Harmony P (CA) - Taxable Credits Information (TD-1)

NOTE: This article only applies to Canadian Harmony customers.

Description:

You want to enter new or updated TD-1 information into the Harmony system.

Pre-Requisites:

Your employee must have provided and submitted the new or updated TD-1 information.

IMPORTANT: You can ONLY enter the additional taxable credits information that would be recorded AFTER an employee has provided YOU with the information themselves. The TD-1 form is a LEGAL document that MUST be signed by the employee and be kept on record. Intentionally incorrect information that is entered on the form is a criminal offence.

Solution:

1. Navigate to Payroll Employees > Employees.
2. Select the employee whose TD-1 information you'd like to update.
3. At the bottom of the screen are several tabbed sections. Click on the "Federal" or "(Provincial/Territorial)" tabs to add the new or updated taxation information.
   Note: There are TD-1 details available in both the "Federal" and "(Provincial/Territorial)" tabs. It is your responsibility to ensure that all required fields and information is updated.
4. Complete the required fields as necessary. Harmony will use these details for the basis of the calculation. Anything that is a rate or indicated as *"yes"* or *"no"* will be handled in the software tax updates every year.
   Note: Any adjustments that are entered manually must be updated each year when your tax tables are updated.
5. Click the save icon on the upper-right corner of the page to save your changes.

Basic Claim Amounts

These are managed by automatic software and tax table updates provided by Paymate. You will not need to update these amounts on the employee's taxation information screen yourself.

Entering Additional Taxes on TD-1

1. Navigate to Payroll Employees > Assign Payroll Category.
2. Select the employee that you want to add additional taxes to.
3. Scroll down the list of assigned payroll categories until you see *"Federal Extra Income Tax"*. By default, the payroll category code is 302.
4. Click the pencil/edit icon on the right side of the row to enter the additional credits.
5. Click the save icon to save your changes to the payroll category.
6. Click the save icon on the upper-right corner of the page to save your changes to the employee.