

# User Guide

Submit Employment Income Records at myTax Portal (Online Application)

(Auto-Inclusion Scheme)

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## About Submit Employment Income Records at myTax Portal

- 1. Submit Employment Income Records at myTax Portal (Online Application) allows employers to prepare and submit their employees' income information online.
- 2. It is suitable for employers who:
  - Do not have a compatible payroll system (e.g. employers recording payroll manually)
  - Have to <u>make amendments</u> to submitted records
  - Have registered for the CPF Data Link-up Service, which allows income details of your NRIC employees to be obtained from CPF Board and pre-filled.

# Hardware and Software Requirements

Ensure your computer fulfils the minimum hardware/ software requirements:

#### Operating system

- Windows 7 and above
- MAC OS X 10.7 and above
- Java Runtime Environment 7 and above.

## Hardware requirements

- Pentium 4 PC and above with 2 GB RAM (recommended)
- 512Kbps speed Broadband with connection to a local ISP

### <u>Browser</u>

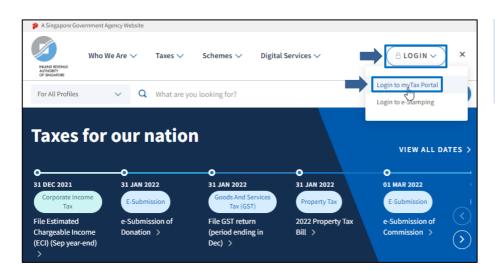
- Internet Explorer 6.0 and above
- Mozilla Firefox 18.0 and above
- Google Chrome 24 and above
- Safari Browser 4.0 to 5.1.3, and 5.1.7 and above

Please ensure that you have enabled Java and JavaScript for your Browser.

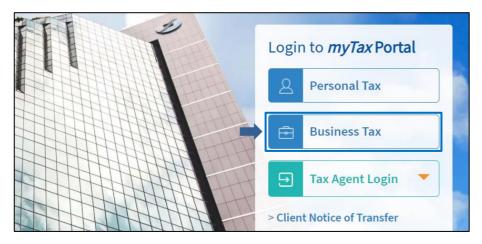
# Step 1: Access Submit Employment Income Records

1. Access Submit Employment Income Records 2. Preparation 3. Submission

Before accessing Submit Employment Income Records, ensure that the authorisation for the "SUBMISSION OF EMPLOYMENT INCOME RECORDS" e-Service is completed via Corppass. Learn how to authorise staff via the Corppass systems.

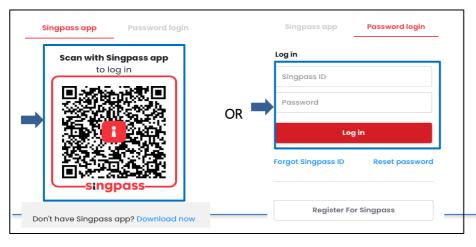


- At IRAS' Website https://www.iras.gov.sg,
- Select <LOGIN>.
- Click <Login to myTax Portal>.



#### At myTax Portal,

Select Log in for <Business Tax >.



#### Login using:

- Singpass App, or
- Password login

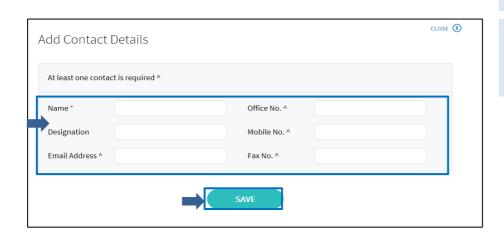




- Mouse over to <EMPLOYERS>.
- Click <Submit Employment Income Records>.

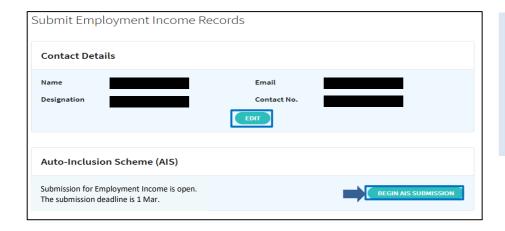
#### Note:

Only staff who has been authorised with the "Approver"(AP) or "Preparer"(PR) role for SUBMISSION OF EMPLOYMENT INCOME RECORDS at the <u>Corppass</u> will be able to view the Employers tab and the link.



Employers logging in for the first time will need to update their contact details:

- Fill in the particulars.
- Click <SAVE>.



 Click <BEGIN AIS SUBMISSION> to begin.

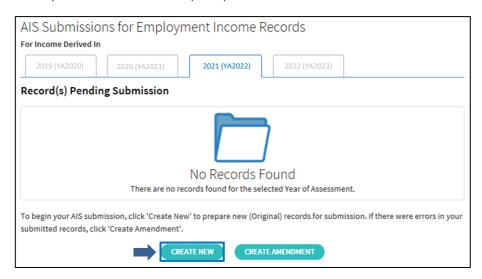
#### Note:

For existing employers, ensure that the contact person's details are correct so that you can receive our latest AIS communication.

## Step 2: Preparation – Create Employee Records

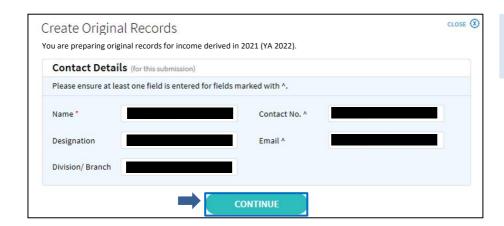
1. Access Submit Employment Income Records 2. Preparation 3. Submission

If you have signed up for the CPF Data Link-up Service, refer to <u>page 9</u> "For employers who have signed up for CPF Data Link-up Service" section on steps to proceed.

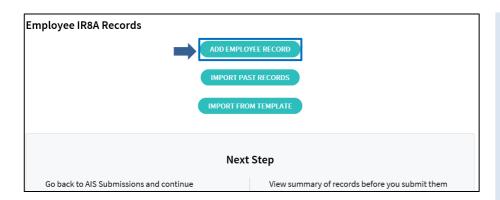


By default, the current year is selected. E.g. For employers logging in to myTax Portal in the year of 2022, the default year selected will be 2021 (Year of Assessment 2022). Ensure that the correct year is selected.

Click <CREATE NEW> to add new (Original) record for submission.



 Change the contact details for this submission where necessary and click <CONTINUE>.



At Employee IR8A Records,

- Click <ADD EMPLOYEE RECORD> to create employees' IR8A records;
- Click <IMPORT PAST RECORDS> to import employees' personal particulars from past submitted submissions records;
- Click <IMPORT FROM TEMPLATE> to import employees' IR8A records from an excel template.

#### Note:

For details on how to add employee records, refer to <u>page 14</u> of this user guide.

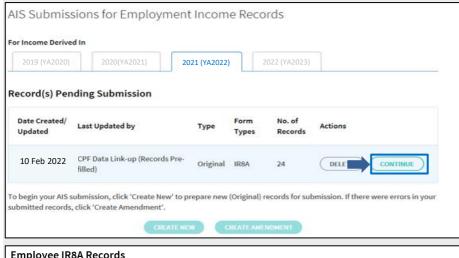
For details on how to import from template, refer to <u>page 10</u> of this user guide.

Access Submit Employment Income Records

2. Preparation

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## For employers who have signed up for CPF Data Link-up Service



Click <CONTINUE> to proceed.

#### Note:

Only NRIC employees' data which is e-Submitted via EZPay to CPF Board will be pre-filled into the Submit Employment Income Records at myTax Portal (Online Application).

The pre-filled data from CPF Data Linkup Service cannot be recovered once it has been deleted at myTax Portal.



- The list of employee record(s) will be shown.
- Click <EDIT> to adjust the amounts or particulars of the employee where necessary.

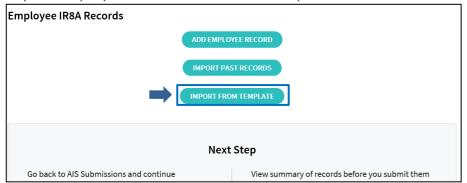
### What do you have to do before submitting the data to IRAS?

- Verify the displayed information
- Adjust the amounts into the correct classification (e.g. Allowances) and create supporting appendices where necessary.
- Add on information not obtained from CPF Board (e.g. Foreign Employees' Records, Director's Fees, etc.) and allowable deductions (e.g. Donations to Community Chest) where necessary.

For more information on the data obtained via the CPF Data Link-up Service, refer to IRAS' website.

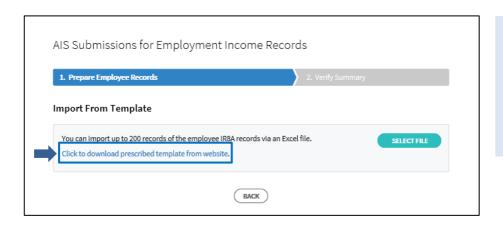


## Import Employee IR8A Records from Template

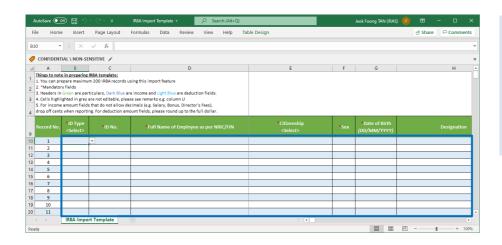


If you want to import the employees' IR8A records from Excel,

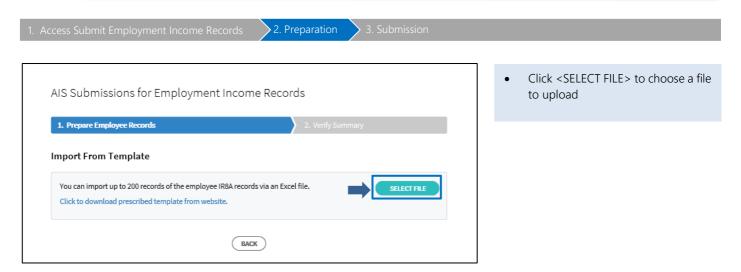
• Click <IMPORT FROM TEMPLATE> at Employee IR8A Records.

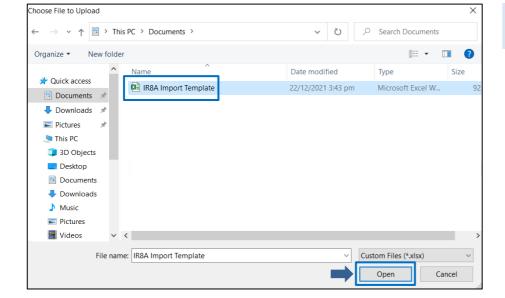


 Click <CLICK TO DOWNLOAD PRESCRIBED TEMPLATE FROM WEBSITE> to download the "IR8A Import template" at Other Submission Methods > Submission via myTax Portal or PAT System table.

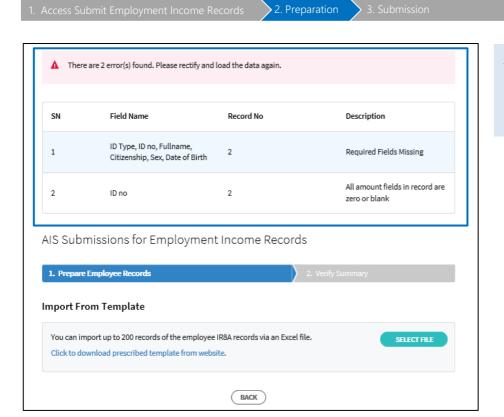


 You can prepare/ import up to a maximum of 200 IR8A records per upload from template.
 If there are more than 200 records, prepare in a separate template.
 Ensure that all required fields have been filled before uploading.



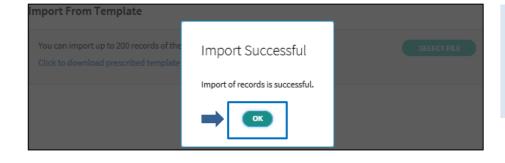


- Select the relevant file for import.
  - Click <Open>



#### If there are errors detected

Errors will be listed as shown. Rectify the error(s) within your IR8A template file before you click <SELECT FILE> to upload the revised file.



### If there are no errors

The page will display the <Import Successful> message prompt.

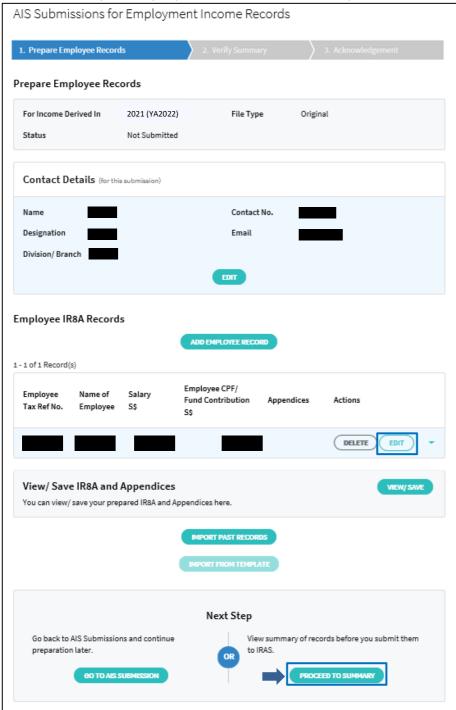
• Click <OK> to proceed.

Access Submit Employment Income Records

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## View Summary of Employee Records Created/Imported



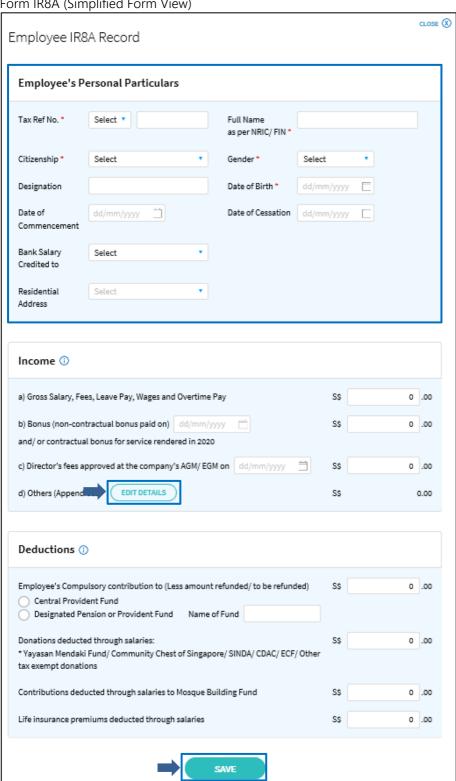
- Click <PROCEED TO SUMMARY> to proceed to the next step.
  - Other functions in the Prepare Employee Records page:
  - <EDIT> under contact details section: Edit contact details.
- <ADD EMPLOYEE RECORD>: Add another employee record. You are allowed to create up to 200 records in each submission.
- <DELETE> under the Employee IR8A records: Delete an employee record.
- <EDIT> under the Employee IR8A records: Edit an employee record to include supporting forms or update information.
- <VIEW/ SAVE>: Print Form IR8A and Appendices. For more details, refer to page 18 of this user guide.
- IMPORT PAST RECORDS>: Import employees' personal particulars from your past submissions submitted via Submit Employment Income Records at myTax Portal (Online Application).
- <IMPORT FROM TEMPLATE>: Import employees' IR8A records via an excel template. This option will be disabled once there are draft Employee records pending submission.

2. Preparation

3. Submission

## Add/ Edit Employee Record

Form IR8A (Simplified Form View)



- Enter employee's details in the Form IR8A.
- Click <EDIT DETAILS> to display and enter other income information and appendices if necessary.
- Click <SAVE>.

Access Submit Employment Income Records

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### Form IR8A (Full Form View)



Select the different tabs to prepare for Form IR8S, Appendix 8A and Appendix 8B.

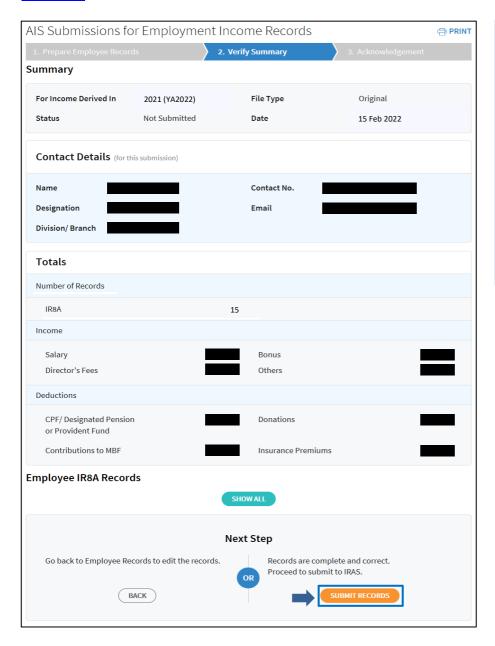
- Form IR8S for Excess CPF Contributions.
- o Appendix 8A for Benefits-In-Kind.
- o Appendix 8B for Share Option Gains

## Step 3: Submission

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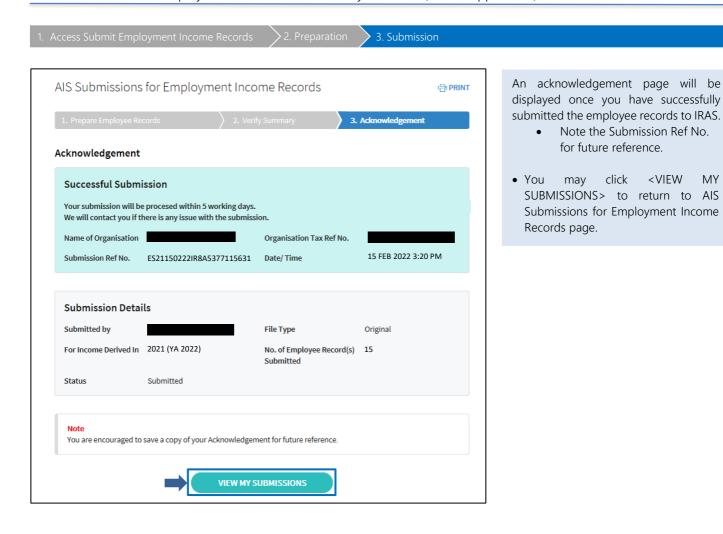
Only staff who has been authorised with the 'Approver' role at the <u>Corppass</u> can submit the employment income information to IRAS electronically.

If the 'SUBMIT RECORDS' button is disabled within Submit Employment Income Records at myTax Portal (Online Application), it means that you have been authorised with the 'Preparer' role. A 'Preparer' can prepare employee records but does not have the authorisation to submit the records to IRAS electronically. To edit your authorisation role, refer to the <u>Authorisation</u> User Guide.



Verify the information in the summary before proceeding with your submission.

- Click <SUBMIT RECORDS> to submit records to IRAS.
  - Other functions in the Summary page:
- o <PRINT>: Print summary page.
- SHOW ALL>: Show all employee records created.
- <BACK>: Go back to employee records to edit the records.



How to view submitted information?

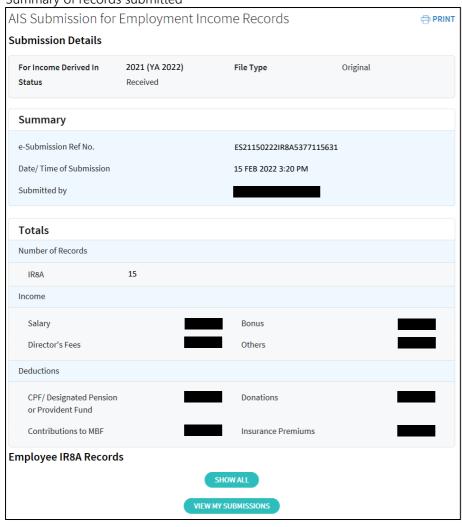


 To view more details on the submission, click <VIEW> at the AIS Submissions for Employment Income Records. . Access Submit Employment Income Records

2. Preparation

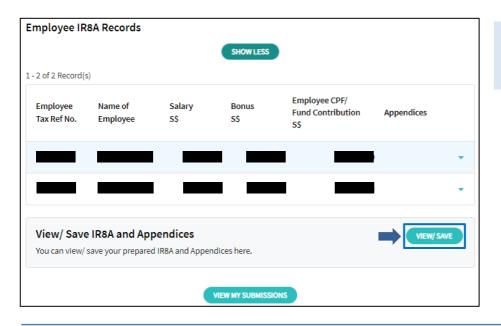
3. Submission

Summary of records submitted

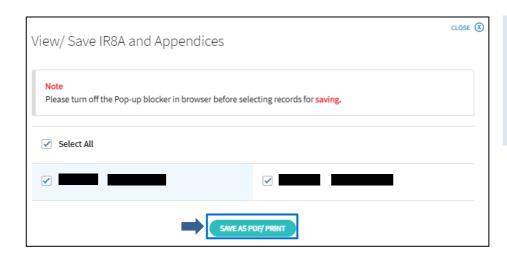


- Functions in Submission Details page:
- <PRINT>: Print summary of records submitted.
- <SHOW ALL>: Display all employee records submitted. You may also save/ print your prepared Form IR8A and Appendices.
- <VIEW MY SUBMISSIONS>: Go back to AIS Submission for Employment Income Records.

How to View/ Save IR8A and Appendices?



• Click <VIEW/ SAVE> to proceed.



- Ensure that the pop-up blocker(s) in your browser is turned off, then select the records you wish to save/ print.
- Click <SAVE AS PDF/ PRINT> to generate the IR8A and Appendices of your selected records for saving/

If the printouts for your IR8A and Appendices do not fit into one page and/ or if there are some texts appearing in the header/ footer of your printouts, please refer to <u>Frequently Asked Questions (Technical Issues)</u> on IRAS' website for more information.

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