



Payroll, made easy

EOFY Preparation FAQs

Can you save a layout of a Employee details report so you can use the same layout another time?

Unfortunately you can't save a layout but this has been requested in the past. I will add you to the request so that it strengthens this and if developed you'll be informed.

Would that be their personal email address that all the information is sent to once you have finalised all the end of year reports?

On the payroll platform, whatever email is entered for that employee is what will be used. However, the myGov account could potentially have a different email which would be where the information is sent to.

Is there a Leave Balances report that shows hours only? If Leave Values are shown staff can calculate the pay rates.

The leave balances report shows the hours but there isn't a report that only shows the hours.

If you have multiple entities, where do you see your other entities' ATO settings?

If you have multiple entities, the settings will sit under Payroll Settings > Employing Entities.

Is there a way to upload the FBT under section 57A instead of entering manually? And will this upload still work for terminated employees?

[Please check out the article](#)

From memory, there is a cap for super guarantee. Will this be automatically applied and SG will be calculated?

That's correct, this is also automatically updated on 1st July and can be managed/reviewed via the employee profile and also within each Pay Rate Template. See more information here: [Setting the Maximum Quarterly Contributions Base](#)

Regarding Superannuation, is there a export we can do to check it all?

No, these checks will need to be done manually at this stage. You will find the instructions here: [Payroll Guide: Annual increase to superannuation guarantee \(SG\) rate effective from 1 July](#).

Where do we enter FBT amounts for each employee?

FBT can be entered via an Update Event or in the Finalisation Event, [check out this article](#).

Do we have to manually update the super effective from 01/07 on allowances?

The rate will be automatically updated in the payroll system but if you want this reflected the same way in the HR platform, you will need to perform a manual sync. This can be done via General Settings > Add-ons > Update Pay Details and Employee Details.

How do I pay payment in lieu of notice?

[Please check out this article](#).

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| Is SGC payable on allowances? | Please refer to the ATO for what is and isn't SGC payable here . |
| All types of allowances are taxed right? | Generally all allowances are taxable but please refer to the ATO for what is and isn't taxable here . |
| My last pay for this financial year is 19/6. My first in new FY is 3/7. Do we have to balance/reconcile EOFY before we run new one? | The finalisation event only includes pay runs with paid dates within the FY. You can continue to process pay runs in the new FY without having finalised this FY, as the system can separate it out based on the paid date. |
| I have had an employee refund a bonus payment. How do I record this to update the STP filing and reverse the payment of the bonus (payment and refund all in the same FY)? | You can create an ad hoc pay run to reverse the initial payment (as a negative line item) and then lodge this pay run to the ATO. |
| If we have closely held employees that are reported weekly do they still need to be reported separately? | Please check out the article here for closely held employees . |
| Can this report be run for both pay schedules, e.g. Monthly and Fortnightly on the same file? | You can create a draft finalisation event for all pay schedules and export the STP YTD report that way. |
| We are an FBT exempt company but have not ticked the FBT exempt "YES" to the setting. Can we fix it now? | Yes you can go ahead and tick that now, this is part of EOFY checklist , see Step 2 Review business details in our Preparing for EOFY handout from this webinar. |
| What is the reconciliation process when you've transitioned from Weekly to Fortnightly pay cycle during the Financial Year? | You will need to create a finalisation event for all pay schedules that are linked to an employee as their primary/default pay schedule. |
| Is it advisable to create and change the Pay Schedule before the EOFY finalisation? | You can change the pay schedule if need be. The employee's YTD date will be linked to whichever pay schedule is set as their primary. This will be the pay schedule that needs to be finalised. |
| If we have finalised STP, how do we rectify that? | You can fix incorrect lodgements by following this article . |
| How do we delete timesheets we do not need from Last Financial Year before we roll over to new FY? | If the timesheets are no longer needed or are invalid, you can decline the timesheet or delete them via the Timesheet Management screen. |
| What if payroll YTD is in another software? How to compare that? | This article will explain how to deal handle this: Transition options available with STP reporting Payroll Guide |
| Where are the variance figures pulling from as mine is primarily blank? | The Excel Download compares the Payroll YTD tab and STP YTD tab any variances between those will appear in the Variances worksheet. |
| Should we lodge any unlodged pay events now if they weren't at the time? | If you have missed lodging a pay event but have since lodged pay events for those employee then it is best not to go back and lodge as this would send old YTD data to the ATO and override the current YTD figures. It is best to Create and Lodge an Update Event as per this article . |

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| Would an accommodation deduction fall under Workplace giving? | You can refer to this guide to understand how to classify deduction categories. If your scenario is not covered by this list please contact your financial advisor or the ATO. |
| Is there a need to manually update the FY in the system? | There is no need to change the financial year in the platform as the system recognises the FY based on pay run "paid dates". It is also important that you do not adjust the Initial FY settings in Opening Balances menu option. |
| Is there a report the same as the Payroll YTD tab which is available for periods other than the financial year? All the reports I've been able to create are broken down by location | Yes, this is the Detailed Activity Report. See Detailed Activity Report . It will default to split by location but can also be run at an entity or pay schedule level. |
| If we only have a few RFBT, what's the best way to do it? | RFB can be entered/uploaded via an STP but the data isn't held in future events so it's best to submit them in the Finalisation Event, check out this article for instructions . |
| Will the super be calculated correctly where the super is included as package not plus super? I had issues calculating this last year. | Super will be automatically applied to the relevant pay categories. The system is not currently set up to account for super inclusive rates. You will need to set the pay rates to account for the extra calculation. |
| We run a calendar year as our accounting period and are audited. We need to be able to produce the Payroll YTD tab report from 1st Jan to 31st Dec. | If you are referencing the Single Touch Payroll report which runs along the FY timeframes, then no we can't provide a Calendar year breakdown for this. |
| Do you recommend processing EOFY by entity? | The system will default to lodge per pay schedule and all entities will be included. |
| If categories were updated, does STP needs to be lodged again? Even if there is no change in value? | If you refresh the data in the update event and export a new YTD report you should see the applicable changes. If not you can lodge an update event to refresh the reports, even if the figures have not changed. |
| In the new year how do we remove the external ID and use employee ID when reporting STP? | The STP ID field in opening balances in the employee payroll file is what is used for STP. Changing this at the wrong time may cause income statement duplications. It is best to leave this as it is. |
| What happens when an employee transfers from one company to another company (within a group), will they receive two Income Statements? | Both entities are included in the EOFY process with multiple earnings lines reported for employees who worked across more than one entity. |
| If the variance was cleared, STP needs to be lodged again? | We recommend lodging the update event anyway, especially if classifications are updated. |
| Can gross to net report run for a few pay runs? | You can't select multiple pay runs however you can run it for a date range which would naturally include multiple pay runs. |
| I created my pay event YTD but the variance showing zero for all fields. Why is that? | Ensure the excel workbook has been unlocked for editing to ensure the figures are all pulling through correctly. |

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If you have done an unscheduled run with zero value just to correct leave days but it was done in the incorrect financial year, how do you correct it or do you need to correct it as it has nil effect on \$ amounts?

You can unlock the pay run and using Pay Run actions, you can edit the pay period/paid date only, then refinalise. As it does not impact figures you should not need to lodge a pay event however, if you do see a discrepancy it will be best to lodge anyway.

How do you add Reportable FBT into individual employees?

RFB can be entered/uploaded via an STP but the data isn't held in future events so it's best to submit them in the Finalisation Event, [see this article](#) for further instructions. Note: figures are entered individually per employee in this process or left as 0 when not applicable.

When employees move from one entity to another, will this effect the reports on both entities or will they become one for the employee?

This will generate separate income statements and will show as separate lines within an update event and finalisation event. It will also likely require the business to lodge as an intermediary, see ATO Settings in [this article](#).

When super increases is the employee pay details current salary in HR platform automatically updated or does that have to be created manually?

When super is increased legislatively, you will need to update this in HR. We typically send out communication to let clients know at the time.

What setting do you need to select in the payroll settings to check that the SGC Rate will update?

This is the "Automatically update super rates" check box at the bottom of the Business Details page in the payroll platform.

Do you recommend to finalise employees on termination or only at year end?

When you process a termination via a pay run, the system will automatically mark that payment as final in the pay event (which finalises their YTD figures with the ATO unless an update event is created to submit further earnings). This is the recommended process.

Do we need to re lodge partially lodged pay events?

Yes, if there are amendments to be made to the pay run you can unlock, edit and then relodge. Alternatively, you can create and lodge an Update Event to do a YTD refresh.

If we have multiple entities, can we lodged as a employer one by one?

Both entities are included in the EOFY process with multiple earnings lines reported for employees who worked across more than one entity. You will only be able to continue to lodge as an employer with multiple entities if there are no employees who have earnings in more than one entity during the FY. If even one employee has multiple lines in the update or finalisation event you will need lodge as an intermediary or BAS agent. Please see ATO Settings in [this article](#) for more information. For specific questions on this please raise a ticket with our support team.

If using both HR and PR platform, which one to use as a preference for checking all employee and entity details for EOFY check?

You can run the Employee Details Report from the payroll platform as demonstrated but any changes to employee data will need to be made in the HR platform (which will then sync to payroll).

If you lodge an event for earlier in the year does it submit the YTD figures at that point in time though?

If you have missed lodging an old STP event it is not recommended to go back and lodge it out of order as this will affect the YTD figures held by the ATO. An update event is best as it will capture current YTD earnings and put through all data from finalised pay runs whether lodged or not.

We have an employee who was terminated and then they rejoined the organisation after two months, how will that affect their ATO lodgments?

If you have used the same employee profile and reactivated it, the YTD totals will be updated when you create and lodge an update event.