

UltiPro Job Aid – EAdmin-Editing Taxes

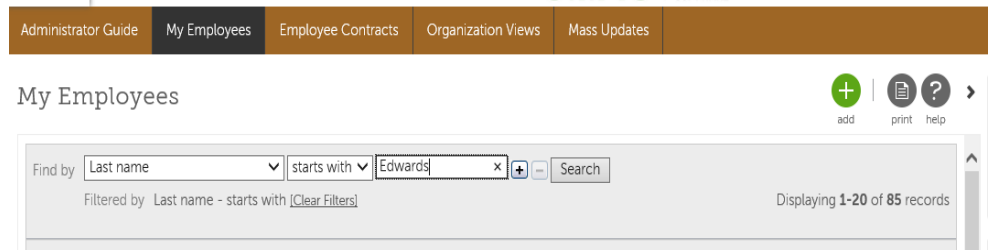
This job aid explains how the Employee Administrator can make changes to an employee's tax forms. Before you begin, ensure that you have all the necessary information required to complete the update to the Tax information.

You will need:

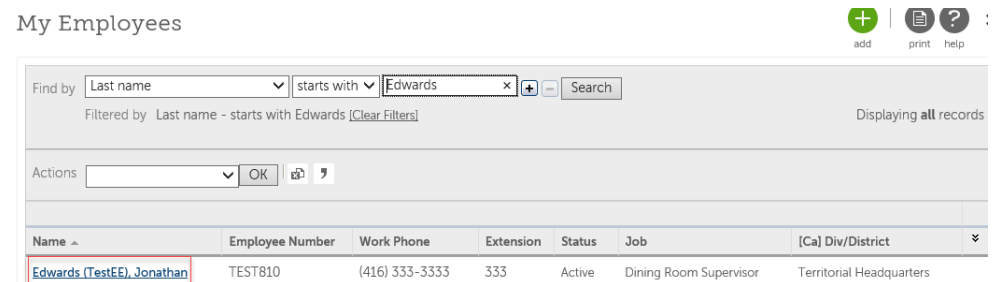
- Provincial Tax Form
- Federal Tax Form

From the **Administration Menu**, click on **My Employees**.

1. Search for the employee who requires an update to their Tax information. Click **Search**.

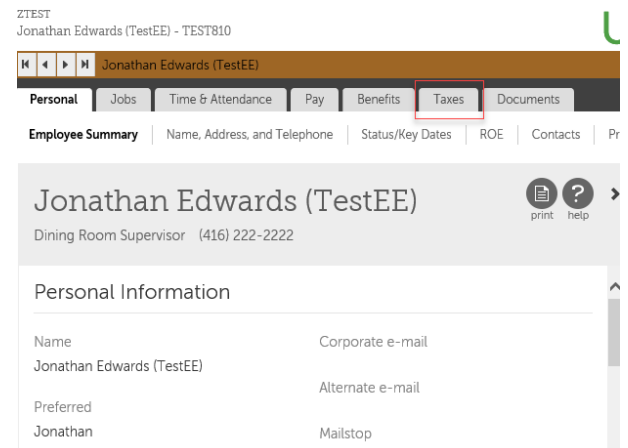


2. Click their name to open their profile.



Name	Employee Number	Work Phone	Extension	Status	Job	[Ca] Div/District
Edwards (TestEE), Jonathan	TEST810	(416) 333-3333	333	Active	Dining Room Supervisor	Territorial Headquarters

3. **Click on Taxes**.



4. Click on **Income Tax**.

ZTEST
Jonathan Edwards (TestEE) - TEST810

Jonathan Edwards (TestEE)

Personal | Jobs | Time & Attendance | Pay | Benefits | **Taxes** | Documents

Work Location | **Income Tax** | Year-End Slips

Work Location

add | print | help

Work Location	Province Of Employment	Province/Territory	Status
Territorial Headquarters	<input checked="" type="checkbox"/>	Ontario	Active

Adding Additional Tax

5. To modify or add the Federal or Provincial Tax, select whichever one is applicable. The example here is using Federal Tax.

ZTEST
Jonathan Edwards (TestEE) - TEST810

Jonathan Edwards (TestEE)

Personal | Jobs | Time & Attendance | Pay | Benefits | **Taxes** | Documents

Work Location | **Income Tax** | Year-End Slips

Income Tax

print | help

Province Of Employment	Description	History	Use Basic Personal Amount	Total Claim Amount	Requested Reduction	Block Withholding	Exempt
	Federal Tax			\$0			
<input checked="" type="checkbox"/>	ON Prov Tax		<input checked="" type="checkbox"/>	\$0			

Things I Can Do

FOR THIS PAGE

- [View Personal Tax Credits Amounts](#)
- [Add Personal Tax Credits Amounts](#)
- [View Overseas Tax Credit records](#)

FOR THIS TAB SET

- [Add Work Location \(CAN\)](#)

6. In our example we added an additional tax of \$50.

We also clicked on **Use Personal Tax Credits**. This allows us to complete the next step of adding personal tax credit amounts.

7. Click **Save**.
8. Click **Submit**.

Change Federal Tax

RP Account: 0002 - Full Rate

back | save | reset | cancel | print | help

Employee Is Exempt From

Income Tax
 Canada Pension Plan
 Employment Insurance

Withhold and Report

Canada Pension Plan
 Prorate Contribution
Months to contribute:

Personal Tax Credits Return [Form TD1](#)

Use basic personal amount
 Use personal tax credits amounts

Total claim amount: \$0.00

Total income less than total claim amount

Deduction for living in a prescribed zone:

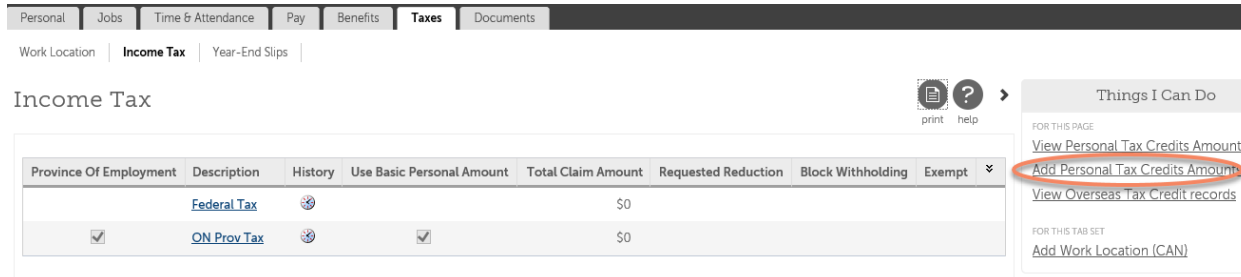
Additional tax to be deducted:

Employee requested reduction in tax deductions [Form T1213](#)

Add Personal Tax Credit Amounts

In our previous example we selected **Use Personal tax Credit Amounts** field in the Federal Tax form. This allows us to use the **Add Personal Tax Credit Amounts** option for the Federal Tax form. If the Provincial Tax Form is required follow the same steps and select **Use Personal tax Credit Amounts**.

1. Click on Add Personal tax Credit Amounts.



Personal | Jobs | Time & Attendance | Pay | Benefits | **Taxes** | Documents

Work Location | **Income Tax** | Year-End Slips

Income Tax

Province Of Employment	Description	History	Use Basic Personal Amount	Total Claim Amount	Requested Reduction	Block Withholding	Exempt
	Federal Tax			\$0			
<input checked="" type="checkbox"/>	ON Prov Tax		<input checked="" type="checkbox"/>	\$0			

Things I Can Do

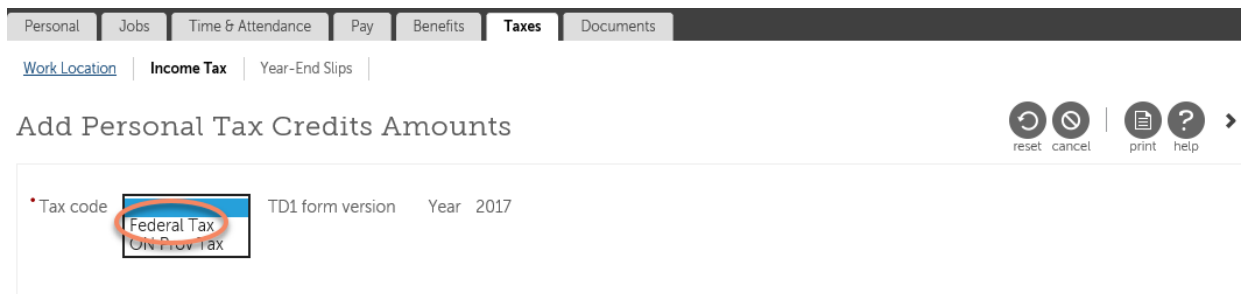
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FOR THIS TAB SET

- [Add Work Location \(CAN\)](#)

2. Select Provincial or Federal Tax. In our example we select **Federal Tax**.



Personal | Jobs | Time & Attendance | Pay | Benefits | **Taxes** | Documents

[Work Location](#) | **Income Tax** | Year-End Slips

Add Personal Tax Credits Amounts

• Tax code Federal Tax TD1 form version Year 2017

ON Prov Tax

3. A number of editable fields are displayed. Type required amounts into whatever field is required.
4. Click Sum.
5. Click Save.
6. Click Submit.

Add Personal Tax Credits Amounts



* Tax code Federal Tax TD1 form version Year 2017

Basic personal amount	<input type="text"/>
Caregiver amount for infirm child	<input type="text"/>
Age amount	<input type="text"/>
Pension income amount	<input type="text"/>
Tuition, education and textbook amounts	<input type="text"/>
Disability amount	<input type="text"/>
Spouse or common-law partner amount	<input type="text"/>
Amount for eligible dependant	<input type="text"/>
Caregiver amount	<input type="text"/>
Amount for infirm dependants age 18 or older	<input type="text"/>
Amounts transferred from your spouse	<input type="text"/>
Amounts transferred from a dependant	<input type="text"/>
Total claim amount	<input type="text"/> <input type="button" value="Sum"/>