



April 2009  
Tax Updates  
For Navision 2.60

April 3, 2008

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In the Budget 2009 announced on January 27, 2009, the basic personal amount, spouse or common-law partner amount and the amount for an eligible dependent were retroactively set at \$10,320 (formerly \$10,100) effective January 1, 2009. Therefore, the prorated amounts are outlined in this document.

Two updates are required prior to running your first payroll of April. The first update report inserts new TD1 values for all employees. The second update – a manual update –creates the new tax brackets.

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*This is an instruction document intended to assist clients updating tax brackets in NAV. Open Door Technology includes rates in the procedure examples but does not guarantee these rates. Clients are responsible for knowing and entering the correct rates as released by the Canada Revenue Agency (CRA).*

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## CHANGING THE BASIC PERSONAL EXEMPTION

The Basic Personal Exemption can be changed on each employee card or through the object designer.

By employee:

From the **Payroll Menu > Employees > Payroll button > Tax Info**



The screenshot shows a window titled "AH Alice Hart - Employee Tax Info" with a table containing the following data:

	Government Type	Effective Date	Province	Total Credits Claimed	
	Federal	01/01/07		8,929.00	▲
	Federal	01/01/08		9,600.00	▲
	Federal	01/01/09		10,100.00	
▶	Federal ▼	04/01/09		10,375.00	
	Provincial	01/01/07	AB	15,435.00	
	Provincial	01/01/08	AB	16,161.00	
	Provincial	01/01/09	AB	16,775.00	▼
					▼

A "Help" button is located at the bottom right of the window.

Insert a new line, select Federal or Provincial, enter the new Effective Date, select the Province, and enter the new exemption amount.

Through Object Designer:

Go to **Tools > Object Designer > Table**

Find the Employee Tax Info table, click Run.

Set the following filters:

Government Type = Federal

Effective Date = 01/01/09

For each record, create a new record by pressing F3 and using F8 to copy the line information from above, then entering the new Total Credits Claimed amount.

Repeat these steps for the Provincial Authorities.

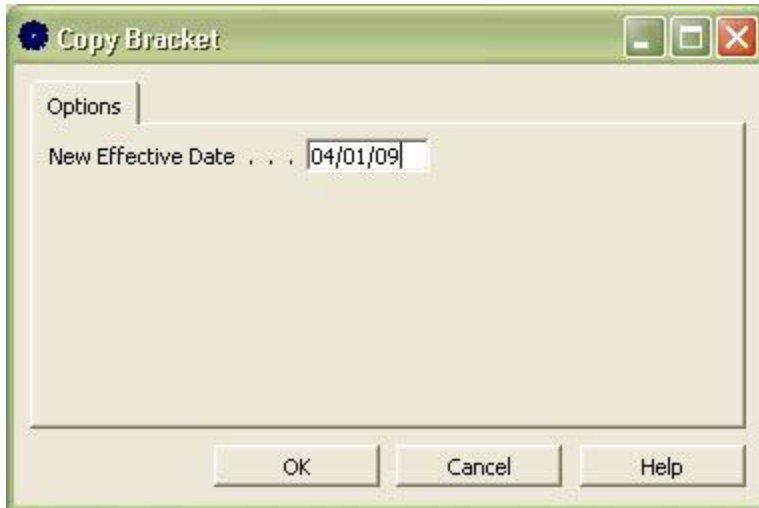
<b>Reporting Authority</b>	<b>Old Amount</b>	<b>New Amount</b>
Federal	10,100	10,375
Yukon	10,100	10,375

# ADJUSTING THE TAX BRACKETS

From the **Payroll Menu > Payroll Controls**

Select each affected Tax pay control > **Calculation button > Brackets**

Using the copy button copy, create a new bracket for each of the following with the Effective Date of April 1, 2009. After copying, remember to select the record with the April 1, 2009 Effective Date before updating the details.



You will need to update the information in the newly created brackets as follows.

## ***Federal Brackets***

### **FED TAX**

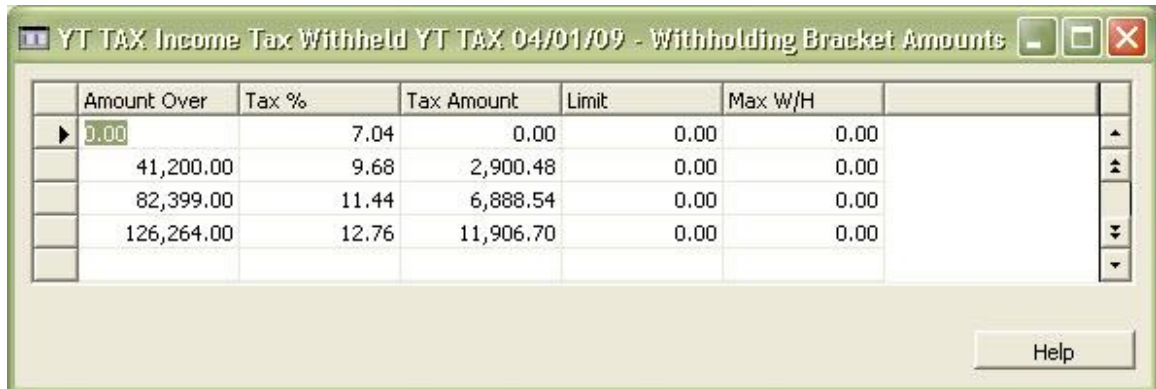
The image shows a dialog box titled 'FED TAX Income Tax Withheld FED TAX 04/01/09 - Withholding Bracket Amounts'. It contains a table with the following data:

Amount Over	Tax %	Tax Amount	Limit	Max W/H
0.00	15	0.00	0.00	0.00
41,200.00	22	6,180.00	0.00	0.00
82,399.00	26	15,243.78	0.00	0.00
126,264.00	29	26,648.68	0.00	0.00

A 'Help' button is located at the bottom right of the dialog box.

## Yukon Brackets

### YT TAX W/H



	Amount Over	Tax %	Tax Amount	Limit	Max W/H	
▶	0.00	7.04	0.00	0.00	0.00	▲
	41,200.00	9.68	2,900.48	0.00	0.00	▲
	82,399.00	11.44	6,888.54	0.00	0.00	▼
	126,264.00	12.76	11,906.70	0.00	0.00	▼

Help