

Pathfinder Tax Calculation Customizations

1. Objects Modified

Object Type	Object ID	Object Name
Codeunit	37032330	Payroll Calculation

2. Code Customizations

2.1. Method: CalculateDependentTax() - Codeunit PayrollCalculation

```
LOCAL CalculateDependentTax(PayrollJnlLine : Record "Payroll Journal Line") DependentAmount : Decimal
//SSI2.0 - START
GetBracketHeader(PayrollJnlLine,FilingStatusToGetTypes::Either);
EmployeeTaxAuthInfo.RESET();
EmployeeTaxAuthInfo.SETRANGE("Employee No.", PayrollJnlLine."Employee No.");
IF EmployeeTaxAuthInfo.FINDFIRST() THEN BEGIN
    EmployeeRate.RESET();
    EmployeeRate.SETRANGE("Employee No.", PayrollJnlLine."Employee No.");
    EmployeeRate.SETFILTER("Payroll Rate Code", 'SALARY');
    IF EmployeeRate.FINDFIRST() THEN BEGIN
        BracketDetail2.RESET();
        BracketDetail2.SETCURRENTKEY(Amount);
        BracketDetail2.ASCENDING(FALSE);
        BracketDetail2.SETRANGE("Bracket Code", BracketHeader.Code);
        BracketDetail2.SETRANGE("Bracket Type Code", BracketHeader."Bracket Type Code");
        BracketDetail2.SETRANGE("Bracket Effective Date", BracketHeader."Effective Date");
        IF EmployeeTaxAuthInfo.Allowances >=4 THEN
            BracketDetail2.SETRANGE("From Allowance",4)
        ELSE
            BracketDetail2.SETRANGE("From Allowance",EmployeeTaxAuthInfo.Allowances);
        BracketDetail2.SETFILTER(Amount , '<%1',EmployeeRate.Amount);
        IF BracketDetail2.FINDFIRST() THEN
            DependentAmount := BracketDetail2."Max. Amount" * -1;
    END;
END;
//SSI2.0 - END
```

Purpose: This new method was added to calculate the additional tax amount based on the number of dependents. It identifies the appropriate tax bracket and returns the corresponding amount.

2.2.Switch Case: 500 - APPLY DEPENDENT BRKT

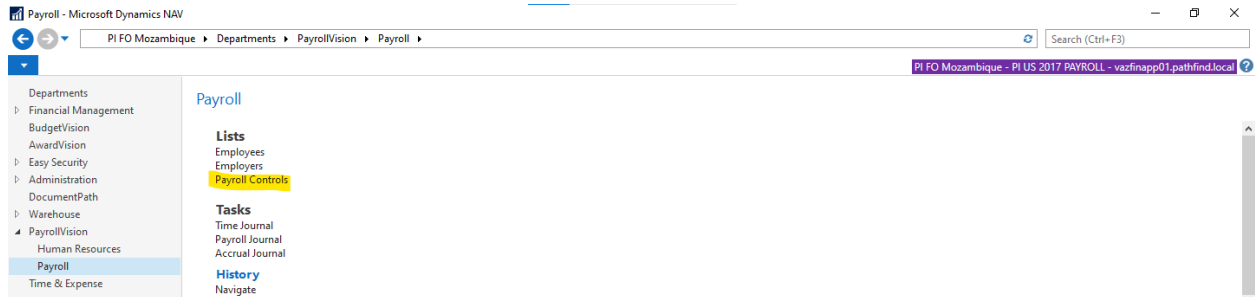
```
//SSI2.00 - START
500:    // APPLY DEPENDENT BRKT
BEGIN
    "Adjusted Amount" := CalculateDependentTax(Rec);
END;
//SSI2.00 - END
```

Purpose :This is the switch case linked to the new method step **APPLY DEPENDENT BRKT**.

3. Testing Instructions

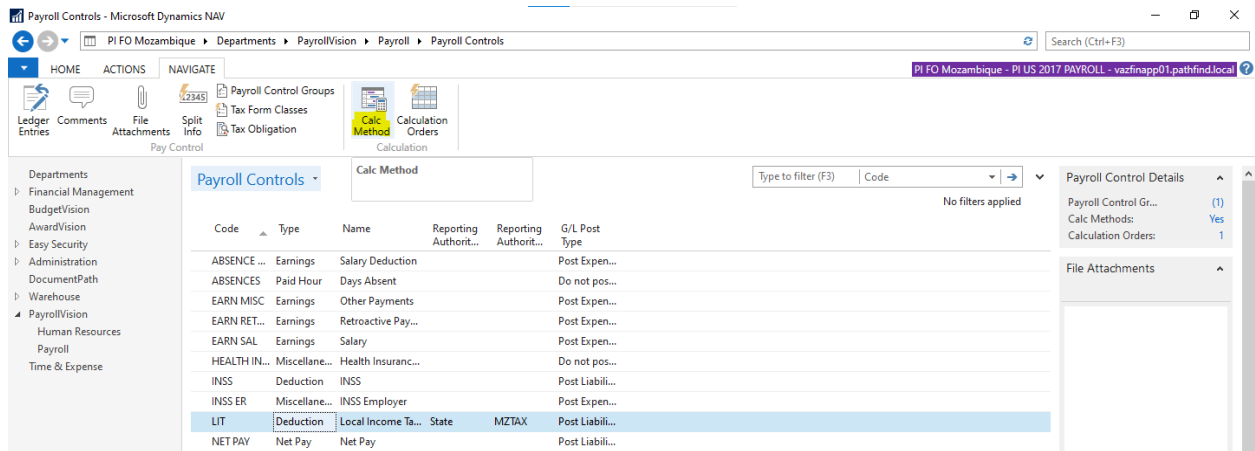
Step 1: Access Payroll Control

- Navigate to the Payroll Role Center page.
- Click on “**Payroll Controls**”



Step 2: Select the LIT Record

- Choose the LIT record.
- Click on the "**Calc Method**" action, which will redirect to the Payroll Calc Method page.



Step 3: Review the New Method Steps

- On the Payroll Calc Method page, select the last effective date.
- Click on the "**Steps**" action to view the method steps.

Edit - Payroll Calc Method - LIT - Local Income Taxes

HOME ACTIONS NAVIGATE

PI FO Mozambique - PI US 2017 PAYROLL - vazfinapp01.pathfind.local

New View List Edit List Delete Copy... Steps Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Payroll Calc Method

Type to filter (F3) Effective Date Filter: LIT

Effective Date	Description
2/2/2024	Tax Calc based on Table
2/5/2024	Tax Calc based on Table
2/6/2024	Tax Calc based on Table

- Verify that two new method steps **APPLY DEPENDENT BRKT** and **ADD ADJUSTED TO AMT** have been added to calculate brackets based on the number of dependents.

Edit - Payroll Calc Method Lines - LIT - Local Income Taxes

HOME

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New View List Edit List Delete Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Payroll Calc Method Lines

Type to filter (F3) Method Step Code Filter: LIT • 02/06/24

Method Step Code	Base Amount Code	Payroll Rate Code	Pay Structure Code	Bracket Type Code	Bracket Code	Activation Code	Comment
STOP IF TAX EXEMPT							
ADJUSTED IS TAXABLE							
APPLY TAX BRACKETS				WITHHOLDI...	MZVHSTATUS		
TEMP IS ADJUSTED							
NEGATIVE TEMP							
DEDUCTION - STANDARD				DEDUCTION	TEST DEP		
ADD ADJUSTED TO AMT							
NEGATIVE AMOUNT							
ZERO TAXABLE							
TAXABLE IS AMOUNT							
AMOUNT IS EMP RATE		TAX DEP					
ADD TAXABLE TO AMT							
NEGATIVE AMOUNT							
APPLY DEPENDENT BRKT				DEDUCTION	TEST DEPN		
ADD ADJUSTED TO AMT							

Step 5: Verify Calculations

- Navigate Back to Payroll Role Center Page and click on **"Payroll Journal"**.
- Click on the **"Calculate.."** action, which runs a report to create payroll journal lines for the employees specified.
- Verify the Payroll amount on the created journal lines.

Edit - Payroll Journal - DEFAULT: Default Journal

HOME ACTIONS NAVIGATE

PI FO Mozambique - PI US 2017 PAYROLL - vazfinapp01.pathfind.local

Delete Submit Entry Setup... Calculate... Calculate Single Employee... Preview Check Print Checks... Test Report Post Post and Print Refresh Find

Batch Name: DEFAULT Calculate...

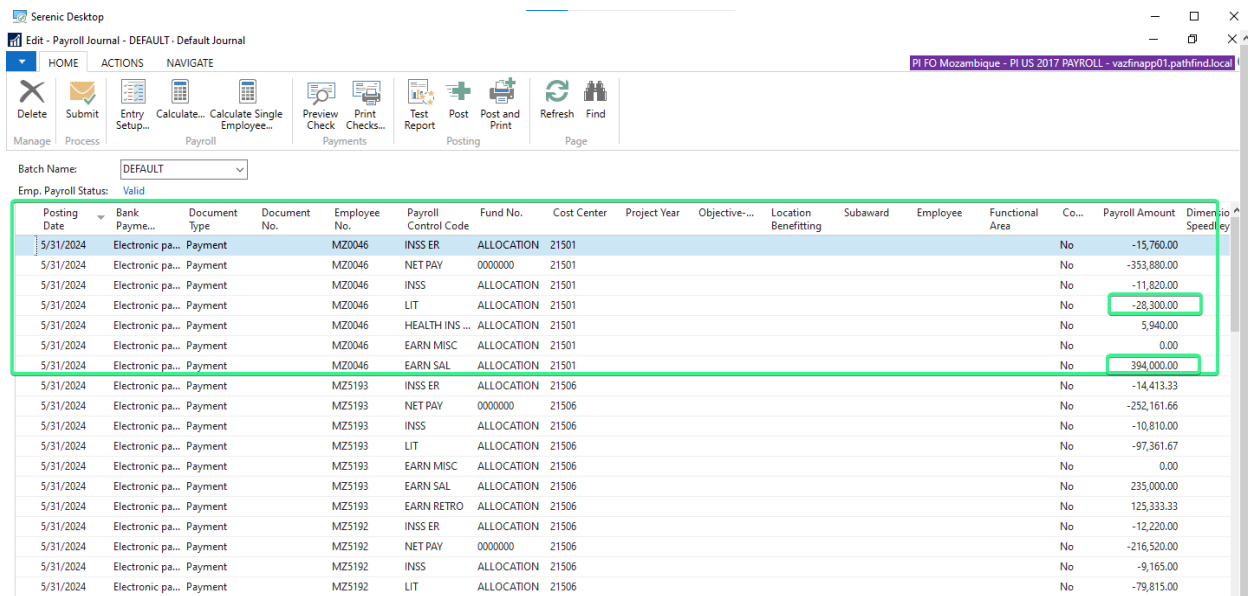
Emp. Payroll Status: Valid

Posting Date	Bank Paym...	Docum... Type	Document No.	Employee No.	Payroll Control Code	Fund No.	Cost Center	Project Year	Objective...	Location Benefiting	Subaward	Employee	Functional Area	Co...	Payroll Amount	Dimension Speedkey
5/31/2024	Electronic pa...	Payment		MZ0046	INSS ER	ALLOCATION	21501							No	-15,760.00	
5/31/2024	Electronic pa...	Payment		MZ0046	NET PAY	0000000	21501							No	-333,480.00	
5/31/2024	Electronic pa...	Payment		MZ0046	INSS	ALLOCATION	21501							No	-11,820.00	
5/31/2024	Electronic pa...	Payment		MZ0046	LIT	ALLOCATION	21501							No	-48,700.00	
5/31/2024	Electronic pa...	Payment		MZ0046	HEALTH INS ...	ALLOCATION	21501							No	5,940.00	
5/31/2024	Electronic pa...	Payment		MZ0046	EARN MISC	ALLOCATION	21501							No	0.00	
5/31/2024	Electronic pa...	Payment		MZ0046	EARN SAL	ALLOCATION	21501							No	394,000.00	
5/31/2024	Electronic pa...	Payment		MZ5193	INSS ER	ALLOCATION	21506							No	-14,413.33	

4. Screenshots

Before

This screenshot shows the system behavior prior to implementing the new tax calculation method.

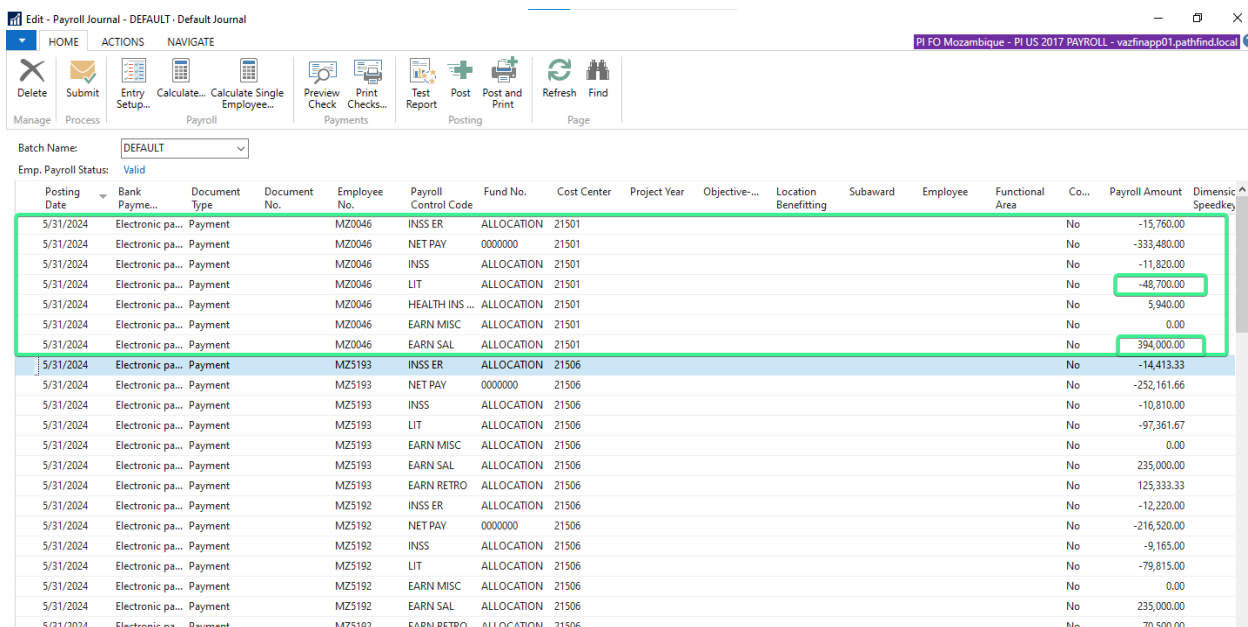


The screenshot shows the 'Edit - Payroll Journal - DEFAULT - Default Journal' window. The 'Batch Name' is 'DEFAULT' and the 'Emp. Payroll Status' is 'Valid'. The table displays payroll entries for 5/31/2024. The 'Payroll Amount' column shows a value of -38,300.00 for the entry with Employee No. MZ0046 and Payroll Control Code INSS.

Posting Date	Bank Paym...	Document Type	Document No.	Employee No.	Payroll Control Code	Fund No.	Cost Center	Project Year	Objective...	Location Benefitting	Subaward	Employee	Functional Area	Co...	Payroll Amount	Dimensio Speedkey
5/31/2024	Electronic pa...	Payment		MZ0046	INSS ER	ALLOCATION	21501							No	-15,760.00	
5/31/2024	Electronic pa...	Payment		MZ0046	NET PAY	0000000	21501							No	-353,880.00	
5/31/2024	Electronic pa...	Payment		MZ0046	INSS	ALLOCATION	21501							No	-11,820.00	
5/31/2024	Electronic pa...	Payment		MZ0046	LIT	ALLOCATION	21501							No	-38,300.00	
5/31/2024	Electronic pa...	Payment		MZ0046	HEALTH INS ...	ALLOCATION	21501							No	5,940.00	
5/31/2024	Electronic pa...	Payment		MZ0046	EARN MISC	ALLOCATION	21501							No	0.00	
5/31/2024	Electronic pa...	Payment		MZ0046	EARN SAL	ALLOCATION	21501							No	394,000.00	
5/31/2024	Electronic pa...	Payment		MZ5193	INSS ER	ALLOCATION	21506							No	-14,413.33	
5/31/2024	Electronic pa...	Payment		MZ5193	NET PAY	0000000	21506							No	-252,161.66	
5/31/2024	Electronic pa...	Payment		MZ5193	INSS	ALLOCATION	21506							No	-10,810.00	
5/31/2024	Electronic pa...	Payment		MZ5193	LIT	ALLOCATION	21506							No	-97,361.67	
5/31/2024	Electronic pa...	Payment		MZ5193	EARN MISC	ALLOCATION	21506							No	0.00	
5/31/2024	Electronic pa...	Payment		MZ5193	EARN SAL	ALLOCATION	21506							No	235,000.00	
5/31/2024	Electronic pa...	Payment		MZ5193	EARN RETRO	ALLOCATION	21506							No	125,333.33	
5/31/2024	Electronic pa...	Payment		MZ5192	INSS ER	ALLOCATION	21506							No	-12,220.00	
5/31/2024	Electronic pa...	Payment		MZ5192	NET PAY	0000000	21506							No	-216,520.00	
5/31/2024	Electronic pa...	Payment		MZ5192	INSS	ALLOCATION	21506							No	-9,165.00	
5/31/2024	Electronic pa...	Payment		MZ5192	LIT	ALLOCATION	21506							No	-79,815.00	

After

This screenshot demonstrates the updated system behavior with the new tax calculation method in place.



The screenshot shows the 'Edit - Payroll Journal - DEFAULT - Default Journal' window. The 'Batch Name' is 'DEFAULT' and the 'Emp. Payroll Status' is 'Valid'. The table displays payroll entries for 5/31/2024. The 'Payroll Amount' column shows a value of -48,700.00 for the entry with Employee No. MZ0046 and Payroll Control Code INSS.

Posting Date	Bank Paym...	Document Type	Document No.	Employee No.	Payroll Control Code	Fund No.	Cost Center	Project Year	Objective...	Location Benefitting	Subaward	Employee	Functional Area	Co...	Payroll Amount	Dimensio Speedkey
5/31/2024	Electronic pa...	Payment		MZ0046	INSS ER	ALLOCATION	21501							No	-15,760.00	
5/31/2024	Electronic pa...	Payment		MZ0046	NET PAY	0000000	21501							No	-333,480.00	
5/31/2024	Electronic pa...	Payment		MZ0046	INSS	ALLOCATION	21501							No	-11,820.00	
5/31/2024	Electronic pa...	Payment		MZ0046	LIT	ALLOCATION	21501							No	-48,700.00	
5/31/2024	Electronic pa...	Payment		MZ0046	HEALTH INS ...	ALLOCATION	21501							No	5,940.00	
5/31/2024	Electronic pa...	Payment		MZ0046	EARN MISC	ALLOCATION	21501							No	0.00	
5/31/2024	Electronic pa...	Payment		MZ0046	EARN SAL	ALLOCATION	21501							No	394,000.00	
5/31/2024	Electronic pa...	Payment		MZ5193	INSS ER	ALLOCATION	21506							No	-14,413.33	
5/31/2024	Electronic pa...	Payment		MZ5193	NET PAY	0000000	21506							No	-252,161.66	
5/31/2024	Electronic pa...	Payment		MZ5193	INSS	ALLOCATION	21506							No	-10,810.00	
5/31/2024	Electronic pa...	Payment		MZ5193	LIT	ALLOCATION	21506							No	-97,361.67	
5/31/2024	Electronic pa...	Payment		MZ5193	EARN MISC	ALLOCATION	21506							No	0.00	
5/31/2024	Electronic pa...	Payment		MZ5193	EARN SAL	ALLOCATION	21506							No	235,000.00	
5/31/2024	Electronic pa...	Payment		MZ5193	EARN RETRO	ALLOCATION	21506							No	125,333.33	
5/31/2024	Electronic pa...	Payment		MZ5192	INSS ER	ALLOCATION	21506							No	-12,220.00	
5/31/2024	Electronic pa...	Payment		MZ5192	NET PAY	0000000	21506							No	-216,520.00	
5/31/2024	Electronic pa...	Payment		MZ5192	INSS	ALLOCATION	21506							No	-9,165.00	
5/31/2024	Electronic pa...	Payment		MZ5192	LIT	ALLOCATION	21506							No	-79,815.00	
5/31/2024	Electronic pa...	Payment		MZ5192	EARN MISC	ALLOCATION	21506							No	0.00	
5/31/2024	Electronic pa...	Payment		MZ5192	EARN SAL	ALLOCATION	21506							No	235,000.00	
5/31/2024	Electronic pa...	Payment		MZ5192	EARN RETRO	ALLOCATION	21506							No	70,500.00	