

GENERAL INFORMAT	GENERAL INFORMATION	
Tax-year:	1 January to 31 December	
What must be submitted:	<ul> <li>ITF 16 - Income Tax Form 16 Return Electronic File</li> <li>P 6 - Tax Certificates</li> <li>Declaration of Salaries and Wages paid</li> <li>Declaration of Salaries and Wages paid for the year</li> </ul>	
Who must submit the documentation:	All employers	
Submission date:	31 January	

STEP	ACTION	DONE
PREPARA	TION	
1.	<b>Copy System</b> If a separate Tax directory has not been created yet, you need to make a copy of the system. Always check that the icon opens VIP and that the companies can be accessed.	
2.	How to Create a VIP Copy System: STEP 1 • Open VIP System (do not open any of the companies) • Click on Options • Click on Copy System • Other Continue • Click on Continue • Click on Continue Group Companies Hardware Info TRP5/U.I.F./SSC Information Licenced Modules System Info SSAE Employment Equity NAM Employment Equity NAM Employment Equity NAM Employment Equity SKills Development ESS/EIS Impot Control Strome Accompany Copy System Mode Management Control Activate ASCII Generator Flow of Info: Premier HR ESS Utilities Frictionless Downloads Sage VIP Insight Control	







	STEP 5
	The system will ask whether you want to create a Shortcut. Click on Yes.
	VIP Payroll
	Po you want to create a Shortcut?
	Ŭ
	Yes No
	Yes No
	Enter a name for the Shortcut.
	Example: TAX2020
	The System will automatically create a shortcut for you on your Desktop.
	Latest Release
3.	Ensure VIP Premier is on the latest release. For December 2020, the latest Release
	must be Release 5.5a
	Tax Module Version
	Ensure that you are using the correct Tax Module Version.
4.	
	Steps:
	From the VIP Main Menu $\rightarrow$ Payroll $\rightarrow$ Definitions $\rightarrow$ Africa Rule Linking
	Basic Company Information Screen
	Verify the information on the Basic Company Information Screen:
	<ul> <li>Registered/trading name of the company (company name that must print on</li> </ul>
	the tax certificates)
	Physical address of the company
	Tax registration number (PAYE reference number)
	On the Additional Information Tab
5.	Additional Company Info 1 = Company Trade Name (P2)
	Additional Company Info 2 = Company SSR Number (P4)
	Additional Company Info 3 = Industry Code Number (P4)
	Additional Company Info 4 = Company SDL Number
	Additional Company Info 5 = IC Number (Industrial Council)
	Additional Company Info 6 = Old Mutual Pension Code
	Steps:
	From the VIP Main Menu → Company → Basic Company Information
	Company Reconciliation Report: Before Changes
	Print the Company Reconciliation Report
6.	Use this to determine what items the client got on the payroll and verify the 12 Month
	Totals.
	Employee Information
	Verify the following on the Employee Information Screens (IS):
	7.1. Personal Details
7.	Surname (no punctuation allowed)
	<ul> <li>First Two Names (no punctuation allowed)</li> </ul>
	<ul> <li>Initials (no punctuation/spaces allowed)</li> </ul>
	<ul> <li>Identity Number/Passport number and Passport Country</li> </ul>
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<ul> <li>Date of Birth         Group: ZIMSTATIP4         Job Title         Marital Status         7.2. Address Details         Residential Address         Postal Address and Work Address (remove all punctuation marks and correct all fictitious information)         7.3. Statutory Details         Tax Number = Employee TPIN Number         Sundry Number 2 = Old Mutual Pension Number         Sundry Number 3 = Nature of Employee A/N         7.4. Additional screens to check is on the Supplementary Screen:         Country field 1 (SUP) = Nationality         Contact Number (SUP) = Driver's Licence Number         Union Number (SUP) = Driver's Licence Number         Union Number (SUP) = Driver's Licence Number         Union Number (SUP) = Pension Number         Education Screen         Verify the employees to be linked to Disable Flag         Confirm employees amounts for Private Subscription (Other Tax Deductibles)         Confirm employee amounts for Private Subscription (Other Tax Deductibles)         Confirm employee amounts for Dratoms (Other Tax Deductibles)         Confirm employee amounts for Dratoms (Other Tax Deductibles)         Confirm employee amounts for Drations (Other Tax Deductibles)</li></ul>	
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Confirm employee amounts for Tradesman Tools (Other Tax Deductibles)	
Confirm employee amounts for Donations (Other Tax Deductibles)	
Steps:	
From the VIP Main Menu $\rightarrow$ Payroll $\rightarrow$ Definitions $\rightarrow$ Calc. Field Definitions	
Africa Tax Rule Linking Screen	
Confirm the Taxable Parameters on the Africa Tax Rule Linking Screen.	
Below are guidelines with regards to the linking.	
9.	
Steps:	
• From the VIP Main Menu $\rightarrow$ Payroll $\rightarrow$ Definitions $\rightarrow$ Africa Rule Linking	



<ul> <li>2. Zimbalswe uses an Annual Tax Calculation setup on Period Average</li> <li>Annual Tax Calculation is linked to Set 2 on the Africa Rules Linking Screen:</li> <li>Tax Elements Tax Table Option 1 Set 2</li> <li>The annual tax calculation uses YTD+ actual figures when calculating tax.</li> <li>Period Average is linked on the company miscellaneous screen:</li> <li>New Employees that start in the middle of a period will be taxed on a full period</li> <li>Terminators will use Actual Days when calculating the final tax</li> <li>Please do not change the SET in December as this will lead to major tax implications. Change in the new tax year 2021.</li> <li>Explanation of the Linking of Tax Elements (Tax Element Tab):</li> <li>BON001: A Bonus</li> <li>Exempt bonus or performance-related award is ZWL5000 Confirm All bonus earnings that should be linked to this rule.</li> <li>BP002: A Bind Person Tax Credit</li> <li>Bind employees get a ZWL9 000 tax credit – Flag on XS screen to be linked</li> <li>MED002: A Disabled Tax Credit</li> <li>Disabled employees get a ZWL9 000 tax credit – Flag on XS screen to be linked</li> <li>MED002: A Medical Aid Tax Credit</li> <li>Disabled employees get a ZWL9 000 tax credit – Flag on XS screen to be linked</li> <li>MED002: A Medical Aid Tax Credit</li> <li>Disabled apployees get a ZWL9 000 tax credit – Flag on XS screen to be linked</li> <li>MED002: A Medical Aid Tax Credit</li> <li>S0% of medical aid expenses paid by an employee can be deducted from income tax</li> <li>Confirm all Perk Tax and Calculation Screen definition lines that should be linked</li> <li>MED3002: A Medical Shortfall Tax Credit</li> <li>S0% of the amount paid by the employee for medical aid shortfall can be deducted from income tax.</li> <li>Confirm all Perkotic Earn Excluding Bonus &amp; Retrench</li> <li>Confirm all periodic taxable earnings excluding bonuses and retrenchments that should be linked to this ru</li></ul>	l Li	nking of Tax Tables (Tax Table Tab)
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<ul> <li>that should be linked to this rule.</li> <li><b>TD002:</b> A Tax Deductible NSSA/Pens/Annuity</li> </ul>		-
TD002: A Tax Deductible NSSA/Pens/Annuity		
Confirm that all NSSA, Pension and Annuity related deductions are linked		
		Confirm that all NSSA, Pension and Annuity related deductions are linked



<ul> <li>Protoc: A Other Tax Deductibles</li> <li>Confirm that all Other Types of Tax deductibles to be linked to this rule.</li> <li>TE002: A Normal Taxable Earnings</li> <li>Confirm all Normal Taxable Earnings that should be linked to this rule.</li> <li>Take Note:         <ul> <li>Confirm the taxability or tax-deductibility of all earnings, deductions park tax and calculation screen definitions.</li> <li>Make sure that all relevant definitions have been linked to the correct rule on the Africa Rule linking screen</li> <li>The Zimbabwe Taxation Summary is a good reference when unsure.</li> <li>Company Reconciliation Report: After Changes</li> <li>Print the Company Reconciliation report and compare the figures to the one printed at the beginning.</li> <li>If there are differences determine the reason and the appropriate action to be taken.</li> <li>Example:</li> <li>You may have changed a periodic taxable line to monthly taxable. The difference in the tax amount must be paid over to the Revenue Authority and recovered from the employee with the next payroll run as a deduction such as a loan or an advance.</li> </ul> </li> <li>Tax Year-End Reconciliation of Tax</li> <li>Do a Tax Year-End Reconciliation of Tax and statutory payments paid over to the local tax authority.</li> <li>Compare each individual's tax to the 12 Month report. (Refer to the monthly report for each month to reconcile)</li> <li>Print the Tax Reconciliation Report for 5 years.</li> </ul> <li>14. This report an be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder. From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called Financial Detail</li> <ul> <li>Print the 12 Month report to keep for 5 years. If you are using VIP Premier, you must remember to include terminations. This report can be printed to PDF and saved t</li></ul>			
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13.       (Refer to the monthly report for each month to reconcile)         Print the Tax Reconciliation Report for the employees that do not reconcile.         14.       Financial Detail Report         14.       Print the Financial Detail report to keep for 5 years.         14.       This report can be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder.         From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called Financial Detail         15.       12 Month Report         Print the 12 Month report to keep for 5 years. If you are using VIP Premier, you must remember to include terminations. This report can be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder.         15.       Steps:         From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called 12 Months         16.       How to print the Annual Tax Year-End reports:         16.       Confirm that you are on the latest release with any report enhancements         2.       Confirm that you have done the Report Setup:		Determine differences	
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Financial Detail Report       Print the Financial Detail report to keep for 5 years.         14.       This report can be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder. From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called Financial Detail         15. <b>12 Month Report</b> Print the 12 Month report to keep for 5 years. If you are using VIP Premier, you must remember to include terminations. This report can be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder.         15. <b>Steps:</b> From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called 12 Months         16.       How to print the Annual Tax Year-End reports: 2. Confirm that you have done the Report Setup:	13.	(Refer to the monthly report for each month to reconcile)	
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<ul> <li>14. This report can be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder. From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called Financial Detail</li> <li>12 Month Report Print the 12 Month report to keep for 5 years. If you are using VIP Premier, you must remember to include terminations. This report can be printed to PDF and saved to the "Zimbabwe Tax Year-End" folder.</li> <li>15. Steps: From the VIP Main Menu → Reports → Reports and Maintenance → Print the report called 12 Months</li> <li>16. How to print the Annual Tax Year-End reports:</li> <li>1. Confirm that you are on the latest release with any report enhancements</li> <li>2. Confirm that you have done the Report Setup:</li> </ul>		Financial Detail Report	
From the VIP Main Menu → Reports → Reports and Maintenance → Print the report         called Financial Detail <b>12 Month Report</b> Print the 12 Month report to keep for 5 years. If you are using VIP Premier, you must         remember to include terminations. This report can be printed to PDF and saved to         the "Zimbabwe Tax Year-End" folder.         Steps:         From the VIP Main Menu → Reports → Reports and Maintenance → Print the report         called 12 Months         16.         16.         17.		Print the Financial Detail report to keep for 5 years.	
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called 12 Months         How to print the Annual Tax Year-End reports:         1. Confirm that you are on the latest release with any report enhancements         2. Confirm that you have done the Report Setup:			
16.       How to print the Annual Tax Year-End reports:         1.       Confirm that you are on the latest release with any report enhancements         2.       Confirm that you have done the Report Setup:			
<ol> <li>Confirm that you are on the latest release with any report enhancements</li> <li>Confirm that you have done the Report Setup:</li> </ol>			
16. 2. Confirm that you have done the Report Setup:			
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	Reports       Sage Intelligence       Interfaces         Reports and Maintenance       Payslips       >         Payslips       >       >         Contemporary Reports       >         Audit Reports       >         Print Audit Trail       >         Log File       >         History Reports       >         Timbabwe Reports       >         Cheque Printing       >
	Report Controls         Payslip Setup         Export/Import Reports         Cheque Print Positions
	Declaration of Salaries and Wages       C       ZB Life Electronic Tile for PAYNET       C         ITT 16 (Electronic Tax Submission File)       ZIMSTAT (Stats Quarter Rent)       C         P2 (Employer Rentlance Form)       C       NEC Rentlance - Commercial Sector       C         P3 (NSSA New Employee Reg Form)       C       Old Mutual Electronic File for PAYNET       C         P4 and P4A(NSSA Remtlance Advice)       C       SDL Quarterly Declaration       C         P4 C(NSSA New/Term Employees)       C       CSZ SFI Version 3 Bank File       C         P4 (Employer Tax Certificates)       C       ATG Version 4 Bank File       C         P6 (Employer NSSAReturn)       C       Barclays Version 002 File       C         ZIMDEF (Training Levy Declaration)       C       C       C
	If any new System Definitions (Earnings, Deductions, Company Contributions, Calculation Fields, Hours, Own, Perks Tax) have been added, please return to the Report Set-up Screen to update report linkings.
3.	After the report setup has been completed, click on the report that you will print and click on "Continue" – These selections will only have to be set up once. Thereafter it will save the selections you have specified



STEP	ACTION	DONE
LIVE DIRE	ECTORY CHECKS	
1.	Start of Period In the Live/Current directory: If VIP has not been rolled into the new tax year, then do a start of period into the new tax year.	
2.	<ul> <li>Tax Module Version</li> <li>Ensure that you are using the correct Tax Module Version. Please confirm this when rolling into the new tax year.</li> <li>This is displayed in the top right-hand corner of the African Rule Linking Screen.</li> <li>Steps:</li> <li>From the VIP Main Menu → Payroll → Definitions → Africa Rule Linking</li> </ul>	
3.	Apply Changes Apply all necessary changes made to the Tax Year End directory to the current VIP directory.	
4.	Earning and Deductions Remove Earning and Deduction lines that are not in use anymore.	