IRIS

Payroll Year End
Checklist

www.iris.co.uk

Payroll Year End Checklist

Company name: _____

Company number: _____

Completed by: _____

Date: _____

Backup location: _____

Step1   Ensure you have installed the latest version of the software. www.iris.co.uk/updates   ☐

Step 2   **Issue P45s** for employees not being paid.   ☐

Step 3   Perform a **reconciliation**.   ☐

Step 4   Create a **year-end backup**.   ☐

Step 5   Submit your **Full Payment Submission**; if you do not need to submit an **Employer Payment Summary** for March, tick **Final submission for this tax year**   ☐

Step 6   Submit your **Final Employer Payment Summary for tax year**, if required, to HMRC   ☐

Step 7   **Distribute P60s** to your employees by 31st May.   ☐

Step 8   If required, produce any **end of year pension statements**.   ☐

Step 9   **Move** into the new year.   ☐

Step 11   Indicate if the company is eligible for **Small Employer's Relief.**   ☐