

ezytax
BLUE

payg
instalments



PAYG Instalments

PAYG Instalments are different to **PAYG Withholding**. Pay As You Go Instalmentss (PAYGI) are prepayments of the current tax paid throughout the year (generally quarterly). PAYGI is raised when you have a payable on the prior year return. EG: In 2019 you have a payable of \$1,500 therefore they ATO will calculate PAYGI for 2020 based on the 2019 payable. When you lodge your tax return, all amounts paid during the year will be offset against any tax you owe for the current financial year.

- 1) Go to the Tax Agent Portal > Client Reports > Prefill.
- 2) On the Prefill under ATO DATA is **Pay as you go (PAYG) instalments**. It is broken down into quarters.

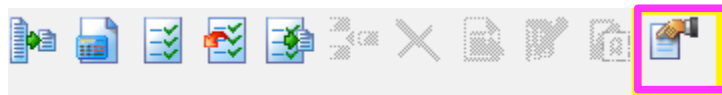
2019-20 ATO DATA

Pay as you go (PAYG) instalments
payment.

as at 09/08/2020: The total amount displayed represents the calculated liability, regardless of

Quarter	Amount
Qtr 1	Not Applicable
Qtr 2	\$540.00
Qtr 3	\$540.00
Qtr 4	\$540.00
Total	\$1,620.00

- 3) Complete the tax return in MYOB as normal. To enter PAYGI, ensure the return is open.
- 4) Top RHS is various icons. Click on the **Hand Pointing**. This is called **Return Properties**.



OR

You can also access Return Properties from the Client Console in MYOB > Tax Returns

tab > LHS Taskbar > Tax Returns > Return Properties.

The screenshot shows the 'Tax Returns' interface for Client - Barnes, Mr Marc David. The 'Tax Returns' tab is selected in the top navigation bar. The main area displays a table of tax returns with columns for Tax Year, Form Type, From, To, Status, Status Date, and Date Due. The 2020 return is highlighted. Below the table, the 'Return Details' section shows information for Marc David Barnes, including Name, Year (2020), TFN (171 518 457), Return Required (Required), Taxable Income (\$0.00), and Tax Estimate (\$0.00).

S	Tax Year	Form Type	From	To	Status	Status Date	Date Due
	2020	Individual	01/07/2019	30/06/2020	Not started		
	2019	Individual	01/07/2018	30/06/2019	Not started		
	2018	Individual	01/07/2017	30/06/2018	Not started		
	2017	Individual	01/07/2016	30/06/2017	Not started		
	2016	Individual	01/07/2015	30/06/2016	In progress		
	2015	Individual	01/07/2014	30/06/2015	Not started		
	2014	Individual	01/07/2013	30/06/2014	Not started		
	2013	Individual	01/07/2012	30/06/2013	Not started		
	2012	Individual	01/07/2011	30/06/2012	Not started		
	2011	Individual	01/07/2010	30/06/2011	Not started		
	2010	Individual	01/07/2009	30/06/2010	Not started		
	2008	Individual	01/07/2007	30/06/2008	Lodged	19/08/2008	

5) Once Return Properties is opened > click PAYG/Lodge

The screenshot shows the 'Return Properties' dialog box with the 'PAYG/Lodge' tab selected. The dialog is divided into 'Last Year' and 'Current Year' sections. The 'PAYG instalments for 2020 estimate' section is highlighted with a pink box. It contains radio buttons for 'Use amounts from the GST/PAYG Profile' and 'Use manually calculated value'. The 'Total PAYG Instalment paid' field is highlighted with a yellow box.

Return Properties - PAYG/Lodge

Last Year

Amt payable/ref.: 0.00

Instalment type: No PAYG instalments

ATO office: BRI Brisbane

Taxable Income or Loss: 0.00

Gross Tax Paid: 0.00

PAYG instalments for 2020 estimate

Use amounts from the GST/PAYG Profile

Quarters 1,2,3: 0.00

Quarter 4 / Annual: 0.00

Use manually calculated value

Total PAYG Instalment paid: []

Current Year

Exclude from Rollover

ATO office: BRI Brisbane

Accounting year: 01/07/2019 to 30/06/2020

Level: []

PAYG estimate option: []

Return required: Required

Date due: []

6) RHS > click **Use manually calculated value** and enter the total value off the prefill. Press OK and complete the rest of the return.

Use manually calculated value

Total PAYG Instalment paid

7) Estimate page will show **Less Credits For Pre-Paid Taxes: PAYG Instalments Raised.**

LESS CREDITS FOR PRE-PAID TAXES: PAYG Instalments raised	1,620.00
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