

# System User Guide Employee Guide on How to View Your Online P60

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### Introduction

This guide covers key tasks for Employees in the 'how to view your online P60' system process. It is related to the Process User Guide for Payroll for Employees, Line Managers, SDAs and HR Operations.

<u>Guide to Payroll for Employees, Line Managers, SDAs and HR Operations</u>

### In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

#### How to View your P60

- 1. From the Home page, click the **Me** tab then select the **Pay** app.
- Click the Year-End Documents tile to view your P60.
   Note: P60s prior to and including tax year 2021/22 are not available in People and Money. P60s that pre-date April 2022 can be requested from Payroll via a Service Request using category P45/P60.
- 3. Using the View drop down list, you can sort by 'All', 'Last 3 Years' or 'Specific Date Range'.
- 4. Click on the **P60** tile you would like to open.
- 5. The P60 details are displayed.

#### What is Included on your P60

Please refer to the <u>detailed</u> section for an overview of your P60 details.

#### How to Print your P60

- 1. From the Home page, click the **Me** tab then select the **Pay** app.
- 2. Click the **Year-End Documents** tile to view your P60.
- 3. Click on the **P60** tile you would like to open.
- 4. To print the P60, click on the **Printer** icon.
- 5. A print dialogue box will open to allow you to print to a printer of your choosing.

#### How to Save your P60

- 1. From the Home page, click the **Me** tab then select the **Pay** app.
- 2. Click the **Year-End Documents** tile to view your P60.
- 3. Click on the **P60** tile you would like to open.
- 4. To save the P60, click on the **Save** icon.
- 5. A save dialogue box will open.
- 6. Rename your file to something more meaningful (e.g. April 2022\_23). Then click on **Save**.

For detailed guidance, see the next section.

# In Detail

#### How to View Your P60

1. From the Home page, click the **Me** tab then select the **Pay** app.



2. Click the Year-End Documents tile.

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			My Payslips View, print, download and search current and past payslips, which contain gross pay, net pay, taxes and other information.	Payment Methods Define and prioritize salary payments details, such as payment type, payment amount and bank accounts details.		Year-End Documents View, print, download and search year-end documents for current or prior tax years.	•	New Starter Declaration	on.			

**Note: P60s prior to and including tax year 2021/22 are not available in People and Money**. P60s that pre-date April 2022 can be requested from Payroll via a Service Request using category P45/P60.

3. Using the **View** drop down list, you can sort by '**All**', '**Last 3 Years**' or '**Specific Date Range**'.

**Note:** if you use the **Specific Date Range** filter, you must use **Start** and **End Dates** that are in the range of the start and end date of the tax years. See <u>Appendix 1</u> for further information.

Select Period			
View			
All			
All Last 3 Years			
Specific Date Range			
2		<b>.</b>	
P60 2025	P60 2024	P60 2023 Tax Reporting Unit	
Tax Reporting Unit	Tax Reporting Unit	Tax Reporting Unit	

**Note:** only P60s from 2025 onwards will show the legal entity.

4. Click on the P60 tile that you would like to view.

Harriet Haricot-Bean		
Select Period		
View All	•	
My Year-End Documents		
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### 5. The P60 details are displayed.

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	P60 End of Year Certificate Tax year to 5 April 2025 This is a printed copy of an eP60 To the employee: Pleasekeep this certificate in a safe place as you will need it if you have to fill in a tax return. You also need it to make a claim	Employee's details Suname Forenames or Initials National Insurance number Works/payroll number Pay and Income Tax details Pay Tax deducted		
	for tax credits and Universal Credit or to renew your claim. It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of on National Insurance contributions. By Iaw you are required to tell Me Revenue and Custome shout any	In previous employment(s)         E         P           In this employment         0         00         00           In this         25468         32         2542         74           Total for year         25468         32         2542         74		
	In mevenue and customs about any Income that is not fully taxod, even if you are not sent a tax return. HIM Revenue and Customs The figures marked $\star$ should be used for your lax return, if you get one	Final tax code S1263L		

### What is Included on Your P60

#### Personal details

Your first name and surname, National Insurance number and Works/Payroll number

#### Pay and Income Tax details

In previous employment – pay earned and tax deducted in tax year to 5 April worked in previous organisations. This information will have been provided when you started your employment on your P45 from your previous employer or as part of the new starter declaration.

In this employment – pay earned and tax deducted in tax year to 5 April worked at the University of Edinburgh (including any statutory payments).

Total for year – total pay earned and tax deducted in tax year to 5 April in all employments.

#### Note 1 - Multiple assignments

If you hold multi-assignments at the University then your earnings for tax and national purposes are aggregated together to determine the correct tax and national insurance. The payments from all assignments are now displayed on a single P60.

This section also shows your Final tax code. It is your responsibility to ensure this is correct.

#### Note 2 - Scottish Tax Code

If your tax code has an S in front of your code e.g. S1257L then HMRC have your status for tax purposes as a Scottish Taxpayer. This means that your tax calculation is partially determined based on rates and thresholds determined by the Scottish government. If it is set at a different rate, then Scottish taxpayers will pay a correspondingly higher or lower rate of income tax than elsewhere in the UK. Definition of a Scottish taxpayer is determined by 'close connection' and is usually defined by 'where an individual has their place of residence'. For the majority of staff this will be straightforward i.e. live in Scotland. However, there will be some cases where this may not be the case.

See <u>Finance Specialist Services SharePoint</u> for further information.

#### National Insurance contributions in this employment

This shows the breakdown of National Insurance Contributions (NIC) paid by the employee during the tax year.

#### Statutory Payments in this employment

This shows the breakdown of statutory payments paid to the employee (where applicable) during the tax year (included in the "pay in this employment" figure. Statutory payments include

- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Shared Parental Pay
- Statutory Shared Parental Bereavement Pay

#### **Other details**

- Student load deductions (in this employment full £s only)
- Post graduate loan deductions (in this employment full £s only)
- The University's full name and address and Employer PAYE reference details (961/2401398)

#### How to Print Your P60

Although it is possible to print a P60, it can be viewed on screen at any time as a history of your P60s will always be available. Printing a P60 is applicable when applying for a mortgage or before ending employment with the University. You can print your P60 whilst it is on your screen.

1. From the Home page, click the **Me** tab then select the **Pay** app.

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	QUICK ACTIONS APPS	
	🔓 Additional Person Info	
	My Salary Directory Journeys Pay Time and Personal Information	
	Persona Decument Records	
	Learning Current Jobs Expenses Maternity Qualifications	
	🔀 Contact Info	
	Family and Emergency Contacts	

2. Click the Year-End Documents tile.



3. Click on the P60 tile that you would like to print.

P45/P60.

HH Year-End Doc Harriet Haricot-Bean	uments		
Select Period			
View	•		
All			
My Year-End Documents			
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B60 2025	B60 2024	B60 2027	
P60 2025 Tax Reporting Unit	P60 2024 Tax Reporting Unit	P60 2023 Tax Reporting Unit	

4. The P60 details are displayed.

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		for tax credits and Universal Credit or to renew your claim. It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of National Insurance contributions.	in previous employment(s)         p         in doubled p         p           In this employment         0         0         0         0           In this         25468         32         2542         74			
		By law you are required to tell HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return. HM Revenue and Customs The figures marked $\star$ should be used for your tax return, if you get one	Total for year 25468 32 2542 74			

5. To print the P60, click on the **Printer icon**.

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HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return. HM Revenue and Customs		
The figures marked <b>*</b> should be used for your tax return, if you get one	Final tax code S1263L	

6. A print dialogue box will open to allow you to print to a printer of your choosing.

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#### How to Save Your P60

Although it is possible to save a P60, it can be viewed on screen at any time as a history of your P60s will always be available. Saving a P60 is advisable before ending employment with the University. You can save your P60 to your computer.

1. From the Home page, click the **Me** tab then select the **Pay** app.

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	My Salary	Directory	Journeys	Pay	Time and Absences	Personal Information			
	Personal Details								
	Document Records	<u>Î</u>	$\bigcirc$		<b>C</b>				
	Identification Info	Skills and Qualifications	Learning	Current Jobs	Expenses	Maternity Calculator			
	Contact Info								
	Family and Emergency Contacts	Annual Review Record	+						

2. Click the Year-End Documents tile.



**Note: P60s prior to and including tax year 2021/22 are not available in People and Money**. P60s that pre-date April 2022 can be requested from Payroll via a Service Request using category P45/P60.

3. Click on the P60 tile that you would like to save.

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P60 2025 Tax Reporting Unit	P60 2024 Tax Reporting Unit	P60 2023 Tax Reporting Unit	

4. The P60 details are displayed.

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		P60 End of Year Certificate Tax year to 5 April 2025 This is a printed copy of an eP60 To the employee: Pleasekeep this certificate in a safe place as you will need it if you have to fill in a tax return You also need it for make a claim	Employee's details Suname Forenames or Initials National Insurance number Works/payroll number Pay and Income Tax details Pay Tax deducted		
		for tax credits and Universal Credit or to renew your claim. It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of National Insurance contributions.	In previous employment(s) 0 00 0 0 0 In this employment 25468 32 2542 74		
		By law you are required to tell HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return. HM Revenue and Customs The figures marked \$ should be used for your tax return, if you get one	Total for year 25468 32 2542 74		

5. To save the P60, click on the **Save** icon.

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Year-End Documents			
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return. You also need it to make a claim for tax credits and Universal Credit or to renew your claim. It also helps you check that your employer is using the correct National Insurance number and deducting the right rate of	Pay         Tax deducted           In previous employment(s)         0         00         0         0           In this         25468         32         2542         74		
National insurance contributions. By law you are required to tell HM Revenue and Customs about any income that is not fully taxed, even if you are not sent a tax return. HM Revenue and Customs	Total for year 25468 32 2542 74		
The figures marked $\star$ should be used for your tax return, if you get one	Final tax code S1263L		

- 6. A save dialogue box will open.
- 7. Rename your file to something more meaningful (e.g. P60 2022\_23). Then click on **Save**. Your P60 will be saved as a pdf.

# Appendix

# Appendix 1 – Search Filter Dates

P60 Year	Tax Year Start	Tax Year End	Search Start Date to Enter in P&M	Search End Date to Enter in P&M
P60 2023	06/04/2022	05/04/2023	01/01/2022	05/04/2023
P60 2024	06/04/2023	05/04/2024	01/01/2023	05/04/2024
P60 2025	06/04/2024	05/04/2025	01/01/2024	05/04/2025

# Version History

Version	Date	Description	Approved By
1.1	N/A	Draft	
2.0	09 June	Updated guide to new format.	ME
	2025	Content and screenshots updated to reflect	
		new Redwood screens.	

# **Reviewers & Approvers**

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.