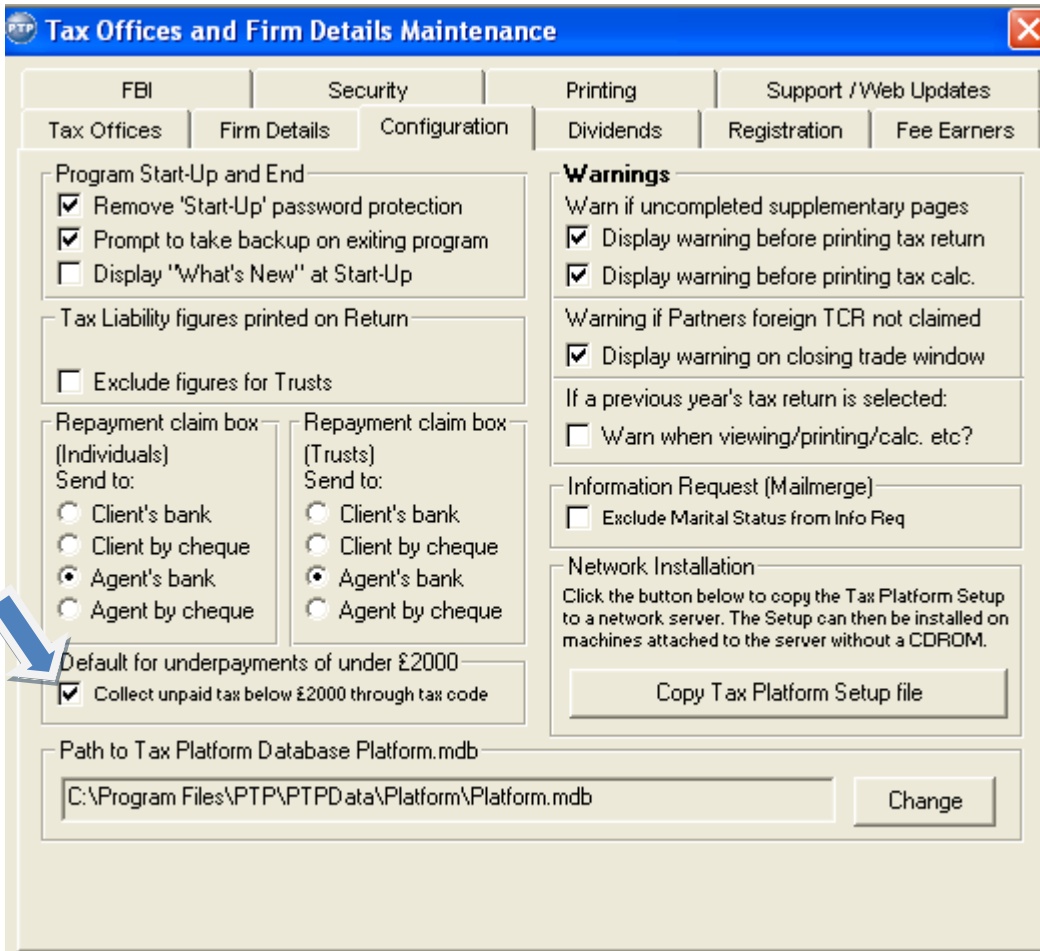




Check the tax default selection from the configuration screen.

- Log on to **PTP Tax Platform**
- Click the **Spanner icon** located on the tool bar to access the tax office and firm details maintenance screen then select the **Configuration Tab**



The screenshot shows the 'Tax Offices and Firm Details Maintenance' window with the 'Configuration' tab selected. A blue arrow points to the 'Default for underpayments of under £2000' checkbox, which is checked. The window contains various configuration options for the tax platform, including program start-up settings, warnings, and database paths.

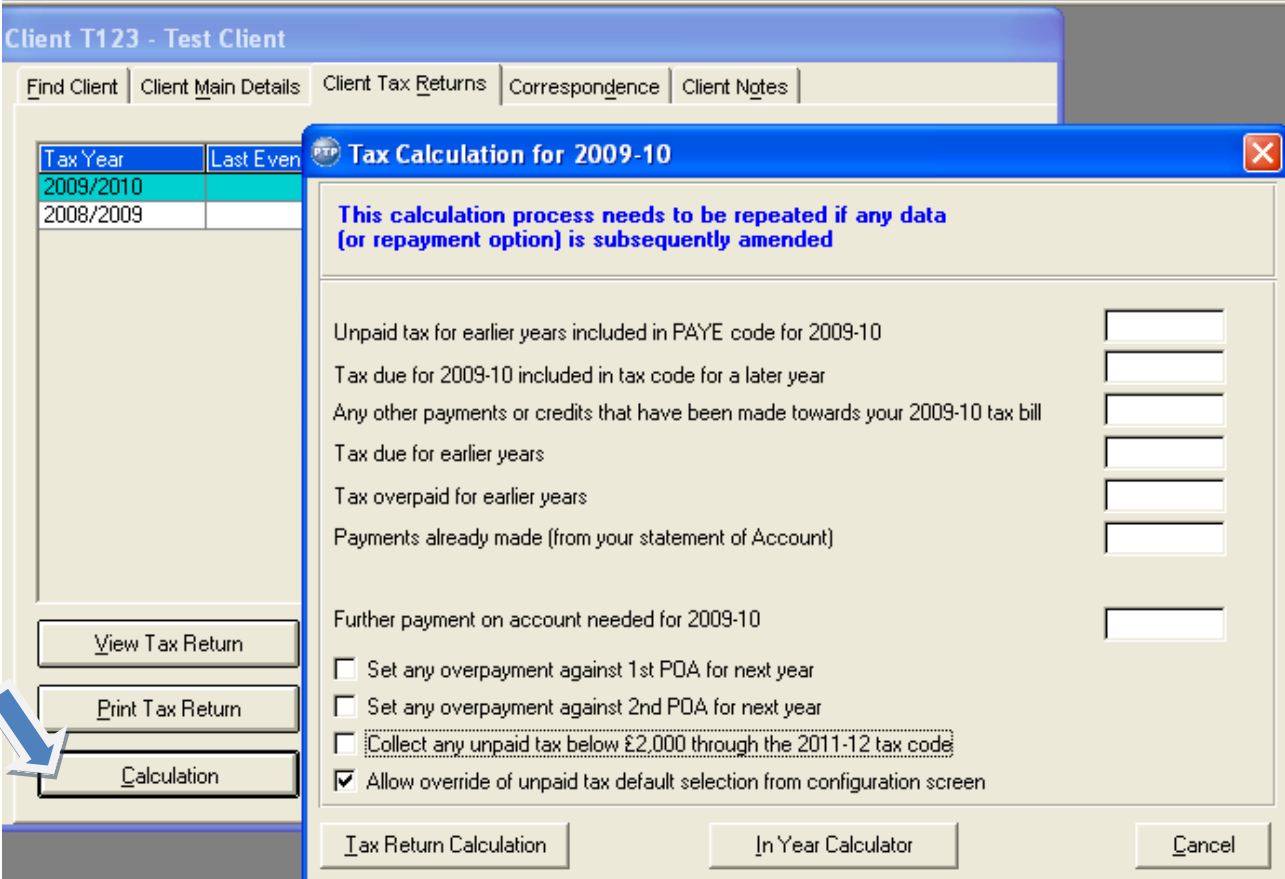
 **Important note:** If the majority of your clients choose to collect unpaid tax below £2000 through tax code, then we recommend having the default setting ticked. This can be changed on the calculation window for specific client who do not wish to collect the unpaid tax through the tax code. **See page 2**

 **Important note:** If the default is not ticked **See page 3** for guidance

- If the default is ticked, and the tax due is below £2000, then page 5, box 2 will not have a cross. Therefore the unpaid tax will be collected through the tax code.
- Click the Cross icon located in the top right corner to close the screen.

## Override the tax default selection from configuration screen

- Select the relevant client and click on the **Client Tax Returns tab**
- Click on the **Calculation tab** which will open the tax calculation window.



Tax Year	Last Event
2009/2010	
2008/2009	

**Tax Calculation for 2009-10**

This calculation process needs to be repeated if any data (or repayment option) is subsequently amended

Unpaid tax for earlier years included in PAYE code for 2009-10

Tax due for 2009-10 included in tax code for a later year

Any other payments or credits that have been made towards your 2009-10 tax bill

Tax due for earlier years

Tax overpaid for earlier years

Payments already made (from your statement of Account)

Further payment on account needed for 2009-10

Set any overpayment against 1st POA for next year

Set any overpayment against 2nd POA for next year

Collect any unpaid tax below £2,000 through the 2011-12 tax code

Allow override of unpaid tax default selection from configuration screen

Tax Return Calculation In Year Calculator Cancel

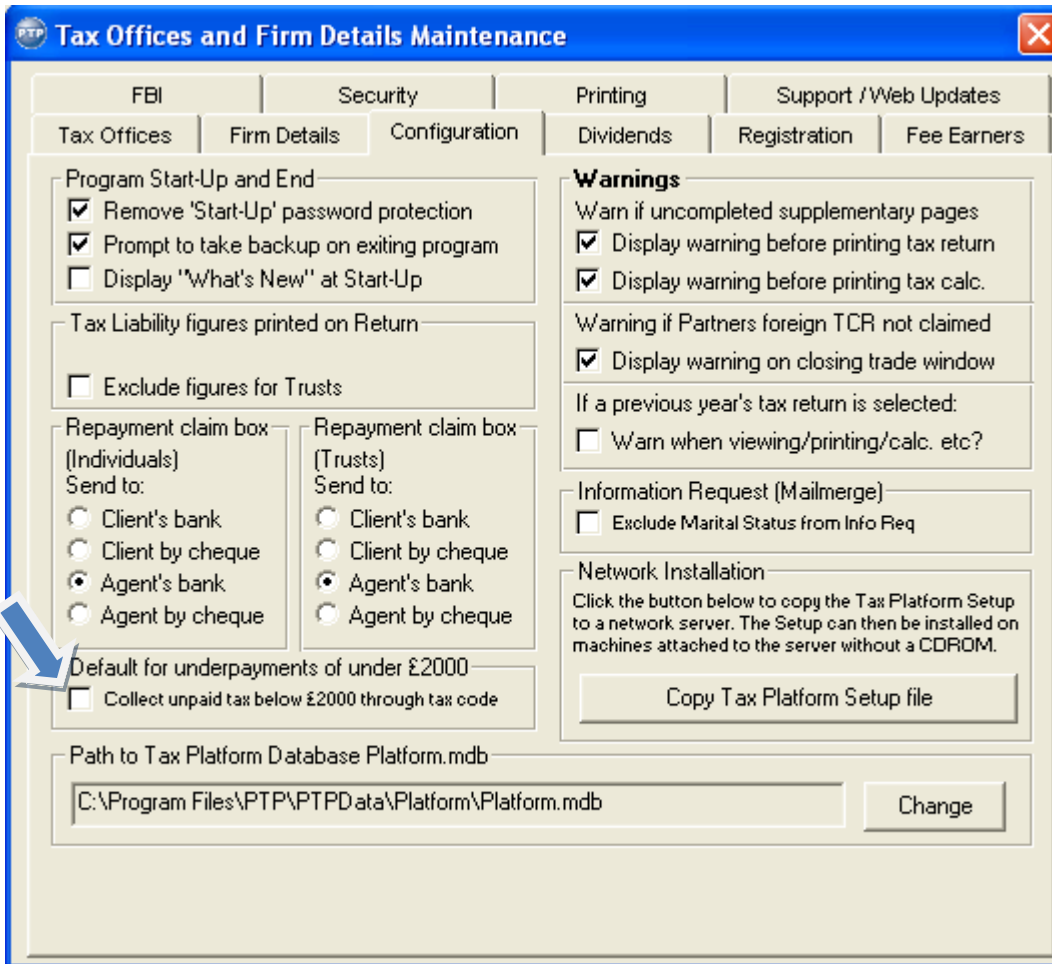
- Click the **allow override of unpaid tax default selection from the configuration** box.
- Now untick the **collect any unpaid tax below £2000 through the 2010-12 tax code** box.

 **Important note:** The tax due below £2000 will not be collected through the tax code and there will be a cross in box 2, page TR5.


- Click the Cross icon located in the top right corner to close the screen.

## Unticked Default Settings

- Log on to **PTP Tax Platform**
- Click the **Spanner icon** located on the tool bar to access the tax office and firm details maintenance screen then select the **Configuration Tab**



The screenshot shows the 'Tax Offices and Firm Details Maintenance' window with the 'Configuration' tab selected. The 'Default for underpayments of under £2000' section contains a checkbox labeled 'Collect unpaid tax below £2000 through tax code', which is currently unchecked. A blue arrow points to this checkbox. Other sections include 'Program Start-Up and End', 'Tax Liability figures printed on Return', 'Repayment claim box', 'Warnings', 'Information Request (Mailmerge)', and 'Network Installation'.

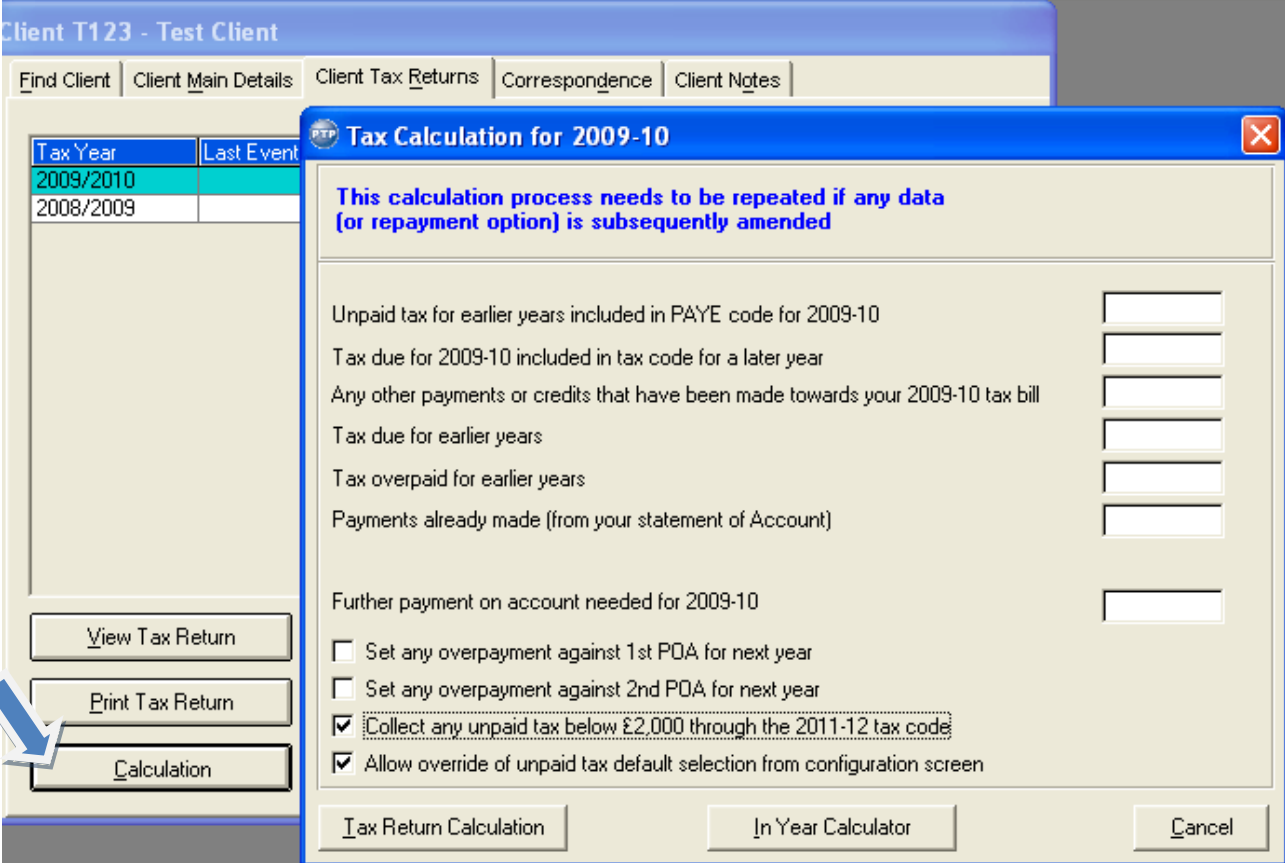
 **Important note:** If the majority of your clients choose not to collect unpaid tax below £2000 through tax code, then we recommend having the default setting not ticked. This can be changed on the calculation window for specific clients who wish to collect the unpaid tax through the tax code. **See page 4**

- If the default is not ticked, and the tax due is below £2000, then page 5, box 2 will have a cross.
- Click the **Cross** icon located in the top right corner to close the screen.

# Collecting Unpaid Tax through the Tax Code

## Override the tax default selection from configuration screen

- Select the relevant client and click on the **Client Tax Returns tab**
- Click on the **Calculation tab** which will open the tax calculation window.



Tax Year	Last Event
2009/2010	
2008/2009	

**Tax Calculation for 2009-10**

This calculation process needs to be repeated if any data (or repayment option) is subsequently amended

Unpaid tax for earlier years included in PAYE code for 2009-10

Tax due for 2009-10 included in tax code for a later year

Any other payments or credits that have been made towards your 2009-10 tax bill

Tax due for earlier years

Tax overpaid for earlier years

Payments already made (from your statement of Account)

Further payment on account needed for 2009-10

Set any overpayment against 1st POA for next year

Set any overpayment against 2nd POA for next year

Collect any unpaid tax below £2,000 through the 2011-12 tax code

Allow override of unpaid tax default selection from configuration screen

- Click the **allow override of unpaid tax default selection from the configuration** box.
- Now tick the **collect any unpaid tax below £2000 through the 2010-12 tax code** box.
- Click the Cross icon located in the top right corner to close the screen.

 **Important note:** The tax due below £2000 will now be collected through the tax code and there will not be a cross in box 2, page TR5.