

Accentra Primo Umbrella

EOY 2021-22 Release Notes v1.0



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I PREPARING FOR EOY

I.1 UPGRADE TO VERSION 2022-23

Primo Umbrella portal will be upgraded by us to the correct version for the new tax year without the need for any physical updates.

I.2 WHEN SHOULD I COMPLETE YEAR END?

As soon as you've finished with the last period of the tax year, you can end the year and start processing the payroll for the new tax year without having to print the P60s. These can be printed from the program any time before the deadline

2 PROCESSING EOY

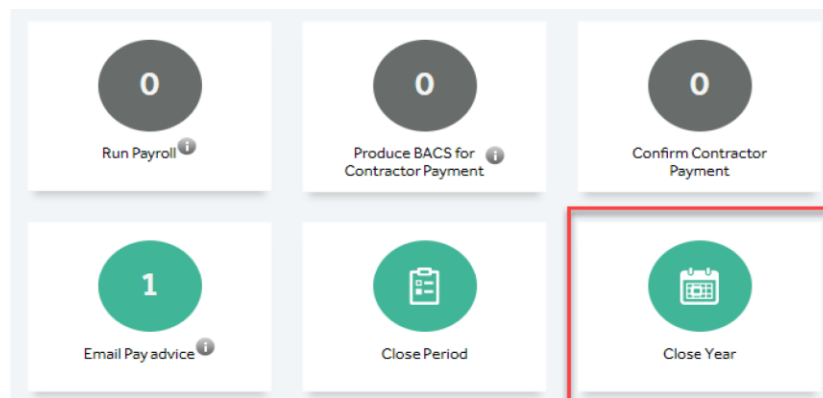
2.1 BEFORE EOY CHECKLIST

- Complete Umbrella Processing for the last period of the year 2021-22
- Complete the Final FPS (refer section [4.1](#))
- Close the period
- If you process more than one payroll frequency, make sure the above steps are completed for all the pay frequencies.

Final EPS: You do not have to submit your final EPS before the year end as this can be done after commencing the new tax year in the same way that the P60s are printed. The final EPS must be submitted by 19th April 2022.

2.2 ENDING THE YEAR

- Once you've closed the last period of the tax year, the program will ask if you wish to process week 53 (for weekly), week 54 (for 2- weekly) & week 56 (for 4-weekly) pay frequencies.
- Click 'Yes' if you wish to process this additional period, else click 'No'.
- Once you have closed the last relevant period, make sure that the payroll is in Period 0.
- Click the 'Close Year' from the Task Manager.



CLOSE YEAR

Tax Year to Close : 2021-2022

LAST PERIOD CLOSED

Weekly : 52

2 Weekly : 52

4 Weekly : 52

Monthly : 12

New Tax Year : 2022-2023

NOTE:

a) HMRC settings will be upgraded to the new year settings

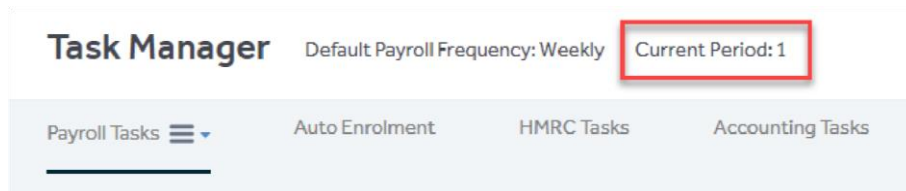
b) AE contribution percentages remains the same as the previous tax year. Hence no uplift required.

-Contractor:5%

-Employer:3%

c) Tax code uplift is not applicable for the year 2022-23.

- The program will display the details relevant to the company.
- When the details have been verified, click proceed and the program will perform the year end process.
- For Multi-Company model, the Close Year should be done from the Companies List Screen → Task Manager → Close Year.
- The current pay period should then show as Period 1.



2.3 AFTER EOY CHECKLIST

After the year end is complete, it is very important that you check and ensure that the following screens have been updated correctly in your payroll data.

- Tax Bands screen should show the bandwidths described in section [3.1](#)
- NI Bands & Rates screen should show the bandwidths described in section [3.2](#) & [3.3](#)
- SSP Rates Screen should show the new rate as described in section [3.4](#)
- SMP/SPP/SAP Parameters should show the new values as described in section [3.5](#), [3.6](#) & [3.7](#)
- Student & Postgraduate Loan & others should show as described in section [3.8](#)
- Auto Enrolment thresholds should show the new values as described in section [3.9](#)
- **You will need to manually input the NMW values listed in section [3.10](#)**

Important: If for some reason, the values you see on the screen are different to the ones mentioned above, please contact us immediately by emailing support@accentra.co.uk

2.4 POST EOY RESPONSIBILITIES

- Complete Final Employment Payment Summary submission. Refer to section [4.2](#) for further information.
- Issue P60 Tax Certificate to your employees. Refer to section [4.3](#) for guidance.

3 Tax Year 2022-23 STATUTORY CHANGES

3.1 TAX BANDS & EMERGENCY TAX CODE

The emergency tax code remain the same at **1257L**. After the EOY, the tax band screen should read as below.

Settings → HMRC → Tax Bands

For England & Northern Ireland

TAX BANDS Current Tax Year [2022 - 2023] England & Northern Ireland				
Bandwidth	From	To	Rate%	Basic Rate?
37700.00	0.00	37700.00	20.00	✓
150000.00	37701.00	150000.00	40.00	✗
99999999.00	150000.01	99999999.00	45.00	✗

For Wales

TAX BANDS Current Tax Year [2022 - 2023] Welsh				
Bandwidth	From	To	Rate%	Basic Rate?
37700.00	0.00	37700.00	20.00	✓
150000.00	37701.00	150000.00	40.00	✗
99999999.00	150000.01	99999999.00	45.00	✗

For Scotland

TAX BANDS Current Tax Year [2022 - 2023] Scotland				
Bandwidth	From	To	Rate%	Basic Rate?
2162.00	0.00	2162.00	19.00	✗
13118.00	2163.00	13118.00	20.00	✓
31092.00	13119.00	31092.00	21.00	✗
150000.00	31093.00	150000.00	41.00	✗
99999999.00	150000.01	99999999.00	46.00	✗

3.2 NATIONAL INSURANCE BANDS

After the year end, the annual NI Bands should read as below.

Settings → HMRC → NI Bands and Rates → Bandwidths

NI BANDS & RATES			
Current Tax Year [2022 - 2023] ▾			
Categories	Band Widths	Rates	
Band Description	Weekly	Monthly	Annual
1 Lower Earnings Limit	123.00	533.00	6396.00
2 Secondary Threshold	175.00	758.00	9100.00
3 Primary Threshold	190.00	823.00	9880.00
4 Upper Secondary Threshold (Under 21)	967.00	4189.00	50270.00
5 Apprentice Upper Secondary Threshold	967.00	4189.00	50270.00
6 Upper Earnings Limit	967.00	4189.00	50270.00
7 Veteran Upper Secondary Threshold	967.00	4189.00	50270.00

3.3 NATIONAL INSURANCE RATES

After the EOY, the NI rates should read as below.

Settings → HMRC Settings → NI Bands and Rates → Rates

NI BANDS & RATES															
Current Tax Year [2022 - 2023] ▾															
Categories	Band Widths							Rates							
	CONTRACTOR %							EMPLOYER %							
Category	Band A	Band B	Band C	Band D	Band E	Band F	Band G	Band A	Band B	Band C	Band D	Band E	Band F	Band G	
A	0.00	0.00	13.25	13.25	3.25	0.00	0.00	0.00	0.00	0.00	15.05	15.05	0.00	0.00	
B	0.00	0.00	7.10	7.10	3.25	0.00	0.00	0.00	0.00	0.00	15.05	15.05	0.00	0.00	
C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.05	15.05	0.00	0.00	
H	0.00	0.00	13.25	13.25	3.25	0.00	0.00	0.00	0.00	0.00	0.00	15.05	0.00	0.00	
J	0.00	0.00	3.25	3.25	3.25	0.00	0.00	0.00	0.00	0.00	15.05	15.05	0.00	0.00	
M	0.00	0.00	13.25	13.25	3.25	0.00	0.00	0.00	0.00	0.00	0.00	15.05	0.00	0.00	
V	0.00	0.00	13.25	13.25	3.25	0.00	0.00	0.00	0.00	0.00	0.00	15.05	0.00	0.00	
Z	0.00	0.00	3.25	3.25	3.25	0.00	0.00	0.00	0.00	0.00	0.00	15.05	0.00	0.00	

3.4 STATUTORY SICK PAY (SSP)

The weekly SSP rate increases from £96.35 to £99.35

SSP SETTINGS Current Tax Year [2022 - 2023]						
	Tax Year	Date Effective	Threshold	From	To	SSP Rate
1	2022-2023	06/04/2022	123.00	123.00	0	99.35
SSP DAYS & LIMITS						
	No.of Waiting Days	3				
	Linkage Period (days)	56				
	Max.Weeks SSP Payable	28				
	Week of 'Transfer Form'	23				
	Max.Age for SSP	65				

3.5 STATUTORY MATERNITY PAY (SMP)

The weekly SMP rate increases from £151.97 to £156.66

SMP SPP & OTHERS Current Tax Year [2022 - 2023]			
Maternity Pay (SMP)	Paternity Pay (SPP)	Adoption Pay (SAP)	Others
STANDARD RATE			
Rate Payable (Pounds)	156.66		
Max.Weeks Payable	33		
EARNINGS RELATED RATE			
Rate Payable (%)	90.00		
Max.Weeks Payable	6		
OTHERS			
Amount Recoverable by the Non-SER Employer %	92.00		
Amount Recoverable by SER Employer %	103.00		
NIC Compensation Rate For SER Employer %	3.00		
Maximum KIT Days Allowed	10		

3.6 STATUTORY PATERNITY PAY (SPP)

The weekly SPP rate increases from £151.97 to £156.66

SMP SPP & OTHERS Current Tax Year [2022 - 2023] ▾			
Maternity Pay (SMP)	Paternity Pay (SPP)	Adoption Pay (SAP)	Others
STANDARD RATE			
Rate Payable (Pounds)	156.66		
Max Weeks Payable	2		
EARNINGS RELATED RATE			
Rate Payable (%)	90.00		
OTHERS			
Amount Recoverable by the Non-SER Employer %	92.00		
Amount Recoverable by SER Employer %	103.00		
NIC Compensation Rate For SER Employer %	3.00		
Maximum KIT Days Allowed	10		

3.7 STATUTORY ADOPTION PAY (SAP)

The weekly SAP rate increases from £151.97 to £156.66

SMP SPP & OTHERS Current Tax Year [2022 - 2023] ▾			
Maternity Pay (SMP)	Paternity Pay (SPP)	Adoption Pay (SAP)	Others
STANDARD RATE			
Rate Payable (Pounds)	156.66		
Max Weeks Payable	39		
EARNINGS RELATED RATE			
Rate Payable (%)	90.00		
RECOVERY			
Amount Recoverable by the Non-SER Employer %	92.00		
Amount Recoverable by SER Employer %	103.00		
NIC Compensation Rate For SER Employer %	3.00		

3.8 STUDENT/POSTGRADUATE LOANS & OTHERS

The student loan Plan Type 1 threshold increases from £19,895 to £20,195. The Plan Type 2 threshold remain the same at £27,295 and the Plan Type 4 threshold increases from £25,000 to £25,375. The student loan deductions remain at 9% recovery rate.

The Postgraduate loan threshold is at £21,000 and the recovery rate at 6%. The Employment Allowance has increased from £4,000 to £5,000.

The Apprenticeship Levy allowance and its charge rate remain the same.

Like other plan types, the user can download plan type 4 student loan start & end dates using the 'Download Student Loan Notifications' and apply it using the 'Apply Student Loan Notifications'. Or if the user wants to manually update it, then this can be done from within the employee record.

SMP SPP & OTHERS

Current Tax Year [2022 - 2023]

Maternity Pay (SMP)	Paternity Pay (SPP)	Adoption Pay (SAP)	Others	
OTHERS				
NI Limits For Small Employer Relief		45000.00		
STUDENT LOAN:		TYPE1	TYPE2	TYPE4
Student Loan Threshold		20195.00	27295.00	25375.00
Student Loan Rate %		9.00	9.00	9.00
POSTGRADUATE LOAN:				
Postgraduate Loan Threshold		21000		
Postgraduate Loan Rate %		6		
RETIREMENT AGE:				
Male Retirement Age		65		
Female Retirement Age		60		
EMPLOYMENT ALLOWANCE:				
Employment Allowance limit		5000.00		
APPRENTICESHIP LEVY ALLOWANCE:				
Allowance Limit		15000		
Charge Rate		0.5%		

3.9 AUTO ENROLMENT THRESHOLDS

The auto enrolment qualifying earnings threshold remain unchanged.

AE EARNINGS THRESHOLD					
Qualifying Earnings <small>Earnings thresholds for the current tax year</small>					
	WEEKLY	2-WEEKLY	4-WEEKLY	MONTHLY	ANNUAL
Qualifying Earnings Lower Limit	£120	£240	£480	£520	£6,240
Qualifying Earnings Upper Limit	£967	£1,934	£3,867	£4,189	£50,270
AE Earnings Trigger	£192	£384	£768	£833	£10,000

The minimum employee & employer pension contributions percentage has not changed and should read the below.

Minimum Contributions		
Minimum contributions for automatic enrolment pensions		
DATE	EMPLOYER MINIMUM CONTRIBUTION	TOTAL MINIMUM CONTRIBUTION
Employer's Staging Date to 05/04/18	1%	2% (Including 1% Staff Contribution)
06/04/18 - 05/04/19	2%	5% (Including 3% Staff Contribution)
06/04/19 Onwards	3%	8% (Including 5% Staff Contribution)

3.10 NATIONAL MINIMUM WAGE

The below NMW rates apply from 1st April 2022.

Category of worker	Hourly rate
Aged 23 and above (national living wage rate)	£9.50
Aged 21 to 22 inclusive	£9.18
Aged 18 to 20 inclusive	£6.83
Aged under 18 (but above compulsory school leaving age)	£4.81
Apprentices aged under 19	£4.81
Apprentices aged 19 and over, but in the first year of their apprenticeship	£4.81

3.11 HOLIDAY PAY BALANCE REPORT

The holiday pay balance of the tax year 2021-22 will become the opening balance of the new tax year 2022-23. So the user should print the holiday pay balance report for cross verifying the figures in the new tax year.

4 FINAL RTI SUBMISSION & P60

4.1 FINAL FULL PAYMENT SUBMISSION

Employers should notify HMRC when the last payroll has been completed for the tax year by submitting the “Final Full Payment Submission”. This is done by ticking the option “Final Submission for this Tax Year?” available on the FPS screen as shown below.

Recruit Ltd - 25182 21 MAR 2022 HMRC TAX WEEK 50 | TAX MONTH 12

Service Provider

FPS Submission Weekly Period Number 52 Select Late Filing Reason Payment Date 17/03/2022

☒ Final submission for this tax year?

SUBMIT FPS Close

No data to paginate

Contractor ID	Forenames	Surname	Net Pay	Previous Submission	To Submit	Leavers Date	Status	System ID
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4.2 FINAL EMPLOYER PAYMENT SUMMARY

In addition to the Final FPS, employers must submit a final EPS before 19th April to notify HMRC that they have completed all required adjustments/amendments for the tax year that has just ended. The final EPS is the same as the usual EPS you submit but with two differences:

The option “Final Submission for this Tax Year?” must be selected

- Task Manager → HMRC → EPS
- Select the previous (relevant) tax year
- Tick the ‘Final submission for this tax year?’ box
- Click the ‘Calculate Due’ & then Submit the EPS

Recruit Ltd - 25182 21 MAR 2022 HMRC TAX WEEK 50 | TAX MONTH 12

Service Provider

Employer Payment Summary Tax Year 2021

An Employer Payment Summary is submitted for a specific tax month and is due by 19th of the following tax month. EPS is required only if (a) no payments are made to any employees in a tax month (b) or you want to recover statutory payments, NIC compensation on statutory payments, CIS deductions suffered (limited companies only) or NIC Holiday for New Businesses.

☒ Final Submission for this Tax Year?

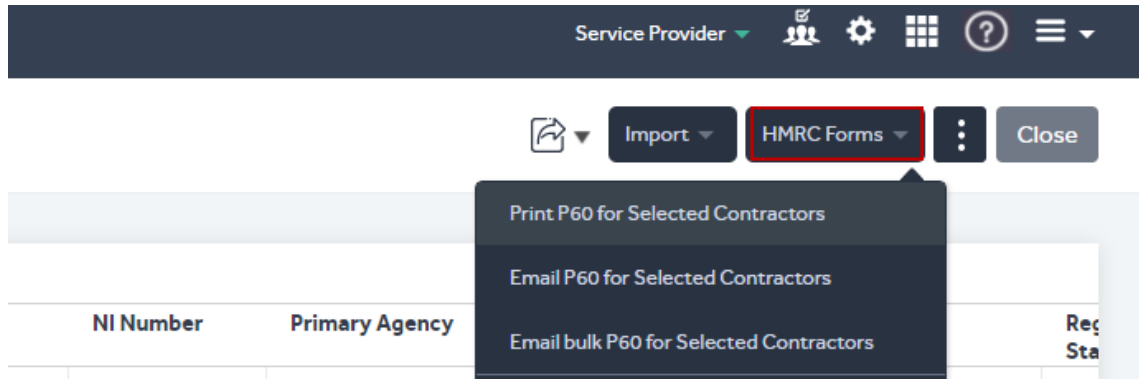
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Action	Tax Month	EPS Due Date	Date Submitted	Amount Due	Pay Bill (Gross For Nil)	Tax	Student Loan	PG Loan	SMP Recovery	SPP & ASPP Recoveries	SAP Recovery	Emp.Allw Claimed	CIS Deductions Suffered	Apprentice Levy Payable	G
1	19/05/2021	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Amendment after final FPS/EPS: If there is a change to the payroll data after you have already completed the final FPS/EPS, it is possible to submit another “final” submission simply by sending a further FPS/EPS submission with the “Final Submission for this Year” option ticked.

4.3 ISSUING P60 CERTIFICATES

To issue P60s to your contractors, from the Contractor list screen, click the HMRC forms dropdown and select the required action. Make sure the correct year has been selected before sending.



5 SUPPORT

We welcome any suggestions for improvements to the software. Please send an email to the below mentioned email address if you have any questions, feedback or suggestions.

If you are experiencing any issues with the software please email the support team at support@accentra.co.uk. This will generate a support ticket and allow our team to respond promptly. Please include your Payroll company ID and contact details in the email.

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