

# GUYANA REVENUE AUTHORITY

## Bulk Generation of IIT Returns

### User Guide

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Prepared for: Companies and Other Organizations

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# Using the Bulk PDF tool to generate IIT Forms from your Form 2 schedules:

## Requirements

Below are the set of tools and files required to generate the Individual Income Tax (IIT) PDF Forms. The files along with the BulkPDF tool can be found on the GRA's website at the following link <http://www.gra.gov.gy/forms/bulk-iit-generation>

1. BulkPDF tool (the Installer i.e. "**BulkPDF.exe**" provided via the GRA's website, refer to link above). Simply download the file from our website and then proceed to follow the simple installation steps to complete the setup of the software.
2. Foxit PDF Reader, the link to download this file is also provided via the GRA's website. Alternatively you can use this link ([Download](#)) to download the Foxit Reader, simply click on the "**Free Download**" button to commence downloading the file .  
Once downloaded, follow the installations steps to install the software on your computer. You do not have to enable Safe Reading Mode during the installation. Also do not select "Install a free 14 day trial of Foxit PhantomPDF"

**Note:** You **MUST ONLY** open the generated PDF files using **Foxit Reader** in order to print the Forms with the embedded barcodes. **No other PDF Reader will work.**

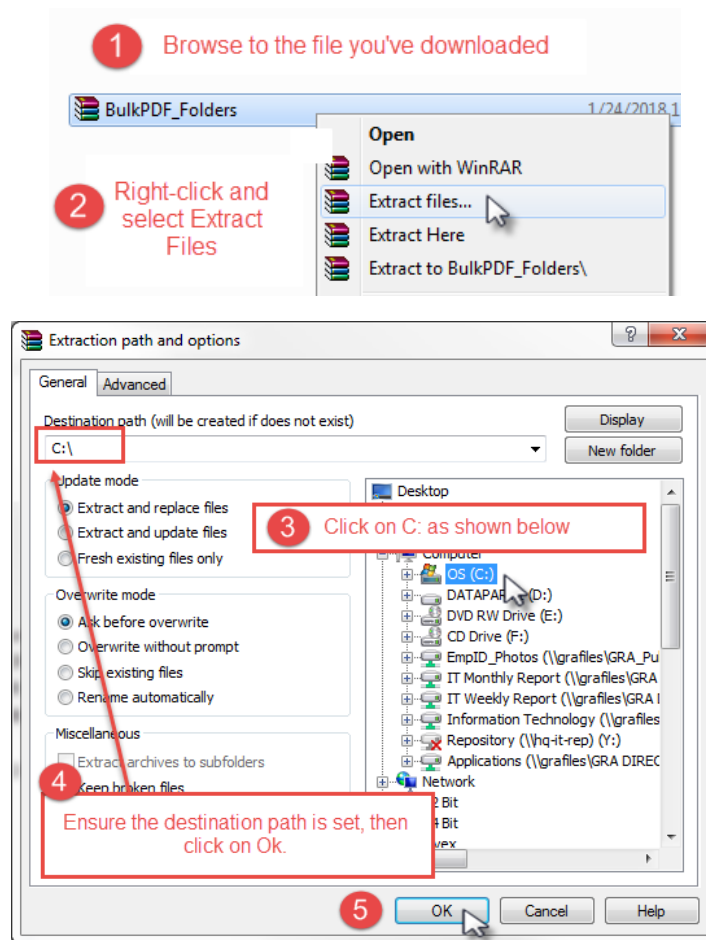
The following files are required to be used with the **BulkPDF tool** to generate the IIT PDF Forms for each employee.

**Note:** These files are found in the "**IITPDF\_Template**" Folder which can be extracted from the "**IITBulkFolders1.1.zip**"

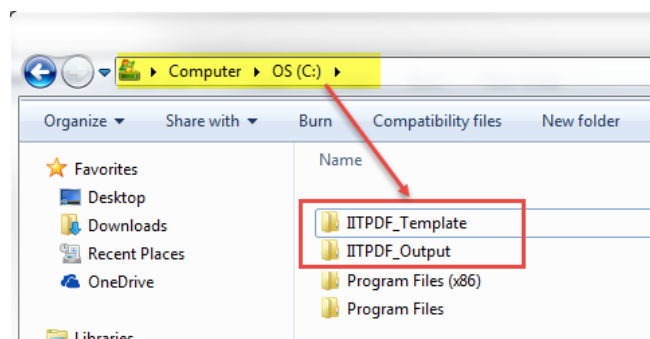
3. BulkPDF Configuration File (see file named **BulkPDF\_IITYA2018\_Configurations.bulkpdf f**, this file can be found within the "**IITPDF\_Template Folder**" which can be extracted from the "**IITBulkFolder.zip**").
4. IIT Bulk Generate PDF Form (see file named **IIT\_YA2018\_Template.pdf**).
5. Form 2 data in a spreadsheet format (see template named **Form2template.xlsx**.) This file must be populated with your PAYE information.
6. Directories (Folders) on the C: Drive of your computer – further details are provided in the **Section "Preparing the Directory/Folder structure,"** that follows. These two folders will be used for storing the configuration files, templates and output (of generated IIT PDF forms).  
The folders are:
  - a) IITPDF\_Output (file path should read **C:\IITPDF\_Output**)
  - b) IITPDF\_Template (file path should read **C:\IITPDF\_Template**)

## 1. Preparing the Directory/Folder structure

To prepare the documents folder, simply extract the contents of the zipped file provided, i.e. “**IITPDFFolders.zip**” using any compatible archive tool e.g. 7-Zip, WinZip, WinRAR. Ensure that the contents are extracted directly onto the c:\ drive of the computer. Please see screenshots below (using the WinRAR tool) for further clarification.



After completing the steps mentioned previously, simply browse to the C:\ drive of the computer to ensure the folders and files have been extracted successfully. Once there, you should see the two folders (see image below).



### Note:

1. The IITPDF\_Output folder is an empty folder. This is where the generated Individual Forms will be created and stored.
2. The IITPDF\_Template folder should contain three files, namely: 1. **IIT\_YA2018\_Template** 2. **Form2template** and 3. **BulkPDF\_IITYA2018\_Configurations**

## 2. Preparing the Form2template.xls for generation of the IIT forms

Before executing the remaining steps below, you must fill out the **Form2template.xls** file downloaded in the previous steps. There is a sample row of data within the file to follow – remove this row before saving the file and proceeding to the next Step i.e. “Generating the PDF forms using BulkPDF.”

Please ensure all dates are written in the required format i.e. “DD-MM-YYYY”. The FILENAME column has a formula which generates a filename automatically (please do not change this).

When filling out the **Form2template.xls**, it is important to note the mandatory and optional information which should be added:

1. **TIN**
2. Employee’s **Number** (*optional*)
  - a. Organisation’s internal employee number, if any
3. Employee’s **Name**: First Name, Last Name Other Names
  - a. If the employee only has one name, enter this name in the Last Name column

**Note:** Do not include special characters e.g. #, /, \, "" etc. as part of the Employee’s Name
4. Employee’s **Personal Address**
5. Employee’s **Period Employed**
  - a. The period an employee worked with your company for the year (Earning Period)
  - b. This value must be in months, up to two decimal places. Please provide this information as accurately as possible e.g. 4 months 15 days (considering it is a 30 day month) should be entered as 4.50.
6. Employee’s **Salary or Wages** received for the period (Total\_Salaries\_Wages)
  - a. This is amount paid to monthly, weekly and daily staff
  - b. The amount should still include commissions, overtime or other emoluments payable in money for each employee.
  - c. Insert the Salaries/Wages into the respective column based on whether the amount was earned via the Public Treasury and/or Other Sources (other than through the Public Treasury).
7. **Personal Allowance**
  - a. The total applicable statutory deduction allowed to the employee
8. **NIS Contribution**
  - a. The employee’s gross National Insurance Scheme (NIS) Employee Contribution based on Gross Earnings
9. **Total Deduction**
  - a. Sum of the Personal Allowance and the NIS Contribution values
10. **Tax on Chargeable Income**
11. **Tax Deducted**
12. **A File Name**
  - a. This column has a concatenation of the employee’s full name is recommended and his/her department e.g. ITD\_Jones\_James\_L
  - b. Do NOT alter the formula on this column or its contents
13. **Year of Assessment**
  - a. This value represents the year in which you submit your Income Tax Return i.e. the current year
  - b. The last two digits should be used e.g. 2017 would be 17
14. Employee’s **National Identification No**
15. Employee’s Date of Birth (*optional*)
  - a. The date format is DD-MM-YYYY
16. Employee’s Occupation (*optional*)
17. Employee’s Phone Number (*optional*)
18. Employee’s Email Address (*optional*)

19. Department (optional) - For ease of use and retrieval of the generated files, you can use an abbreviated format of a Department's name to which the employee is attached.

**Note:** Do not include special characters e.g. #, /, \, "" etc. as part of the Department's Name. Additionally, this information will be used to assist the person printing the forms to easily retrieve/sort/search for the employees' PDF returns by Department/Sections etc.

20. Employer's TIN

21. Employer's Name

22. Employer's Address

23. Employer's Phone Number (*optional*)

### 3. Generating the PDF forms using the BulkPDF tool



After installing the BulkPDF tool, a shortcut is automatically created on the user's Desktop.

The first step is to open the BulkPDF tool, you can do this, by either **double-clicking** on the icon created on your desktop. Alternatively, you can browse the programs listing to find and open the software application.

Once opened, click on the **"Load Configuration"** button on the first window (see *Figure 1 - Load Configuration*). This function allows you to select a preconfigured file with all the necessary settings required to generate the prefilled Individual Income Tax Return forms for your employees (see *Figure 2 - Select Folder* and *Figure 3 - Select configuration file*). Please follow the steps in the images below:

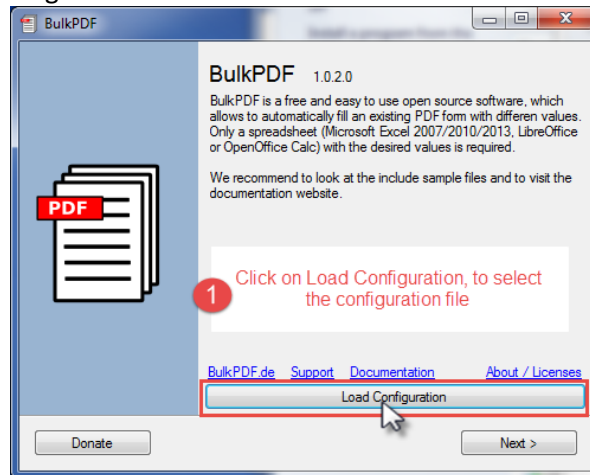


Figure 1 - Load Configuration

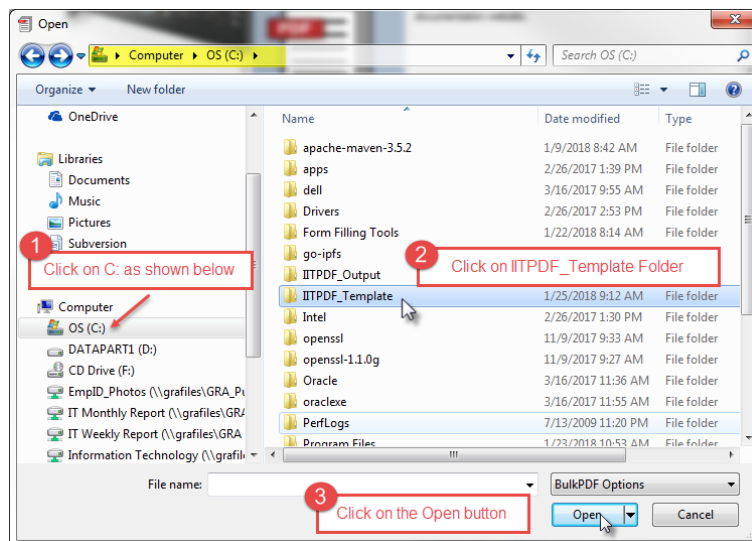


Figure 2 - Select Folder

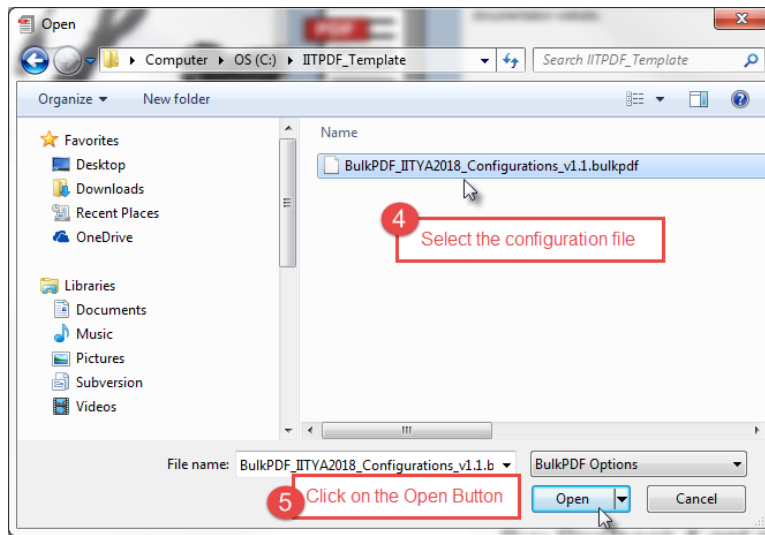


Figure 3 - Select configuration file

Once the steps above have been followed correctly, you should see the following:

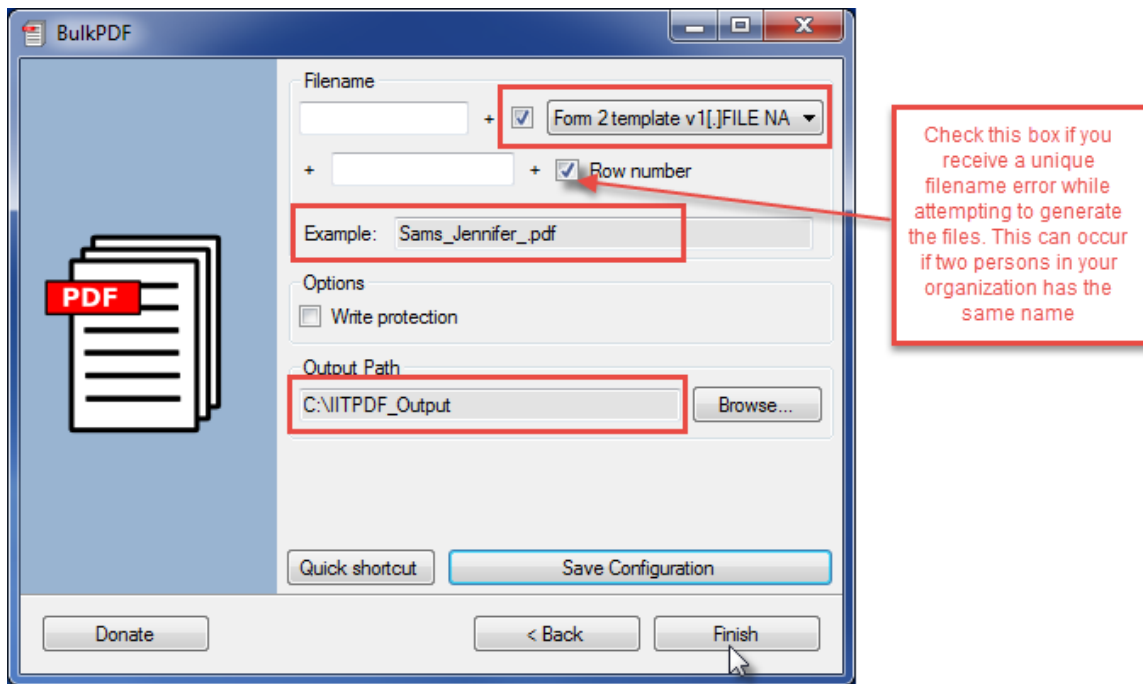


Figure 4 - Final Result

Ensure the values for Filename, Example and Output path are correct. Once verified, click on the Finish Button.

A pop-up window will open telling you how many files will be created. Simply click on Yes to continue.

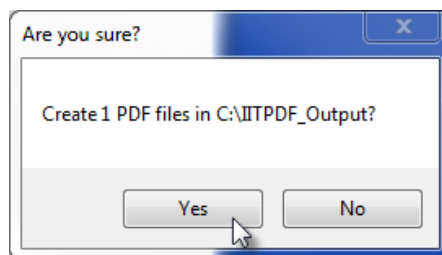


Figure 5 - Confirmation

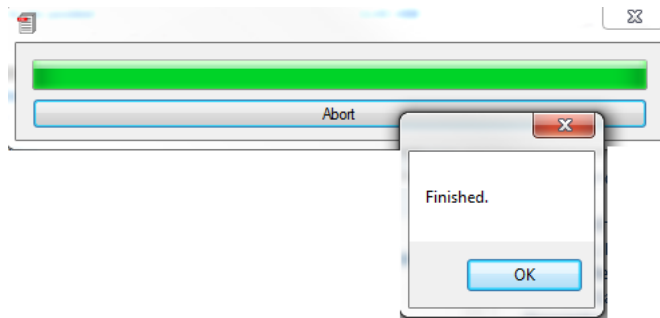
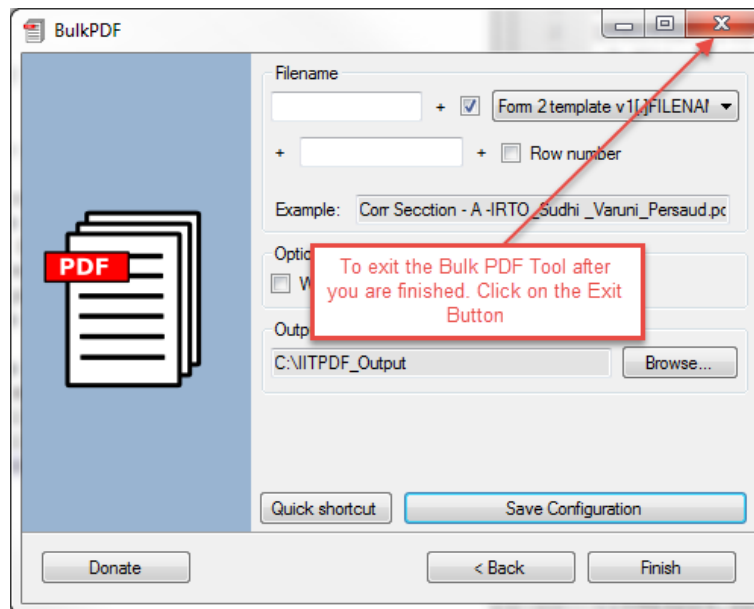


Figure 6 - Successful result

Once the process is completed, close the BulkPDF Tool - do not click on Finish again as this will just re-run the creation of the files. (see image on the following page, how to exit the application)



Browse to the IITPDF\_Output folder to view the files using Foxit PDF Reader and verify its contents. Proceed to print the files using Legal Size pages.