

Sage WageEasy Bring your year to date totals as lump sum values

Purpose: The aim of this fact sheet is to outline correctly entering your year to date figures into Sage WageEasy when changing over from a previous payroll system. When bringing in your year to date figures you need only import figures to complete the current financial year. i.e. if you changed over in September you only need to bring over figures from July 1st and onward. Entering Year to Date - Lump Sum Values

From your previous payroll data, obtain the following information for each staff person:

- Gross Wage Year to Date (Year to Date)
- □ Tax (YTD)
- □ Superannuation YTD
- □ Additions/Deductions (YTD) if applicable

In Sage WageEasy - from the Set Up menu, choose Allowances



Click Add

雴 /	Allowances		8 X		
2	Allowances	Print E-mail			
Drag a column header here to group by that column					
	Description 🛆 Category	Frequency Amount	E		
۷	1 6L Km Reimbursement Per Km	Unit Based	\$0.5800		
۷	Adjustment	Each Pay	\$0.0000		
۷	After Tax Adjustment	Each Pay	\$0.0000		
2	Airport Catering Travel Allowance - Unit Bas	Unit Based	\$6.6800		
8.	Airport Supervisor 11 To 20 Allowance	Weekly	\$23.1300		
8.	Airport Supervisor 6 To 10 Employees	Weekly	\$20.5200		
8.	Airport Supervisor More Than 20 Employees	Weekly	\$38.8000		
8.	Airport Supervisor Up 5 Employees	Weekly	\$14.9200		
۷	Backpay	Each Pay	\$0.0000		
۷	Before Tax Deduction	Each Pay	\$0.0000		
8	Bonus	Weekly	\$0.0000		
۷	Bonus	Each Pay	\$0.0000		
8	Car Allowance	Each Pay	\$30.0000 👻		
Sample .;;					

Sage WageEasy – *Bringing year to date totals into Sage WageEasy as lump sum values* **Prepared by:** Sage WageEasy Support, 27/01/2016 Last updated: 27/01/2016 Page 1 of 3

This Factsheet has been prepared with the intention of providing you with accurate, consistent and clear information on how to use or set up Sage WageEasy to meet particular circumstances. Any award information or interpretation contained in this Factsheet is based on information provided to us and we recommend consulting the relevant Award or EBA and/or obtaining professional advice from your industry association to verify this information.



Set up a Standard allowance called Year to Date. Set the Type as an Addition and the Frequency as Each Pay

Please leave the amount at zero.

Tick the boxes include in Super Calculation and Taxed. Choose Next to set up your GL if you use it, then next again and finish to save.

P Allowance Wizard					
Allowance Details					
What are the entit	ement and calculation	details for this new allowance?			
Description:	Year To Date				
<u>T</u> ype	Addition 💌	Erequency: Each Pay	-		
<u>A</u> mount:	\$0.0000				
Minimum:	\$0.00	√ Ta <u>x</u> ed			
Maximum:	\$0.00	✓ Include in Super Calculation			
Allowance No:					
Conditions:	🖃 Pay Allowan	ce On (Loadings)	~		
	Base Rate for	the Entire Shift	.=D		
	Overtime				
	Period Overtin	e 🗌 🗌			
	Shift Loading (Monday - Thursday)	-		
		< <u>B</u> ack <u>N</u> ext > Cancel			

Now take your PPE (pay period ending) date back to the last pay period of the last month paid in the previous payroll system. This way, the figures will not affect current monthly Super and Tax calculations.

1. In Wages, select your employee and leave the timesheet blank. Click Next to take you into the Adjustment screen.

2. Select Add, and in the Allowance Wizard choose the Year to Date you created and enter in the Amount Payable. Do not include any additions and deductions such as union contributions, clothing and laundry (as these will be entered individually and itemised on the group certificate). Click OK to complete.

3. If you pay allowances/deductions, these should already be set up for these staff and will show on your adjustment screen if not select the allowance drop down list. Double-click on them and edit the amounts to the year to date totals from the previous payroll data.

4. If you have Union contribution to bring forward, select Union from the left menu and Edit at the top to change the dollar value, to match the value on the previous payroll data.

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5. To bring your YTD super contributions, select Superannuation from the left menu and Edit and change the dollar value to match the super value on your previous payroll Superannuation data.

6. Select Tax from the left menu and choose Edit to match the year to date total from your previous system.

7. Select Next to view the payslip and check that ALL the values: Allowances, Gross, Tax, Net and Super balance to the previous payroll data. If they balance, press Save. If they do not balance, click Back and edit as needed.

8. Repeat the process for the next employee. Once this process is complete for all employees, print a Payment Summary – Year to Date and a Superannuation – Year to Date report from Sage WageEasy and check that it balances to your previous payroll system. If you make a mistake and need to delete one of these pay slips, you can do so from File, Maintenance and Delete Payslip.

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