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M A N A G E R

How to Roll Forward Your Data

- Once you have selected and loaded your tax year – select the word ‘dashboard’ or your e-mail address towards the top of your screen – this will take you back a screen where you will be able to see the Roll Forward TAB.
- You will then be able to roll forward to required employers and employees.
- Make sure that when you have loaded it displays the correct tax year you wish to roll forward from at the bottom of the section.
- You will then you will be given three options, select the one that is appropriate for you.
- If you select the option ‘Employers, employees, expenses and Benefits’ you will see a vast amount of boxes pre ticked.
- If you require all different types of benefits rolling forward then leave them all ticked.
- If you only have one or two it is better to deselect all and tick which benefits are relevant as this will reduce the time it takes the system to check and roll forward your data.
- If you select the option ‘employers and employees – personal details only’ this will simply roll forward the selected employees personal details and all benefits from the previous tax year will need to be rolled forward on an employee by employee basis.
- If you select the option ‘Employers Only’ – this will not roll forward any employees leaving you to select these individually or upload using the CSV import tool.
- Once you have rolled forward, please remember that the system will roll forward the data but not the figures, you will still need to go in, enter the new values and check the benefit calculations unless uploading from csv files then it is better to just roll forward your employer, employees only.
- Now select the ‘LOAD’ button.
- Select which employees, employers you wish to roll forward from on the drop down list, then click roll forward, once successful you should be invited to go to the employer list.