

## How to Update Tax Scales in SagePay

The new Tax scales, Tax Parameters and the SGL Maximum Superannuation Contribution value are included in this update for SagePay.



Updating the Tax and Superannuation values must be completed **AFTER** the **End of Year** and the **Change Tax Year** process has been performed.

**NOTE:** You must be on SagePay Version 3.10.31 SP1 before proceeding with this Tax Update.

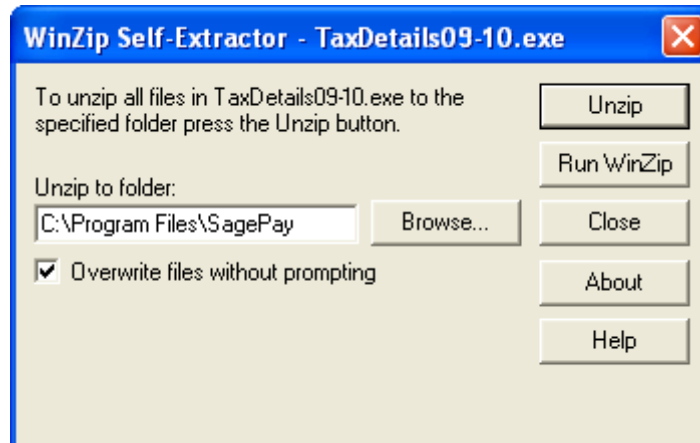
### To update Tax Scales and Quarterly SGL Cap

- 1 The Tax year must be set to 1/7/2009 to 30/6/2010. Select *Maintenance > General > General Parameters* from the menu and select the **Payroll Period** tab.

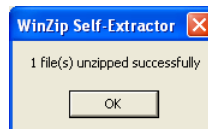
Period End	Processed
02/07/2009	<input type="checkbox"/>

- 2 Ensure there are no transactions entered for employees. If you have more than one database you will need to check that transactions do not exist in each database.
- 3 All users must exit and log out of SagePay.
- 4 Take a backup of all Company databases and the EvolutionCommon database.
- 5 From the email, save the **TaxDetails09-10.exe** executable file to your Desktop.

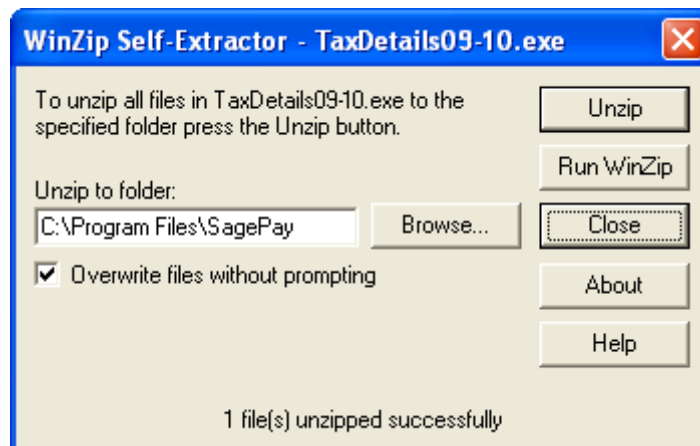
- 6 Go to the Desktop and double-click on the saved file **TaxDetails09-10.exe**.



- 7 The **Unzip to folder** location will default to *c:\Program Files\SagePay*. Change this to the directory path where SagePay is installed. Click on Unzip.



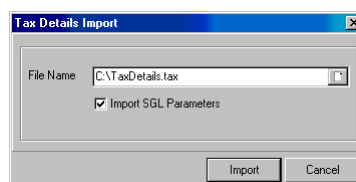
- 8 Click on the **OK** button when the Tax Details file has unzipped.



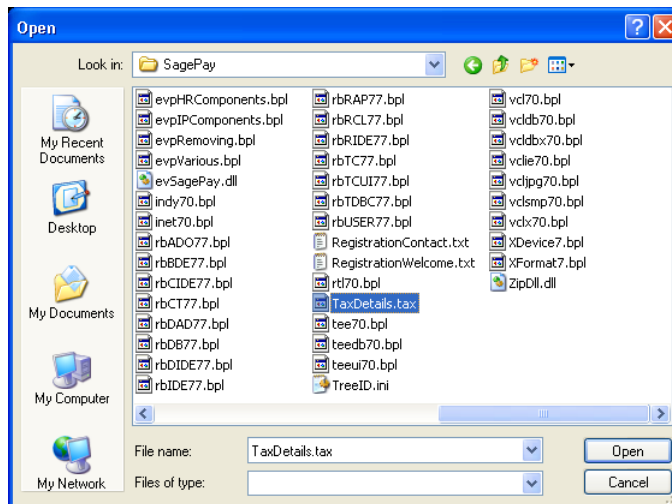
- 9 Click on the **Close** button.
- 10 Start SagePay and logon to the system using the **Admin** agent ID otherwise access will not be granted to update the Tax Details.

**NOTE:** You must import the tax scales for each database that you use.

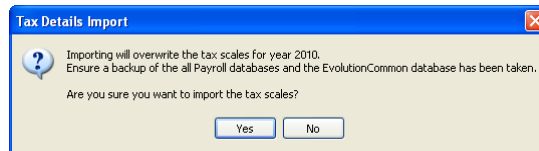
- 11 From the menu select *Administration > System Configuration > Import Tax Details*.



- 12 Click on the browse button in the **File Name** field. Navigate to the *Program Files\SagePay* folder and select the **TaxDetails.tax** file.



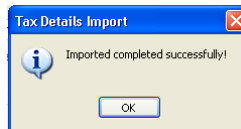
13 Click on the **Open** button.



14 If a backup of all SagePay databases has not been taken select **No** and complete all backups before proceeding.

**NOTE:** You are not required to take a backup of the EvolutionCommon Database.

15 Once the Tax and Superannuation Details have been imported, the following message will be displayed.



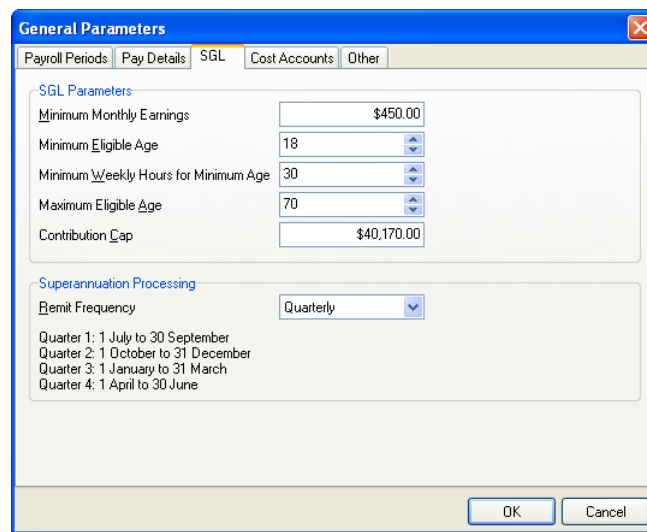
Click **OK** to complete the Import process.

## Check Update

After the Tax Import has been completed, check to ensure that the SGL Parameters and Tax Scales have been updated with new values.

To access the General Parameters from the menu, select *Maintenance > General > General Parameters*.

### Check the SG Contribution Cap



The screenshot shows the 'General Parameters' dialog box with the 'SGL' tab selected. The 'SGL Parameters' section contains the following fields:

Minimum Monthly Earnings	\$450.00
Minimum Eligible Age	18
Minimum Weekly Hours for Minimum Age	30
Maximum Eligible Age	70
Contribution Cap	\$40,170.00

The 'Superannuation Processing' section contains the following field:

Remit Frequency	Quarterly
-----------------	-----------

Below the 'Remit Frequency' field, the following quarters are listed:

- Quarter 1: 1 July to 30 September
- Quarter 2: 1 October to 31 December
- Quarter 3: 1 January to 31 March
- Quarter 4: 1 April to 30 June

At the bottom right of the dialog box, there are 'OK' and 'Cancel' buttons.

Select the **SGL** tab and confirm the **Contribution Cap** is **\$40170**.

### Other 2009/2010 Tax and Superannuation Figures

For tax and superannuation figures for 2009/2010, please refer to the following references on the ATO website.

## Tax Scales

Tax Scale Description	ATO reference
No General Exemption	<p><b>Scale 1 - Where tax-free threshold NOT claimed in Tax file number declaration</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
General Exemption	<p><b>Scale 2 - Where payee is eligible to receive leave loading and has claimed tax-free threshold</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
Non-Residents	<p><b>Scale 3 - Foreign residents</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
No Medicare Levy	<p><b>Scale 5 - Where payee claimed FULL exemption from Medicare levy in Medicare levy variation declaration</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
Half Medicare Levy	<p><b>Scale 6 - Where payee claimed HALF exemption from Medicare levy in Medicare levy variation declaration</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
No TFN Resident	<p><b>Scale 4 - Where tax file number not provided by payee</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
No TFN Non-Resident	<p><b>Scale 4 - Where tax file number not provided by payee</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
No Leave Loading	<p><b>Scale 7 - Where payee not eligible to receive leave loading and has claimed tax-free threshold</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
Single	<p><b>Single</b></p> <p>Schedule 22 Pay as you go (PAYG) withholding (NAT 4466) <i>Special tax table for aged pensioners and low income aged persons (senior Australians)</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf">http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf</a></p>

Tax Scale Description	ATO reference
Illness Separated	<p><b>Illness separated</b></p> <p>Schedule 22 Pay as you go (PAYG) withholding (NAT 4466) <i>Special tax table for aged pensioners and low income aged persons (senior Australians)</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf">http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf</a></p>
Member of a Couple	<p><b>Member of a couple</b></p> <p>Schedule 22 Pay as you go (PAYG) withholding (NAT 4466) <i>Special tax table for aged pensioners and low income aged persons (senior Australians)</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf">http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf</a></p>

## Medicare scales

Medicare Scale Description	ATO reference
Scale 2	<p><b>Medicare levy parameter Scale 2</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
Scale 6	<p><b>Medicare levy parameter Scale 6</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
Scale 7	<p><b>Medicare levy parameter Scale 7</b></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>
Medicare Levy Adjustment for SATO	<p><b>Medicare levy adjustment for senior Australians tax offset</b></p> <p>Schedule 22 Pay as you go (PAYG) withholding (NAT 4466) <i>Special tax table for aged pensioners and low income aged persons (senior Australians)</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf">http://www.ato.gov.au/content/downloads/BUS00194437N44660509.pdf</a></p> <p>Schedule 1 Pay as you go (PAYG) withholding (NAT 1004) <i>Statement of formulas for calculating amounts to be withheld</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf">http://www.ato.gov.au/content/downloads/BUS00194086n10040509.pdf</a></p>

## HELP scales

HELP Scale Description	ATO reference
Tax-free Threshold Claimed	<p><b>Tax-free threshold claimed</b></p> <p>Schedule 14 Pay as you go (PAYG) withholding (NAT 2335) <i>Statement of formulas for calculating Higher Education Loan Programme (HELP) component</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194410N23350509.pdf">http://www.ato.gov.au/content/downloads/BUS00194410N23350509.pdf</a></p>
No Tax-free Threshold Claimed	<p><b>No tax-free threshold claimed</b></p> <p>Schedule 14 Pay as you go (PAYG) withholding (NAT 2335) <i>Statement of formulas for calculating Higher Education Loan Programme (HELP) component</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194410N23350509.pdf">http://www.ato.gov.au/content/downloads/BUS00194410N23350509.pdf</a></p>

## SFSS scales

SFSS Scale Description	ATO reference
Tax-free Threshold Claimed	<p><b>Tax-free threshold claimed</b></p> <p>Schedule 16 Pay as you go (PAYG) withholding (NAT 2335) <i>Statement of formulas for calculating Student Financial Supplement Scheme (SFSS) component</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194413N33050509.pdf">http://www.ato.gov.au/content/downloads/BUS00194413N33050509.pdf</a></p>
No Tax-free Threshold Claimed	<p><b>No tax-free threshold claimed</b></p> <p>Schedule 16 Pay as you go (PAYG) withholding (NAT 2335) <i>Statement of formulas for calculating Student Financial Supplement Scheme (SFSS) component</i></p> <p><a href="http://www.ato.gov.au/content/downloads/BUS00194413N33050509.pdf">http://www.ato.gov.au/content/downloads/BUS00194413N33050509.pdf</a></p>

## Superannuation

Information about Key Superannuation rates and thresholds is available at:

<http://www.ato.gov.au/super/content.asp?doc=/content/60489.htm>

## Termination Tax

Refer to Schedule 32 Pay as you go (PAYG) withholding NAT 70980 *Tax table for employment termination payments.*

<http://www.ato.gov.au/content/downloads/BUS00194441N709800509.pdf>

**NOTE:** Rate of withholding includes 1.5% Medicare levy