

Tax Simplifier Configuration Manual



Tax Simplifier Statement

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Icons in Body Text

Icon	Meaning
	Caution
	Note
	Recommendation
	Syntax
	Example

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Typographic Conventions

Type Style	Description
<i>Example text</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Cross-references to other documentation.
Example text	Emphasized words or phrases in body text, graphic titles, and table titles.
EXAMPLE TEXT	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example text	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example text	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example text>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE TEXT	Keys on the keyboard, for example, F2 or ENTER.

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Tax Simplifier Statement

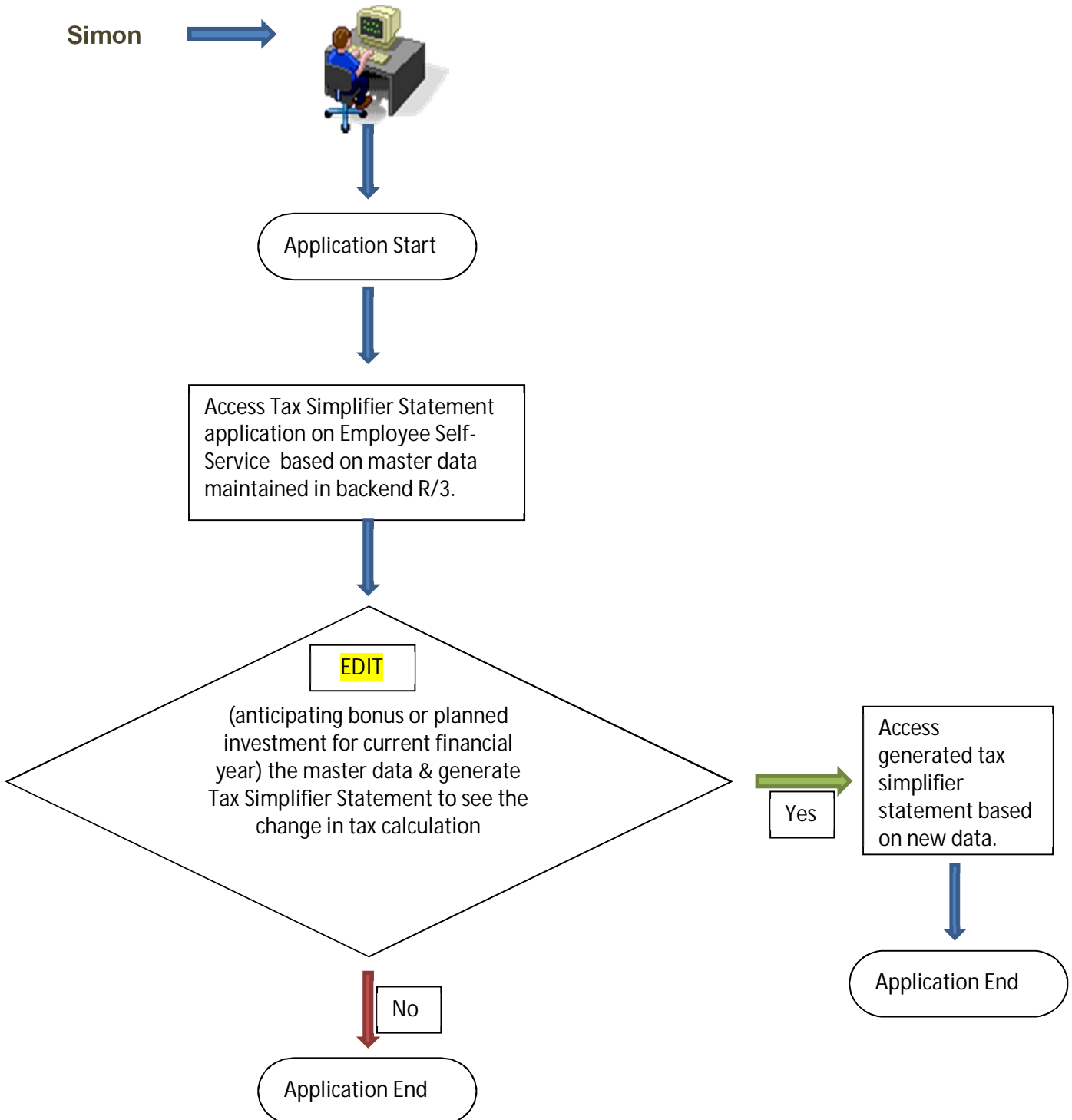
Application Overview:

Tax Simplifier Statement is an Employee Self Service application that is used to view the individual salary components and income tax projection. The aim of developing this application is to reduce the queries that come to the payroll administrator, generally at the end of the financial year from users with regard to income tax calculations.

Business Case:

Simon is a software engineer who wants to see a detailed view of all the components that comprises his salary such as pay components, exemptions, deductions, and so on. He would also like to know how his income tax would get affected based on investments that he makes for a particular financial year.

Process Flow:



Availability:

Tax Simplifier Statement Solution is available from Enhancement Package 4 & above for software component EA-HRCIN.

In case system release is on Enhancement Package 6 (EA-HRCIN: 606) the solution will be available directly.



Note

For release level 604 & 605 (Enhancement Package 4 & 5 respectively) the enterprise business function **HCM_LOC_CI_36** needs to be activated for availing this functionality.

Software Component	Release	Support Package
EA-HRCIN	604	SAPK-60442INEAHRCIN
EA-HRCIN	605	SAPK-60518INEAHRCIN

Basic Settings:

- Activation of Business Function **HCM_LOC_CI_36** (Only for EHP4 & EHP5 Release)
- In the payroll schema 'IN00' or the corresponding copy of 'IN00' within Sub-Schema 'INBD' or its corresponding copy, payroll function 'INCHD' should be inserted.

Display Schema : INBD

✎ 🔒

Cmmnd Stack

Line	Func.	Par1	Par2	Par3	Par4	D	Text
000010	COM						Basic data India
000020	BLOCK	BEG					Edit basic data
000030	ENAME						Determine name of EE (infotype 0001)
000040	INCHD						To implement changed data
000050	WPBP						Read work center/basic pay data
000060	ININI						Set FY Dates and ALGRP tables

This payroll function modifies the payroll data based on the changes made to the following sections in the Tax Simplifier Statement Solution:

- Section 80 - Deductions
 - Section 80C - Deductions
 - Income from Other Sources
 - Additional Payments
- In the payroll schema 'IN00' or the corresponding copy of 'IN00' within Sub-Schema 'INEO' or its corresponding copy, payroll function 'INEXP' should be inserted.

Display Schema : INEO						
Cmmnd <input type="text"/>						Stack
Line	Func.	Par1	Par2	Par3	Par4	D Text
000010	COM					Final processing India
000020	BLOCK	BEG				Final processing
000030	XCODI	XCD0				* Cost Distribut
000040	COPY	XLID				* Cost Distribution
000050	PITAB	L	ATAN			Import ATAN --> TAN
000060	PIT	X070	GEN	NOAB		Cancellation if IT is not empty
000070	XGP					* Global Employment Payroll
000080	SORT	RT				Sort results table
000090	ADDCU		P30			Continue cumulation wage types CRT
000100	IF		SP=B			* If Correction run
000110	ACTIO	INAI				*
000120	ENDIF					* Endif
000130	INEXP					Export salary and payroll details to mem
000140	EXPRT		IN			Export payroll acc. (DB:PCL2 / CL: IN)
000150	BLOCK	END				Final processing

This payroll function stores the Result Table (RT) values to memory. The system identifies the memory location by using a concatenation of the SAP user name and personnel number. The system reads these values from memory while processing various functionalities for India.

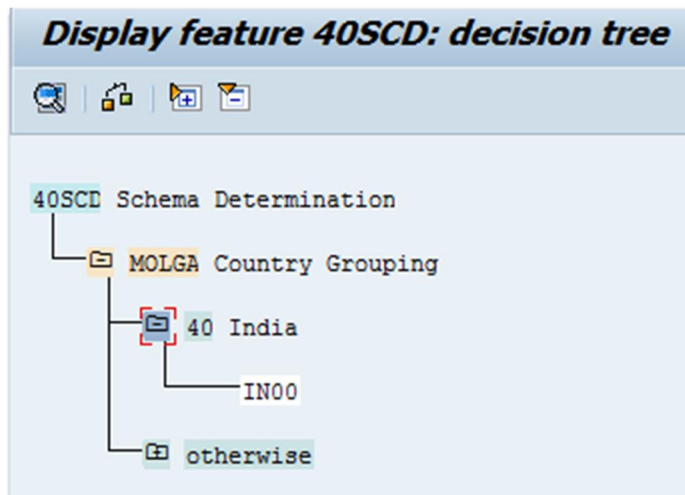
1. Customizing Configurations:

1.1 Configuration

1.1.1 Schema Determination (Feature 40SCD)

IMG Path → SPRO → Payroll → Payroll: India → Employee Self-Services (ESS) → Tax Simplifier Statement → Determine Schema for Tax Simplifier Statement

In this Customizing activity, the payroll schema used in payroll driver India can be maintained using the *Schema Determination (40SCD)* feature. The system uses the schema determined by this feature to generate the tax simplifier statement after simulating payroll.



1.1.2 Section Details (View Cluster: VC_40INF)

IMG Path → SPRO → Payroll → Payroll :India → Employee Self-Services(ESS) → Tax Simplifier Statement → Maintain Section Details for Tax Simplifier Statement

In this Customizing activity, details of the various sections, columns, lines and value determination methods that the system displays on the Tax Simplifier Statement is maintained. These details will be visible to employees in the generated PDF form in Tax Simplifier Statement application.

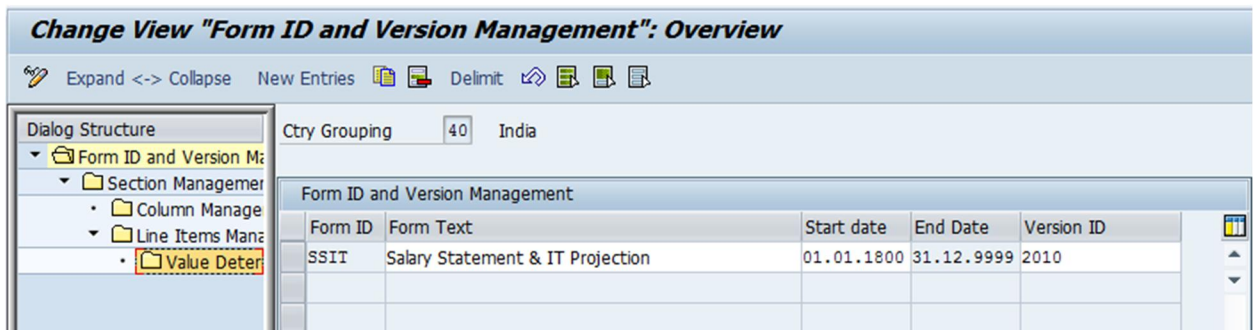
 **Note**

The entire configuration for this view cluster for sections, columns, line items & value determination are delivered as a standard configuration. The section & column details are static on the form and hence these should not be changed.

Following are the standard configuration delivered for this view cluster:

- **Form ID & Version of the salary and income tax projection statement**

You can create the *Form ID* and *Version ID* for a valid period and each of these form ids can have different sections, columns, line items and value determination method.



Change View "Form ID and Version Management": Overview

Expand <-> Collapse New Entries Delimit

Dialog Structure

- Form ID and Version Management
 - Section Management
 - Column Management
 - Line Items Management
 - Value Determination







Ctry Grouping: 40 India

Form ID	Form Text	Start date	End Date	Version ID
SSIT	Salary Statement & IT Projection	01.01.1800	31.12.9999	2010

- **Various sections in the form**

Descriptions of each section along with their respective Ids have been configured for form id 'SSIT' & version '2010'. These sections have been named as per income tax act for more relevance and resemblance to Form 16 which makes it easier for employees to understand the tax components. For example, Salary as per Provisions Contained u/s 17(1), Exemptions u/s 10 etc.

Change View "Section Management": Overview

New Entries      





Dialog Structure

- Form ID and Version Management
 - Section Management
 - Column Management
 - Line Items Management
 - Value Determination

Ctry Grouping: 40 India

Form ID: SSIT Salary Statement & IT Projection

Version ID: 2010

Section Management		
Section ID	Info	Section Text
1		Salary and Income Tax Summary
2		Salary as per Provisions Contained u/s 17(1)
3		Value of Perquisites
4		Profits in lieu of Salary u/s 17(3)

- Columns in each section**

For each of the section details configured in previous step, different column id and their respective text have been maintained. These columns will appear in the *Tax Simplifier Statement* under each section head. For example, Till Date Value, Remaining etc.

Change View "Column Management": Overview

New Entries

Dialog Structure

- Form ID and Version Management
 - Section Management
 - Column Management
 - Line Items Management
 - Value Determination








Country grouping	40	India
Form ID	SSIT	Salary Statement & IT Projection
Section ID	2	Salary as per Provisions Contained u/s 17(1)
Version ID	2010	

Column ID	Column Text
1	Components
2	Till Date Value
3	Current Value
4	Remaining
5	Total for the year
6	Exemptions

- Line items for the corresponding sections**

Line Items can be configured for a particular section as per the business requirement. As a standard delivery from SAP, the basic line items for each section has been delivered. For example, Basic Salary, Fixed DA, etc.

Change View "Line Items Management": Overview

New Entries       

Dialog Structure

- Form ID and Version Management
 - Section Management
 - Column Management
 - Line Items Management
 - Value Determination

Ctry Grouping: 40 India
 Form ID: SSIT Salary Statement & IT Projection
 Section ID: 2 Salary as per Provisions Contained u/s 17(1)
 Version ID: 2010

Line Items Management	
Line Item	Line Item Text
1	Basic Salary
2	Fixed DA
3	Variable DA
4	Conveyance Allowance
5	House Rent Allowance
6	Leave Travel Allowance
7	Children Education Allowance
8	Children Hostel Allowance
9	Uniform Allowance
11	Medical Insurance
12	Bonus
13	Previous Employment Salary u/s 17(1)
14	Leave Encashment
15	Notice Pay
16	Gratuity Received
17	Superannuation amount
18	Voluntary Retirement

- **Maintain methods using which the system determines the values of all columns in a corresponding line item**

In this customizing activity, the methods for determining the values of different line items are defined.

As a standard delivery the methods have been delivered with standard payroll wage types, evaluation class and function modules for each of these line items.

 **Note**

In case customers have their own wages types for determining the pay structures and also have different evaluation class & specifications, the same can be configured in this step to show the payroll data consistently.

Customer specific function modules can also be configured for determining the value.

The option of **CRT & RT** payroll cluster tables is available as a part of configuration for arriving at current & till date values.



Example

In the example below, we will see the sample configuration for determining **House Rent Allowance (HRA)** values for section **Salary as per Provisions Contained u/s 17(1)** for different columns.

Ctry Grouping	40	India
Form ID	SSIT	Salary Statement & IT Projection
Section ID	2	Salary as per Provisions Contained u/s 17(1)
Line Item	5	House Rent Allowance
Version ID	2010	

Column ID	Column Text	Num...	Method	Table	Field	Wage Ty...	Evaluation	Specification	Function Module	Operation
2	Till Date Value	1	Evaluation Class	Cumulative Results Table	Amount		6	05		Subtract
2	Till Date Value	2	Evaluation Class	Results Table	Amount		6	05		Add
3	Current Value	1	Evaluation Class	Results Table	Amount		6	05		Add
4	Remaining	1	Evaluation Class	Results Table	Amount		6	05		Multiply
4	Remaining	2	Wage Type	Results Table	Rate	/401				Add
6	Exemptions	1	Wage Type	Results Table	Amount	/4E4				Add

Here, as per configuration the system determines first the till date value.

- CRT - RT
- The evaluation class '6' and specification '05' values from CRT is first determined in sequence number '1' for column id '2' and operation 'Subtract' is used to get the difference after reading values for evaluation class 6 and specification '05' from RT in sequence number '2'.
- To get the current value which is column id '3' again the evaluation class '6' & specification '05' value from RT is determined.
- For Remaining period, the current value is being multiplied with projection factor wage type '/401'.
- Exemption wage type '/4E4' value gives the data for column id '6'.

1.1.3 Maintain Additional Payments Details

This customizing activity is used to maintain additional payment details that the system uses for display on the Tax Simplifier Statement. For example, bonus payments.

Change View "Additional Payments Configuration": Overview

Expand <-> Collapse New Entries Delimit

Country Grouping 40 India

Payment Type	Additional Payment Text	Start date	End Date	Wage Type	Wage Type Long Text	Unit Based	Currency	Unit
0001	Annual Bonus	01.04.2010	31.12.9999	B101	Bonus - Regular	<input type="checkbox"/>	INR	
0002	Referral Bonus	01.04.2010	31.12.9999	B101	Bonus - Regular	<input type="checkbox"/>	INR	

2. Business Add Ins

2.1 BAdI: Get Additional Payments

BAdI Definition : HRESSIN_FILTER_ADDPY

IMG Path → SPRO → Payroll → Payroll :India → Employee Self-Services(ESS) → Tax Simplifier Statement → BAdI: Get Additional Payments

This Add-In can be used to modify the standard derivation of *Additional Payments Configuration* (V_T77WWW_INFAP) table view.

This Add-In enables you to filter the additional payment details based on specified personnel number and system date.

- Importing parameters

Parameter	Associated Type	Description
IFD_PERNR	PERNR_D	Personnel Number
IFD_EDATE	SY-DATUM	Current Date of Application Server

- Changing parameters

Parameter	Associated Type	Description
CTB_APTYP	PIN_TT_ADDPY_TYPE	Table type for Additional payment

2.2 BAdI: Fetch Current Salary & Previous Form 16 Document

BAdI Definition : HRESSIN_GET_DOCUMENT

IMG Path → SPRO → Payroll → Payroll :India → Employee Self-Services(ESS) → Tax Simplifier Statement → BAdI: Fetch Current Salary & Previous Form 16 Document

This Add-In enables you to fetch the following documents for the current financial year:

- Form 16 of the employee from the previous employment
- Documents related to appraisals - offer letter in case of no appraisal
- Importing parameters

Parameter	Associated Type	Description
IFD_PERNR	PERNR_D	Personnel Number
IFD_EDATE	SY-DATUM	Current Date of Application Server
IFD_DOTYP	PIN_FORMS	Form ID

- Exporting parameters

Parameter	Associated Type	Description
EST_PDFOP	FPFORMOUTPUT	Form Output (PDF, PDL)

2.3 BAdI: Fetch Customer Specific Payslips

BAdI Definition : HRESSIN_GET_PAYSLIP

IMG Path → SPRO → Payroll → Payroll :India → Employee Self-Services(ESS) → Tax Simplifier Statement → BAdI: Fetch Customer Specific Payslips

This Add-In enables you to fetch customer specific pay slips that the system uses to generate the salary and income tax statement.

- Importing parameters

Parameter	Associated Type	Description
IFD_PERNR	PERNR_D	Personnel Number
IFD_DATUM	SY-DATUM	Current Date

- Changing parameters

Parameter	Associated Type	Description
ETB_PAYDATA	PIN_TT_PDFCT	PDF content
