

How to capture Medical Aid Deductions and Medical Expenses

1 Medical Aid

1.1 Define Medical Aid

To capture medical aid for employees firstly the Medical Aid should be defined in the system this is accessed by the menu Payroll Definitions>Payroll Deductions> Employee Deductions



To define the Medical Aid deduction, enter the Name and Description of the deduction "Medical Aid Deduction". Select the account category from the drop down list "Other Deductions".

Name Description Medical Aid Deduction Medical aid for emptoyees Account Category Medical Expences Credit			Apply Tax Credits Fundamental Example Contribut Total Tax Credits Fundamental Exampted Examples Ex	Allowable De ion Attribution e.g Medical / Maximum Ex 0 50.0	Aid,Medical Expences	S		Save ancel elete Close	
			- l						
ID	Name	Description	Tax Exemption	Minimum Exempt Am Ma	ximum Exempt A E	Exempt Percentage	тс	AD	
1D 13	Name Represent Annuny F Pension Fund Contri	Description communion rearem Pension	Tax Exemption	Minimum Exempt Am Ma u 2,7 0 0 0	ximum Exempt A E	Exempt Percentage	TC 1	AD	
ID 33 15	Name Reurement Annuty F Pension Fund Contri Salary Recovery	Description common rearem Pension Recovery of salary	Tax Exemption TES YES NO	Minimum Exempt Am Ma 0 2,7 0 0 0	ximum Exempt A E 0.0 30. 0.0	Exempt Percentage 0.00000000000000000000000000000000000	TC 1	AD	
ID 53 15 16	Name Reurement Annuny F Pension Fund Contri Salary Recovery Funeral Assurance	Description Commonion reinem Pension Recovery of salary Payment of Fiuneral	Tax Exemption YES NO NO	Minimum Exempt Am M. 0 0 0 0 0 0 0 0 0	ximum Exempt A E 00 30 30 0.0 0.0 0.0	Exempt Percentage 0.00000000000000000000000000000000000	TC 1 0 1 0 0 0 0	AD	
ID 53 15 16 19 18	Name Reurement Annulty F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper	Description Contribution retirem Pension Recovery of salary Payment of Fiuneral Supper	Tax Exemption TES YES NO NO NO	Minimum Exempt Am Ma u 2,7 0 0 0 0 0 0 0 0 0 0 0 0	ximum Exempt A E 0.0 30 0.0 0.0 0.0 0.0	Exempt Percentage U.O.O.O.O D.O.O.O.O.O D.O.O.O.O.O.O.O.O.O	TC 1 0 1 0 0 0 0 0 0	AD	
ID 33 35 36 39 38 37	Name Reurement Annuny F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper Canteen	Description Contribution rearem Pension Recovery of salary Payment of Fluneral Supper Food for employees	Tax Exemption TES YES NO NO NO NO	Minimum Exempt Am., U M. 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ximum Exempt A 30 0.0 0.0 0.0 0.0 0.0 0.0	Exempt Percentage 0 .0 0 0 0 0 0 0 0 0 0 0 0 0 0	TC 1 0 1 0 0 0 0 0 0 0 0 0 0	AD	
ID 33 35 36 39 38 38 37 34	Name Retirement Annuny F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper Canteen Loan	Description Commoun rearem Pension Recovery of salary Payment of Fiuneral Supper Food for employees Loans to employees	Tax Exemption YES NO NO NO NO NO	Minimum Exempt Am M v Z,r 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ximum Exempt A E 30. 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0	Exempt Percentage 0.0 0 0.0	TC 1 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0	AD	
ID 33 35 36 39 38 39 38 39 38 37 34	Name Reunement Annung F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper Canteen Loan Arrears Pension Con	Description commoun reurem Pension Recovery of salary Payment of Fiuneral Supper Food for employees Loans to employees Arrears on pension p	Tax Exemption TES YES NO NO NO NO YES	Minimum Exempt Am Mail 0 0 2,7 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 1,8	ximum Exempt A 30. 0.0 0.0 0.0 0.0 0.0 0.0	Exempt Percentage 0.0 0 0 0.0 0 0.	TC 1 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0	AD	

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Account Category

Name Description Medical Aid Deduction Medical aid for employees				Apply Tax Credits Employee Contribution	Allowable Deductions			Save
Account Medical	t Category Il Expences Credit			100% Employer Contribution Minimum Exempt Amount	e.g Medical Aid,Medical E Maximum Exempt Amoun 0	xpences t		Cancel Delete Close
				Exempt Percentag	5			
ID 13	Name Representationality F	Description	Tax Exemption	Minimum Exempt Am Maximum Exempt Am	xempt A Exempt Percer	ntage TC		
1D 3	Name Reurement Annuny F Pension Fund Contri	Description common rearem Pension	Tax Exemption TES YES	Minimum Exempt Am Maximum Ex 0 2,700 0 0	xempt A Exempt Percer 0.0 30.0	ntage TC	AD	
ID 3 5 6	Name Retirement Annuity F Pension Fund Contri Salary Recovery	Description commoutor retirem Pension Recovery of salary	Tax Exemption TES YES NO	Minimum Exempt Am Maximum Exempt Am 0 0 0 0 0 0	xempt A Exempt Percer 0.0 30.0 0.0	ntage TC 0 0	AD 1 1 0	
ID 3 5 6 9	Name Retirement Annung F Pension Fund Contri Salary Recovery Funeral Assurance	Description Commoutor retirem Pension Recovery of salary Payment of Fiuneral	Tax Exemption YES YO NO	Minimum Exempt Am Maximum Exempt Am 0 0 0 0 0 0 0 0 0 0	xempt A Exempt Percer 0.0 30.0 0.0 0.0	ntage TC 0 0 0 0	AD 1 0 0	
ID 3 5 6 9 8	Name Representation Fund Contri Salary Recovery Funeral Assurance Overtime Supper	Description commouson rearem Pension Recovery of salary Payment of Fiuneral Supper	Tax Exemption YES YES NO NO NO	Minimum Exempt Am Maximum Exempt Am 0 0 0 0 0 0 0 0 0 0 0 0 0 0	xempt A Exempt Percer 0.0 30.0 0.0 0.0 0.0 0.0	ntage U TC 0 0 0 0 0 0	AD 1 1 0 0 0	
ID 3 5 6 9 8 7	Name Reurement Annuny F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper Canteen	Description commousion rearern Pension Recovery of salary Payment of Fiuneral Supper Food for employees	Tax Exemption YES NO NO NO NO	Minimum Exempt Am Maximum Exempt Am 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	xempt A 30.0 0.0 0.0 0.0 0.0 0.0	ntage 0 0 0 0 0 0 0 0	AD 1 1 0 0 0 0 0	
ID 3 5 6 9 8 7 4	Name Retirement Autouty F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper Canteen Loan	Description commount rearem Pension Recovery of salary Payment of Fluneral Supper Food for employees Loans to employees	Tax Exemption TES VES NO NO NO NO NO	Minimum Exempt Am Maximum Exempt Am 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	xempt A Exempt Percer 0.0 0.0 0.0 0.0 0.0 0.0 0.0	ntage 0 0 0 0 0 0 0 0 0 0	AD 1 1 0 0 0 0 0 0 0 0	
ID 3 5 6 9 8 7 4 1	Name Reurement Annuny F Pension Fund Contri Salary Recovery Funeral Assurance Overtime Supper Canteen Loan Arrears Pension Con	Description Contribution rearem Pension Recovery of salary Payment of Fluneral Supper Food for employees Loans to employees Loans to employees p Arrears on pension p	Tax Exemption YES NO NO NO NO YES	Minimum Exempt Am Maximum Exempt Am 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 1,800	xempt A Exempt Percer 30.0 0.0 0.0 0.0 0.0 0.0 0.0 8.0	ntage 0 0 0 0 0 0 0 0 0 1	AD 1 1 0 0 0 0 0 0 0 0 0 0	

Ensure that account category as Medical Expences

Select the selections under Apply Tax Credits as shown above

- Employee Contribution
- 100% Employer Contribution e.g, Medical Aid, Medical Expenses
- The credit for this category is a total of 50% for "medical expenses" paid for. To apply Medical Aid contribution tax credits > select the tick box next to Apply Tax Credits. Under Exempt Percentage(%) enter number 50. Click Save

Name Medical	Aid Deduction Media	Description Deduction Medical aid for employees		Apply Tax Credits Employee Contril On 100% Employer (Allowable	e Deductions cal Aid,Medical Expend	ces		Save Cancel
Account Medical	Category Expences Credit		•	Minimum Exempt Amoun	nt Maximur 0 50.0	n Exempt Amount			Delete Close
ID 33 35	Name Retirement Annuity F Pension Fund Contri Salary Recovery	Description Commonutor retrem Pension Recovery of salary	Tax Examplion TES Payline Payro YES	Minimum Exampt Am	X X	Exempt Percentage 0.0 30.0 0.0	TC 0 0	AD 1 0	
36		Roymont of Fiunoral	NO Re	cord Saved Successfully		0.0	0	0	
36 39 38 37 34	Funeral Assurance Overtime Supper Canteen Loan	Supper Food for employees Loans to employees		OK		0.0 0.0 0.0	0 0 0 0	0 0 0 0	_=



1.2 Defining Scheme Providers

To define the Medical Aid Scheme providers in the system this is accessed by the menu **Payroll Definitions>Scheme Providers.**

Once the window for defining scheme providers has opened, select the Deduction Type "**Medical Aid Deduction**". Enter the scheme provider under "**Scheme Provider Name**" e.g. CIMAS and click **Save**.

Maintain Scheme Providers		_		×	
Deduction Type Medical Aid Deduc 💌	Sch CIM	eme Provi	der Nar	ne	
Save Cancel Providers ID De 1 Medica	duction Type al Aid Deducti	Scheme PSMAS	ose Provide	er	
3 Medica 4 Funera 5 Funera	al Aid Deducti al Assurance al Assurance	Generatior Nyaradzo Doves	nal Heal	th	
Edit Record					

After you save the Scheme Provider Name records saved will appear.

1.3 Defining Employee Dependant

To define the Employee Dependants in the system this is accessed by the menu Payroll Definitions>Employee Data Definitions > Employee Dependents Types.

To enter a dependent click below **Copayment Dependent** enter the type of dependent e.g Self, Mother. Once the dependent type has been entered click save to and the dependent will appear in the list below.



Self		<u> </u>		
Save	Cancel	Delete	Close	
Dep	endent	Use	rID	
Father		postgres		
Mother		postgres		
Children		postgres		
Nephew		postgres		
Spouse		postgres		
Niece		postgres		
Aunt		postgres		

1.4 Medical Aid Deduction Co-Payments

To allocate the Medical Aid the Employee Dependants in the system this is accessed by the menu Employee Data>Co-Payments



🔬 Co-Payments				- 🗆 ×
Monthly Gertnightly Gerthightly		r Scheme-		
• Monally • Forangilay • Weekly				
First Name	Search	CoPayments	Active	-
Employee Code First Name Last Name 1 Sarina Mortimer 5 Ebonie Knott 6 Raya Maynard 2 Rodger Brogdon 3 Mabel Shifflett 7 Victor Stanton	 National ID 23-12-3456790 23-1234-G45 12345678 12-234444-D34 12-2097ww 	System ID Scheme Nu 5 890 2 123	I Deduction Scheme Arrears Pe Medical Aid PSMAS	Pr Start Date 2020-09-01 2020-06-01
Edit Record 2	Detail ID			
New Scheme/Update Scheme				
Employee Code	Employ	yee Victor		
Deduction Type Medical Aid Ded	ucti 🔻 32 Status	Active		
Scheme Provider PSMAS	- Schem	ne Name Parents S	cheme	
Scheme Number 123				
Start Date June 1, 2020	End Da	ate January 1	, 2999	
Scheme Details Copayment Father V Emplo	yee Amount	Employer Amo	Active	▼ Commit
Employee Code System ID		wment Employee Amou	at Employer Amount	Activo
7 2 4	Father	100	100 A	ctive
7 2 6	Children	50	50 A	ctive
7 2 5	Mother	100	100 A	ctive
	Save Cancel	Delete Close		

Select Employee as shown above. In the section labelled **Edit Records** select the Deduction Type Medical Aid Deduction. Select the Scheme Provider from the previously defined . Enter Scheme Name and Scheme Number. In the section for Start Date enter the date the scheme was started.

1.5 Scheme Details

In the Scheme details section you will select the dependant type to receive the **Copayment** e.g. Father, Mother or in the case of the employee select Self. Enter the amounts to be paid by the Employee in **Employee Amount** and the Employees contribution in Employer Amount. After confirming the information has been captured correctly Click Commit and Click Save. The captured **Copayment** should look similar to the below. Repeat the above steps for other dependents.

payment Fathe	r 🔻	Employee Amount	Er	nployer Amo	Activ	e 🔻 🖊	Commit
Employee Code	System ID	Detail ID	CoPayment	Employee Amount	Employer Amount	Active]
	2	4	Father	100	100	Active	1
	2	6	Children	50	50	Active	
	2	5	Mother	100	100	Active	

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Once all details are entered click save

💪 Co-Payments								- 🗆	\times
	_			Cabama					
Monthly	Fortnightly	y 🔾 Weekly		Scheme —					
First Name		S	iearch	CoPayme	ents A	ctive	•		
Employee Code 1 5 6 2 3 7	First Nam Sarina Ebonie Raya Rodger Mabel Victor	e Last Name Mortimer Knott Maynard Brogdon Shifflett Stanton	National ID 23-12-3456790 23-1234-G45 12345678 12-23444-D34 12-2097890 290qww	System I 5 2	D Scheme Nu 890 123	Deduction Schen Arrears Pe Medical Aid PSMAS	ne Pr Start Date 2020-09-01 2020-06-01		
Edit Record			Detail ID						
New Scheme/U	pdate Schem	ne							
Employee Cod	le		Payline Payr	oll	×				
Deduction Typ Scheme Provi	be ider	Medical Aid Deduc	ti 🔻 🚺 Re	ecord Saved Su	ccessfully	me	•		
Scheme Num	ber	123		OK					
Start Date		June 1, 2020	End	Date	January 1, 2	2999			
Scheme Details Copayment	Father	The second secon	ee Amount	Emplo	yer Amo	Active	e 🔻	Commit	
Employee C	code S	vstem ID	Detail ID Co	Pavment E	mplovee Amount	Employer Amount	Active		
7	2	4	Father	10	0	100	Active		
7	2	6	Childre	n 50		50	Active		
7	2	5	Mother	10	0	100	Active		
		[Save Cance	el Delete	Close				

1.6 Run Payroll

-

Run payroll and if the scheme has been defined in the appropriate payroll run it will appear in the payslip as shown below

Earnings		Deduction	
Salary	12,500.00	Arrears Pension Contribution	100.00
Accommodation	120.00	Medical Aid Deduction	250.00
Acting Allowance	200.00	NSSA Pension	24.50
* Arrears Pension Contribution Benefit	100.00	AIDS Levy	80.29
Emergency allowance	340.00	NEC Medical Contributions	187.50
Telephone Allowance	570.01	PAYE	2,676.38
		Total	3,318.67
Total Earnings	13,830.01	Net Salary	10,411.34



2 Medical Expenses Paid by Employer

Medical expenses paid for the employee by the employer are captured the same way as medical aid using the **Copayment** screen.

** For Medical expenses which are only paid by employees on their own use the *Individual Deduction* screen.

2.1 Define the Deduction to be Paid by Employee

			-	
Name Description Medical Expence 1 Employer Paid Expence Account Category Medical Expences Credit	Apply Tax Credits Employee Contribution 100% Employer Contribution Minimum Exempt Amount Exempt Percentag	Allowable Deductions on e.g Medical Aid,Medical Expences Maximum Exempt Amount		Save ancel elete Close
ID Name Description Tax Exem	nption Minimum Exempt Am Maximum	Exempt A Exempt Percentage	TC AD	
33 Reurement Annulty F., Contribution reurem., YES	0 2,700	0.0 0	1	
35 Pension Fund Contri Pension YES	0 0	30.0 0	1	
36 Salary Recovery Recovery of salary NO	0 0	0.0 0	0	
39 Funeral Assurance Payment of Fiuneral NO	0 0	0.0 0	0	
38 Overtime Supper Supper NO	0 0	0.0 0	0	_ =
37 Canteen Food for employees NO	0 0	0.0 0	0	
34 Loan Loans to employees NO	0 0	0.0 0	0	
21 Arrages Bangion Con Arrages on pangion n VES	0 1,800	8.0 1	0	
Arrears remain con Arrears on pension p rea	0	50.0 2	0	_

Ensure that the expense is defined with Apply Tax credits for all options

2.2 Capture the Tax Credits

Name	Descr	iption		Apply Tax	Credits	Allowable Deductions			Save
Medical	Expence 1 Emplo	oyer Paid Expence		Emplo	yee Contribution				ouro
				100%	Employer Contribut	ion e.g Medical Aid,Medical E	xpences	C	ancel
Accoun	It Category			Minimum Exo	mot Amount	Maximum Exampt Amoun	•		oloto
Modica	LExpanços Cradit			WIIIIIIIUIIIEXe		Maximum Exempt Amoun			Pelete
Metrica	II Experices credit			0		0		(Close
				Exempt Perce	entag	50.0			
				Exempt Perce	entag	50.0			
				Exempt Perce	entag	50.0			
ID	Name	Description	Tax-Exom	Exempt Perce	entag	n Exempt A Exempt Perce	ntage TC	AD	
5 ID	Name Pension Pana Conar Salary Recovery	Description	Tax-Exomo TEO NO	Exempt Perce	entag	n Exempt A Exempt Percer	ntage TC	AD	
1D 5	Name Pension Puna Comm Salary Recovery Funeral Assurance	Description rension Recovery of salary Payment of Fiuneral	Tax-Exomo TEO NO NO	Exempt Perce	entag	1 Exempt A Exempt Percer 30.0 0.0 0.0	ntage TC 0 0	AD 0 0	
ID 5 6 9	Pension Pana Contra Salary Recovery Funeral Assurance Overtime Supper	Description rension Recovery of salary Payment of Fiuneral Supper	Tax Examination NO NO NO NO	Exempt Perce	entag E	0.0 Exempt A Exempt Percer 0.0 0.0 0.0	ntage TC 0 0 0	AD 1 0 0 0	
ID 6 9 8 7	Name Pension Pana Contin Salary Recovery Funeral Assurance Overtime Supper Canteen	Description rension Recovery of salary Payment of Fiuneral Supper Food for employees	Tax Example NO NO NO NO	Exempt Perce	entag	0.0 n Exempt A Exempt Percer 0.0 0.0 0.0 0.0 0.0 0.0	ntage 0 TC 0 0 0 0 0 0	AD 1 0 0 0 0	
ID 6 9 8 7 4	Name Peristor Fund Contra Salary Recovery Funeral Assurance Overtime Supper Canteen Loan	Description Persion Recovery of salary Payment of Fiuneral Supper Food for employees Loans to employees	Tax-Examination NO NO NO NO NO NO	Exempt Perce	entag X	0.0 1 Exempt A Exempt Percer 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.	ntage 0 0 0 0 0 0 0	AD 1 0 0 0 0 0 0	
ID 6 9 8 7 4 1	Name Perison Fund Contrat Salary Recovery Funeral Assurance Overtime Supper Canteen Loan Arrears Pension Con	Description remain Recovery of salary Payment of Fiuneral Supper Food for employees Loans to employees Arrears on pension p.	Tax Exomo NO NO NO NO YES	Exempt Perce	entag (0.0 Exempt A Exempt Percel 0.0 0.0 0.0 0.0 0.0 0.0 0.0 0.	ntage U TC 0 0 0 0 0 0 1	AD T 0 0 0 0 0 0 0 0 0 0 0	
ID 6 9 8 7 4 1 2	Name Salary Recovery Funeral Assurance Overtime Supper Canteen Loan Arears Pension Con Medical Aid Deduction	Description Recovery of salary Payment of Fiuneral Supper Food for employees Loans to employees Arrears on pension p Medical aid for empl.	Tax Evon NO NO NO NO YES YES	Exempt Perce	ccessfully	50.0 Exempt A Exempt Percer 50.0 0.0 0.0 0.0 0.0 0.0 0.0 50.0	ntage 0 0 0 0 0 0 0 0 1 2	AD T 0 0 0 0 0 0 0 0 0 0 0 0 0	

Capture the tax credits portion with 50% as shown above or the applicable percentage on the expense as stipulated by regulations

** Ensure the account category is correct as shown above.



2.3 Process in Copayment

Process medical expenses in the **Copayment** screen. Capture the amount in the **Copayment Details** with the appropriate amounts.

≦ Co-Payments	– 🗆 X
Monthly Fortnightly Weekly	_ Scheme
First Name Search	CoPayments Active 💌
Employee CodeFirst NameLast NameNational ID1SarinaMortimer23-12-34567905EbonieKnott23-1234-G456RayaMaynard123456782RodgerBrogdon12-234444-D343MabelShifflett12-20978907VictorStanton290gww	System ID Scheme Nu Deduction Scheme Pr Start Date 5 890 Arrears Pe 2020-09-01 2 123 Medical Aid PSMAS 2020-06-01
Edit Record Detail ID	
Employee Code 7 Empl Deduction Type Medical Expence 1 Statu Scheme Provider Hospital Sche Scheme Number Start Date January 1, 2020 End E	loyee Victor us Active ame Name Hospital Treatment Date January 1, 2999
Copayment Self Employee Amount	Employer Amo Active 👻 Commit
Employee Code System ID Detail ID CoF 7 0 0 0 Self	Payment Employee Amount Employer Amount Active 450.00 .00 Active
Save Cancel	I Delete Close

2.4 Run the Payroll

Run the payroll and the system will pick up the medical expense however will not appear as a benefit as according to the Income Tax Third Schedule it is exempt from income tax

3 Medical Expenses Paid by Employee

Medical expenses paid by the employee for their own medical expense are captured as an individual deduction using the Individual Deduction screen.

3.1 Define the Deduction to be Paid by Employee



Name Description Medical Expence Empl Employee Expence Account Category Itedical Expences Credit				Allowable Deductions Employee Contribution 100% Employer Contribution e.g Medical Aid,Medical Expences Minimum Exempt Amount Maximum Exempt Amount Exempt Percentag 50.0					Save Cancel Delete Close
ID	Name	Description	Tax Exemption	Minimum Exempt Am	. Maximum Exempt A	Exempt Percentage	TC	A	D
ID 1	Name Arrears Pension Con	Description Arrears on pension p	Tax Exemption YES	Minimum Exempt Am	. Maximum Exempt A 1,800	Exempt Percentage 8.0	TC 0	A	ND
ID 1 3	Name Arrears Pension Con Retirement Annuity F	Description Arrears on pension p Contribution retirem	Tax Exemption YES YES	Minimum Exempt Am 0 0	Maximum Exempt A 1,800 2,700	Exempt Percentage 8.0 0.0	TC 0 0	0 1	ND
ID 11 13	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri	Description Arrears on pension p Contribution retirem Pension	Tax Exemption YES YES YES	Minimum Exempt Am 0 0 0	Maximum Exempt A 1,800 2,700 0	Exempt Percentage 8.0 0.0 30.0	TC 0 0 0	A	
ID 11 13 15	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery	Description Arrears on pension p Contribution retirem Pension Recovery of salary	Tax Exemption YES YES YES NO	Minimum Exempt Am 0 0 0 0	Maximum Exempt A 1,800 2,700 0	Exempt Percentage 8.0 0.0 30.0 0.0	TC 0 0 0 0	A 0 1 1 0	
ID 11 13 15 16 18	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper	Tax Exemption YES YES YES NO NO	Minimum Exempt Am 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0	TC 0 0 0 0 0 0	A 0 1 1 0 0	
ID 11 13 15 16 18 17	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper Canteen	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper Food for employees	Tax Exemption YES YES NO NO NO	Minimum Exempt Am 0 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0 0.0	TC 0 0 0 0 0 0 0	A 0 1 1 0 0 0 0	
ID 11 13 15 16 16 16 18 17 14	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper Canteen Loan	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper Food for employees Loans to employees	Tax Exemption YES YES NO NO NO NO	Minimum Exempt Am 0 0 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0 0 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0 0.0 0.0 0.0	TC 0 0 0 0 0 0 0 0	A 0 1 1 0 0 0 0 0	

Ensure that the expense is defined with Apply Tax credits for all options. Do not select 100% Employer Contribution e.g Medical Aid , Medical Expences.

3.2 Capture the Tax Credits

Name Description Medical Expence Empl Employee Expence			Apply Tax Credits Allowable Deductions Employee Contribution 100% Employer Contribution e.g Medical Aid,Medical Expences					Sav Canc	e cel	
Medica	al Expences Credit			Minimum Exempt Amo	unt Maximun	n Exempt Amount			Dele	te se
			l	Exempt recontagin						_
ID	Name	Description	Tax Exemption	Minimum Exempt Am	Maximum Exempt A	Exempt Percentage	TC		AD	
ID 31	Name Arrears Pension Con	Description Arrears on pension p	Tax Exemption YES	Minimum Exempt Am	Maximum Exempt A 1,800	Exempt Percentage	TC 0		AD	
ID 31 33	Name Arrears Pension Con Retirement Annuity F	Description Arrears on pension p Contribution retirem	Tax Exemption YES YES	Minimum Exempt Am	Maximum Exempt A 1,800 2,700	Exempt Percentage 8.0 0.0	TC 0 0	0	AD	
ID 31 33 35	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri	Description Arrears on pension p Contribution retirem Pension	Tax Exemption YES YES YES	Minimum Exempt Am 0 0	Maximum Exempt A 1,800 2,700 0	Exempt Percentage 8.0 0.0 30.0	TC 0 0 0	0 1 1	AD	•
ID 31 33 35 36	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery	Description Arrears on pension p Contribution retirem Pension Recovery of salary	Tax Exemption YES YES YES NO	Minimum Exempt Am 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0	Exempt Percentage 8.0 0.0 30.0 0.0	TC 0 0 0 0	0 1 1 0	AD	•
ID 31 33 35 36 38	Name Arrears Pension Con. Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper	Tax Exemption YES YES YES NO NO	Minimum Exempt Am 0 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0	TC 0 0 0 0 0	0 1 1 0 0 0	AD	•
ID 31 33 35 36 38 37	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper Canteen	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper Food for employees	Tax Exemption YES YES YES NO NO NO	Minimum Exempt Am 0 0 0 0 0 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0 0 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0 0.0	TC 0 0 0 0 0 0 0	0 1 1 0 0 0 0	AD	•
ID 31 33 35 36 38 38 37 34	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper Canteen Loan	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper Food for employees Loans to employees	Tax Exemption YES YES YES NO NO NO NO	Minimum Exempt Am 0 0 0 0 0 0 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0 0 0 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0 0.0 0.0	TC 0 0 0 0 0 0 0 0 0 0 0 0 0	0 1 1 0 0 0 0 0 0 0	AD	•
ID 31 33 35 36 38 37 34 39	Name Arrears Pension Con Retirement Annuity F Pension Fund Contri Salary Recovery Overtime Supper Canteen Loan Funeral Assurance	Description Arrears on pension p Contribution retirem Pension Recovery of salary Supper Food for employees Loans to employees Payment of Fiuneral	Tax Exemption YES YES NO NO NO NO NO NO	Minimum Exempt Am 0 0 0 0 0 0 0 0 0 0 0 0 0	Maximum Exempt A 1,800 2,700 0 0 0 0 0 0 0 0 0	Exempt Percentage 8.0 0.0 30.0 0.0 0.0 0.0 0.0 0.0 0.0 0.0	TC 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 1 1 0 0 0 0 0 0 0 0 0 0	AD	

Capture the tax credits portion with 50% as shown above or the applicable percentage on the expense as stipulated by regulations

** Ensure the account category is correct as shown above.

3.3 Process in Individual Deductions

Process medical expenses in the **Individual Deduction** screen. Capture the amount in the **Regular Continuous Deductions** with the appropriate amounts , start and end dates.



Individual Deductions								-		×
Search Employee		Maalub								
	ortnightiy 💛	vveekiy								
Employee Name Se	earch									
Code	Name	Surname	National ID		Code	Name				
1	Sarina	Mortimer	23-12-3456790	•	3	Mabel				
2	Rodger	Brogdon	12-234444-D34	=						
3	Mabel	Shifflett	12-2097890-R34		Edit Record					
4	Huong	Lotiin	63-789012-G45	•						
Deductions Bar Deduction Type Description Global Amount 0.00 Apply Interest Yes Interest Rate 0.0 Monthly Payment 0.0 Periodic Payroll Deduction Start Date	Sed on Global Max Arrears Pens Mor 3 No Nun Total Amount	imum Amount ion Contr ▼ 31 thiy Fee 0.00 ther of Months 0 to Be Paid 0.00 View Armotization 0.00 Status Active ▼	Regular (Deduction Type Description Monthly Paymer Start Date End Date Administration F Status	Conti E E E E E E E E E E	Annous Deductions		Exec	ute Sa Ca De Clo	ave ncel lete ose	

Once all details are entered click save

3.4 Run the Payroll

Run the payroll and the system will pick up the employee Medical Expence Employee under deductions.

Deduction (1997)	
Canteen	250.00
Medical Aid Deduction	145.00
Medical Expence Employee	250.00
NSSA Pension	24,50
AIDS Levy	291.82
NEC Medical Contributions	525.00
PAYE	9,727.42
Total	11,213.74
Net Salary	25,246.26