

 SmartHR

メールアドレス

パスワード

ログイン

9:41

 SmartHR

行政手続きを申請する

 扶養追加の手続き

 扶養削除の手続き

 住所変更の手続き

 氏名変更の手続き

 申請・承認フォーム

 年末調整の手続き

 給与明細

2019(令和01)年07月15日支給分 給与明細

[給与明細の一覧を見る](#)

 **SmartHR**

Year-end tax adjustment  
Manual(2020)

## At first

This year's "year-end tax adjustments" will be implemented via SmartHR provided by SmartHR Co., Ltd. By answering an online questionnaire your year-end tax adjustment documents will be drafted automatically.

Filling out complicated documents will no longer be necessary. At Kwansei Gakuin we are promoting switching to electronic formats and paperless formats, and we thank you very much for your understanding and cooperation in these efforts.



# What are year-end tax adjustments?

This refers to adjusting excesses or deficiencies in your income tax withholding applied to the wages paid to you from the one year period from January to December. Income tax cannot be calculated without establishing the amount of annual income, so a "provisional income tax amount" is deducted from each month's salary based on your income and number of dependents.

Then at the end of the year, your precise income tax withheld is calculated and the amount is reduced if you have paid too much or increased and levied if you have not paid enough. This is called year-end tax adjustment.

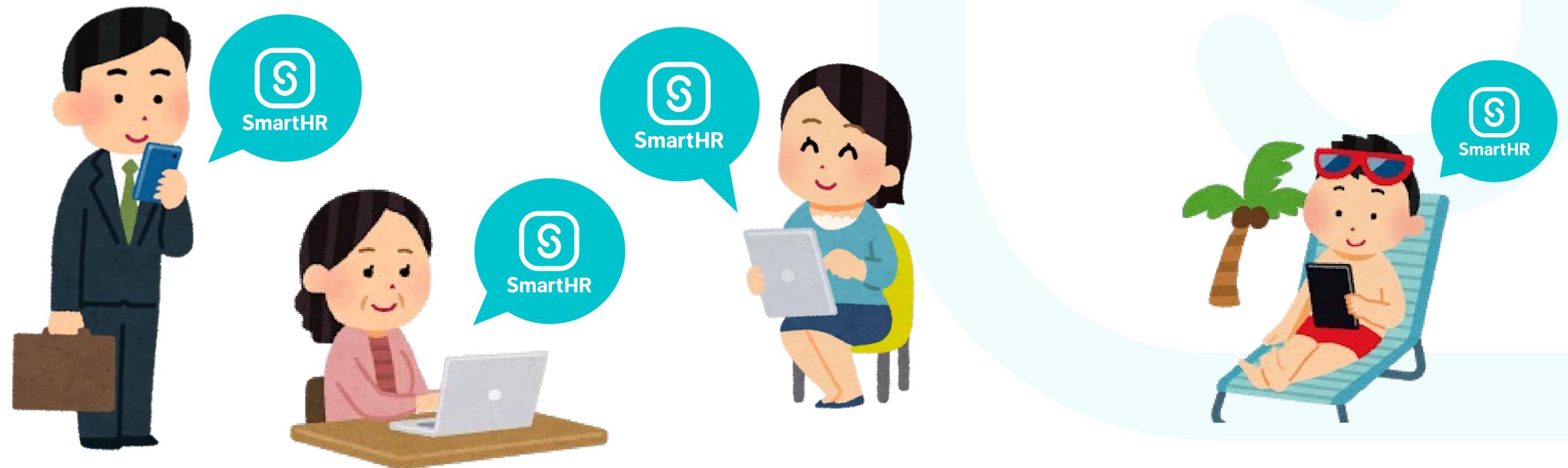


# What is needed to use SmartHR ?

It can be used if you possess a PC, smart phone, or tablet device.

If you can use a family device, that is also acceptable.

\*Feature phones (flip phones) are not supported.



## Documents required to be submitted as original copies in year-end tax adjustments

### ● **Original copy of insurance certificate**

If you are enrolled in life insurance, etc., a deduction certificate will be delivered to your home.

### ● **Applications for mortgage deductions**

(1) Applications for housing loans (specified expansion and reconstruction) by salaried employees

(2) Year-end balance certificate for housing acquisition loan

\*A final income tax return is required for the 1st year after taking out the loan, but from the 2nd year it can be done with year-end tax adjustment

### ● **(If you were employed mid-career, etc.), the withholding slip for 2020 from your previous job**

The above 3 must be submitted as original copies.

After performing the year-end tax adjustment using SmartHR, please be sure to submit original copies of these documents.

# Year-end tax adjustment application procedure

# Year-end tax adjustment procedure



The image shows a screenshot of the SmartHR login page for Kansai Gakuin University. At the top left is the SmartHR logo. Below it, the text reads '学校法人関西学院 専用ログイン画面'. The main login area is enclosed in a red rounded rectangle and contains two input fields: '社員番号 または メールアドレス' (Employee ID or Email Address) and 'パスワード' (Password). Below these fields is a teal 'ログイン' (Login) button. At the bottom of the login area, there is a link that says 'パスワードをお忘れの方' (If you have forgotten your password).

Please access SmartHR  
(<https://kwansei-gakuin.smarthr.jp/login>)  
and enter your email address or personal ID code and  
your password to log in.

# If you have forgotten your password



Please click "Forgot Password" displayed at the bottom of the screen.

- (1) Enter your email address or personal ID code (6 digits)
- (2) Please click "reset password".

And email for resetting your password will be sent to you, so please log in again after resetting it.

# Year-end tax adjustment procedure



Access the “Year-End Adjustment” displayed on the top page after logging in.

# Year-end tax adjustment procedure



## Answer in accordance with the on-screen information

It is in the form of a questionnaire, so please answer the questions on the screen.

\*Your selections and input information will be automatically saved, so you can re-start from the middle.

# Year-end tax adjustment application procedure

(those eligible for housing loan deductions)

Enter the information in accordance with the details of your original housing loan deduction certificate, and a sample for filling out your report will be drafted.

**Please fill in the information on your report (original copy) while checking the drafted sample.**



# Year-end tax adjustment procedure (to revise your answers)



## Return to your response history and redo them

If you notice a mistake you made part-way through, you can use the "response history" located at the bottom of the screen to redo your responses.

Click on the item you wish to revise to return the previous question and then resume answering from that question after your revision.

# Year-end tax adjustment procedure(when suspending input)



Input content automatic save feature

If there is information you are unsure of due to not having an original copy on hand, etc., you can temporarily suspend your input and resume it at another time.

If you close the screen during input, the information up to the screen before the screen you closed will be automatically saved.

(Please note that the information input on the screen that you actually close will not be saved.)

# Confirm report details and submit



The respective reports for year-end tax adjustment will be drafted based on the information you have input.

Confirm the contents and click "Complete input", and the input results will be sent to the personal section.

**Please be sure to check the information for mistakes before submission.**

# Submit required documents

By accessing the year-end tax adjustment, you can confirm what documents are required.



# About submission

\*All SmartHR output materials do not need to be printed.

## [About insurance certificates]

After online submission it is absolutely necessary to submit original copies of certificates.

\*Please fill in your (1) Personal ID code (6 digits) and (2) Name in the blank spaces of certificate before submitting.

\*If there are multiple certificates, please staple them in the top-left corner.

In such cases it will only be necessary to fill out (1) and (2) described above in either one certificate.

## [Housing loan deduction applications]

Cannot be accepted using the sample drafted on the website. Please fill out the application received from the tax office yourself and affix your seal to it, and be sure to submit the original copy.

## [Submission of original copies]

Submission in person to the personnel section, school email, and submission by post are all acceptable.

### (Materials requiring submission of original copies)

● Original copy of insurance certificate

● Original copies of report/certificate on housing loan deductions (special housing loan deductions report/year-end balance certificate)

● Withholding slip for 2020 from your previous job \*Only for employees hired mid-career in 2020

# Q&A



# Input method for insurance certificate

## 生命保険料控除証明書 (介護医療用)

適用制度: 新制度 <span style="color: red;">⑥</span>		
契約者名 須磨 英知 様 <span style="color: red;">④</span>		
保険種類 医療 <span style="color: red;">②</span>	保険期間 終身 <span style="color: red;">③</span>	
証券番号 987654321	契約日 2015年 9月 1日	払込方法 月払
被保険者 須磨 英知 様 <span style="color: red;">⑤</span> <small>(5)このタイプの証明書は受取人名の表示がありません。契約内容にご記憶がなければ、保険証書が生命保険会社で確認できます。</small>		

一般	一般生命保険料 円	配当金 (相当額) 円	一般証明額 円
	10,800	***	10,800
介護	介護医療保険料 円	配当金 (相当額) 円	介護医療証明額 円
	2573	***	2573

<ご参考> 証明年12月末時点のご申告予定 ⑦ は以下のとおりです。

一般	年間一般生命保険料 円	配当金 (相当額) 円	一般申告額 円
	14,400	***	14,400
介護	年間介護医療保険料 円	配当金 (相当額) 円	介護医療申告額 円
	35,100	***	35,100

① Smart生命保険

- 1) Name of insurance company, etc.
- 2) Type of insurance, etc.
- 3) Insurance period or pension payment period
- 4) Name of policy owner
- 5) Recipient/name

\*This type of certificate does not display the recipient's name.

If you do not remember the contract details you can confirm them in your insurance papers or with the life insurance company.

- 6) You can confirm new system or old system here.
- 7) Premium amounts

(Example) Inputting the premium amounts on this certificate is as follows.

New system: General life insurance premium: 14,400 yen

New system: Nursing care insurance premium: 35,100 yen

### Caution!

The upper row are the payment results from January to around September at the point of issuance of this certificate. If you will continue paying premiums from October, this will result in underreporting. Furthermore, if you intend to cancel the contract by the end of the year, please calculate the paid premiums up to the cancellation and enter that.

# Input method for insurance certificate

## 生命保険料控除証明書 (一般用)

ご契約者 須磨 英知 様 ④

被保険者 須磨 英知 様

保険料等受取人 須磨 有子 様 ⑤

※保険金等受取人は、ご契約内容に応じて保険金受取人・給付金受取人（被保険者様）等を記載しています。なお、受取人が複数名の場合も、お一人のみ記載しています。

証券番号 XXXXXXXXX	② 保険種類 医療保険	③ 保険期間 終身
ご契約年月日 平成23年10月1日	払込方法 月払 (払込継続中)	

〇〇年〇月のお払込金額を下記のとおり証明します。

区分	保険料(A) 円	配当金等(B) 円	証明額(A-B) 円	
旧制度適用	一般	23,400	0	23,400
	個人年金	***	***	***
新制度適用	一般	18,800	***	18,800
	個人年金	***	***	***
	介護医療	26,100	***	26,100

【ご参考】月払い契約で12月分までの保険料をお払い込みの時の申告額は下記の通りです。

区分	年間保険料(イ) 円	年間配当金等(ロ) 円	申告額(イ-ロ) 円	
旧制度適用	一般	31,200	0	⑥ 31,200
	個人年金	***	***	⑦ ***
新制度適用	一般	14,400	***	⑧ 14,400
	個人年金	***	***	⑨ ***
	介護医療	34,800	***	⑩ 34,800

① Smart生命保険

- 1) Name of insurance company, etc.
- 2) Type of insurance, etc.
- 3) Insurance period or pension payment period
- 4) Name of policy owner
- 5) Recipient/name
- 6) Old system: General life insurance premium
- 7) Old system: Personal pension insurance premium
- 8) New system: General life insurance premium
- 9) New system: Personal pension insurance premium
- 10) New system: Nursing care insurance premium

### Caution!

The upper row are the payment results from January to around September at the point of issuance of this certificate. If you will continue paying premiums from October, this will result in underreporting. Furthermore, if you intend to cancel the contract by the end of the year, please calculate the paid premiums up to the cancellation and enter that.

# How to calculate the total estimated earnings

## of dependent family members (other than spouse)

How to calculate the total estimated earnings of dependent family members (other than spouse)

For dependent family members (other than spouse), enter the following (1) through (3) to calculate the total estimated earnings.

**(1) Earned income (in the case of wages received from the company they are employed by)**

Please enter the annual amount of income from taxable wages (hourly wages, base pay, overtime allowance, etc.)

\*The maximum amount that can be entered into this field is 1.03 million yen.

**2) Pension income (if they are receiving a public pension, etc.)**

Pension income amount up to the following amount are eligible for dependents.

\*Under age 65      1.08 million yen or less

\*Age 65 or older      1.58 million yen or less

**3) Income other than wages (if they receive remuneration through self-employment, etc.)**

If they have income other than wages or pension income, please enter the amount of earnings after deducting expenses.

\*The maximum amount that can be entered into this field is 480,000 yen.

The screenshot shows a digital form for entering tax information for dependent family members. It is divided into three main sections: '給与収入' (Wages), '年金収入' (Pension), and '給与以外の収入' (Income other than wages). Each section has a '必須' (Required) label and a text input field with a '円' (Yen) unit button. Below each input field is a small explanatory text and a note about the maximum input limit. The '給与収入' section also includes '所得控除額' (Income tax allowance) and '所得見積額' (Estimated taxable income) fields. The '年金収入' section also includes '所得控除額' and '所得見積額' fields. The '給与以外の収入' section includes a '所得額' (Income) field.

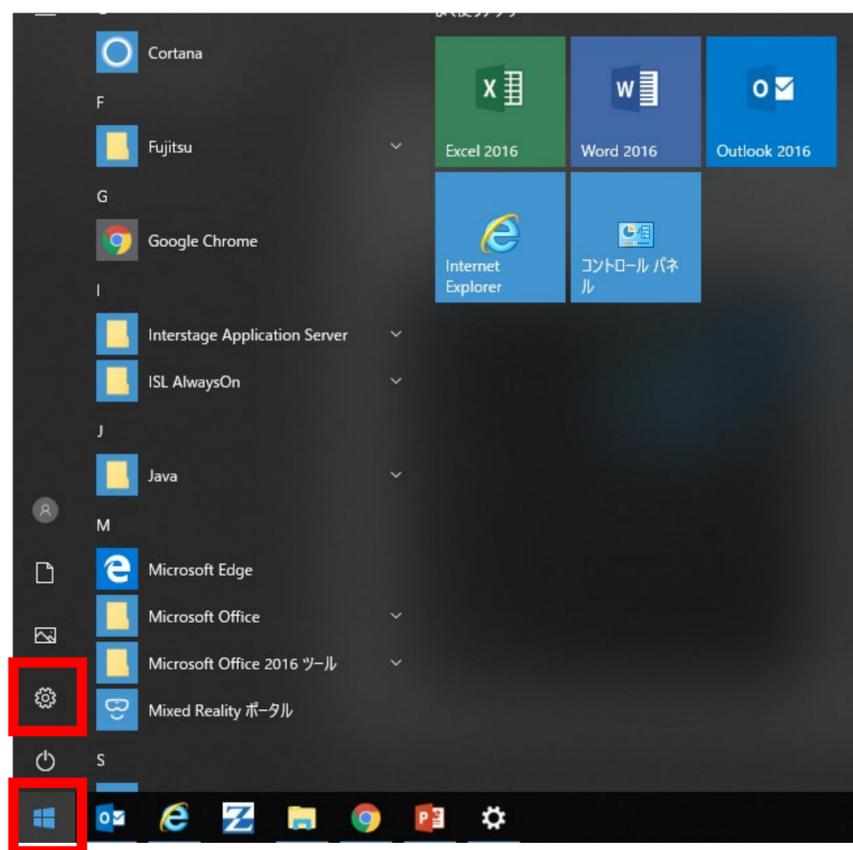
### Things not included as income

- Payments received from health insurance associations or public employment securing office called “Hello Work” in Japan.  
(Example) Accident and sickness benefits, maternity leave allowances, childcare leave payments, unemployment benefits, etc.
- Commuting allowance within tax-exempt limit (if using public transportation, up to 150,000 yen per month)

# Foreign language support

SmartHR supports English, Chinese (Simplified and Traditional), Korean, and Vietnamese. It will be displayed in the language according to the language setting of your computer, so please check it. If it isn't displayed in the language, you also need to change the language setting of the browser.

**(Reference) About PC settings: The setting method may vary depending on the PC.**



Select Time and Language



Click Language and select a display language

# Inquiries for questions or issues

Inquiries for questions or issues

Kwansei Gakuin, Personnel Department, Personnel Section

Contact point hours:

Weekdays 8:50-16:50(Closed 11:30-12:30)

Saturdays 8:50-12:20

\*In some cases staff may not be present on Saturdays,  
so please inquire on weekdays whenever possible.