



# **Guide to UK Payroll Year End 2023/2024**

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## Check List

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

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## Stage 1: Prepare for Year End

### Stage 1: Prepare for Year End

Sage 50 Payroll v29 includes both the new legislation for the 2023/2024 tax year, and the legislation for 2022/2023 and prior. This means you can install v29 before you process the final pay period of the 2022/2023 tax year.

You can [update via the automatic update prompt](#) when you open your software, or manually download and install the update following the steps below.

#### Before you install v29

Before you [process your payroll year end](#), you must check that you are on the latest version of the software. You can check your software as follows:

Under **Program Details** check:

- Click **Help**, then click **About** check the version begins **v29.00**.
- If your version number is **v29.00.239**, you've already installed your update and you don't need to take any further action.
- If your version number begins with v28, you need to follow the steps below to install **v29**

If not, you must install the update before you move on.

To make the installation process easier, we recommend that you carry out the preparation steps below.

- [Check your antivirus software to avoid conflicts with Sage 50 Payroll >](#)
- [Optimise your data >](#)
- Make a note of the Program Directory
  1. Click **Help** then click **About**
  2. Make a note of the **Program Directory**
- [Backup your data >](#)
- Check your computer meets the [system requirements for Sage 50 Payroll >](#)

## 1. Install Your Year End Software Update

a. Close Sage 50 Payroll.

b. Now, simply click the link below:

- [Download Sage 50 Payroll v29.00.239 >](#)
  - If you're prompted to Run or Save the installation file, click **Save**, it then downloads to your computer

c. To begin the installation, locate and right-click **exe**, then click **Run as administrator**.

*NOTE: The installer must be opened using the Run as administrator option.*

d. Click **Accept Licence** then click **Next**.

e. Check the path is the same as the program directory you noted earlier, then click **Yes**.

- If the path isn't the same, click **No** then **Yes** and browse to the program directory you noted, click **Sage50Payroll\_2900239.exe**, then click **Open**

f. Click **OK**, when the installation completes, click **Close**.

g. [Enable background updates >](#)

**TIP:** If Sage 50 Payroll is installed on more than one computer, repeat these steps on each one.

When you log in to a company for the first time after you install v29, your software upgrades your company data into the new version.

From v29, after the data upgrade process completes your software automatically optimises the database for your company. This helps to reduce the size of your backups, and to maintain error free data.

## 2. Paid your employees for the last time in the 2022/2023 tax year:

- From the payroll desktop, check the date in the **Last Updated** column.

If you pay your employees on Tuesday 5 April 2023, you may have an extra pay run at the end of the tax year.

Week 53 occurs if your regular pay date for weekly, fortnightly or four weekly paid employees falls on 5 April. This is because the number of days in the tax year doesn't divide into a whole number of tax weeks.

 **TIP:** You don't have a week 53 if you process a monthly payroll.

### Check if you have a week 53

In the 2022/2023 tax year, week 53 is Wednesday 5 April 2023. You have a week 53 if the following applies:

Your normal pay day is a Wednesday and...

- You last processed your **weekly** paid employees on **Wednesday 29 March 2023**.
- You last processed your **fortnightly** paid employees on **Wednesday 22 March 2023**.
- You last processed your **four weekly** paid employees on **Wednesday 8 March 2023**.

In each of these instances, you're next due to process the employees on 5 April 2023, week 53.

### Process a week 53

It's easy to process a week 53, simply process it in the same way as any other pay period and your software will complete the [correct calculations](#) automatically.

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## 3. Process any leavers who left on or before 5 April 2023:

- From the payroll desktop, check the **Current Status** column to see if it shows **Leaver**.

When an employee leaves your company, you need to provide them with a P45. To do this, after updating their final payment, but before submitting the full payment submission (FPS), you must mark them as a leaver.

Before you start, visit our guide on [What to consider before processing an employee as a leaver >](#)

Once you've done this, you're ready to process your employee's final pay and process them as a leaver.

 **NOTE:** If you have an employee who's leaving earlier than your normal pay day, you can follow our guide to [Pay a leaver mid month >](#)

[Click here for detailed instructions on processing a leaver](#)

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#### 4. Submitted your FPS for the last pay period:

- From the payroll desktop, check the date in the **last FPS Date** column.

The FPS is the submission you must make to HMRC each time you pay your employees. It contains:

- Starter and leaver information
- Employee information such as name, address, NI number and tax code
- Employee payment and deduction information
- Tax, NI and student loan contributions

[Click here for detailed instructions for Full Payment Submissions \(FPS\) – The basics](#)

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#### 5. If required, submitted your employer payment summary (EPS) for month 12:

- Click **e-Submission**, then click **e-Submission Log**.

You can use the EPS to report values to HMRC that you can't include in your [full payment submission \(FPS\)](#). The values that are sent in the EPS affect the payments you make to HMRC on a monthly or quarterly basis.

[Click here for detailed instructions on submitting employer payment summary \(EPS\)](#)

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## 6. Backed up your Sage 50 Payroll data:

- Click **File**, then click **Backup** and follow the steps in the **Backup Wizard**.

[Click here for details on taking a backup of your data](#)

## Stage 2: Process Year End

This is step three of four to completing your payroll year end. See all [four steps here >](#)

Payroll year end is quick and simple, let's take a look at the tasks you need to complete below.

✦ **TIP:** Take a look at our handy [process year end checklist](#) to help you along the way.

### 1. Set your process date

2. On the Payroll navigation bar, click **Change Process Date**.
  3. Enter **05/04/2023**, then click **OK**.
- 

### 1. Choose tax year

1. To begin the year end process, click **Payroll Year End**.
  2. Click **Choose Tax Year**, then click **Yes** to include all employees.
  3. Check the Tax Year is **2022/2023**.
  4. Check the Reports date is **05/04/2023**.
  5. If your company has ceased trading, in the **Cessation Date** box enter the date it ceased trading. Otherwise, leave this blank.
  6. Click **OK**.
- 

### 2. Internet submissions

This is your final submission of the 2022/2023 tax year. You must submit it no later than **19 April 2023**.

1. Click **Internet Submissions**, read the Important Notice, then click **Continue**.
2. Check your company details are correct, then click **Submit**.
3. Check the correct tax year is showing and your details are correct.
4. Click **Submit**.

When the HMRC Government Gateway is busy, it can take a while for the submission to send. If you want to continue processing and come back later to check the progress of your submission, click [Check again later](#).

5. Once your submission is successfully sent, click the link provided, then click **Print**.
  6. Click **Close**.
-

### 3. Produce P60s

Anyone who's still employed by you on 5 April 2023 will require a P60. You must provide them with this by **31 May 2023**. You don't need to produce a P60 for any employee who leaves on or before 4 April 2023.

To produce your P60s;

Click **Produce P60s** and select whether to upload, print or email them.

- [Upload Online P60s >](#)
  - [Print P60s >](#)
  - [Email your P60s >](#)
- 

### 4. Backup data

At this point, it's a good idea to back up your payroll data. [Read more >](#)

 **TIP:** We recommend you include all files in this back up.

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### 5. Complete year end

1. Click **Complete Year End**, then click **Yes**.
  2. If you keep mileage records, click **Yes**, or if you don't, click **No**.
  3. Click **OK**.
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### 6. Distribute YE returns

This step is just a reminder that you must give your employees their P60s by **31 May 2023**. You must also pay any tax and national insurance due to HMRC for tax month 12 by **19 April 2023** as normal.

- To complete this step, simply click **Close**.
-

## Stage 3: Get ready for the new tax year

This guide explains how to get ready for the 2023/2024 tax year in Sage 50 Payroll.

This is the final step to completing payroll year end. See all [four steps here >](#)

Before processing in the new tax year, follow our simple 4 steps to ensure your software is ready.

### 1. Check you're using the correct version

Before you can start processing in the new tax year, you must have installed the update for the 2023/24 tax year.

You can find out how to do this in our [quick guide >](#)

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### 2. Update your employees' tax codes

For the 2023/24 tax year, the personal allowance and emergency tax code remain the same at **£12,570** and **1257L**.

This means you won't need to change your employees' tax codes unless informed by HMRC, however you will need to remove the **week 1 / month 1** flag on any employees' tax codes before processing in the new tax year. [Update your employees' tax codes](#)

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### 3. Small employers' relief

If you're eligible for the small employers' relief, you need to set your software to calculate and claim it. [What is Small Employers' Relief \(SER\)? >](#)

1. Click **Company** then click **Settings**.
  2. Select the **Eligible for Small Employers' Relief** check box.
  3. Click **OK**.
-

## 4. Apply for Employment Allowance

★ **TIP:** Make sure your process date is set to 06/04/2023 before completing this.

In the 2023/2024 tax year the employment allowance allows eligible employers to reduce their annual Employers National Insurance liability by up to **£5,000**.

If you're eligible to claim employment allowance, you can easily apply to HMRC to claim the employment allowance and keep track of how much you've claimed through your software. [What is employment allowance? >](#)

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## 5. Pensions Data Exchange

If you use Pensions Data Exchange (PDX) to send pension data to your provider, there are some additional steps to complete at the start of the tax year. [Prepare Pensions Data Exchange for the new tax year >](#)

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## 6. New legislation for the 2023/2024 tax year

There are a few changes to legislation in the new tax year. Find out what they are in our handy guide.

[Legislation changes for the 2023/2024 tax year >](#)

## 7. 2023/2024 Tax Year Calendar

In the 2022/2023 tax year, week 53 is Wednesday 5 April 2023. You have a week 53 if the following applies:

Your normal pay day is a Wednesday and...

- You last processed your **weekly** paid employees on **Wednesday 29 March 2023**.
- You last processed your **fortnightly** paid employees on **Wednesday 22 March 2023**.
- You last processed your **four weekly** paid employees on **Wednesday 8 March 2023**.

In each of these instances, you're next due to process the employees on 5 April 2023, week 53.

Payroll tax calendar 2023/2024								Sage
Tax Month 1				6 April – 5 May 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
1	6	7	8	9	10	11	12	
2	13	14	15	16	17	18	19	
3	20	21	22	23	24	25	26	
4	27	28	29	30	1	2	3	
5	4	5						
Tax Month 2				6 May – 5 June 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
5			6	7	8	9	10	
6	11	12	13	14	15	16	17	
7	18	19	20	21	22	23	24	
8	25	26	27	28	29	30	31	
9	1	2	3	4	5			
Tax Month 3				6 June – 5 July 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
9						6	7	
10	8	9	10	11	12	13	14	
11	15	16	17	18	19	20	21	
12	22	23	24	25	26	27	28	
13	29	30	1	2	3	4	5	
Tax Month 4				6 July – 5 August 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
14	6	7	8	9	10	11	12	
15	13	14	15	16	17	18	19	
16	20	21	22	23	24	25	26	
17	27	28	29	30	31	1	2	
18	3	4	5					
Tax Month 5				6 August – 5 September 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
18				6	7	8	9	
19	10	11	12	13	14	15	16	
20	17	18	19	20	21	22	23	
21	24	25	26	27	28	29	30	
22	31	1	2	3	4	5		
Tax Month 6				6 September – 5 October 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
22							6	
23	7	8	9	10	11	12	13	
24	14	15	16	17	18	19	20	
25	21	22	23	24	25	26	27	
26	28	29	30	1	2	3	4	
27	5							
Tax Month 7				6 October – 5 November 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
27		6	7	8	9	10	11	
28	12	13	14	15	16	17	18	
29	19	20	21	22	23	24	25	
30	26	27	28	29	30	31	1	
31	2	3	4	5				
Tax Month 8				6 November – 5 December 2023				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
31					6	7	8	
32	9	10	11	12	13	14	15	
33	16	17	18	19	20	21	22	
34	23	24	25	26	27	28	29	
35	30	1	2	3	4	5		
Tax Month 9				6 December – 5 January 2024				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
35							6	
36	7	8	9	10	11	12	13	
37	14	15	16	17	18	19	20	
38	21	22	23	24	25	26	27	
39	28	29	30	31	1	2	3	
40	4	5						
Tax Month 10				6 January – 5 February 2024				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
40			6	7	8	9	10	
41	11	12	13	14	15	16	17	
42	18	19	20	21	22	23	24	
43	25	26	27	28	29	30	31	
44	1	2	3	4	5			
Tax Month 11				6 February – 5 March 2024				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
44						6	7	
45	8	9	10	11	12	13	14	
46	15	16	17	18	19	20	21	
47	22	23	24	25	26	27	28	
48	29	1	2	3	4	5		
Tax Month 12				6 March – 5 April 2024				
Week	Thu	Fri	Sat	Sun	Mon	Tues	Wed	
48							6	
49	7	8	9	10	11	12	13	
50	14	15	16	17	18	19	20	
51	21	22	23	24	25	26	27	
52	28	29	30	31	1	2	3	
53	4	5						

## What's new in Sage 50 Payroll v29

### Updated name and desktop shortcut

We've simplified the software name to Sage 50 Payroll. Don't worry though, all your cloud based features such as Online Services and Pensions Data Exchange remain in place and work as normal.

When you install v29 a new icon named **Sage 50 Payroll** is added to your desktop. Simply delete the old Sage 50cloud Payroll icon and use your new icon to launch your software.

Find out about the new shortcut icon and more in our [software name change to Sage 50 Payroll](#) guide.

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### Legislation for the 2023/2024

Up to date legislation for the new tax year is built in, giving you everything you need to stay fully compliant.

Find out more about [legislation changes for the 2023/2024 tax year >](#)

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### Enhanced help in your software

If you're not sure and need support, or just want to know a little more we're proud to give you enhanced access to our award-winning support. Just click any help option within your software including the F1 shortcut and the window will open.

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### Nominal link file export for Sage Business Cloud Accounting (SBCA)

You can now set up nominal link to export a file with your payroll values, ready to import right into SBCA.

[Setup and post nominal link to a file for Sage Business Cloud Accounting >](#)

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## **Submit year end submissions for multiple companies**

We've added great new functionality to the multi company tasks feature, available in Sage 50 Payroll Professional. You can easily submit the year end submission for multiple companies in a few easy clicks.

[Use the Multi-Company Tasks option to process year end >](#)

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## **Extra company analysis fields**

We've increased the number of company level analysis fields from three, to 20! This gives you much greater flexibility if you need to enter details that are unique to your business and reporting requirements.

[How to use the analysis options >](#)

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