BELINA PAYROLL

The Leading **Payroll** & **HR** Software

YEAR-END PROCEDURES | 2017

Dear Client,

Please find below the detailed instructions for Belina Payroll year end procedures.

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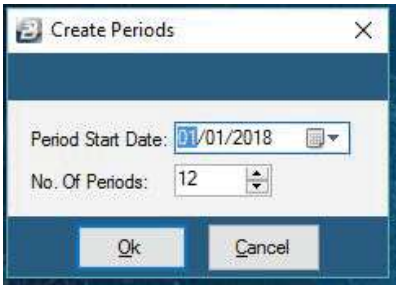
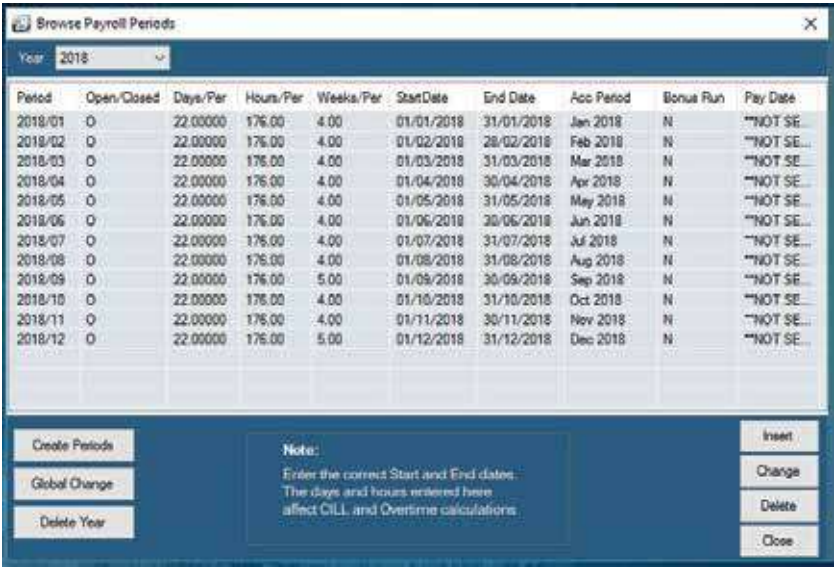
Section 1: Creating Periods for 2018

Once the final period of the year has been processed:

1. Go to "Setup" - > "Periods" - > "Pay Periods".
2. Click on "Create periods".
3. Type in the year start date i.e. 01/01/2018.



4. Input the number of periods in the year i.e. 12 for a monthly payroll, 26 for a fortnightly payroll and 52 for a weekly payroll.
5. Click on "Ok".
6. Check that the average hours and days per period are correct.



7. If the default average units per period are incorrect, input the desired days and hours required per period by clicking on Global Change and update details accordingly.

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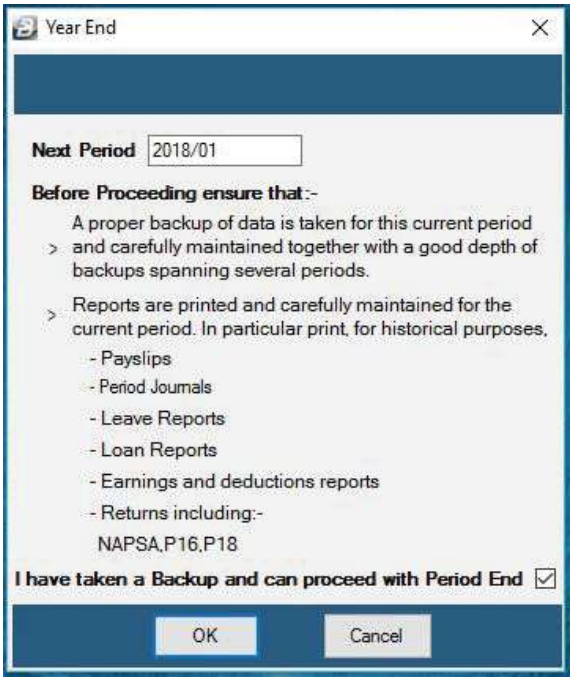
Section 2: Period End

1. Print any Year-end reports. Remember most reports can be printed afterwards.

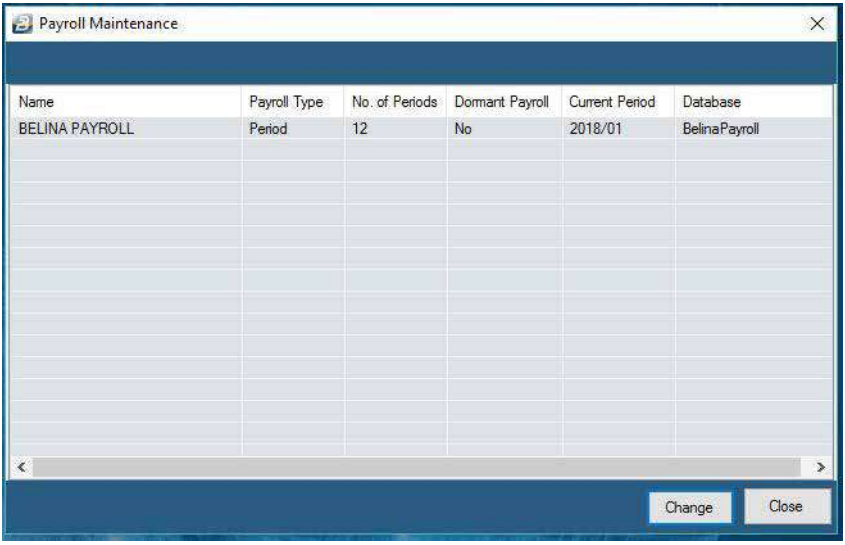
2. Backup each payroll onto reliable media such as CD, DVD. We suggest that a backup is also done on computer harddrive as an additional precaution.

3. Run a period end. This will take you into 1st period of 2018.



Section 3: Checking the Number of Periods

1. Go to "Data" - > "Payroll Maintenance".



2. Look for the name of your payroll and along the same line, check that the number of periods is now 12 (monthly), 26 (fortnightly), 52 (weekly), etc.

3. Go to "Setup" - > "Periods" - > "Pay Periods", check that each period has the correct start and end date, and that it has the correct "Accounting Period".

Section 4: Tax Method Convert (ONLY FOR PAYROLL USERS)

Month1 or NORMAL Computations

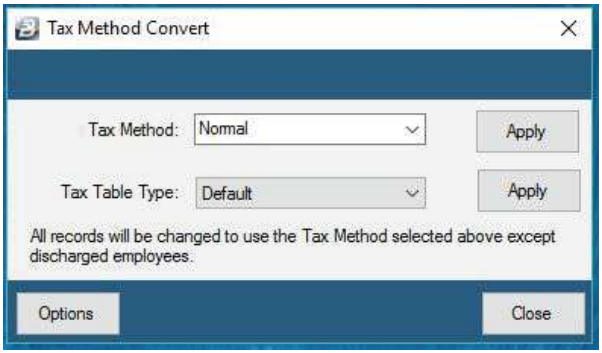
Month1 is the method for calculating TAX as you earn in that pay-period and each pay period is treated as its own tax period (where an employee was not employed by you at the start the tax year).

Normal is the method for calculating TAX cumulatively after your earnings accumulate and are forecasted over a number of pay periods (where an employee is employed by you at the start of the tax year).

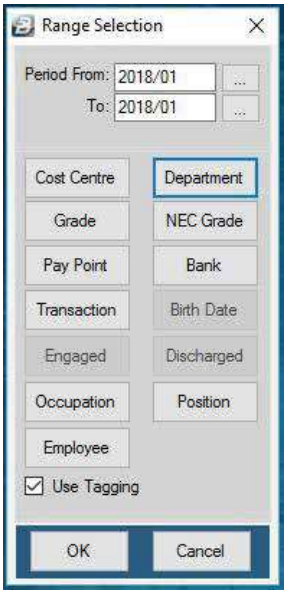
As a precaution we would like to ensure that new employees taken on during 2018 that were not on Normal are now correctly converted from ***Month1 onto Normal*** tax method:

Bulk conversion of employees at beginning of tax year from Month1 to Normal:

1. Click on "Data" -> " Bulk Routines" -> "Tax Method Convert".
2. Select "NORMAL" under "Tax Method".



3. Click on "Options".
4. Click on "Employee" and then tick "Use Tagging".



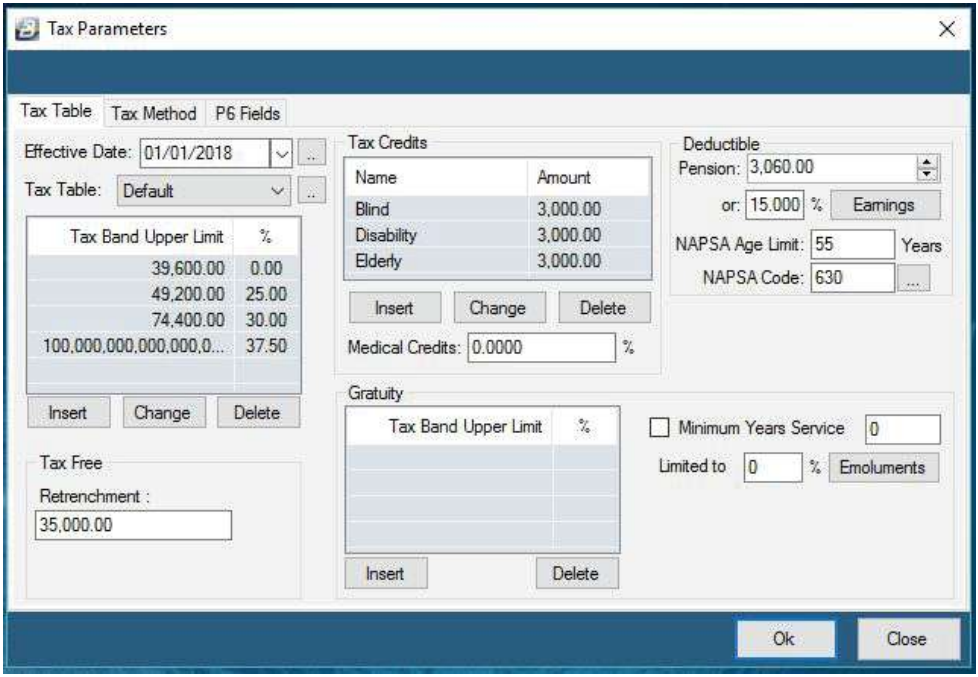
5. Click on "Tag All".

6. Click on “Ok” then “Ok” again.
7. Click on “Apply” against the “Tax method” option.
8. Repeat the above steps, except in step 2 where you select “Default” under “Tax Table Type”.
9. Click on “Apply” against the ““Tax Table Type” option.
10. Click “Close”.

Section 5: The Tax Bands

ZMK 0.00	**ZMK** 39,600.00	**0%**
ZMK 39,600.01	**ZMK** 49,200.00	**25%**
ZMK 49,200.01	**ZMK** 74,400.00	**30%**
ZMK 74,400.01	**Above**	**37.5%**

N.B. – Tax Credits for the elderly, blind and disabled persons remain unchanged.



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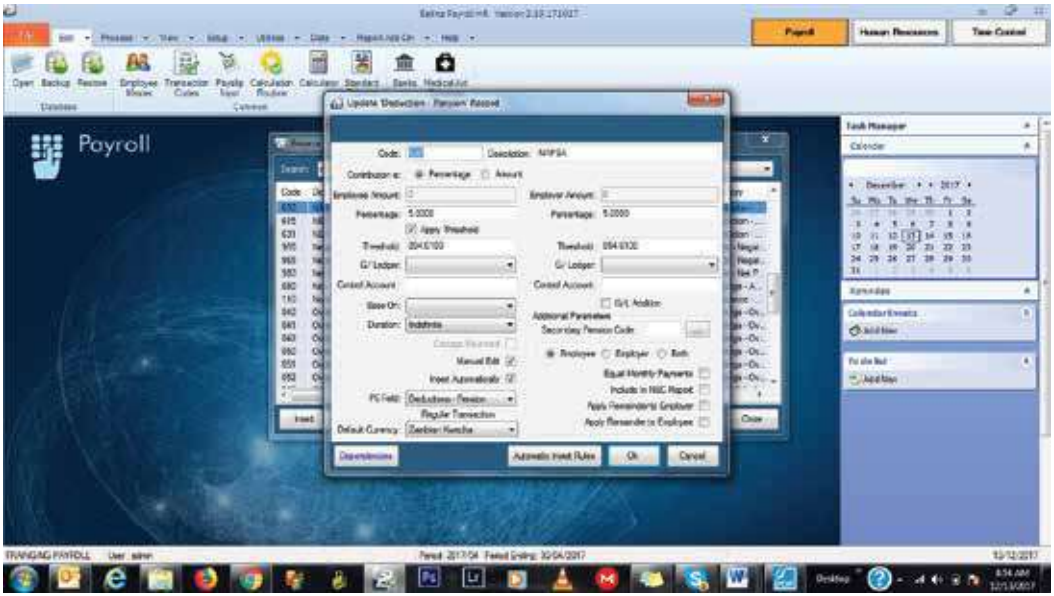
Section 6 – Napsa Changes

Please note that there hasn't been any change as yet on the NAPSA Ceiling for the year 2018. We will however, endeavor to keep you well informed accordingly if they are announced and gazetted by the Pension Scheme authority.



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General

You are now setup and ready to proceed to process your January 2018 payroll run. We are committed to providing you with good service. We do appreciate any feedback that you may have so that we can improve further.

Please feel free to contact us:

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