

# User Guide

E-Pay

Tax Form 1721 (Admin Mode)



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## TAX FORM SETUP

Admins can upload pdf file of Tax Form 1721 and update tax form release status. Navigate to **E-Pay** module and select **Form 1721 (Admin)**.




### 1.1 Upload Tax Form

Admin can upload Tax Form 1721 in pdf file format through the **Upload** tab.

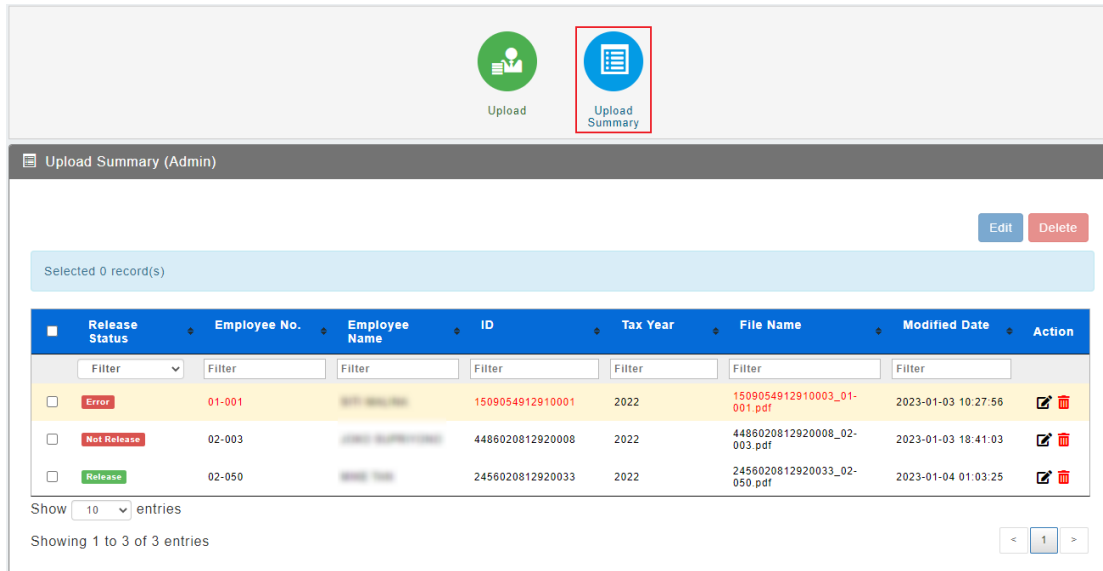
A screenshot of a web application interface for uploading tax forms. At the top, there are two tabs: 'Upload' (highlighted with a red box) and 'Upload Summary'. Below the tabs, the page title is 'Upload (Admin)'. On the right side, there is an 'Upload' button. On the left side, there is a 'Tax Year' dropdown menu and an 'Upload File' section with a 'Choose Files' button and the text 'No file chosen'. A yellow message box at the bottom states: 'Please select tax year to upload form 1721.'

Follow the steps below to upload the tax form:

1. Select tax year from the dropdown list
2. Select the attachment to be uploaded. Only pdf file type is allowed and file name format must in ID\_EMPLOYEEENO. Admin can upload multiple files at once.
3. Click  to upload tax form

## 1.2 Upload Summary

Admins can update release status to allow employees to view their tax forms or remove uploaded tax forms through the **Upload Summary** tab. Employees can only view their respective tax forms that have been released.



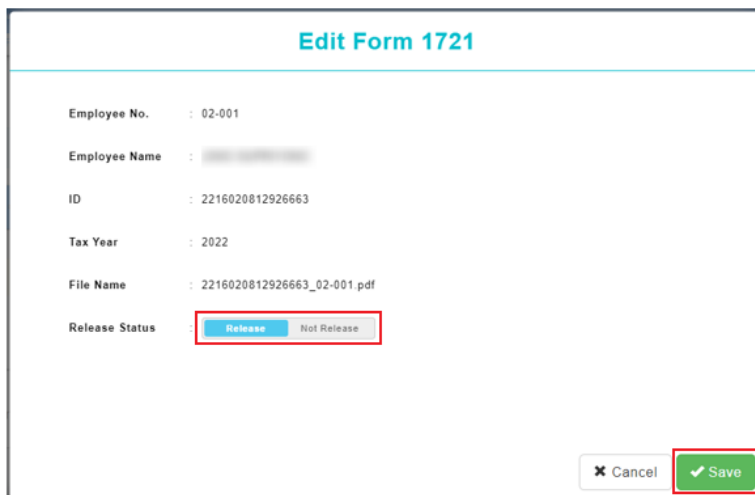
Release Status	Employee No.	Employee Name	ID	Tax Year	File Name	Modified Date	Action
Error	01-001	[REDACTED]	1509054912910001	2022	1509054912910003_01-001.pdf	2023-01-03 10:27:56	[Edit] [Delete]
Not Release	02-003	[REDACTED]	4486020812920008	2022	4486020812920008_02-003.pdf	2023-01-03 18:41:03	[Edit] [Delete]
Release	02-050	[REDACTED]	2456020812920033	2022	2456020812920033_02-050.pdf	2023-01-04 01:03:25	[Edit] [Delete]

Click on the respective columns to sort or enter keyword in the search box to filter the desired items. An **Error** will be shown in the list when there is a discrepancy in the file name between employee profile ID and employee number.

**\*Record under ERROR status will cause user unable to export the tax form**

Follow the steps below to update release status for a single tax form record:

1. Click on the  button of the desired record



**Edit Form 1721**

Employee No. : 02-001

Employee Name : [REDACTED]


ID : 2216020812926663

Tax Year : 2022

File Name : 2216020812926663\_02-001.pdf

Release Status : Release Not Release

Cancel Save

2. Select the release status, either **Release** or **Not Release**
3. Click  button to save the record

Follow the steps below to update multiple tax form records:


1. To update multiple records, tick ☒ the check box of the desired records and click on the  button

**Bulk Edit Form 1721 - 2 record(s)**

Release Status	Employee No.	Employee Name	ID	Tax Year	File Name	Modified Date	
<input type="checkbox"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	
<input checked="" type="checkbox"/> Not Release	01-012	[REDACTED]	3215550812920443	2022	3215550812920443_01-012.pdf	2023-01-04	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Not Release	02-033	[REDACTED]	3216020813022228	2022	3216020813022228_02-033.pdf	2023-01-04	<input checked="" type="checkbox"/>

2. Click ☒ if you would like to remove the selected item(s) from the list.
3. Select either  or  button to update all tax form release status or click the  button to cancel the changes.

Follow the steps below to delete tax form records:




1. Click on the  icon of the desired record to be removed

### Confirm delete

Are you sure you want to delete this record(s)?

Delete

Cancel

2. Click on  button to confirm deletion.
3. To delete multiple records, tick  the check box of the desired records and click on the  button

### Confirm delete

Are you sure you want to delete this record(s)?

Delete

Cancel

4. Click on the  button to confirm deletion.