Mid-year Employment Allowance and Apprenticeship Levy

Setup paiyroll® · https://paiyroll.com/kb/mid-year-employment-allowance/

Employment Allowance and Apprenticeship Levy part way through a year

If you start paiyroll® part way through a tax year, paiyroll® does not know how much Employment Allowance you used this tax year, or your Apprenticeship Levy so far. You enter these values in the company state: you download the company file, add the values, and upload the file again.

The columns that you add depend on whether the company has state:

Your company	Columns to add
Created by copying a company, with no pay run yet: it has no state	**$actual_t+**, **$report.GB RTI EPS.tax_month+** and **$report.GB RTI EPS.employment_allowance+**
Has state, for example after an FPS import or a pay run	**$report.GB RTI EPS.employment_allowance+**, and the existing **$actual_t** without a +

The + at the end of a heading tells the upload to replace that value in the company state.

Before you start

Have these values from your previous payroll system:

- The date of your last pay run.
- The Employment Allowance used this tax year.
- If you pay the Apprenticeship Levy: the levy and the pay bill so far this tax year.

Claim Employment Allowance on the EPS

The amount that you upload tells paiyroll® how much Employment Allowance you used. The EPS claims Employment Allowance only if its report definition says so. A copied company has the settings of the company that it was copied from, so check them.

1. Click **Setup** > **Report Definitions**.
2. Find **GB RTI EPS**, and click **Update**.
3. In the **Settings** tab, select the check box for your sector, for example **Claim Employment Allowance, when industrial**. Most companies are industrial. Select only one.
4. Click **Update**.

For more information, see Claim Employment Allowance.

Download the company file

1. Click **Companies**, then click **Download...**.
2. Select the company, and click **Download**. You get the file company.csv.

Add the values

A company with no state

The number of columns in company.csv can change with each release of paiyroll®, so always add the new columns after the last **bankdetail** column.

1. Open company.csv in a spreadsheet program.
2. After the last **bankdetail** column, for example **bankdetail.BACS_SUN**, add three columns with these headings: **$actual_t+**, **$report.GB RTI EPS.tax_month+** and **$report.GB RTI EPS.employment_allowance+**
3. In row 2, under **$actual_t+**, enter the date of your last pay run, for example 2026-11-20.
4. Under **$report.GB RTI EPS.tax_month+**, enter the tax month of that date. Tax month 1 starts on 6 April, tax month 2 on 6 May, and so on. For example, 20 November is in tax month 8.
5. Under **$report.GB RTI EPS.employment_allowance+**, enter the Employment Allowance used this tax year, for example 10500.

For example, a shortened company.csv:

Embedded media: https://paiyroll.com/wp-content/uploads/kb-snapshots/mid-year-employment-allowance/no_state_example.html

A company with state

1. Open company.csv in a spreadsheet program.
2. Find the columns **$report.GB RTI EPS.employment_allowance** and **$actual_t**. If they are not there, add them after the last **bankdetail** column.
3. Change the heading **$report.GB RTI EPS.employment_allowance** to **$report.GB RTI EPS.employment_allowance+**, and enter the Employment Allowance used this tax year.
4. Keep **$actual_t** without a +. If it is empty, enter the date of your last pay run.

For example, with 514.88 used up to the last pay run on 30 September:

Embedded media: https://paiyroll.com/wp-content/uploads/kb-snapshots/mid-year-employment-allowance/state_example.html

Apprenticeship Levy

1. Find or add the columns **$report.GB RTI EPS.apprenticeship_levy_ytd+** and **$report.GB RTI EPS.apprenticeship_levy_pay_bill_ytd+**.
2. Enter the levy and the pay bill so far this tax year.

Save the file

Always save the file in XLSX format (Excel Workbook), and upload the XLSX file. Do not save it as CSV, because a CSV file can change the dates.

Upload the company file

1. Click **Companies**, then click **Upload...**.
2. For **Jurisdiction**, select **GB**.
3. For **File**, select your XLSX file, then click **Upload file to server**.
4. Click **Pre-process selected data**. This page shows the usual company columns only. Your new columns are not shown, but they are uploaded.
5. Click **Publish**.

Check the values

You must check that the upload worked. Do these steps before you approve a pay run.

1. Click **Pay runs**, then click **Redo** on the running pay run, and wait for the reports.
2. Click **View**, then click the **Reports** tab.
3. Click **View** for the **GB RTI EPS** report.
4. Find **Employment Allowance used (before, after) payrun**.

The first value must be the Employment Allowance that you entered. For example, if you entered 10500, you see **10500, 10500**: 10500 was used before this pay run, and 10500 after it. If you pay the Apprenticeship Levy, check its values in the same way.

If the first value is 0, the upload did not work: see "The Employment Allowance used is 0" below.

Troubleshooting

postaldetail.line1 is not a string

You see an error such as "postaldetail.line1: 405 is not a string" when you upload.

Cause: The spreadsheet program changed a house number in the address to a number.

Remedy: In the file, put a quote before the number, for example '405. Then upload the file again.

The Employment Allowance used is 0

In the **GB RTI EPS** report, **Employment Allowance used (before, after) payrun** starts with 0, not the amount that you entered.

Cause: The upload did not change the company state. Usually a heading is not correct, or does not end with a +.

Remedy: Open the file that you uploaded, and check each new heading letter by letter against the example. Make sure that each new heading ends with a +. Then upload the file again, and do "Check the values" again.

Next steps

- Alternative ways to import
- Claim Employment Allowance

- Updating Employee or Company State and Recoverables
- Updating state