

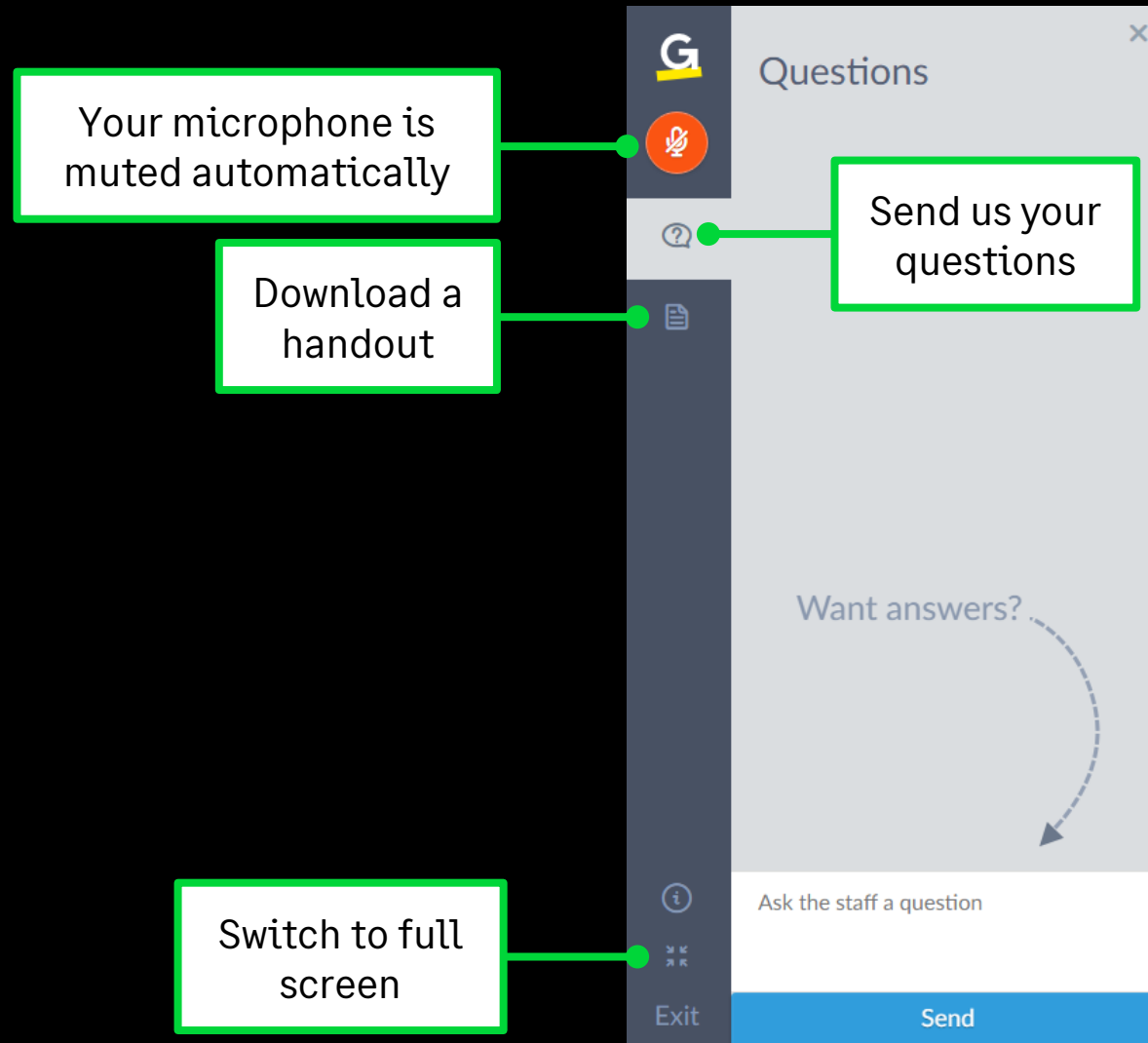
# **Sage 50 Payroll** **Year End – Part 1** **Install & Prepare**

**Presented by Calvin & Duncan**

**Sage**



# Housekeeping



# Contents

## **Install your year end update**

Top tips for a smooth installation of your update

## **Prepare for year end**

Checklist to finish payroll for 2022/23 and get ready for year end

## **Further support**

## **Questions**

# Install your year end update



# Prepare to install

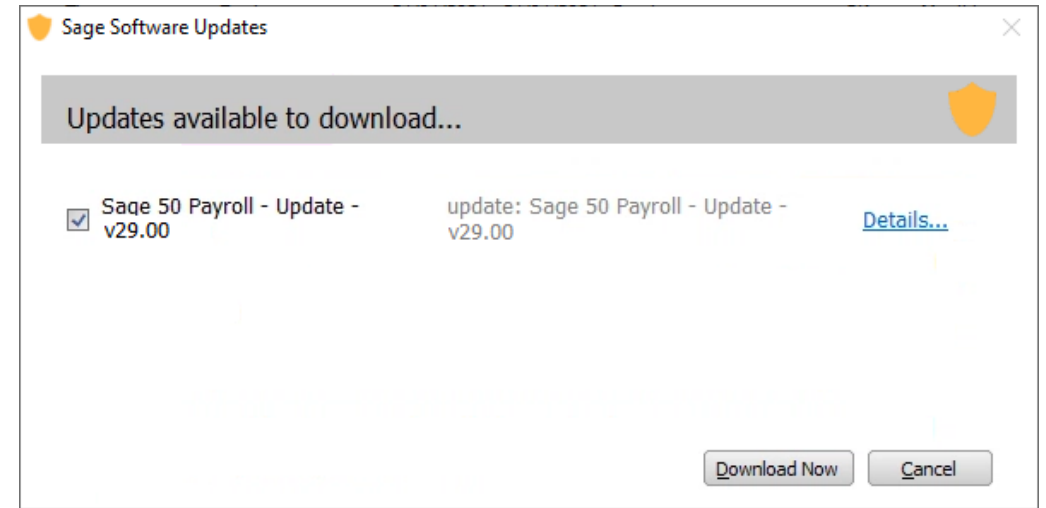
- Optimise your data
- Check your program directory
- Check Automatic Updates are switched on
- Backup your payroll data



The payroll year end update (v29.00) is available now. Visit [www.sage.co.uk/pye](https://www.sage.co.uk/pye) for more details.

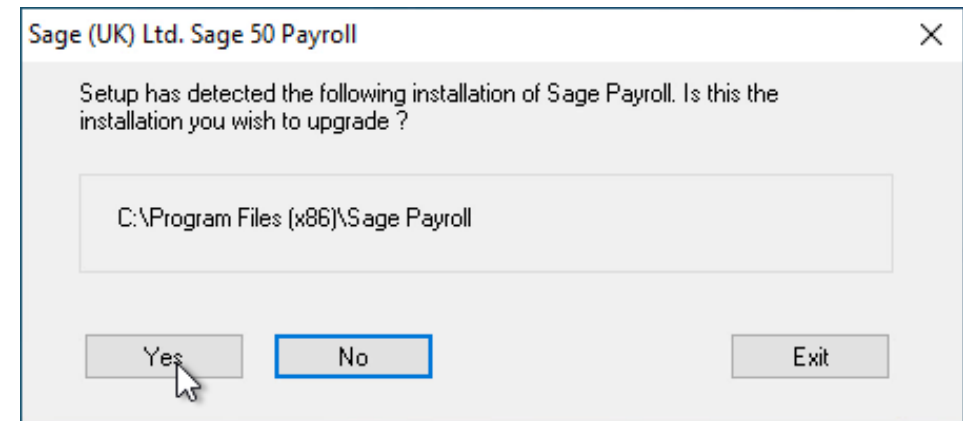
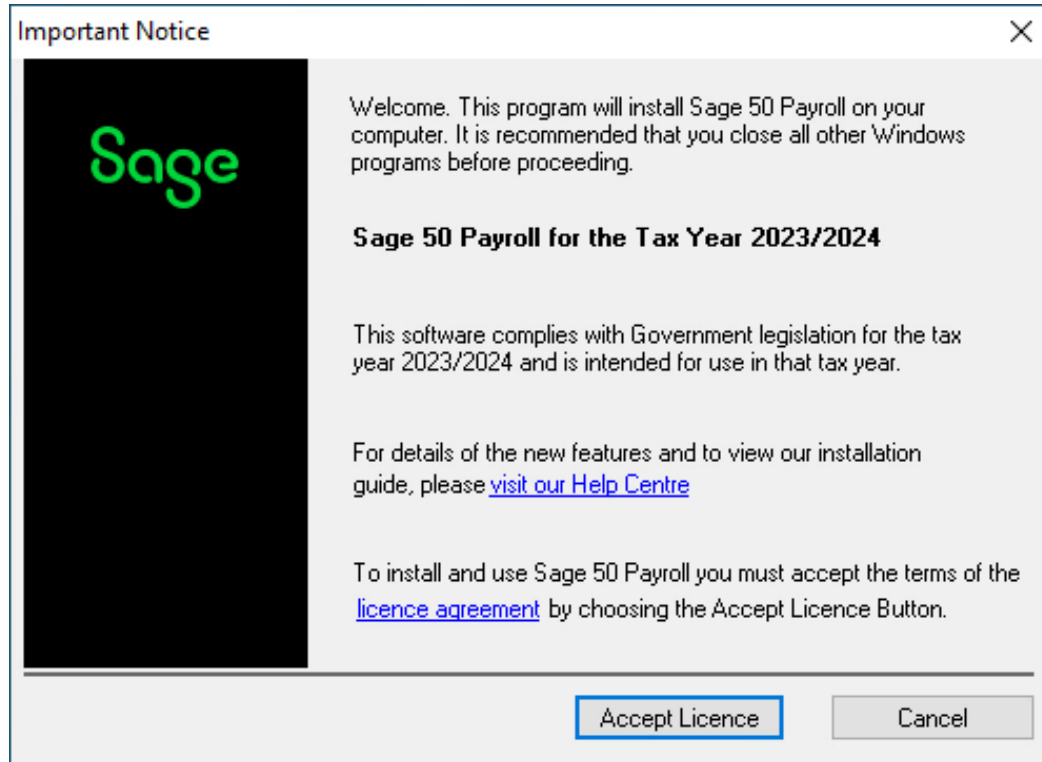
# Download your update

- Download using **Automatic Updates**
- Download manually from our Help Centre



The payroll year end update (v29.00) is available now. Visit [www.sage.co.uk/pye](http://www.sage.co.uk/pye) for more details.

# Install your update



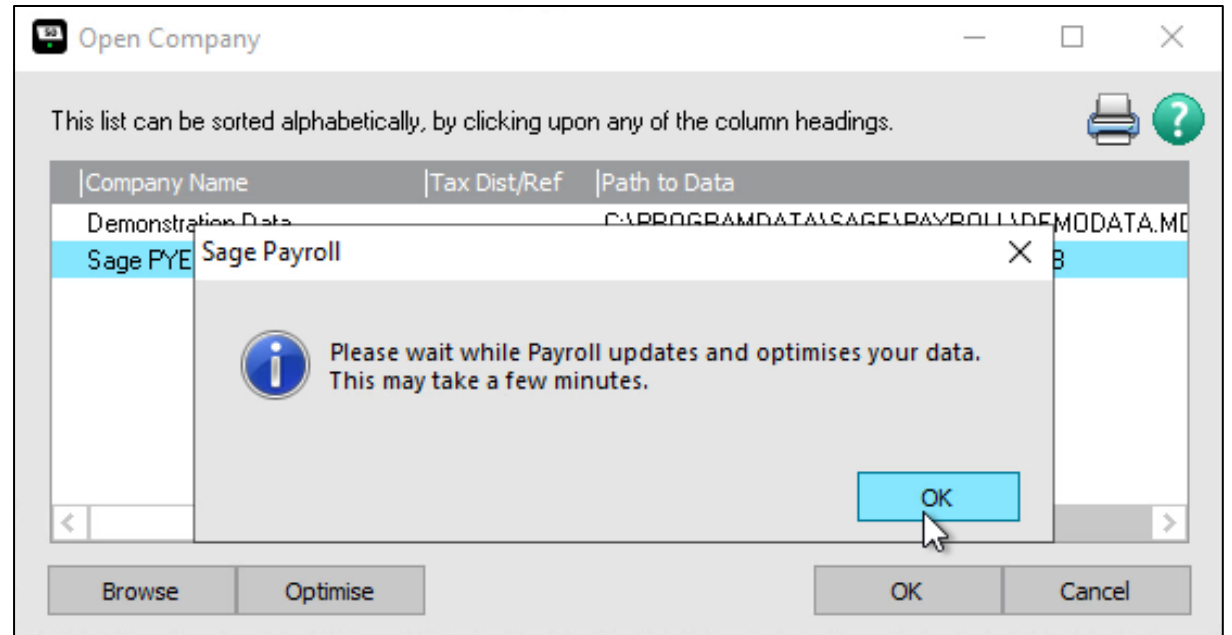
The payroll year end update (v29.00) is available now. Visit [www.sage.co.uk/pye](http://www.sage.co.uk/pye) for more details.

# After installing

- Upgrade your payroll data
- Check your **version number** starts with **v29.00**



Program Details	
Version Number	29.00.239

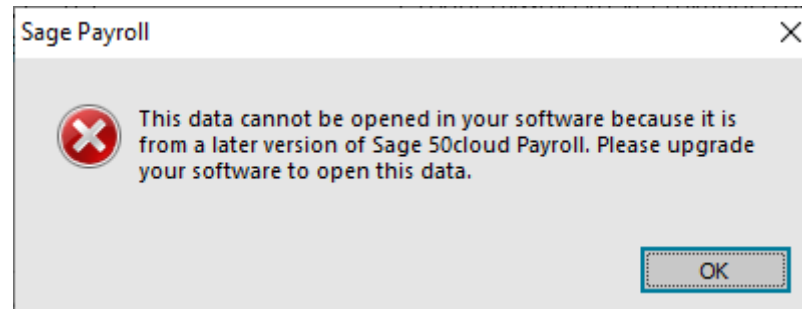
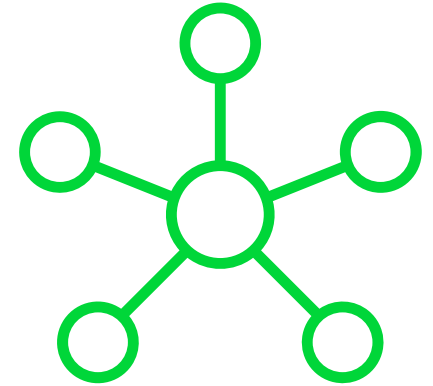


The payroll year end update (v29.00) is available now. Visit [www.sage.co.uk/pye](http://www.sage.co.uk/pye) for more details.

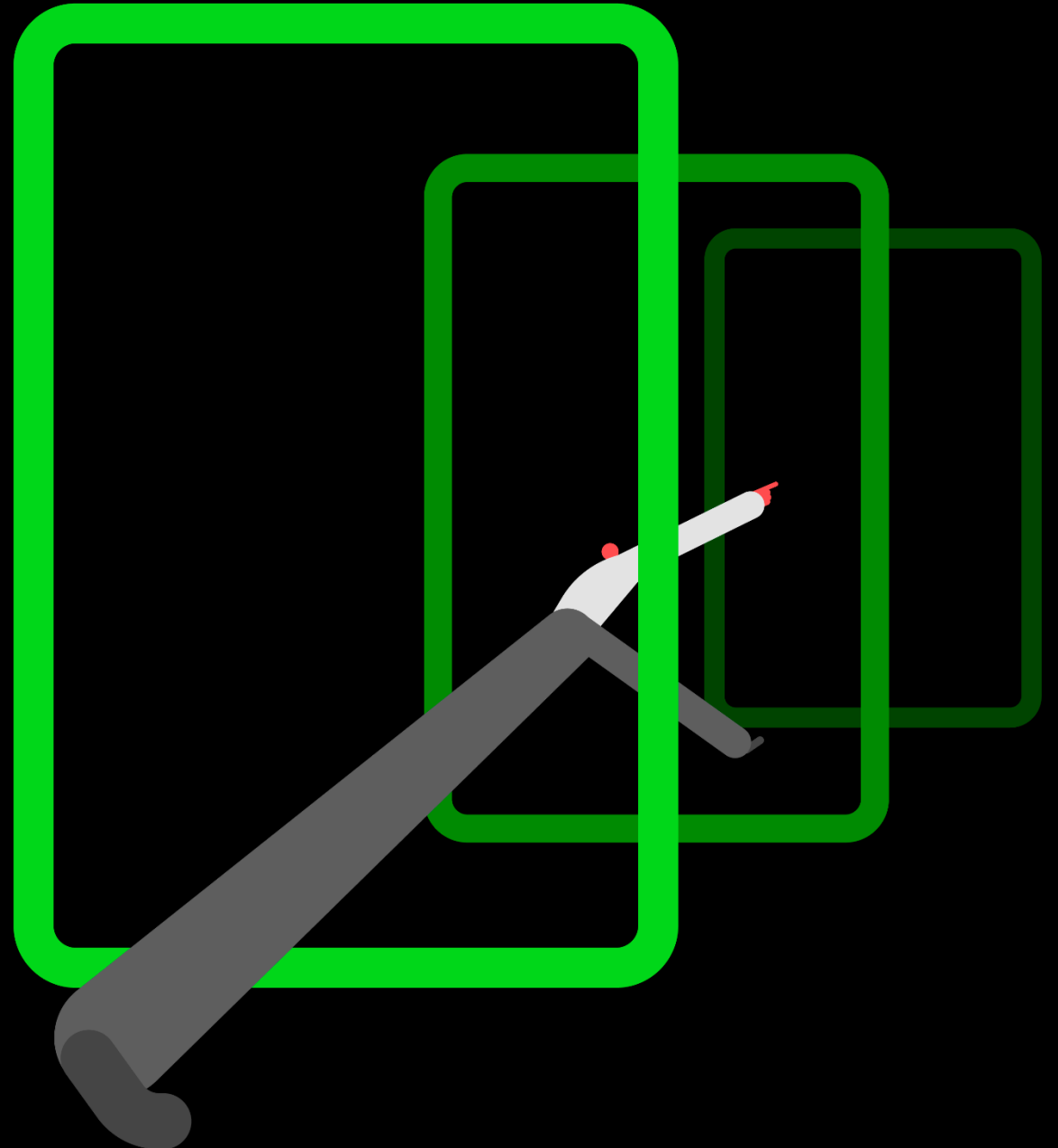


# Network installations

- Multiple installations connected to one set of data
- All connected installations need to be updated
- Message below appears when data on the server has been updated but the program on a connected computer has not been updated



# Prepare for year end



# Checklist

1. Check if you have a week 53
2. Process and update your final pay period for 2022/2023
3. Process leavers
4. Submit your FPS and EPS
5. Back up your data



# Week 53

If you run a **weekly, fortnightly or 4-weekly** payroll, check if you have a [week 53](#).

$$\begin{array}{c} \text{2022/23} \end{array} \text{ has } \begin{array}{c} \text{365} \\ \text{days} \end{array} \text{ divided by } 7 = \begin{array}{c} \text{52} \\ \text{weeks} \end{array} + \begin{array}{c} \text{1} \end{array} \text{ day}$$

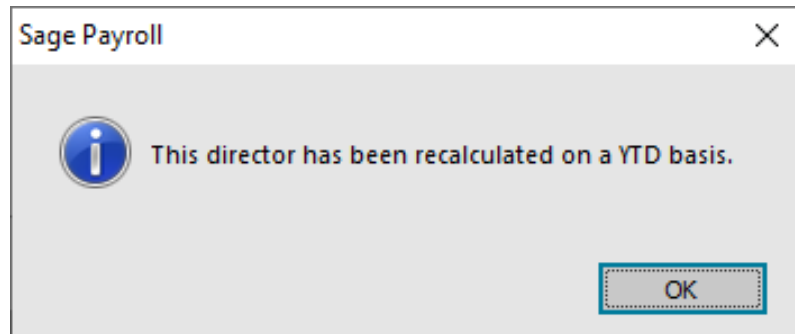


You will have a week 53 if your regular pay date falls on:

**Wednesday 5 April 2023**

# Directors' NI

- By the end of the tax year, all directors must have paid the correct NICs based on their cumulative earnings and Annual Directors NI thresholds.
- If Director Status is **Pro-rata basis**, NI is recalculated in the last period of the tax year.



Director NIC calculations will use the following 'annualised' thresholds and rates for 2022/23:

**Directors Primary Threshold - £11,908**

**Employee (PT to UEL) - 12.73%**

**Employer - 14.53%**



More info – <https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200427112157618>

# Directors' NI – Pro rata Method

Date : 05/04/2023

Sage PYE Demo

Page : 1 of 1

Time : 13:38:01

## Payment Summary History Part 1 - By Employee

Employee Reference From : 1

Payment Period : All

Processing Date From : 06/04/2022

Employee Reference To : 9999999

Processing Date To : 05/04/2023

Employee: 1 - E One

Process Date	Tax Week	Tax Month	Gross Pay pre Sacrifice	Gross Pay post Sacrifice	Taxable Gross	P.A.Y.E.	Employee NIC	Employer NIC	Employee Pension	Employer Pension*	Student/ Postgrad Loan	SSP	SMP	SPP	SAP	ShPP	SPBP	Net Pay
30/04/2022	4	1	2,500.00	2,500.00	2,500.00	290.20	222.20	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1908.40
31/05/2022	8	2	2,500.00	2,500.00	2,500.00	290.40	222.20	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1908.20
30/06/2022	13	3	2,500.00	2,500.00	2,500.00	290.40	222.20	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1908.20
31/07/2022	17	4	2,500.00	2,500.00	2,500.00	290.20	192.39	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1938.21
31/08/2022	22	5	2,500.00	2,500.00	2,500.00	290.40	192.39	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1938.01
30/09/2022	26	6	2,500.00	2,500.00	2,500.00	290.40	192.39	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1938.01
31/10/2022	30	7	2,500.00	2,500.00	2,500.00	290.40	192.39	262.17	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1938.01
30/11/2022	35	8	2,500.00	2,500.00	2,500.00	290.20	174.24	240.40	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1958.38
31/12/2022	39	9	10,000.00	10,000.00	10,000.00	1,790.40	493.14	1,275.40	148.78	110.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7589.70
31/01/2023	43	10	2,500.00	2,500.00	2,500.00	290.40	174.24	240.40	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1958.18
28/02/2023	47	11	2,500.00	2,500.00	2,500.00	290.40	174.24	240.40	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1958.18
31/03/2023	52	12	2,500.00	2,500.00	2,500.00	290.20	805.84	294.73	79.20	59.40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1324.76
Employee Total			37,500.00	37,500.00	37,500.00	4,984.00	3,257.85	4,128.52	1,017.98	783.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	28240.18
Report Total			37,500.00	37,500.00	37,500.00	4,984.00	3,257.85	4,128.52	1,017.98	783.47	0.00	0.00	0.00	0.00	0.00	0.00	0.00	28240.18

\*For salary sacrifice pension schemes this is the employer contribution including the amount sacrificed by the employee.

# Submit your FPS and EPS

- Your FPS is **not** your final submission.
- You send a final **EPS** submission as part of the payroll year end process.

## Full Payment Submission

### Important Information

The details below have been used to generate your Full Payment Submission to HMRC.

If you are sure the details are correct, click Submit. If you need to make changes, click Close.

Date of Submission: 31 March 2023		
Company Name:	Sage PYE Demo	Accounts Office Reference:
Tax District/Ref:	999/A300	Total Number of Employees:
Final Submission for Year:	No	Total Liability:



More info – <https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200427112446692>

# Checklist

- ✓ **Check if you have a week 53**
- ✓ **Process and update your final pay period for 2022/2023**
- ✓ **Process leavers**
- ✓ **Submit your FPS and EPS**
- ✓ **Back up your data**





# P60s

## Online P60s

Upload to Sage HR Online Services

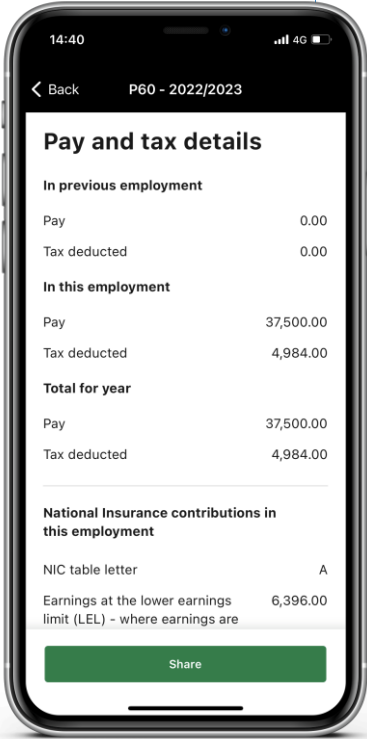
## Email P60s

Send from Microsoft Outlook or webmail (SMTP)

## Print P60s

Print onto plain paper

\*P60 stationery no longer available from Sage or HMRC



Sage PVE Demo P60 Year End Statement - Message (HTML)

File Message Insert Draw Options Format Text Review Help Tell me what you want to do

To: ee1\_pve@dispostable.com

Cc:

Subject: Sage PVE Demo P60 Year End Statement

P60 (Apr 2023) Email.pdf 11 KB

The attached file is a Sage Report in PDF (Adobe Acrobat) format. To view the report you will need Acrobat Reader, available as a free download from <http://www.adobe.com/>

**P60 End of Year Certificate**

Tax year to 5 April 2023

This is a printed copy of an eP60

**To the employee:**  
Please keep this certificate in a safe place as you will need it if you have to fill in a tax return. You also need it to make a claim for tax credits and Universal Credit or to renew your claim.

It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of National Insurance contributions.

By law you are required to tell HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return.

**Employee's Details**

Surname: ONE  
Forenames or initials: E  
National Insurance Number: BA 48 24 68 B  
Workspayroll number: 1

**Pay and income Tax details**

	Pay	Tax deducted
In previous employment(s)	£ 0.00	£ 0.00
In this employment	£ 37500.00	£ 4984.00
Total for year	£ 37500.00	£ 4984.00
Final tax code	1257L	

**National Insurance contributions in this employment**

NIC table letter	Earnings at the Lower Earnings Limit (LEL) where earnings are equal to or exceed the LEL	Earnings above the LEL, up to and including the Upper Primary Threshold (PT)	Earnings above the PT, up to and including the Upper Earnings Limit (UEL)	Employee's contributions due on all earnings above the PT
A	£ 6396	£ 5512	£ 25592	£ 3257.86

**Statutory payments included in the pay in this employment figure above**

Statutory	£	p	Statutory	£	p	Statutory	£	p
Maternity Pay	0.00		Paternity Pay	0.00		Shared Parental Pay	0.00	
Statutory Adoption Pay	0.00		Statutory Parental Bereavement Pay	0.00				

**Other details**

Student Loan Deductions in this employment (where Ex only): £ 0

Postgraduate Loan Deductions in this employment (where Ex only): £ 0

To employee: 8 Roker Park, South Shields, Tyne and Wear, NE33 4ST

Your employer's full name and address (including postcode): Sage PVE Demo, Cobalt Business Park, Newcastle upon Tyne, NE28 9EJ

Employer PAYE reference: 999 / A300

**Certificate by Employer/Paying Office:**  
This form shows your total pay for Income Tax purposes in this employment for the year. Any overtime, bonus, commission etc, Statutory Sick Pay, Statutory Maternity Pay, Statutory Paternity Pay, Statutory Shared Parental Pay or Statutory Adoption Pay is included.

P60 (2022-23)(Substitute)(Sage) Do not destroy

# Further support



# Webinars

## Year End Part 2 – Process year end

*Various dates from 7 March to 12 April*

In this webinar, we take you through the payroll year end process in Sage 50 Payroll and the steps to get ready for the new tax year. We also run through legislation changes and what's new in 2023/24.

**Register now**

## Are you ready for payroll year end? Simplify it with Sage

*Monday 13 March – 1pm*

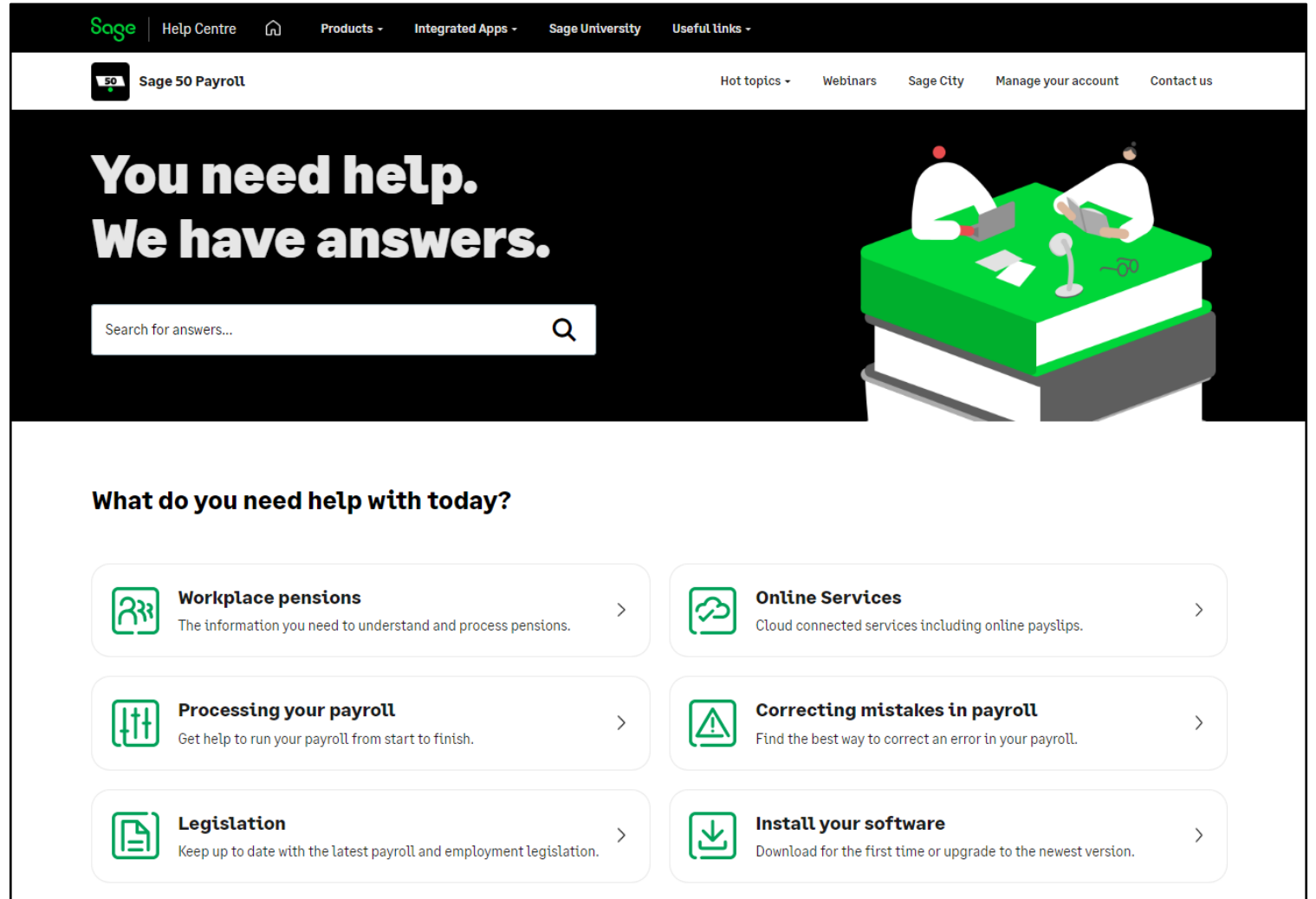
Join our panel of payroll experts, who will share their knowledge on payroll, provide advice on getting it right first time, highlight common mistakes and offer tips on planning for the new tax year.

**Register now**

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- Videos
- Get in touch



# Sage University

[www.sageu.com](http://www.sageu.com)

- e-Learning
- Certification
- Bite-sized learning

## A clear learning path to certification

We have designed learning paths to provide you with the knowledge and experience to master Sage 50cloud Payroll and become Sage Certified.



**Get started**



**Payroll  
fundamentals**



**Certification**



**Bitesized Learning**


✓ [Payroll Basics](#)

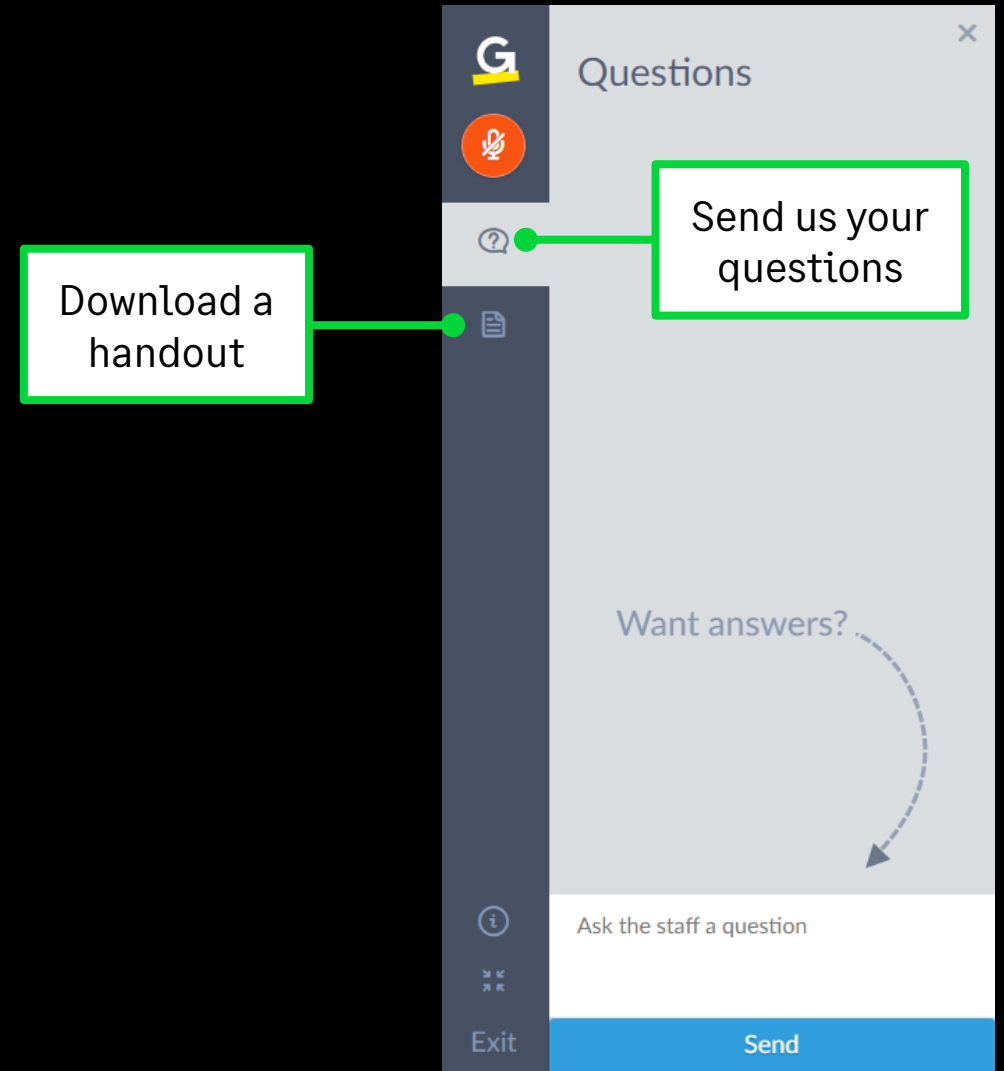
✓ [Fast Start 1: 'Get started with 50cloud Payroll'](#)

✓ [Fast Start 2: 'Run your Payroll'](#)

# Questions

Submit your questions in the Q&A now!

 This part of the webinar has no sound.



# Thank you!