



Payroll, made easy

Preparing for EOFY

Take these steps before lodging your finalisation event.



Step 1: Review employee details and amend as required. To do this, run an employee details report in the payroll platform, filtered to:

- Email address
- Tax File Number
- Residential Address
- Single Touch Payroll Status
- Tax Declaration options

Note:

If using both HR and Payroll, you will need to make the changes in the HR platform.



Step 2: Review business details:

- ATO Settings
 - Confirm ATO settings are correct
- Fringe Benefit Tax exemptions
 - Check settings at business/employing entity level
- Employing entities
 - Ensure employees are linked to the correct Employing Entities
- Super Guarantee rates
 - Review automatic update settings
- Allowance pay categories
 - Review payment classifications
- Deduction Categories
 - Classifications need to be correct
- Pay Runs
 - All pay runs for the applicable financial year need to be finalised
- Pay Events
 - All lodged and Update Event processed



Step 3: Complete a reconciliation

1. Create but don't lodge an Update Event.
2. Navigate to Download in the far right
3. Export the Excel (YTD) report
4. Review the data in each tab
5. Open the Variance tab
6. If there is a variance, follow these next steps. Lodge the Update Event once you've completed the reconciliation steps.



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Resources (linked)

[EOFY Hub](#)

On this page, you will find links to helpful articles, guides and videos to help you through the busiest time of year.

[Single Touch Payroll \(STP\) reporting for EOFY 2022/23 | Payroll Guide](#)

This article will guide you through wrapping up the 2022/2023 financial year, lodging the finalisation declaration and getting ready for the 2023/2024 financial year.

[Questions around End of Financial Year 2022/23 processing via Single Touch Payroll \(STP\) | Payroll FAQ](#)

Businesses who were reporting via Single Touch Payroll (STP) in the 2022/23 financial year must complete the year end process via an STP finalisation event. We have compiled this article, which you should read alongside the [STP EOFY Guide](#).

[Single Touch Payroll \(STP\) End of Year Reconciliation | Payroll Guide](#)

This guide will take you through the necessary steps to reconcile employee and business data prior to lodging the finalisation event.

[Payroll Platform: Employee details report](#)

The employee details report allows you to get access to a detailed view of your employee data in a simple, customisable way.

[Australian Taxation Office \(ATO\) settings | Payroll Web Platform](#)

The payroll platform uses your ATO settings when lodging a pay event or update event to your ATO portal. This article will explain how to configure these settings and enable electronic lodgement.

[Overview of Single Touch Payroll \(STP\) Phase 2](#)

Most employers would be familiar with reporting through STP which began on the 1 January 2022. The biggest change is additional reporting requirements of employee and earnings data. This article will outline the changes in detail.

[STP FAQs](#)

This section will provide you with a list of answers based on frequently asked questions by our customers.



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Resources (continued)

[Payroll Guide: Annual increase to superannuation guarantee \(SG\) rate effective from 1 July](#)

This article will clarify the system settings that the platform automatically manages at the commencement of each financial year and specify what exceptions apply that prevent the SG rate from increasing automatically and requiring manual user intervention.

[Manage the reportable fringe benefit amounts \(RFB\) within a pay event | Payroll Web Platform](#)

If the value of certain fringe benefits you provide to an individual employee exceeds \$2,000 in a fringe benefits tax (FBT), you must report the grossed-up taxable value of those benefits through Single Touch Payroll for the corresponding income year. This article will walk you through how.

[Transition options available with STP reporting | Payroll Guide](#)

This article applies to any employer who starts reporting STP events during the financial year, from within this payroll system, because:

- The employer gained a deferral and so was not required to report on 1 July, or
- A change of payroll system has occurred part way through the financial year.
- A change of payroll system has occurred between financial years.

[Re-assign an employees employing entity | Payroll Web Platform](#)

You can use the Reassign Employee feature to move an employee to a different employing entity.

[Managing your company employing entities | HR Web Platform](#)

You can use the Employing Entities feature to update your employing entity details stored within the HR platform, such as the location, name and business number.

[Reference list for STP Phase 2 pay category payment classifications | Payroll Guide](#)

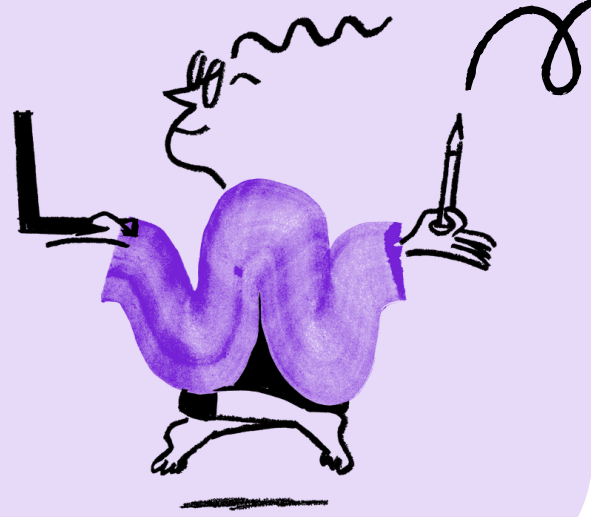
A reference guide to help when selecting the applicable payment classification when you are creating your organisation's pay categories.

[Service Charter PDF](#)

Click to view our practical guide to help you submit support requests in the best possible way, for the quickest possible resolution during this busy time.

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Video Tutorials (linked)



 employmenthero

VIDEO TUTORIAL

End of Financial
Year Single Touch
Payroll (STP)



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VIDEO TUTORIAL

STP Phase 2 - ATO
Settings and Electronic
Lodgement




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VIDEO TUTORIAL

STP Phase 2 - Income
Types and Country
Codes




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VIDEO TUTORIAL

STP Phase 2 - Tax
Treatment and
Reporting




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VIDEO TUTORIAL

STP Phase 2
Disaggregation of
Gross Amounts



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Single Touch
Payroll Phase 2
Compliance

