



## ! YEAR-TO-DATE TOTALS

This feature has one main function. It allows the user to transfer the employee's incomes and deductions from the previous payroll system (manual or computerised) into Vanilla Payroll. The YTD figures can only be updated if no payslips have been added to the employee's records. It, therefore, usually forms part of the set up procedure of getting started. It is not necessary to do anything with this record if you are starting your payroll at the beginning of the tax year.

To begin, click on the setup button to enter the pro-rata period worked from the beginning of the tax year to date. The program will automatically update the YTD information whenever a payslip is added, edited or rolled back.

Employees	Personal	Payslip Profile	Leave & Overtime	Payslips	Year-To-Date Totals
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**Periods Worked**  
 Period: From: 1/03/2009 To: 30/06/2009 Periods Worked: 4.0000 Setup

**Income Source**

Code	Description	RFI	YTD Amount
3601	Income - Taxable	<input checked="" type="checkbox"/>	40,000.00

**Gross Remuneration** Add Edit Erase

Gross Annual Payments: 0.00  
 Gross Non-Taxable Income: 0.00  
 Gross Retirement Funding Income: 40,000.00  
 Gross Non-Retirement Funding Income: 0.00  
 Gross Remuneration: 40,000.00

**Deductions**

Code	Description	Clearance / Ref. No.	YTD Amount

\*Any RAF deductions (the navy entries in the list above) are tax deductible, but are not deducted from their salary. Add Edit Erase

**Employees Tax Deductions**

Total Tax Due: 3,948.00 Company Contributions  
 Less: Tax Paid:   
 Tax Still Owing:

- The following screen appears. Firstly you must set up the period for which this income is relevant. Enter the start and end dates of this period. Ensure the 'Periods Worked' field is correct as this affects the tax calculation YTD. Click on the OK button to save this information.



Select Periods Worked

Period From: 1/03/2009

Period To: 30/06/2009

Periods Worked: 4.0000

Clear OK Cancel Help

- The best way of handling the YTD payroll data is to add the incomes from the previous periods by SARS codes.
- Click on the ADD button to add the YTD incomes, select the correct SARS code and enter the YTD value.
- Do the same for the deductions; ensure you use the ADD button under the deduction section.
- Finally, enter the total tax paid in the field provided at the bottom of the YTD screen. If there is a difference between the actual deduction and the calculated tax, the system will make an adjustment in the next period.
- When including 'Voluntary over deduction of tax', remember to add the entry under 'deductions' as well as including the amount under the tax paid figure.

Thank you for using Vanilla Payroll

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