

Earnie™ Year-end Checklist

Use this checklist if you plan to send your final submissions before you start running payrolls in the 2024/2025 tax year.

Company name:	
Company number:	
Completed by:	
Date:	

Before you start, make sure you have installed the April update of Earnie™, version 24.10*

- Step 1** Complete payrolls up to the end of 2023/2024 - run reports ☐
- Step 2** Issue outstanding P45s for 2023/2024 ☐
- Step 3** Check year-to-date NI for Directors if you started using Earnie™ part way through the tax year ☐
- Step 4** Back up your 2023/2024 data. Use the space below to keep a record of where you saved it and when you did this: ☐
Back-up details
Location/filename _____
Date/Time _____
- Step 5** Submit your **FPS**. If an **EPS** is NOT required for March, tick **Final Submission for Year** ☐
- Step 6** Submit your **Final Employer Payment Summary for Year**, if required, to HMRC (Tick **Final Employer Payment Summary for Tax year**) ☐
- Step 7** Print or publish **P60s** and give to your employees by 31st May 2024 ☐
- Step 8** From the **Year-end** menu run the **Year-end Restart** ☐
- Step 9** If your company newly qualifies as a small employer, tick the **Small Employer Relief** box ☐
- Step 10** Reselect any reports you use regularly (unless they are bespoke) ☐
- Step 11** Make sure you know about changes to the software and payroll legislation – click on **Help** and select **Update Notes** ☐
- Employment allowance:** ☐
If you are claiming/continuing to claim Employment Allowance in the new financial year, you are required to send an Employer Payment Summary end of Month 1 in 2024-2025