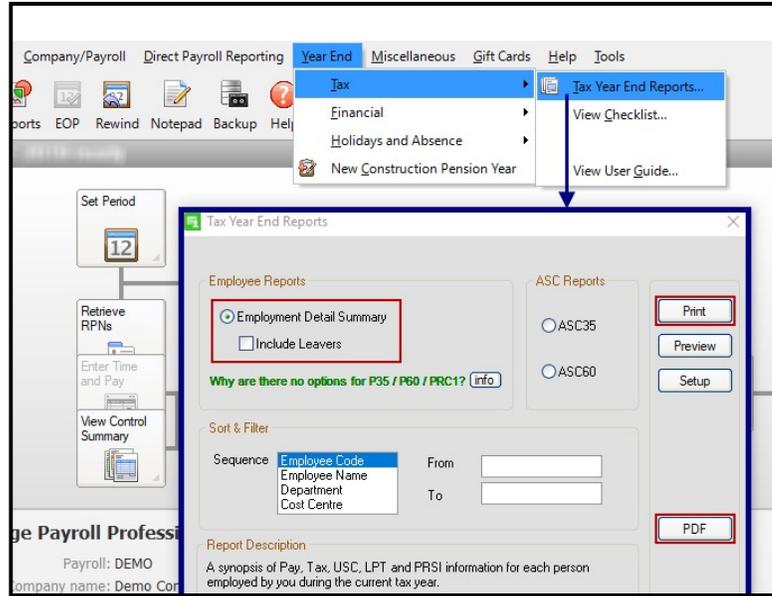
3.Print/Save Earnings Tax & PRSI Report:
- Select the **'Reports\Payroll Reports'** from the menu at the top of the screen. *(Alternatively select the 'Reports' button from the main screen).*

- When the Payroll Reports window is presented select the **'Employee'** tab at the top of the screen:

- Select '**Earnings Tax & PRSI'** report on the left:

- To print click the '**Print'** button or if you prefer to save it as a PDF file, click the **'PDF'** button:

- You can select a single employee or a range of employees by choosing **Employee Code** in the Sequence listbox, and entering the relevant employee(s) in the **From** and **To** fields.

- The Earnings Tax & PRSI Report shows one page per employee, and lists each periods earnings, tax, PRSI, USC etc for that employee.

- Browse your report and confirm that it is correct & complete.
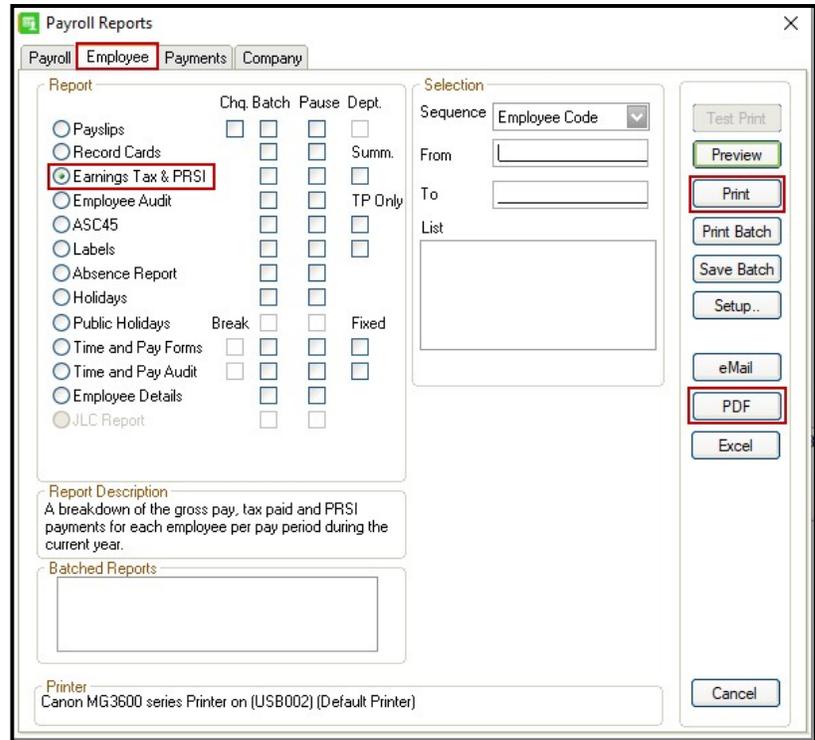
- There is also an option to print/save a summary of the Earnings Tax & PRSI report.

- In addition to the steps above, just tick the **'Summ'** tickbox before clicking **'Print'/'PDF':**

- The summary report shows one line per employee.
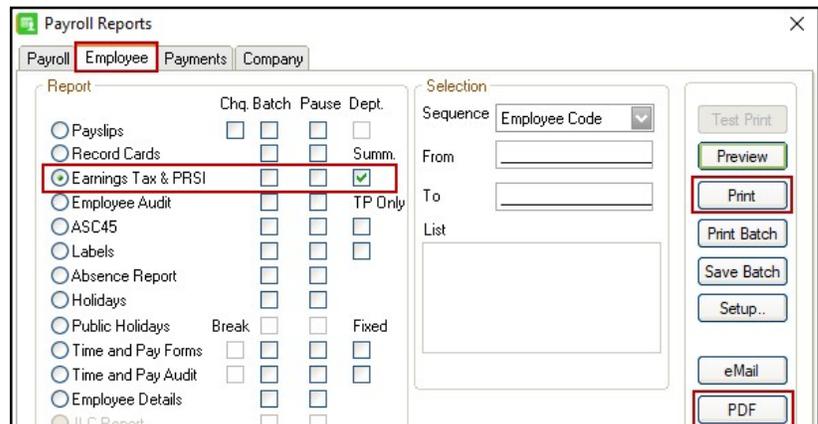
4.Print/Save ASC35 and ASC60 Reports (Previously PRD)

- If ASC (Additional Superannuation Contributions) are applicable to your payroll in 2019 then you will need to print the ASC35 and the ASC60 reports.
- The ASC35 pertains to the whole payroll and is a summary of all the ASC processed throughout the year.
- The ASC60 pertains to the individuals from whom it was deducted.

- To access these reports, click on the '**Year End**' menu item at the top of the screen, then choose '**Tax\Tax Year End Reports**':

- From the window that is presented, choose '**ASC35' or 'ASC60**' as desired.

- To print click the '**Print**' button or if you prefer to save it as a PDF file, click the '**PDF**' button:

- You can select a single employee or a range of employees by choosing **Employee Code** in the Sequence listbox, and entering the relevant employee(s) in the **From** and **To** fields.
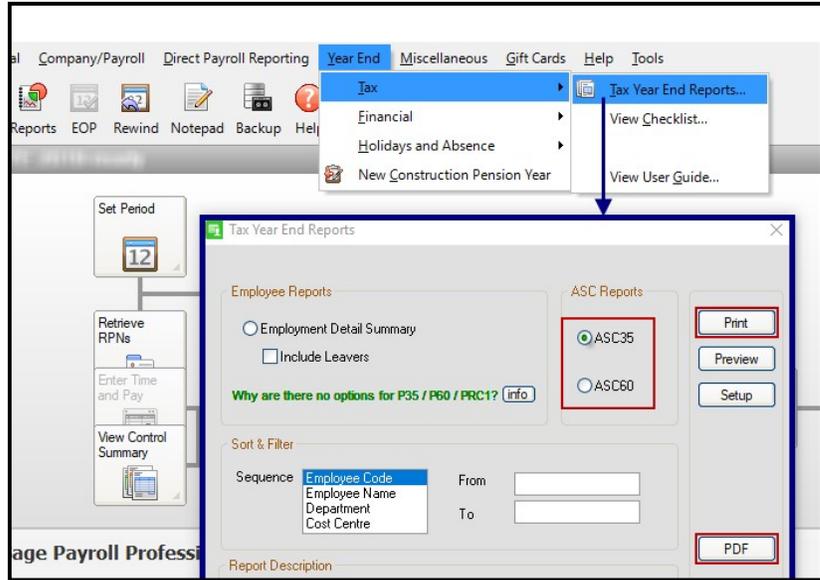
- If your payroll is a weekly payroll, you will be asked if there was an extra pay period.
- Choose Yes or No as appropriate to your payroll.

Your ASC35 will look something like this:

ASC35

Additional Superannuation Contribution (ASC) Annual Report

	2019	25/11/2019	Week 53 N

EMPLOYER

EMPLOYER REG NO	EMPLOYER	ADDRESS	CONTACT NAME	PHONE
3333333M	Pimbrook Software	1 central park Lepordstown Dublin 18	Tony Caligula	00353145172

EMPLOYEES

PPSN	WORKS NO	GROSS INCOME	ASC	START DATE	END DATE
1111111L	0001	€37626.72	€562.67	31/01/2019	
0001524P	0003	€88380.00	€5779.90	31/01/2019	
6982924L	0004	€39360.00	€1061.00	31/01/2019	
0101935UW	0006	€35832.00	€383.20	31/01/2019	
4239144R	0027	€37920.00	€592.00	31/01/2019	
0000016O	0035	€92268.00	€4123.56	31/01/2019	
	TOTAL	€331386.72	€12502.33		

Your ACS60's will look something like this:

ASC60M   **Main Employment**
Additional Superannuation Contribution - Certificate
End-of-Year Balancing Statement

Employee Details

Surname of Employee
FLOOD

First Name
BOB

Address
9 THE STREET
BALLYHOO
DUBLIN

Commencement Date for
Additional Superannuation Contribution

| 3 | 1 | 0 | 1 | 2 | 0 | 1 | 9 |

Payroll/Works Number

| 0 | 0 | 0 | 1 | | | | |

PPS Number

| 1 | 1 | 1 | 1 | 1 | 1 | 1 | L |

Additional Superannuation Contribution Details

Below are the details of the Additional Superannuation Contribution made in previous employments and in this employment during the year

Gross Pensionable Income for Additional Superannuation Contribution for Previous Employments in this year

€

Gross Pensionable Income for Additional Superannuation Contribution for THIS Employment in this year

€ 37,626.72

Amount of Additional Superannuation Contribution made for previous employments in this year

€

Amount of Additional Superannuation Contribution made for THIS employment

€ 562.67

Please insert total of all gross pensionable incomes and Additional Superannuation Contribution made in all previous employments in this year in the first column. Where an employee had more than one period of employment with the same employer in the year, please insert the gross pensionable income and Additional Superannuation Contribution figures for the latest period of employment ONLY in the second column.

Employer Details

I certify that the particulars entered above are correct.

Employer

PIMBROOK SOFTWARE

Address

1 CENTRAL PARK
LEPORDSTOWN
DUBLIN 18

Signature/Stamp of Paymaster

Employer Registered Number

| 3 | 3 | 3 | 3 | 3 | 3 | M |

Phone Number

0035314517233

Email

PYE@SAGE.COM

Date

| 2 | 5 | 1 | 1 | 2 | 0 | 1 | 9 |

Employer: *This certificate is to be given to the employee.*

Employee: *This is a certificate of the Additional Superannuation Contribution made in previous employments and in this employment in this current year to the end of the year. Please retain carefully.*

PLEASE PRINT THIS CERTIFICATE OR COMPLETE IN BLOCK CAPITALS

Step 4: Housekeeping Tasks (Validate Payroll Data)

Most of the following housekeeping tasks can be done at any time throughout the tax year, but the end of a tax year is a good time to make sure everything in your payroll data is correct, before you move that data into the new year.

Housekeeping tasks that you can carry out are:

1. Validate Your Payroll Data (Every Pay Period)
2. Check Your 'Company' Information is correct
3. Check your Employee Details are correct
4. Check Directors Setting (If Applicable)
5. Check Starter Dates (If Applicable)
6. Check Leaver Dates (If Applicable)
7. Check PAYE Exclusion Orders (If Applicable)
8. Check Shadow Payroll Information (If Applicable)
9. Check Your Pensions are Setup Correctly (If Applicable)
10. Check 'Medical Insurance Eligible for Tax Relief' in employee records

For your reference, a 'Housekeeping Guide' which further details tasks 2-10, can be found at the end of this booklet

*Validate Your Payroll Data (Every Pay Period)*
- You can use the Validate Payroll Data option to check your payroll data for any issues that may cause your Revenue submissions to fail.
- We recommend that you Validate your Payroll Data during every pay period, as part of your regular payroll process.
- It's usually best to run the Validate Payroll Data Process prior to running your submission to ROS.
- If you do not run the Validate Payroll Data option every pay period, you may find yourself in a situation where an issue has gone undetected, and you may be forced to re-run and re-submit previous payrolls to correct the problem.

To Validate Your Payroll Data, select '**Reports'** from the menu at the top of the screen, then click '**Validate Payroll Data'**.
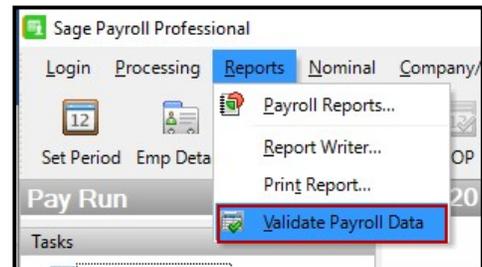
The Validate Payroll Data procedure will run, and the results will be displayed in a Notepad Screen. Any issues will be displayed in the screen along with any solution/resolution the software has to offer.

You should apply the solution suggested, but if you are in any doubt feel free to call us for advice.
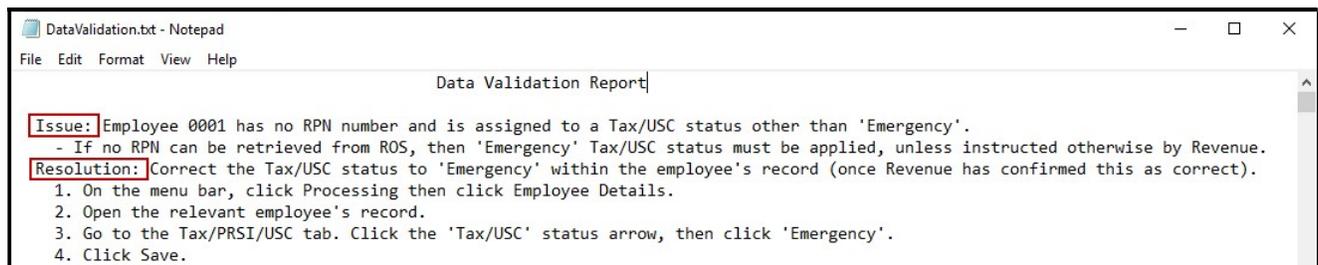
To print a copy of the Validate Payroll Data report, click **File,** then click **Print**.

If you have more than one payroll, repeat the process above in each of them.

Stage 3: Starting the Tax Year 2020

Things to Note Before Processing First Pay in 2020.

Clear RPN Submission Logs:
- As part of the 'Set up Tax Year 2020' the RPN logs are not migrated across to the new tax year system.
- When a user moves their payroll from current tax year (e.g. 2019) to new tax year (e.g. 2020) both the RPN & Payroll submission logs will not come across. This is so they are easier to manage and reconcile.

Employer Monthly Liability Report 2020 Report – 2020 Pay Dates from 2019 Payrolls are Included:
- Sage acknowledge that, while it's not encouraged, a 2019 tax year payroll may contain January 2020 pay date(s) which will need to be included in the January section of the 2020 Employer Monthly Liability report.
- The Employer Monthly Liability Report in the 2020 system, will include 2020 pay dates from 2019 payrolls.

RPN Numbers in your 2020 System:
- When you create your 2020 Payroll, the RPN number in employee detail records will be cleared, as per Revenue guidelines.
- The RPN number will start again at 1 for the new tax year for each employee.

New 'Pay Period' field Included on Payroll Submission:
- To comply with the ROS Payroll Submission schema for tax year 2020, Sage have included a new 'Pay Period' field on the Payroll Submission for 2020.
- The 'Pay Period' field will be used by Revenue for Employee in-year re-calculations to determine if credits/rate bands are allocated to best effect.

Clear PAYE Exclusion Order flag in 2020 System (Where Appropriate):
- To ensure the employee has the correct exclusion order settings for 2020, the Sage Payroll software will examine the exclusion order 'Has effect until' date when transferring a payroll into the 2020 System.
- If an employee in Sage Payroll 2019 has the 'Apply PAYE Exclusion Order' checkbox selected, Sage Payroll will check the 'Has effect until' date while running the 'Set Up 2020 Tax Year' routine.
- Depending on what this date is, the employee's PAYE Exclusion Order may need to be cleared. The setup routine will clear it if appropriate.

RPNs in Relevant Tax Year:
- As you probably already know, Revenue can issue RPNs for a future tax year e.g. they may issue 2020 RPNs in December of 2019.
- If the RPN applies to the 2020 tax year the software will not allow it to be retrieved into the 2019 tax year system, and visa versa.
- The software will only allow appropriate (correct tax year) RPNs to be retrieved in each tax year.

ROS Cert File Extensions:
- When selecting a ROS Certificate, The Sage Payroll 2020 system will now allow you to select a file of any extension.
- The software now includes an 'All Files' option in the drop down list when browsing for a certificate file.
- This is to future proof the software against possible cert extension changes.

CWPS Calendar – CWPS Year Changed:
- If you are using CWPS you may remember that the CWPS year changed during 2019.
- The CWPS year used to run from Jan to Dec. The new CWPS Year runs from Oct to Sept.
- Since the start of the CWPS year is now mid-year, there is now no need to setup the CWPS calendar at the Start of a new tax year (Jan).
- Due to the change you also do not need to cleardown the CWPS Balances. This should be done mid-year after the last payroll in Sept.

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Page 23

Step 1: Creating Tax Year 2020

You will need to carry out this procedure for **each** one of your payrolls.

1. Ensure you are logged into Sage Payroll **2019:**
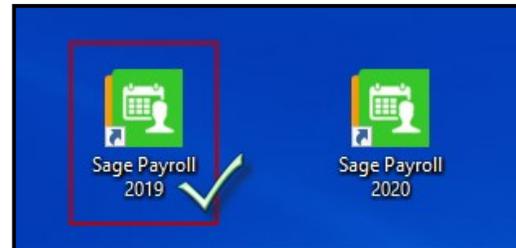
 2. Select the '**Year End - Tax - Set up 2020 Tax Year'** menu option:
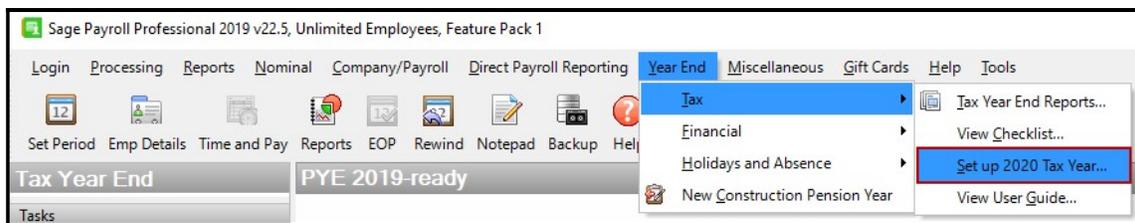
3. You will be presented with the payroll setup screen, click '**Continue'** to start the process.
- During the process of creating the payroll for the 2020 Tax Year, employee cumulative values coming forward from 2019 are cleared, and all leavers are removed.
- Payroll data for 2020 is stored in a separate directory from the 2019 data.
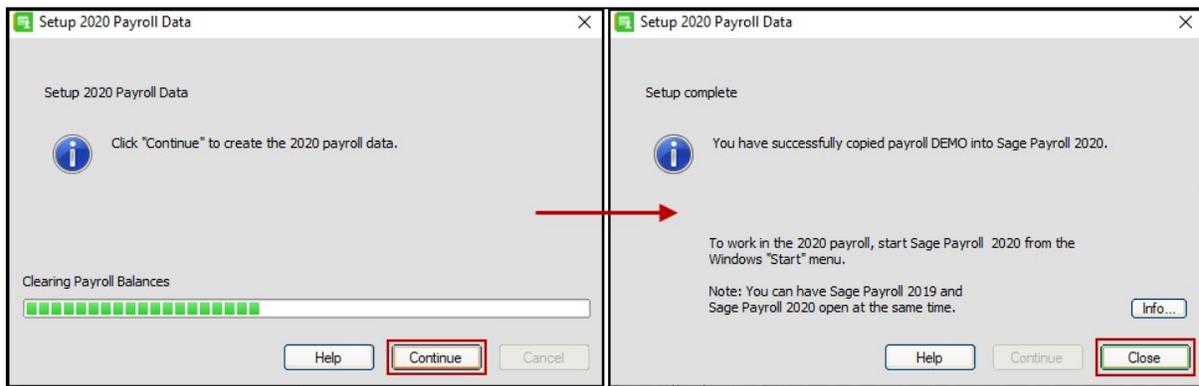
- When the setup is complete, click **'Close'**. You have successfully copied your payroll into the 2020 system. Tax Year 2020 is now initialised for the relevant payroll.

Note: You are still in Sage Payroll 2019, but you can now log into the company's new tax year in Sage Payroll 2020. The new icon will be available on your desktop.

Step 2: Opening Tax Year 2020

Note that Sage Payroll 2020 is Version 23.0 and Sage Payroll 2019 is now Version 22.5

1. To open Sage Payroll for the new tax year double-click the **Sage Payroll 2020** shortcut icon on your desktop:
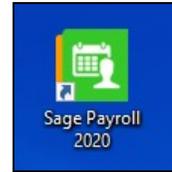
2. Login to the payroll in your usual way.

- You can now work in the 2020 Payroll.

Note: Your payroll status and period will be blank until you set the period for the first time.

- When you login to your 2020 payroll, ensure that your Sage Payroll version number is 23.0.
- You can check this in the title bar of the software.
- Also, please check your limit of employees. This is shown in the title bar as well:
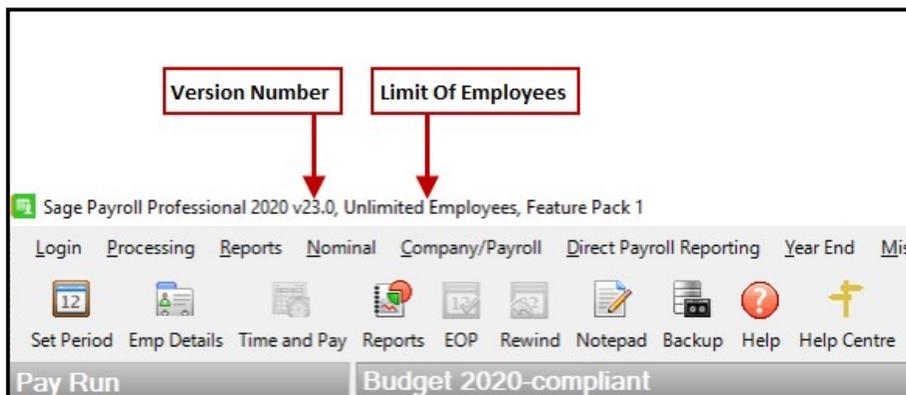
Changes to the payroll legislation announced in Budget 2020

The following are details of the Budget Statement October 2019, as made by the Minister for Finance and Public Expenditure and Reform.

BUDGET SUMMARY 2020

The following are details of the Budget Statement of 8 October 2019, as made by the Minister for Finance and Public Expenditure and Reform.

Income Tax

The tax credits and tax bands changes are in bold.

Tax Credits

Tax Credit	2019 €	2020 €
Single Person	1,650	1,650
Married or in a Civil Partnership	3,300	3,300
Employee Tax Credit	1,650	1,650
Earned Income Tax Credit Max	1,350	**1,500**
Widowed Person or Surviving Civil Partner (without qualifying child)	2,190	2,190
Single Person Child Carer Tax Credit	1,650	1,650
Incapacitated Child Credit Max	3,300	3,300
Blind Tax Credit: Single Person	1,650	1,650
Married or in a Civil Partnership - One Spouse or Civil Partner Blind	1,650	1,650
Married or in a Civil Partnership - Both Spouses or Civil Partners Blind	3,300	3,300
Widowed Parent: Bereaved in 2019 Bereaved in 2018 Bereaved in 2017 Bereaved in 2016 Bereaved in 2015 Bereaved in 2014	- 3,600 3,150 2,700 2,250 1,800	3,600 3,150 2,700 2,250 1,800 -
Age Tax Credit: Single or Widowed or Surviving Civil Partner Married or in a Civil Partnership	245 490	245 490
Dependent Relative	70	70
Home Carer Tax Credit	1,500	**1,600**

Tax Rates and Tax Bands

Personal Circumstances	2019 €	2020 €
Single or Widowed or Surviving Civil Partner, without qualifying child	35,300 @ 20% Balance @ 40%	35,300 @ 20% Balance @ 40%
Single or Widowed or Surviving Civil Partner, qualifying for Single Person Child Carer Credit	39,300 @ 20% Balance @ 40%	39,300 @ 20% Balance @ 40%
Married or in a Civil Partnership, one Spouse or Civil Partner with Income	44,300 @ 20% Balance @ 40%	44,300 @ 20% Balance @ 40%
Married or in a Civil Partnership, both Spouses or Civil Partners with Income	44,300 @ 20% with increase of 26,300 max. Balance @ 40%	44,300 @ 20% with increase of 26,300 max. Balance @ 40%

Exemption Limits

The exemption limits for persons aged 65 years and over remain unchanged:

Personal Circumstances	2019 €	2020 €
Single or Widowed or a Surviving Civil Partner, 65 years of age & over	18,000	18,000
Married or in a Civil Partnership, 65 years of age & over	36,000	36,000

The above exemption limits increase by €575 for each of the first two dependent children and by €830 for the third and subsequent children.

Marginal Relief may apply, subject to an income limit of twice the relevant exemption limit.

Universal Social Charge (USC)

There are no changes to USC rates. The current reduced rate of USC for eligible medical card holders will continue to apply for one further year, 2020.

Standard Rates of USC

USC Thresholds			
2019	Rate	2020	Rate
Income up to €12,012.00	0.5%	Income up to €12,012.00	0.5%
Income from €12,012.01 to €19,874.00	2%	Income from €12,012.01 to €19,874.00	2%
Income from €19,874.01 to €70,044.00	4.5%	Income from €19,874.01 to €70,044.00	4.5%
Income above €70,044.00	8%	Income above €70,044.00	8%

Reduced Rates of USC

USC Thresholds			
Individuals aged 70 years or over whose aggregate income for the year is €60,000 or less.			
Individuals (aged under 70) who hold a full medical card whose aggregate income for the year is €60,000 or less.			
2019	Rate	2020	Rate
Income up to €12,012.00	0.5%	Income up to €12,012.00	0.5%
Income above €12,012.00	2%	Income above €12,012.00	2%

Note 1. 'Aggregate' income for USC purposes does not include payments from the Department of Employment Affairs and Social Protection (DEASP).

Note 2. A 'GP only' card is not considered a full medical card for USC purposes.

The medical card extension for under 70s has been extended for one further year, until 2020.

Detailed information on the budget can be found: https://www.revenue.ie/en/corporate/press-office/budget-information/2020/budget-summary-2020.pdf

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Page 26

Step 3: Setting up a New Payroll Calendar

1.Open the Calendar
Select the **Company/Payroll - Calendar** menu option.
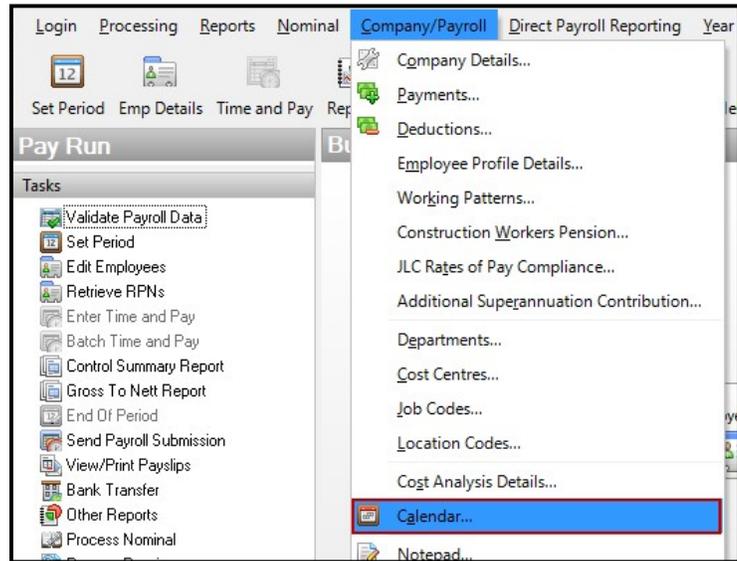
2.Setup The New Calendar

- In the Calendar window, click the '**New Calendar'** tab.

- Enter the calendar details for Period 1 of the new tax year, and then click **Update**.

- **Note:** It's very important to enter the correct '**Period Date'** for Period 1 of the new tax year. This date determines all subsequent dates of the 2020 pay periods.

- For example, if you're on a weekly payroll, your first pay date should fall between 1 - 7 January. For a fortnightly payroll, it should fall between 1 - 14 January.

- If you are unsure about this topic, please refer back to the notes at the beginning of Stage 2 regarding dates.
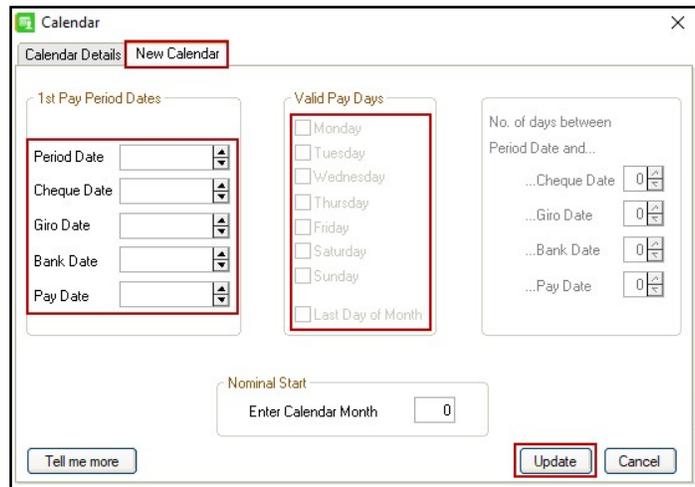
- Be mindful that the **'Pay Date'** refers to 'the date the employees receive their net pay'.
- Revenue use this date to determine when you paid employees.
- They do not use the 'Period Date' to determine this, as is sometimes assumed.

5. Amend the calendar information if required, set your Cost Analysis Year End period and then click **Save**.

- You can amend the Cost Analysis Year End to a period closest to your company's Financial Year End.

- Repeat this procedure for each payroll you set up in 2020 (if you have multiple payrolls with the same frequency and pay date, you can copy the calendar in the Admin section).
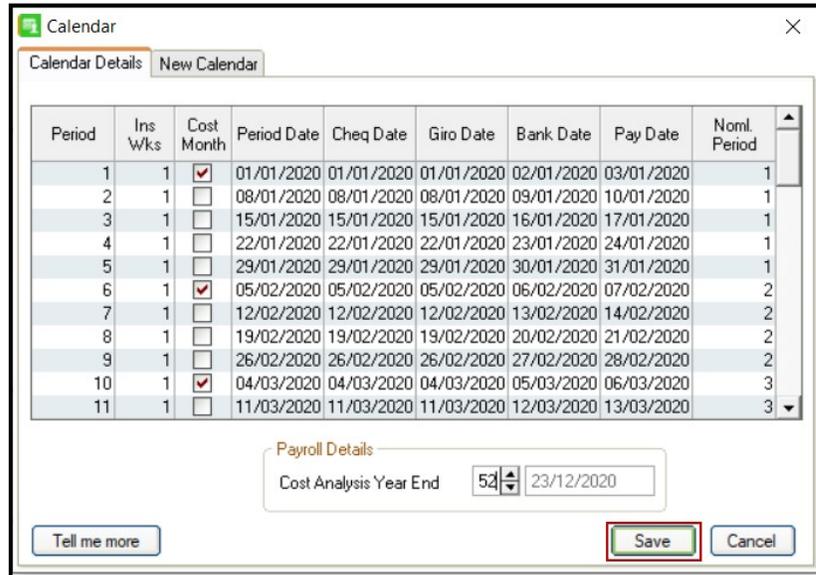
Step 4: Set up ASC Additional Superannuation Contribution - (If Applicable)

- ASC (Additional Superannuation Contribution) calculations came into effect from 1st January 2019 and replace the PRD (Pension Related Deduction).
- ASC is only relevant to public sector employees.
- If you have employees that are liable for ASC deductions in 2020, you must assign the appropriate ASC settings within their records.

- On the menu bar, click **Processing** then click **Employee Details**. *(Alternatively select the 'Edit Employees' button from the main screen).*
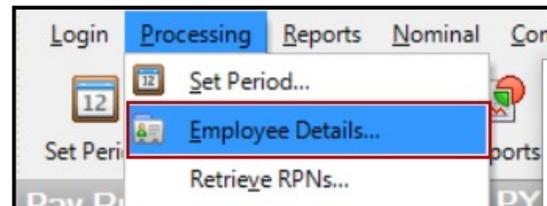
- Select the relevant employee and click on the '**Deductions**' tab.

- Assign the appropriate **ASC Settings.**

- If the employee is in subsidiary employment and their main employment is elsewhere, select the '**Subsidiary**' check box.

- Click '**Save**' to save any changes made.
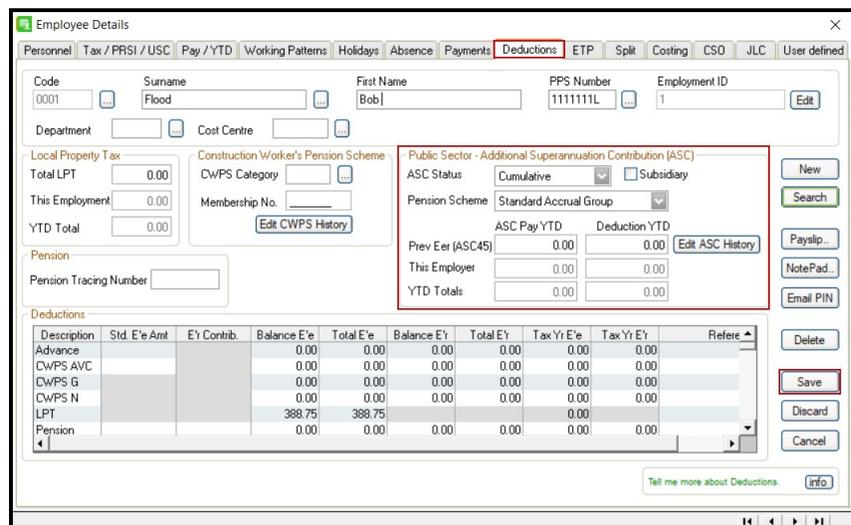
Stage 4: Accounting/Financial Year End

Note: The clear downs below are done in the 2020 system, <u>NOT</u> the 2019 system! Please ensure you are in the correct system.

The steps that follow involve accounting/financial year end tasks, which can be carried out whenever is appropriate for your company. The tax year runs from 1 January to 31 December, however your company's financial year may not coincide with these dates, for example, 1 August to 31 July. If your financial year coincides with the tax year then it is appropriate to carry out the Financial Year Cleardown before running Period 1. Before doing this, ensure that you print the following reports:

1. Cost Analysis Report
2. Payments Report (payment balances)
3. Deductions Report (deduction balances)

If your financial year runs from 1 January to 31 December, and you don't clear down the balances before processing the first period of the new tax year, you won't be able to clear down the balances at a later stage during the year. At that point you would need to make manual corrections within Employee Details.

Step 1: Clear Cost Analysis

1. Select **Year End - Financial - Clear Cost Analysis**.

> **Note: Do Not Clear Cost Analysis if you are using cumulative figures for Job Costing.**
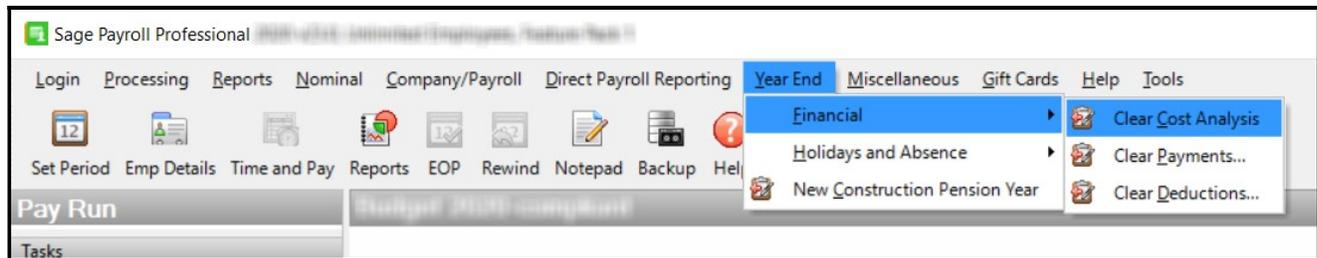
2. A message alerts you that the cost analysis will be cleared. Click **OK** to carry out the cleardown.
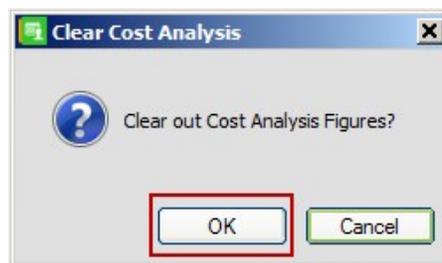
3. Clear out complete. Click **OK** to continue.
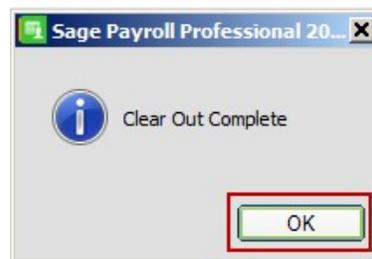
Step 2: Clear Payments

1. Select **Year End - Financial - Clear Payments**.
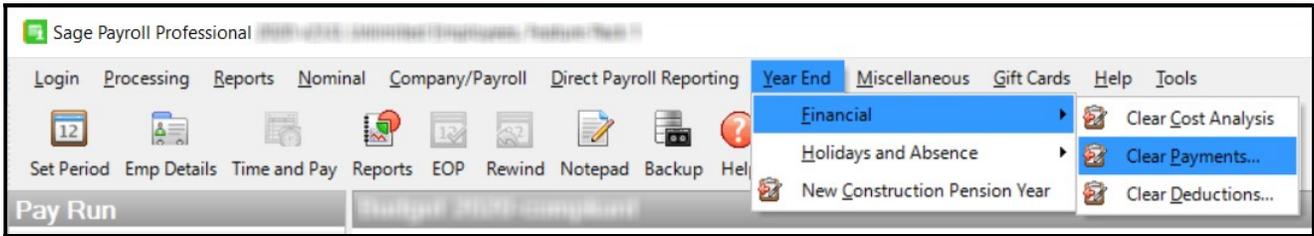
2. A table displays all the payments that can be cleared. Select the relevant **Hours** and**/**or **Values** checkboxes, to clear the amounts for the selected payments. If you select nothing, nothing will be cleared.

Different Payments can be cleared out at different Times of the Year if required.
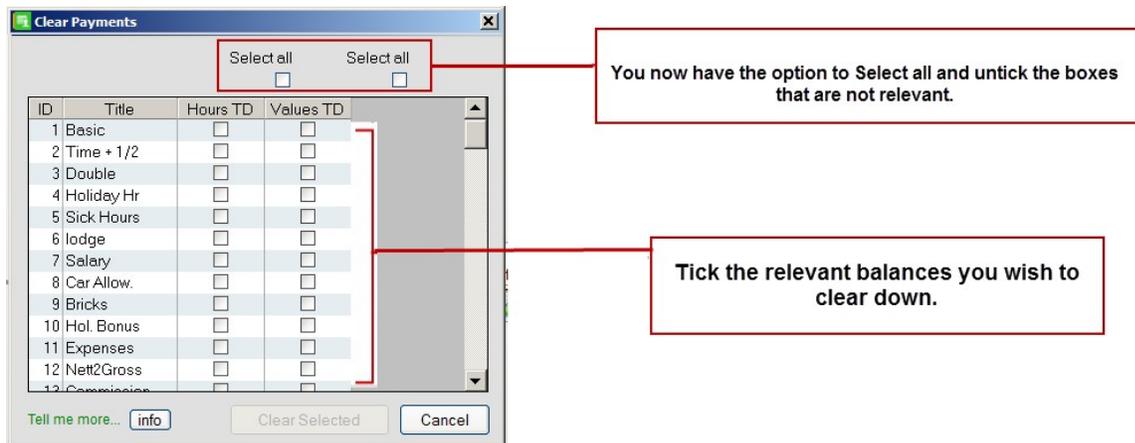
3. Click **Clear Selected** to proceed with the cleardown.
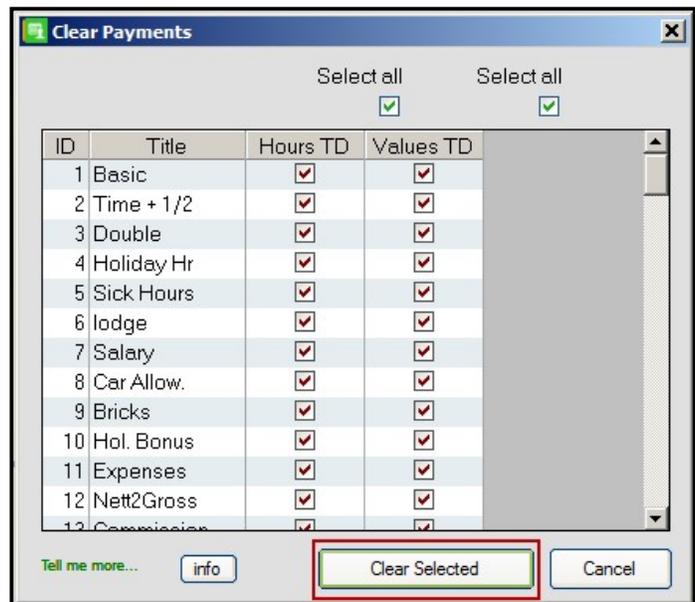
4. When prompted to Continue, Click '**Yes'.**

- Financial year balances for the selected items will be set to 0.
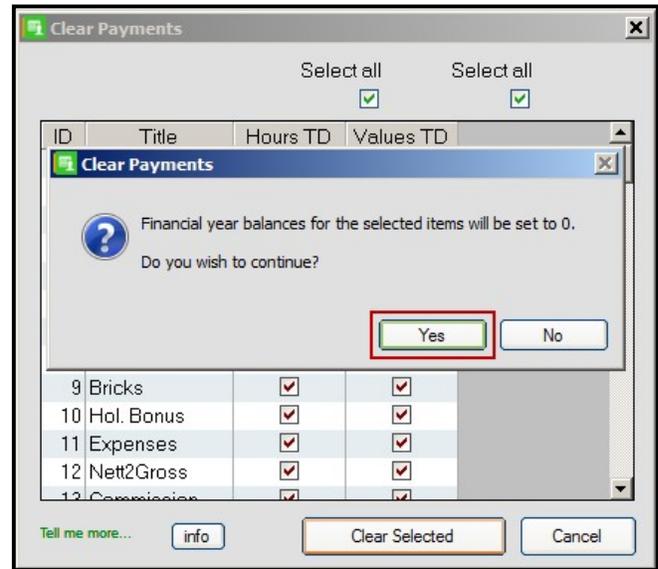
- When the Payments are cleared, Click **OK:**

Step 3: Clear Deductions

1. Select **Year End - Financial - Clear Deductions**.
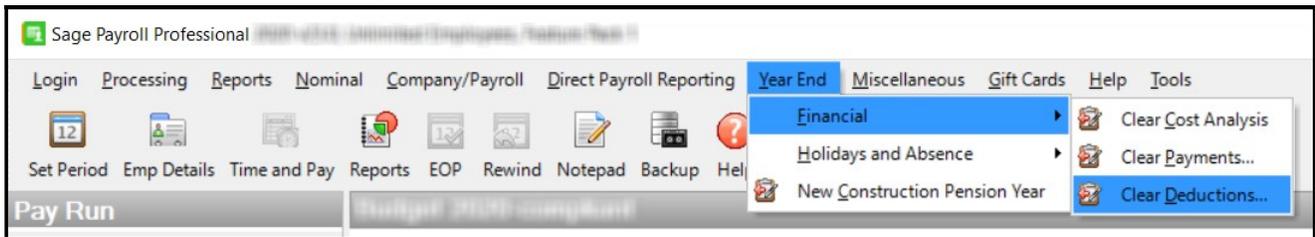
2. Select the checkboxes corresponding to each deduction to be cleared.
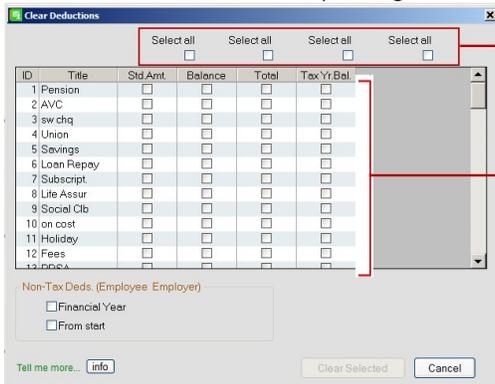
You now have the option to select all and untick the boxes that are not relevant.

Tick the relevant balances you wish to clear down.

Take particular care when clearing the balances on a Reducing Balance Deduction i.e. loans.

You can choose to clear one or more of the following:
• **Std.Amt**: Amount deducted in each period
• **Balance**: Deduction total accumulated since the last clearance
• **Total**: A Running total of the deduction since the deduction was first introduced
• **Tax Yr. Bal.**: Tax Year Balance

> **N.B. DO NOT CLEAR DOWN STD.AMT, UNLESS YOU ARE SURE YOU WANT TO CLEAR DOWN THE EMPLOYEE VALUE OF A DEDUCTION, AS YOU WILL LOSE ANY DEDUCTION VALUE FOR THAT DEDUCTION.**

You can also clear the employee and employer Non-Tax Deds. history by selecting the checkboxes in the Non-Tax Deds. (Employee Employer) section, as appropriate. If you select nothing, nothing will be cleared.

3. Once you have selected the Deductions you want to clear, click **Clear Selected.**
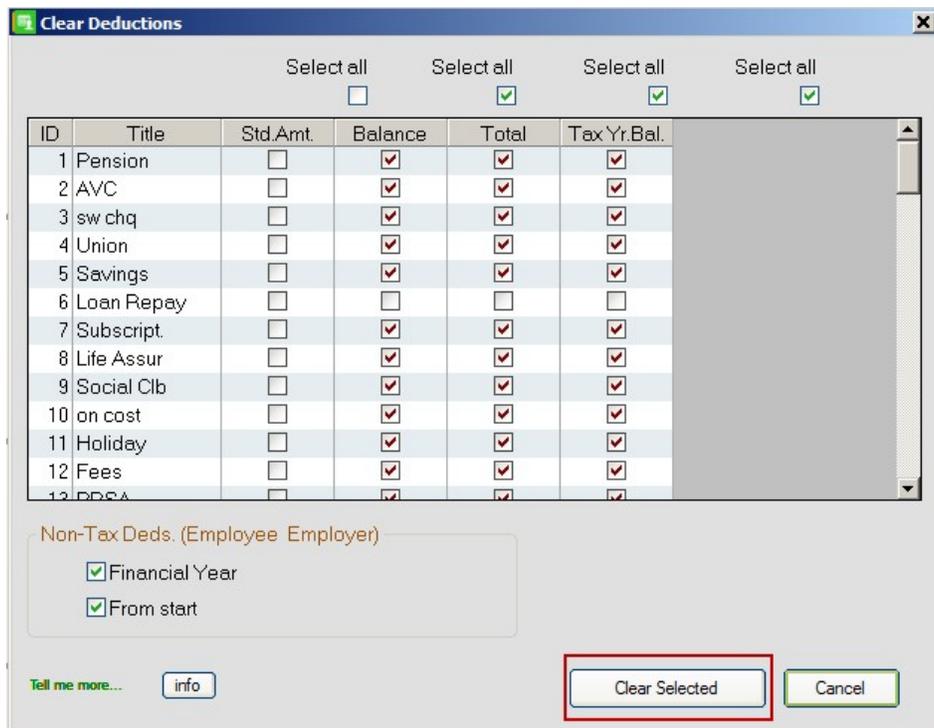
4. It will ask you to Clear Deductions "Financial year balances for the selected items will be set to 0. Do you wish to continue?" Click **Yes** to Continue.
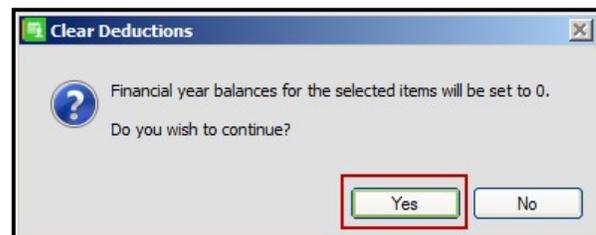

5. When the Deductions are cleared Click **OK**.

You can confirm that the Cost Analysis, Payments & Deductions have been properly cleared by running the relevant reports. Values cleared should not appear in the reports.

# Stage 5: Set the First Period & Roll Forward Holiday Year

Step 1: Set The First Period

- To set the first Period, select **'Processing\Set Period'** from the menu bar at the top of the screen: *(Alternatively select the 'Set Period' button from the main screen).*

- In the Set Period screen that is presented, ensure that the New Period to process is set to 1 and check that the dates proposed are appropriate for the first period.

- Click **'Ok'** to continue.
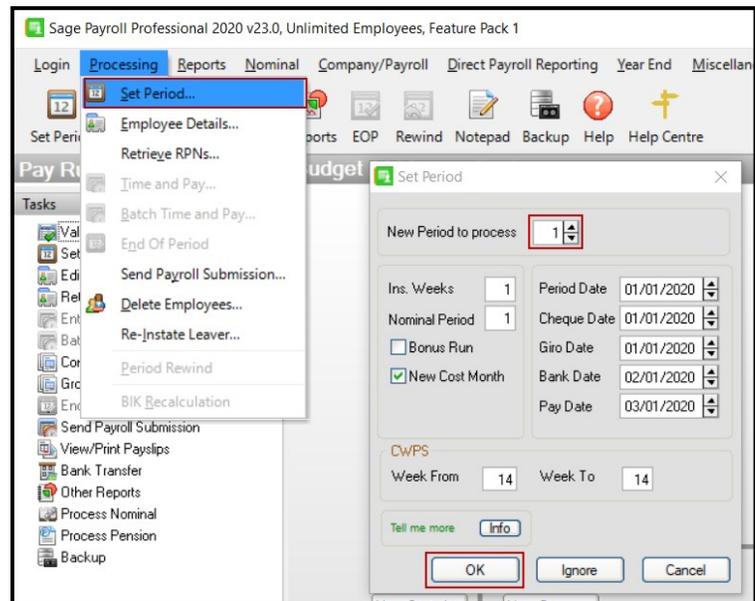
Step 2: Roll Forward Holiday & Absence Year

- If your payrolls' Holiday Year Finish Date is 31/12/2019, the system will automatically prompt you to roll forward the holiday information when setting the First Period.
- When you click **'Ok'** on the Set Period screen (in Step 1 above), you will be prompted to roll forward your Holiday & Absence Year.

Carry forward employee holidays due into next holiday year	Selecting this option specifies that the employee's holiday balance (positive or negative) at the end of the holiday year, should be added to the holiday balance at the beginning of the new holiday year. For the accrual methods **Calculate holidays as 8% of hours worked** and **Calculate holidays as 1/3 of a working week**, the Holidays Brought Forward value for the new holiday year is equal to the balance of Total Holidays Due at the end of the holiday year. ***Note:*** *For the accrual method **Standard Holiday Entitlement for the holiday year***, *the Holidays Brought Forward is equal to the Holidays Due value up to the last processed period.*
Set up the Payroll's next holiday year start and end dates	By selecting this option, you instruct the system to automatically set up the start and end dates of the new calendar year on the basis of the dates of the calendar year currently ending.
Set employee's holiday adjustment to zero	This option resets the employee's Holiday Adjustment (+/-) value to zero.

- Select the options you want to apply and then click '**Continue Set Period'**.

Note: Even if you don't use the Holiday feature, we recommend to still select to roll forward the payrolls Holiday and Absence year, otherwise this screen will appear at each Start of Period.

- Once Period 1 is set and the Holiday Year has been successfully rolled forward, you can continue to process your payroll as normal. (Retrieve RPNs, Enter Time & Pay Etc…)

Stage 6: Guides & Other Information

Housekeeping Guide

This section is a reference section and supports the 'Housekeeping' list of tasks shown in Stage 2, Step 4. The items in the list are further detailed below.

Check Your 'Company' Information is Correct
- Your company's name, employer registration number, postal address and contact details are included on your online returns to Revenue. They may be used by Revenue to contact you if they have any queries about your submissions.
- To open the Company Details Window, choose **Company/Payroll** from the menu at the top of the screen, then click **Company Details**.
- Check that the details entered are correct. If any information is incorrect, edit as appropriate and click **'Ok'.**

No Hyphens or extra characters are allowed in this section by ROS (e.g. '!"£$%^&*,.:>)

Also known as Employer Registration Number

Check Directors Setting (If Applicable)
If an employee is a Director, you must record what type of Director he/she is within Employee Details, so that this flag can be included on your Revenue returns. To do this, complete the following steps:

- From the menu bar at the top of your window, click '**Processing'** then click '**Employee Details'**. *(Alternatively select the 'Edit Employees' button from the main screen).*
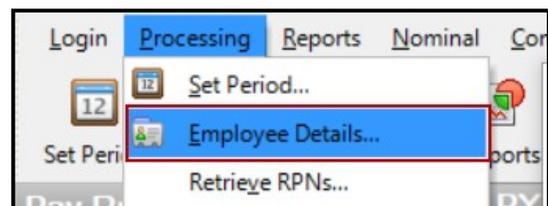
- In the employee details window, select the relevant employee.

- On the Personnel tab, check the '**Director'** check box is selected. If not, select it.

- Click the '**Type'** arrow, then choose either '**Proprietary'** or '**Non-Proprietary'**.
- Click '**Save'** to save the changes.

- Repeat the process above for each employee that is a director.
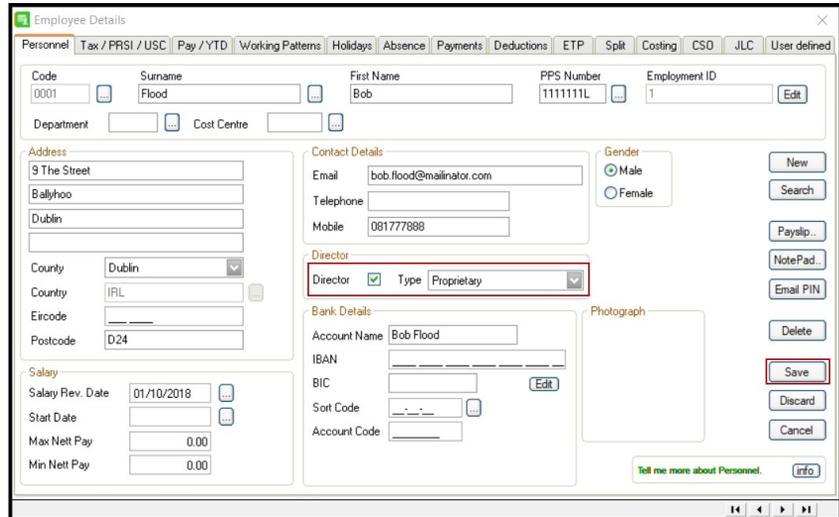
Note: A proprietary Director is the company's beneficial owner (or Director) who can control directly or indirectly more than 15% of the company's ordinary share capital.

Check Starter Dates (If Applicable)
- For new starters this year, check that a start date has been entered on their employee record.
- You can check/edit the date an employee started with your company by doing the following:

- From the menu bar at the top of the window, click '**Processing'** then click '**Employee Details'**. *(Alternatively select the 'Edit Employees' button from the main screen).*
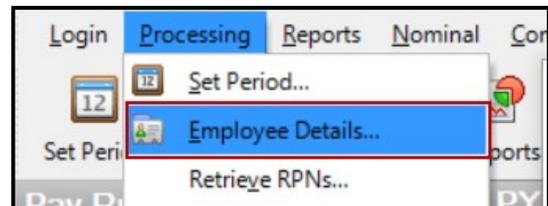
- In the employee details window, select the relevant employee.

- Within the Salary section of the Personnel tab, check the employee's '**Start Date'** is specified and correct. If it's not, enter the correct date and click **'Save'**. Alternatively, click **Cancel** to close the record.
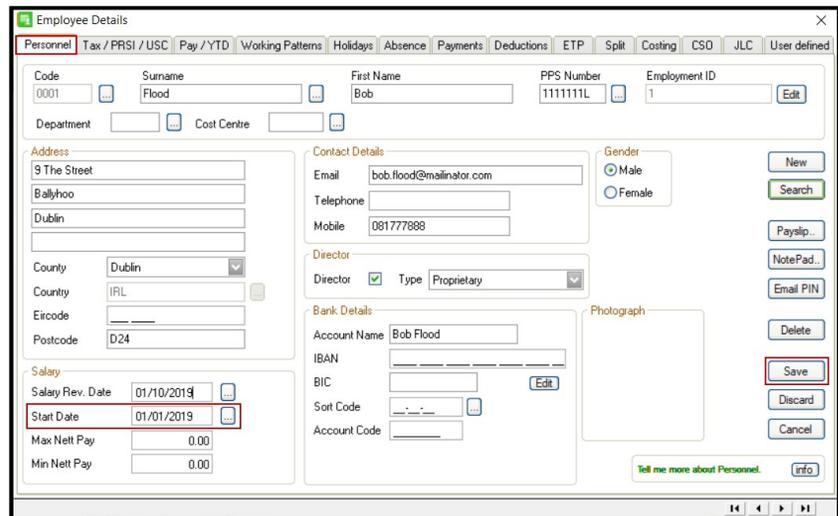
Check Leaver Dates (If Applicable)
- For leavers this year, check that both finish date and finish period have been entered on their employee record.
- You can check/edit the date an employee left your company by doing the following:

- On the menu bar, click **Processing** then click **Employee Details**.
(Alternatively select the 'Edit Employees' button from the main screen).
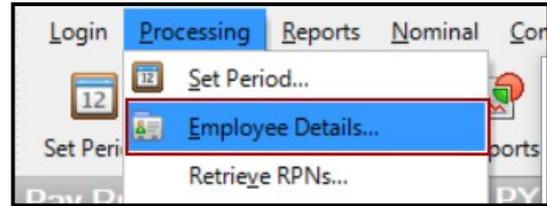
- In the employee details window, select the relevant employee.

- Click the '**Tax/PRSI/USC**' tab. Check that the '**Finish Date**' and '**Finish Period**' are correct for the chosen employee.

- If they are not correct, enter the correct finish date and finish period and click '**Save**'.

- Alternatively, click **Cancel** to close the record.
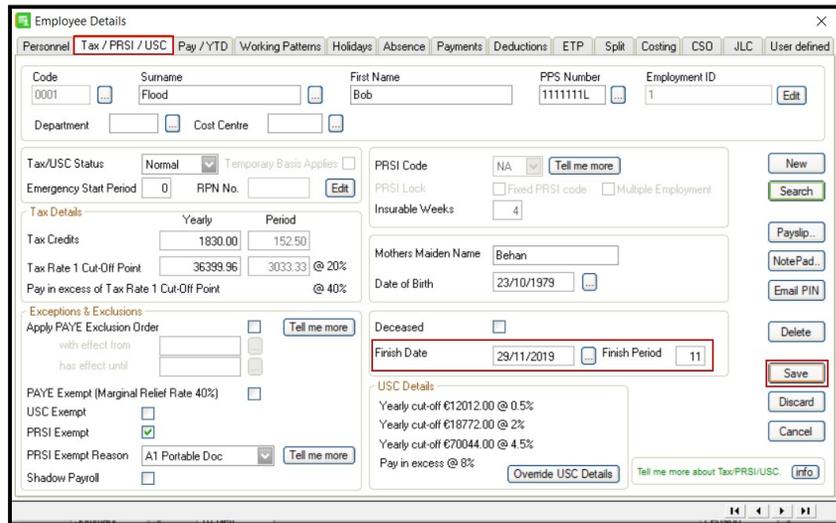
Apply PAYE Exclusion Orders (If Applicable)
- A PAYE Exclusion Order is a certificate issued by Revenue that authorises you to <u>not</u> deduct income tax and/or Universal Social Charge (USC) from an employee's pay.
- If you receive a PAYE exclusion order, you should enter it's details immediately on the relevant employee record.
- If a *PAYE* exclusion order is issued by Revenue this will be imported into Sage Payroll when you Retrieve RPNs.
- However, if you need to enter a PAYE exclusion order details manually, follow the steps below.

- On the menu bar, click **Processing** then click **Employee Details**.
(Alternatively select the 'Edit Employees' button from the main screen).
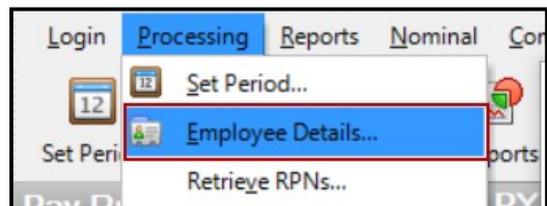
- In the employee details window, select the relevant employee.

- Click the '**Tax/PRSI/USC**' tab. Under Exceptions & Exclusions, click the '**Apply PAYE Exclusion Order**' check box.

- Enter the relevant dates in the '**with effect from**' and '**has effect until**' boxes.

- If you're unsure about what dates to enter here, please review the PAYE Exclusion Order you received from Revenue or contact them directly for assistance.
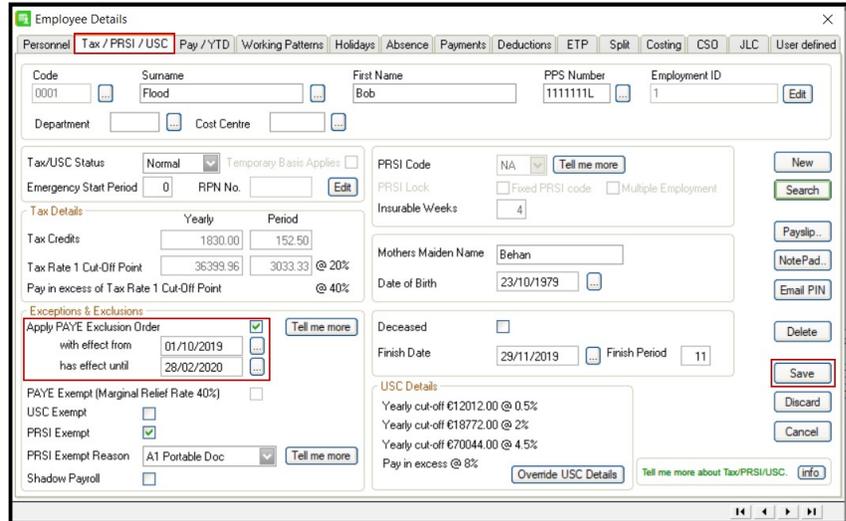
- If the PAYE exclusion order states that Universal Social Charge (USC) should not be deducted from the employee pay, then also select the '**USC Exempt**' check box.

- If you are happy that everything has been entered correctly, click '**Save**' to save any changes or alternatively, click **Cancel** to close the record without saving changes.

- Repeat the process above for any other employees you need to enter PAYE exclusion order details for.

Note: Expired exclusion orders are automatically cleared by the software when you process your year end. Active orders are carried over into the new tax year and so do not need to be re-entered when you roll over to the new year.

Check Shadow Payroll Setting (If Applicable)
- Shadow payroll is a term used to report compensation data that is actually paid from another country.
- If you have an employee on assignment in a foreign country, their wages may need to be reported in both the home and host countries via a shadow payroll.
- If you do have any employees being paid via a shadow payroll, you must record this piece of information within their employee record as its required for PAYE submissions to Revenue.
- To check shadow payroll setting, follow the process below:

- On the menu bar, click **Processing** then click **Employee Details**. *(Alternatively select the 'Edit Employees' button from the main screen).*
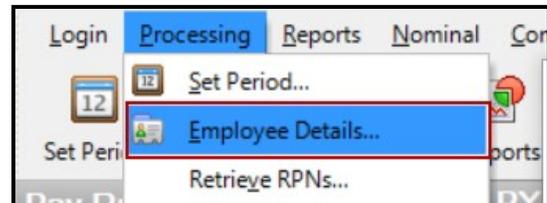
- In the employee details window, select the relevant employee.

- Click the '**Tax/PRSI/USC'** tab. Under Exceptions & Exclusions, select the '**Shadow Payroll'** tick box.

- Click '**Save'** to apply the change.

- Repeat the process above for all employees being paid via a shadow payroll.
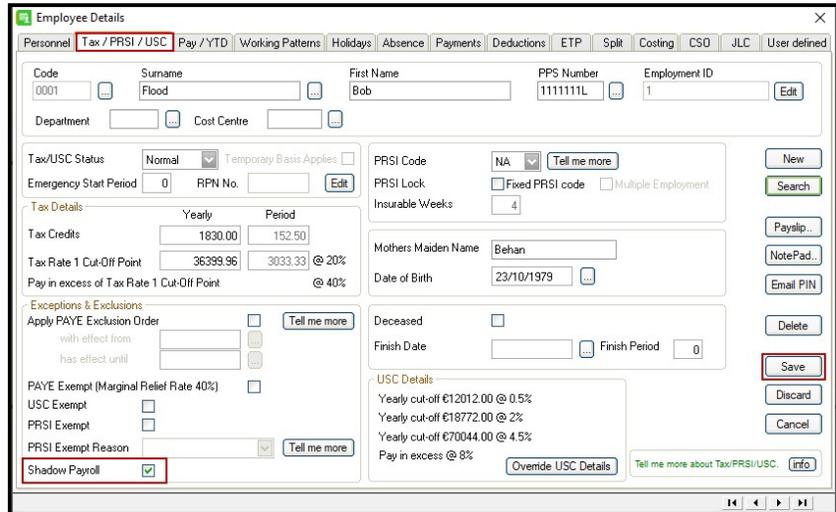
Check Your Pensions are Setup Correctly
- Your submissions to ROS include details of any pension contributions made by your employees and your company on their behalf.
- If you have any pension, Personal Retirement Savings Account (PRSA), Retirement Annuity Contract (RAC) or Additional Voluntary Contribution (AVC) deductions on your payroll, you must check they are set up correctly and that they have a pension link assigned to them.
- To check pension deduction settings, follow the process below.

- On the menu bar, click '**Company/Payroll'** then click '**Deductions'**.
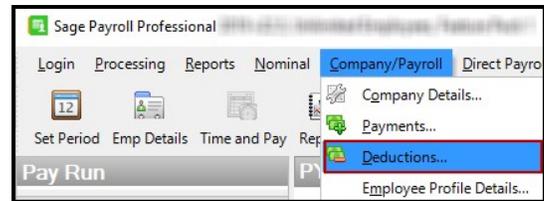
- In the Deductions screen double click on the pension deduction you want to check.

- When the deduction opens, check that the Type, Sub-Type, Pension Scheme (Pension Link) are correct for this pension.

- If the pension deduction is an AVC, select the AVC check box.

- When you are happy that the pension is setup correctly, click '**Save'.**
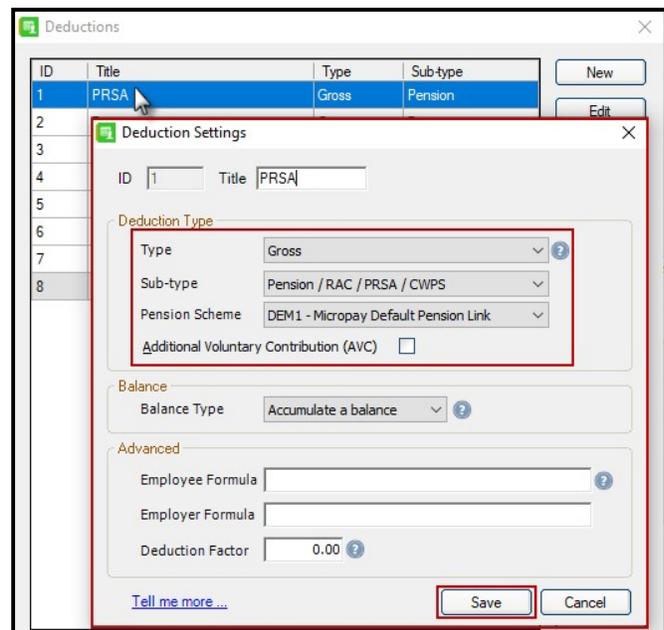
For employees who are members of an approved pension scheme or a PRSA, you must ensure that their pension tracing numbers are entered on their employee record. To do this follow the process below:

On the menu bar, click **Processing** then click **Employee Details**.
(Alternatively select the 'Edit Employees' button from the main screen).
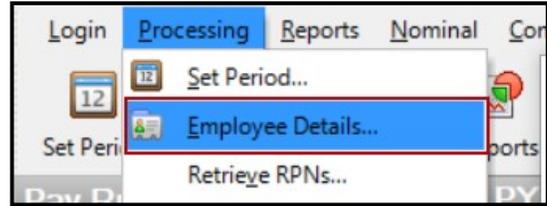
In the employee details window, select the relevant employee.

Click the '**Deductions**' tab. In the 'Pension' section, enter the Pension Tracing Number in the Pension Tracing Number field.

Click '**Save**' to apply the change.

Repeat the process above, for all employees who have a Pension Tracing Number.
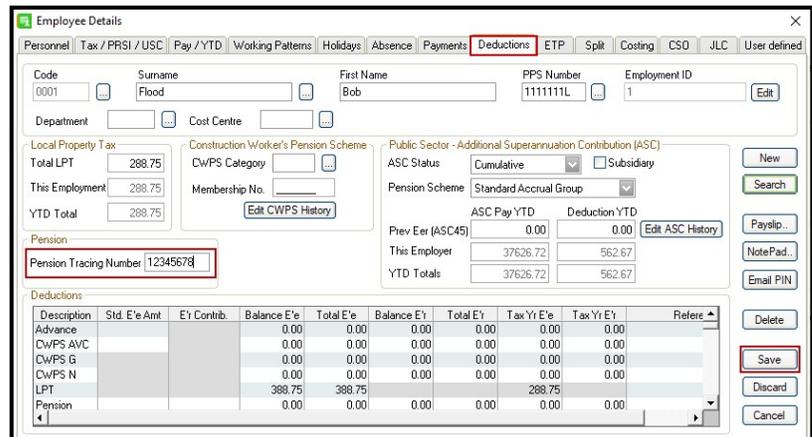
Medical Insurance Eligible for Tax Relief
- If you pay medical insurance premiums on behalf of an employee, you must include how much of this is eligible for tax relief in the employee's record.
- Your medical insurance provider tells you how much this is for each employee.
- You must then enter this in the employee records.

To manually enter medical insurance eligible for tax relief values, following the steps below:

- On the menu bar, click **Processing** then click **Employee Details**. *(Alternatively select the 'Edit Employees' button from the main screen).*

- In the employee details window, select the relevant employee and click the **Pay / YTD** tab. In the 'BIK Year To Date Section', enter the amount in the '**Medical Insurance Eligible for Tax Relief**' field.
- Click **Save**.
- Repeat the process above for all relevant employees.
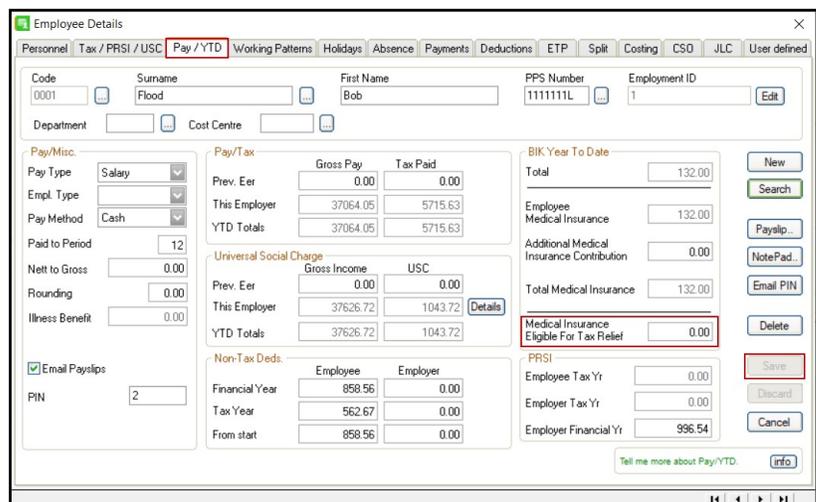
How to Setup a Consolidated Company

To setup a consolidated company for reporting purposes, follow the steps below:

1.Log in as Administrator (user name: **ADMIN**, default password **PASS**).

2.Select **Company – Consolidation Setup.**

3.Enter a unique name for the consolidated company and select the relevant check boxes to specify the companies to be consolidated: *Note: For convenience, we recommend to use the ID 'CONS' or 'CONSOL' for a consolidated company, to distinguish it from a regular payroll.*
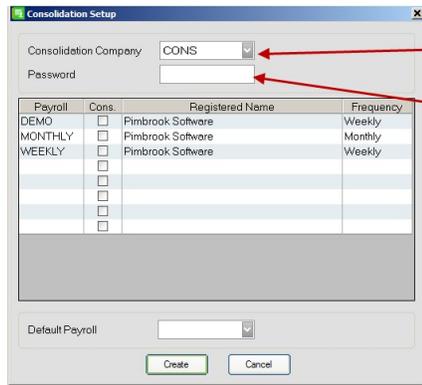
> Type a new unique name for the consolidated company.

> Enter Password if required

> Tick the boxes for the companies to be consolidated.
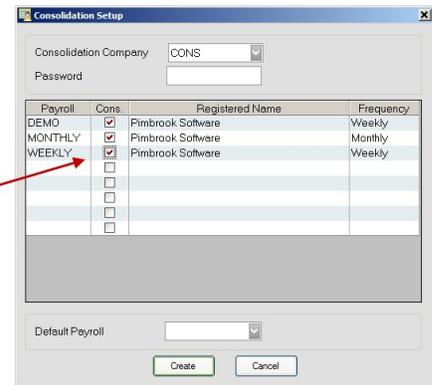
One of the selected companies must be the default company.
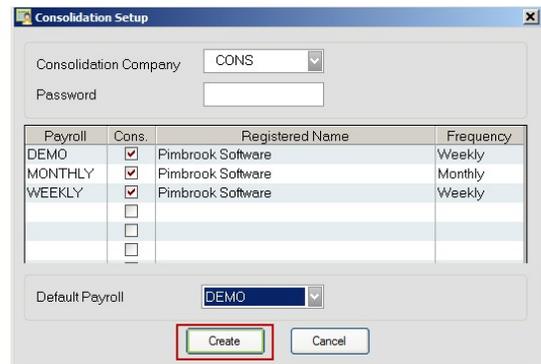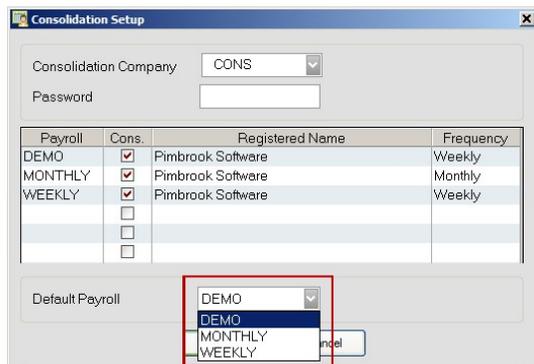
4.Select the name of this company in the **Default Payroll** drop-down list and then click **Create**.

- You will be prompted to create a new consolidation company. Click **Yes**.

- This will take a moment to create:
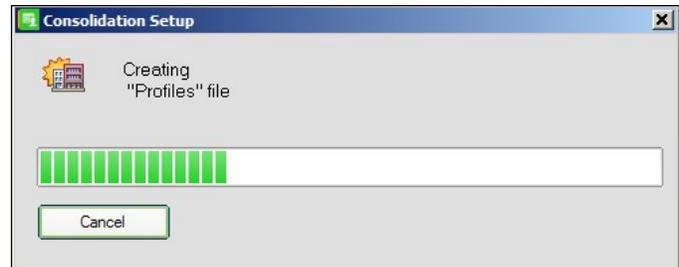
- Once the consolation process is complete, you can login to it and consolidate the chosen payrolls.

- When the consolidation company opens, click the **'Cons All'** button.

- The data for your chosen companies will merge.
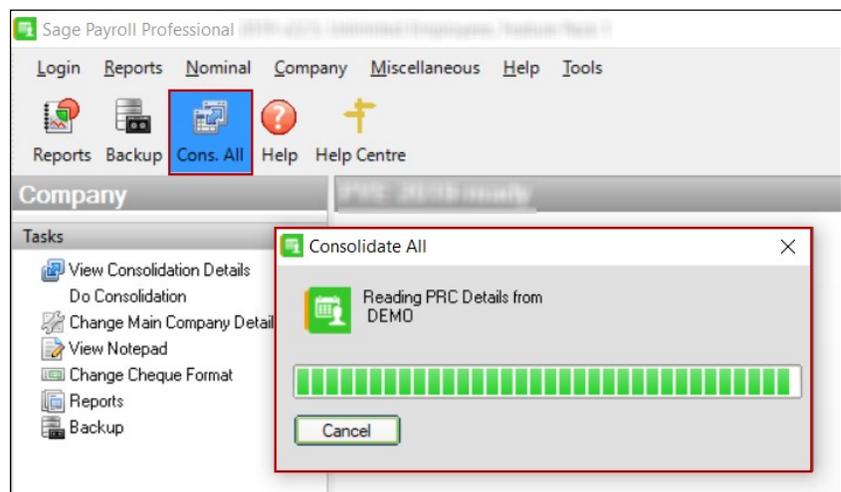
- When the data has been successfully consolidated you will receive this message:

- click **'Ok'** to acknowledge.
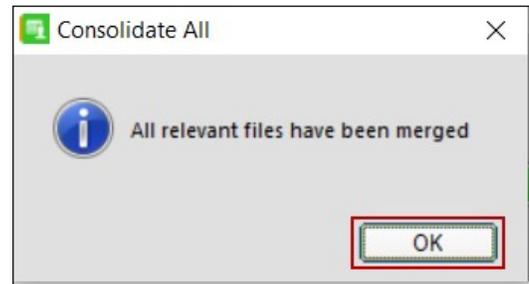
- Once the data has been consolidated, you can run any report offered in the Reports screen.
- The figures shown in any of the chosen reports will be derived from the merged data.
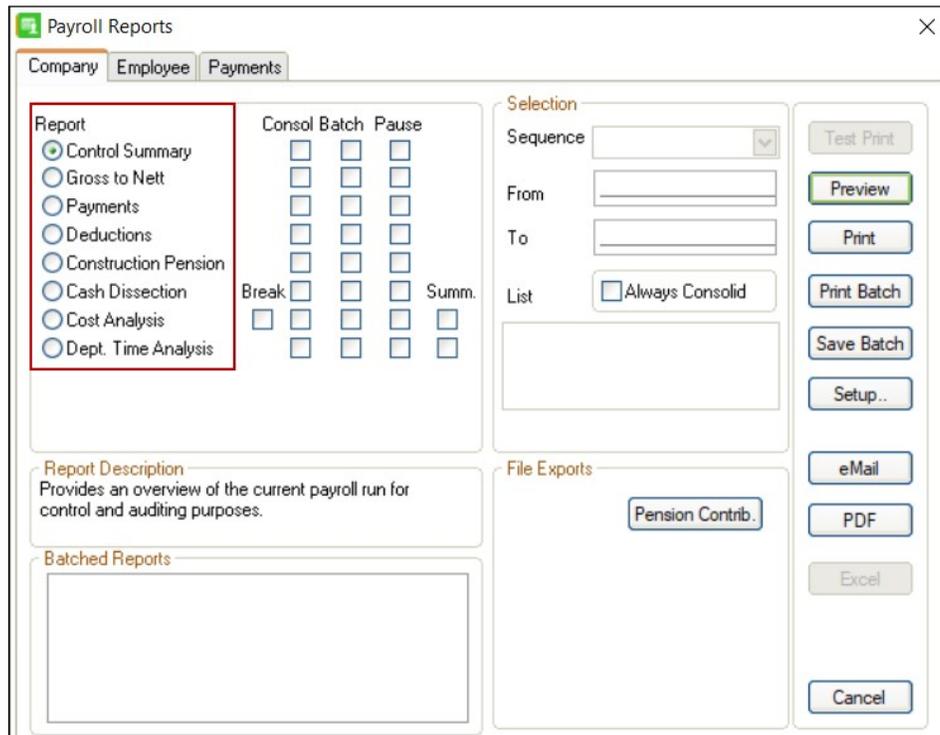
Additional Resources

Check out our Online Year End Resource at: https://pimbrook.ie/knowledge-base/25210/

Here You Can:

- o Download the Year End Update
- o Download The Booklet (PDF Format)
- o Download The Checklist (PDF Format)
- o Link to relevant Knowledgebase Articles

Other Products and Services from Pimbrook that may be of interest to you:

Sage 50 – Trusted by over 400,000 Businesses
Sage 50 Accounting Software, can help you keep track of your finances – managing your cash flow, profitability, preparing and submitting VAT returns and your year-end accounts. It can also fully integrate with your Sage Payroll!

Sage Software Support & Training
Exceptional Sage Software Support is our #1 Goal. Pimbrook currently service over 1,500 clients and we are reporting 99% satisfaction from our on-going customer care calls.

We are also extremely well placed to offer class-leading Training, as our background is in Sage 50 Accounts and Sage Payroll Software training. We firmly believe that no two clients are the same, so we provide bespoke training programmes that address their specific needs and challenges.

For more information, please contact us now:

Tel: 051 395900
Email: info@pimbrook.ie
Web: www.pimbrook.ie

Congratulations!

This Completes
The Payroll Year End Processing
for 2019!

Please check our website www.pimbrook.ie for details of any further updates

If you require further clarification on any of the steps in the manual do not hesitate to contact us.

We do our utmost to ensure our year end guide and support is of the highest possible standard. Please feel free to contact us if we haven't reached this level or indeed if we have exceeded your expectations.

Thank You Again.

From all the team at Pimbrook Software