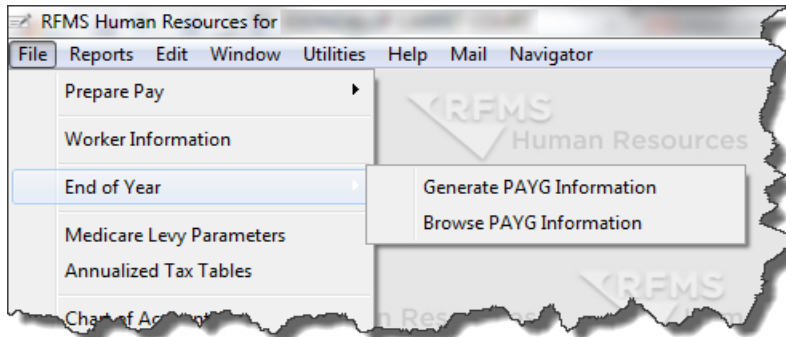


Tax Forms Printing for Australia

Tax forms preparation and printing for Australia is available. As shown below, End of Year processes to Generate and Browse/Adjust PAYG Information has been implemented.



Generate PAYG Information

Some of the figures for the “PAYG – payment summary – individual non-business” form come from figures specifically stored by HR (Total Tax Withheld, Gross payments, and Reportable employer superannuation contributions).

The rest of the figures are totaled by selecting the Account Code(s) for the remaining categories (see screenshot below). Pressing the ellipsis buttons [...] to the right of each category will show a browse with available Accounts Codes.



Notes:

Once an Account Code has been selected for one of the categories it will not be available for another category. If a category has Account Codes in it, and its ellipsis button is pressed, the Account Code browse will come up with those codes already marked. Marked codes can be removed and will then be available for other categories.

Description	Account Codes
CDEP payments	
Reportable Fringe benefits	060038
Total allowances	021016,060156
Lump Sum - A	
Lump Sum - B	
Lump Sum - D	
Lump Sum - E	

☐ Ignore Voids

Once the categories have been set up, simply press the [Process] button. When the process successfully finishes, you will automatically be taken to “Browse PAYG Information”.

Browse / Adjust PAYG Information

The desired employee can be looked up by Name or Tax File Number.

The screenshot shows a window titled "Tax Forms". At the top right, there is a dropdown menu for "Worker Type" set to "Employee (PAYG)". Below this, there are tabs for "Name" and "SS Number". A search bar labeled "Search Lastname" is present, with a "Count: 13" indicator to its right. Below the search bar is a table with two columns: "Name" and "TFN". The table contains several rows of employee data, with the first row highlighted in blue. At the bottom of the window, there are navigation buttons (back, forward, etc.) and a scrollbar.

At this point, PAYG records can be added, adjusted or even removed. The user has the freedom to edit any field as shown below.

The screenshot shows a window titled "Changing a Tax Form Record". The main content area is titled "PAYG payment summary – individual non-business" and "Payment summary for year ending 30 June 2014". It includes a "Payee details" section with fields for First Name, Last Name, Address #1, #2, City, Province, and PC. There is also a "NOTICE TO PAYEE" section with text about tax withholding and contact information. The "Period of payment" is set from 01/07/13 to 30/06/14. The "Payee's tax file number" is entered. The "TOTAL TAX WITHHELD" is shown as \$13,137. Below this, there are fields for "Gross payments" (\$59,454), "CDEP payments", "Reportable fringe benefits amount" (\$17,031), "Reportable employee superannuation contributions" (\$475), and "Total allowances" (\$2,769). On the right, there are fields for "Lump sum payments" (A, B, D, E) and a "Type" dropdown menu. At the bottom right, there are "OK" and "Cancel" buttons.

Printing

The final two steps are to print the “Tax Forms Summary” report and the “PAYG – Payment Summaries.”



Notes:

: Both of these reports are specifically designed for A4 paper.

