

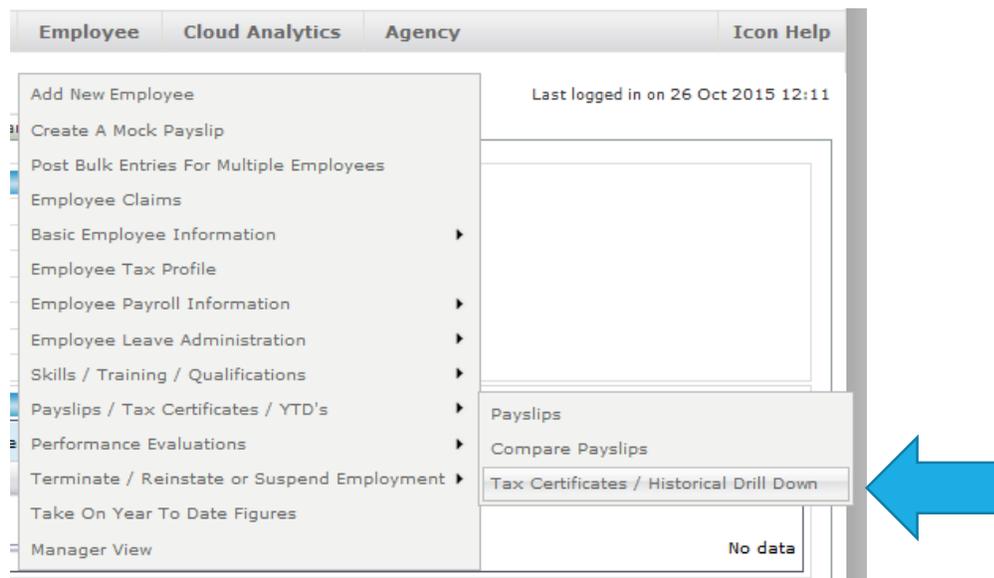
Paymaster Online Tutorial

IRP 5 certificates and Tax Drilldown

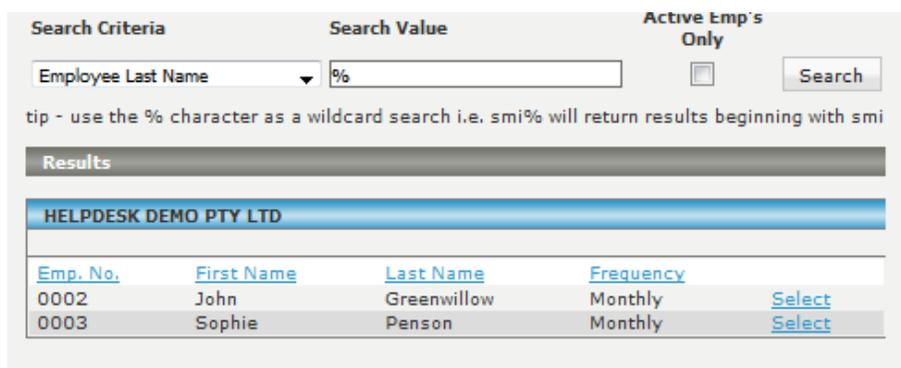
It is that time of the year again – SARS TIME! It happens every single year. The moment 1 March rolls around, the employees are begging for a copy of their tax certificates. Tax season for individuals only opens on 1 July, and they will lose their copy between now and then, but they still insist!

If you don't have employee self service set up on your payroll, you will need to either save each certificate individually (how painful!) or save the whole lot and print out each employee's certificate. If you do have self service, tell your employees to download it from their profile. They can save 10 copies in case they lose the other 9.

To access each employee's IRP 5 individually, click on **employee, payslips/tax certificates/YTD's, tax certificates/historical drilldown**



You can now select the employee you want to see the tax certificate for from your list of employees



You will now see the list of tax certificates from the tax year the employee started. My employee only started on 1 October, so his tax certificate is from 1/10/2015 – 28/02/2016.

YTD Tax Certificates

[Click here to toggle page instructions](#)

[PAGE HELP](#)

Tax Year Start Date	Tax Year End Date	Manual Number	
01 Oct 2015	29 Feb 2016		enter manual number view tax certificate view drill down

To view the tax certificate, click on **view tax certificate**. This will open the document as a PDF file that you can save and send to your employee.

To extract the certificates for all of your employees, click on **company, reports**. Scroll down to the **legislative section**, and click on **IRP 5/Lump sum certificates**. Extract like a normal report.

The tax drilldown is a fun option. This shows you a breakdown of all of the components per tax code, so if an employee complains about something on their tax certificate, you can show them the drilldown so explain how the numbers on the tax certificate were made up.

To view the tax drill down, click on **view drill down**.

I am going to use a different demo employee to show more transactions on the drill down

Employee Tax Drilldown - PAYMASTER DEMO

as of which run would you like to view the YTD's from :

October - 2015

period from : 2015/03/01 period to : 2015/10/31 periods : 12 worked : 8,000,000,000 age : 30 cert type : Tax Cert

[expand all](#) [collapse all](#)

Earning Section

Tax Details	Non RFI Amount	RFI Amount	YTD Total
<input type="checkbox"/> 3601 - Income Taxable	110,435.68	0.00	110,435.68
<input type="checkbox"/> 3606 - Commission	989,318,576.00	0.00	989,318,576.00

Allowance Section

Tax Details	Non RFI Amount	RFI Amount	YTD Total
<input type="checkbox"/> 3701 - Travel Allowance Taxable	12,000.00	0.00	12,000.00

Benefit Section

Tax Details	Non RFI Amount	RFI Amount	YTD Total
<input type="checkbox"/> 3810 - Medical Aid Contributions FB	4,000.00	0.00	4,000.00

Gross Total Section

Tax Details	YTD Total
3698 - Gross Non Retirement Funding Income	989,445,011.68

Deduction Section

Tax Details	YTD Total
<input type="checkbox"/> 4005 - Employee Deductions and Deemed Deductions	8,000.00
4497 - Total Deductions and Company Contributions	12,000.00

Company Contribution Section

Tax Details	YTD Total
<input type="checkbox"/> 4474 - Employer's Medical Aid Contributions	4,000.00

Information Section

Tax Details	Non RFI Amount	RFI Amount	YTD Total
3699 - Gross Remuneration	989,445,011.68	0.00	989,445,011.68
<input type="checkbox"/> 4103 - Total Tax	405,607,842.12	0.00	405,607,842.12
<input type="checkbox"/> CAR - Travel / Company Car Taxable	9,600.00	0.00	9,600.00

Employee's Tax Section

The section at the top explains which tax year it is, for what period, even how old the employee is.

As you can see each grey section is contracted to make the report not so long winded. If you want to see the long winded version, click on expand all in the top left corner. This will show each tax code per month.

Earning Section			
Tax Details	Non RFI Amount	RFI Amount	YTD Total
<input type="checkbox"/> 3001 - Income Taxable	110,435.68	0.00	110,435.68
<input type="checkbox"/> Basic Pay			110,435.68
October - 2015			13,804.46
September - 2015			13,804.46
August - 2015			13,804.46
July - 2015			13,804.46
June - 2015			13,804.46
May - 2015			13,804.46
April - 2015			13,804.46
March - 2015			13,804.46
<input type="checkbox"/> 3606 - Commission	989,318,576.00	0.00	989,318,576.00
<input type="checkbox"/> Commission			989,318,576.00
October - 2015			123,664,822.00
September - 2015			123,664,822.00
August - 2015			123,664,822.00
July - 2015			123,664,822.00
June - 2015			123,664,822.00
May - 2015			123,664,822.00
April - 2015			123,664,822.00
March - 2015			123,664,822.00
Allowance Section			
Tax Details	Non RFI Amount	RFI Amount	YTD Total
<input type="checkbox"/> 3701 - Travel Allowance Taxable	12,000.00	0.00	12,000.00
<input type="checkbox"/> Vehicle Allowance			12,000.00
October - 2015			1,500.00
September - 2015			1,500.00
August - 2015			1,500.00
July - 2015			1,500.00
June - 2015			1,500.00
May - 2015			1,500.00
<input type="checkbox"/> Medical Aid Fringe Benefit			4,000.00
October - 2015			500.00
September - 2015			500.00
August - 2015			500.00
July - 2015			500.00
June - 2015			500.00
May - 2015			500.00
April - 2015			500.00
March - 2015			500.00
Gross Total Section			
Tax Details			YTD Total
3698 - Gross Non Retirement Funding Income			989,445,011.68
Deduction Section			
Tax Details			YTD Total
<input type="checkbox"/> 4005 - Employee Deductions and Deemed Deductions			8,000.00
<input type="checkbox"/> Medical Aid Deductions And Deemed Deduction			8,000.00
October - 2015			1,000.00
September - 2015			1,000.00
August - 2015			1,000.00
July - 2015			1,000.00
June - 2015			1,000.00
May - 2015			1,000.00
April - 2015			1,000.00
March - 2015			1,000.00
4497 - Total Deductions and Company Contributions			12,000.00
Company Contribution Section			
Tax Details			YTD Total
<input type="checkbox"/> 4474 - Employer's Medical Aid Contributions			4,000.00
<input type="checkbox"/> Medical Aid Employer Contribution			4,000.00
October - 2015			500.00
September - 2015			500.00
August - 2015			500.00
July - 2015			500.00
June - 2015			500.00
May - 2015			500.00
April - 2015			500.00
March - 2015			500.00

Employee's Tax Section

Tax Details			
	Non RFI Amount	RFI Amount	YTD Total
4102 - PAYE	405,607,842.12	0.00	405,607,842.12
PAYE - Pay As You Earn			405,607,842.12
October - 2015			50,700,980.26
September - 2015			50,700,980.27
August - 2015			50,700,980.26
July - 2015			50,700,980.27
June - 2015			50,700,980.26
May - 2015			50,700,980.27
April - 2015			50,700,980.26
March - 2015			50,700,980.27
4116 - Medical Tax Credit	2,160.00	0.00	2,160.00
Medical Tax Credit			2,160.00
October - 2015			270.00
September - 2015			270.00
August - 2015			270.00
July - 2015			270.00
June - 2015			270.00
May - 2015			270.00
April - 2015			270.00
March - 2015			270.00
4141 - Employee and Employer UIF Contribution	2,379.52	0.00	2,379.52
UIF Employee			1,189.76
October - 2015			148.72
September - 2015			148.72
August - 2015			148.72
July - 2015			148.72
June - 2015			148.72
May - 2015			148.72
April - 2015			148.72
March - 2015			148.72
UIF Employer			1,189.76
October - 2015			148.72
September - 2015			148.72
August - 2015			148.72
July - 2015			148.72
June - 2015			148.72
May - 2015			148.72
April - 2015			148.72
March - 2015			148.72

All the detail you could possibly want, all in one place.