

ESS - Recording Taxation information

Introduction

A new VCAA employee must record their initial taxation information using Employee Self Service before they can be paid. A current employee may update their taxation requirements using Employee Self Service.

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Recording taxation information – NEW employee

As a new employee taxation information is required to calculate your pay. You will need to enter your taxation information as soon as possible following your appointment on the payroll. If the tax information is not recorded before the first pay finalisation, your pay cannot be calculated, and you will not be paid.

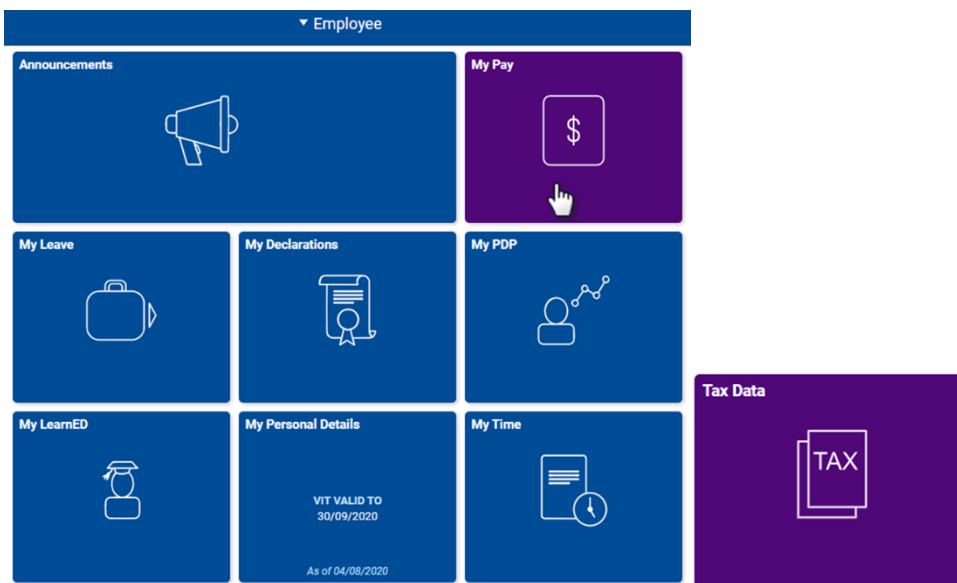
Entry of your tax information is mandatory. You cannot 'cancel' the entry of tax information and come back later.

You will need your:

- Employee ID and eduPay login details – if you have not been provided with these contact details, please get in touch with VCAA HR and ask for them.
- Tax file Number or information about appropriate exemption from tax
- Answers to the questions asked on the Tax File Number Declaration form

To record your tax information:

1. Log into eduPay. You may update taxation details from an external location (e.g. from home)
2. From the Employee page, select the My Pay tile, then the Tax Data tile.



- If you are also employed by the Department (DOE) or with any school on the School Local Payroll (SLP) on eduPay, you will need to select the relevant employer that this tax update applies to. As the Department and each School are separate employment entities, you need to record taxation details against **each** employment record. So in this instance you would need to add your tax details to your VCAA Casual role.

If you are only employed at the one location, this page will not appear.

The screenshot shows the 'Tax Details' page for a user named Stephen. It features a 'Job Information' table with 2 rows:

Select Job Title	Department	Supervisor	Company
Classroom Teacher	Hometown Primary School	Kevin	Dept of Education and Training
Casual Relief Teacher	Uptown Primary School	Ross	School Local Payroll

Select the job title hyperlink for the employer you wish to update your tax record for. Please note newer versions of eduPay may have drop down box with your roles. You will need to select the VCAA Casual role from the drop down to add in your corresponding tax details.

- The Tax Details page appears. Complete each section as you would answer on the Tax file number declaration form. This electronic version is the equivalent of the hardcopy form.

The screenshot shows the 'Tax Details' form with several sections and a modal dialog. Red numbers 1 through 8 indicate key steps:

- 1:** *TFN Status dropdown (set to 'Not Supplied')
- 2:** *Pay Entity dropdown (set to 'DEPARTMENT OF EDUCATION')
- 3:** *Basis of Payment dropdown (set to 'Casual')
- 4:** STSL radio button (set to 'No')
- 5:** Calculate Levy Adjustment radio button (set to 'No')
- 6:** Calculate Tax Scale button
- 7:** Declaration radio button (set to 'No')
- 8:** Save button

The modal dialog 'Calculate Tax Scale' contains the following questions:

- Claim Tax Free Threshold? No (A)
- Resident for Tax Purpose? No (B)
- Senior? No (C)
- If Yes, Select one of the following Radio Buttons:
 - Single?
 - Separated by Illness?
 - Member of a Couple?

Buttons: OK (D), Cancel

1. Record your Tax File Number (TFN) in the applicable field – enter carefully if you make a mistake it may not be possible to correct without providing updated information to your HR Administrator. On entry of a valid TFN, the Status box will change to “TFN provided” and hide your TFN.
 - a. If you do not have your TFN select the appropriate option from the TFN Status drop down box. An ATO authorised default will appear. Where ‘*applied for*’ has been chosen you have 28 days to provide your TFN before the top tax will be automatically applied to your record.
2. The *Pay Entity* and *Balance Group Nbr* will populate automatically based on the employer chosen prior to this page.
 - If a Department employee – DOE displays and the Balance Group Nbr will display as 000
 - If a School Local Payroll employee: - SLP displays with the *Balance Group Nbr* reflecting your employment instance at that particular school (001, 002, 003 etc.)
3. Select the Basis of Payment from the options displayed.
4. If you have a STSL debt (previously *HELP*, *SSL*, *TSL* or *SFSS Debt*) *click the slider to Yes* if you have one otherwise leave as No.
5. Click the options for Medicare Levy Details if applicable otherwise leave blank.
6. Click the Calculate Tax Scale button the alternate page opens.
 - a. Click the Claim Tax Free Threshold slider if you are claiming this option.
 - b. Click the Resident for Tax Purposes slider if you are a resident of Australia. Most employees are required to select this option.
 - c. Click the ‘Senior?’ slider if appropriate and then the relevant radio button
 - d. Click OK to save and continue with the selected options or cancel to return without saving the selected options.
7. Click the Declaration Slider to indicate the information entered is true and correct. This is equivalent to your signature. There are penalties for deliberately making a false or misleading statement.
8. Click Save. Entry of Tax information is mandatory, once commenced you cannot ‘cancel’ the entry.

5. Tax entry has been saved following step 8 above.

What happens next?

Your tax information will be automatically recorded from your Hire date with the details entered above. If you enter your tax information after your hire date, your tax details will be effective from the next available pay period. Tax will be deducted automatically from your pay in accordance with the relevant Australian Taxation Office requirements and the entries you have recorded.

Please note, if no tax information is recorded or if an invalid TFN is entered, you will be taxed at the top tax rate as advised by the Australian Taxation Office.

Changing your Tax information – Current employee

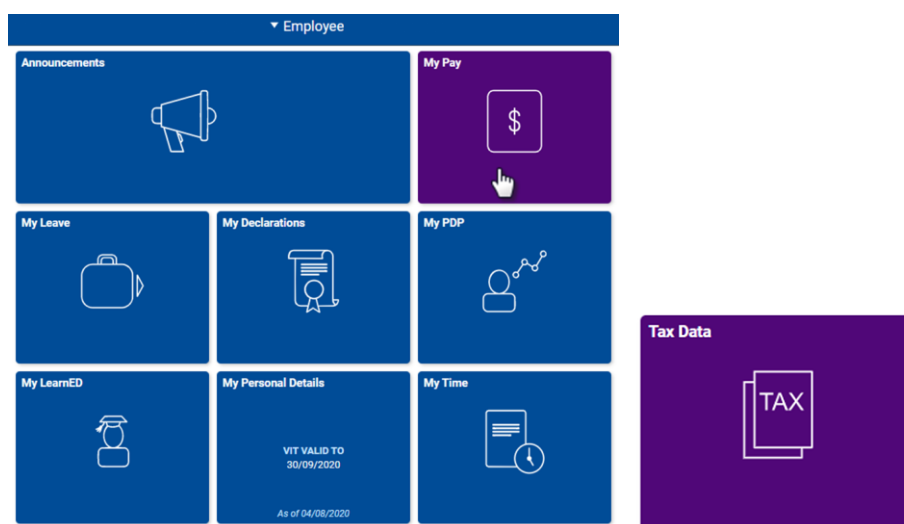
An employee may only change their recorded tax information from the next available pay period. A tax adjustment cannot be entered retrospectively.

Before commencing this process, ensure you have all the relevant tax information to fully complete this process. Entry of your tax information is mandatory. You cannot 'cancel' the entry of tax information and come back later. You will need your:

- Tax file Number or information about appropriate exemption from tax
- Answers to the questions asked on the Tax File Number Declaration form

To update your tax information:

1. Log into eduPay. You may update taxation details from an external location (e.g. from home)
2. From the Employee page, select the My Pay tile, then the Tax Data tile.



3. If you are employed by the Department (DOE) or with any school on the School Local Payroll (SLP) on eduPay, you will need to select the relevant employer that this tax update applies to. As the Department and each School are separate employment entities, you need to record taxation details against each employment record. So in this instance you would need to add your tax details to your VCAA Casual role.

If you are only employed at the one location, this page will not appear.

Tax Details

You have more than one active employment record in the payroll. Please select the relevant employment record from the list below applicable to this transaction. Where this transaction applies to more than one employment record you will need to access each employment record separately to apply the change.

Job Information 2 rows

Select Job Title	Department	Supervisor	Company
Classroom Teacher	Hometown Primary School	Kevin	Dept of Education and Training
Casual Relief Teacher	Uptown Primary School	Ross	School Local Payroll

Select the job title hyperlink for the employer you wish to update your tax record for. Please note newer versions of eduPay may have drop down box with your roles. You will need to select the VCAA Casual role from the drop down to add in your corresponding tax details.

- The Tax Details page displays with the previously recorded tax information for the employer selected.

The eduPay page reflects the questions on the Tax File Number declaration form. Complete each section as you would on the form. It is important that you complete the process fully and not 'skip' sections. Each new access to the page results in the equivalent of a new form and if not fully completed default entries apply which may result in incorrect tax deductions from your pay.

The Tax File Number is not visible for employees or VCAA HR. To protect the privacy and security of your TFN, once recorded it cannot be viewed.

You cannot change or record your TFN again. In the rare instance that your TFN is changed by the ATO or where you receive advice from the Department that an invalid number is recorded, the HR Administrator/Business Manager can re-enter a new number overwriting any previously recorded number.

The page displays with the previously recorded tax information for the employer selected.

The screenshot shows a web interface for 'Tax Details'. At the top, there's a navigation bar with 'My Pay' and 'Tax Details'. Below, a section titled 'Tax Details' contains a 'Tax File Number' field with a dropdown for '*TFN Status' set to 'TFN Provided' (callout 1). Another 'Tax Details' section includes fields for '*Pay Entity' (DOE), 'DEPARTMENT OF EDUCATION', '*Balance Group Nbr' (000), '*Basis of Payment' (dropdown), '*Tax Scale', and 'STSL' (radio buttons for 'No' and 'Yes', callout 4). A 'Medicare Levy Details' section has 'Calculate Levy Adjustment' (radio 'No'), 'Spouse' (radio 'No'), and 'Nbr of Dependents'. A 'Declaration' section has a 'I declare that the information I have given is true and correct' (radio 'No', callout 7) and a 'Date Signed' field. A 'Save' button (callout 8) is at the bottom. A red arrow points from the 'Calculate Tax Scale' button (callout 6) to a secondary window titled 'Calculate Tax Scale'. This window contains 'Claim Tax Free Threshold?' (radio 'No', callout A), 'Resident for Tax Purpose?' (radio 'No', callout B), 'Senior?' (radio 'No', callout C), and radio buttons for 'Single?', 'Separated by Illness?', and 'Member of a Couple?'. 'OK' (callout D) and 'Cancel' buttons are at the bottom.

- The Tax File Number cannot be updated. It is unlikely that a TFN will change. If your TFN has been changed by the ATO, provide evidence to VCAA HR for updating.
- The *Pay Entity* and *Balance Group Nbr* will populate automatically based on the employer chosen prior to this page.
 - If a Department employee – DOE displays and the Balance Group Nbr will display as 000
 - If a School Local Payroll employee: - SLP displays with the *Balance Group Nbr* reflecting your employment instance at that particular school (001, 002, 003 etc.)
- Adjust the Basis of Employment if required
- Select or deselect the STSL (previously *HELP*, *SSL*, *TSL* or *SFSS Debt*) slider depending on whether you have a debt.
- Medicare Levy Details – update as required
- Click the Calculate Tax Scale button the alternate page opens (this step determines the Tax Scale entry)
 - a. Click the Claim Tax Free Threshold slider if you are claiming this option
 - b. Click Resident for Tax Purposes slider if you are a resident of Australia. Most employees are required to select this option.
 - c. Click the 'Senior?' slider if appropriate and then the relevant radio button
 - d. Click OK to save continue with the selected options or Cancel to return without saving the selected options. Warning: If Cancel is clicked, the page reverts to blank and may incorrectly calculate your tax rate resulting in insufficient or additional tax amounts deducted from your pay.

- Click the Declaration Slider to indicate the information entered is true and correct. This is equivalent to your signature. There are penalties for deliberately making a false or misleading statement.
 - Save the transaction. Entry of tax information is mandatory and cannot be cancelled.
5. Tax entry has been saved following step 8 above.

What happens next?

After saving the update, eduPay will add a new taxation row with an effective date for the commencement of the current open pay period. Updates completed before pay finalisation (Friday before pay day) in any pay period will apply to the next pay day. Updates completed after pay finalisation will be included in the next available pay period.

Completing this process electronically is the equivalent of providing a signed Tax File Number declaration form. The printed copy does not need to be provided to VCAA HR where this has been successfully saved.

What if?...

Scenario	Action
<p>I wish to pay (or cease) additional tax per fortnight?</p>	<p>Provide your request in writing to VCAA HR who can add a new tax row and implement the additional fortnightly amount indicated from the next available pay period.</p> <p>A separate request in writing to VCAA HR is required to cease any previously entered additional tax entries from the next available pay period.</p>
<p>My TFN has been changed by the ATO</p>	<p>For security and privacy of your Tax File Number, it cannot be changed via the Self-Service pages and cannot be viewed by you or VCAA HR after the initial entry has been completed.</p> <p>Where the ATO has issued a new or corrected TFN or the VCAA has advised that an invalid TFN has been recorded, provide evidence of your new TFN using a Tax File Number Declaration form directly to VCAA HR to update eduPay with the revised information.</p> <p>As your previous TFN cannot be seen by VCAA HR, ensure you indicate clearly that you are providing a new TFN as provided by the ATO.</p>
<p>I have a variation in tax approved by the ATO</p>	<p>Where you are employed by the Victorian Curriculum and Assessment Authority (VCAA):</p> <p>The ATO sends details of this approval directly to the employer. The People Systems and Services team will update your record on receipt of details from the ATO.</p> <p>The VCAA cannot act on the confirmation advice sent by the ATO to you. Updates can only be made on receipt of the direct advice from the ATO to the Department.</p> <p>These variation approvals cannot be actioned via ESS.</p>
<p>I am requesting a tax change retrospectively</p>	<p>In accordance with ATO rules, taxation records cannot be amended retrospectively, including where a data entry error has been made.</p> <p>Tax records can only be amended effective from the current open pay period if completed prior to pay finalisation (Friday before payday) or the next available pay period if completed after pay finalisation.</p>