EXTERNAL GUIDE

e@syFile[™] EMPLOYER USER GUIDE



REVISION HISTORY TABLE

Date	Version	Description
20-04-2020	5	Employment Taxes Calculation Validation (ETV) for IRP5/IT3(a) certificates
11-09-2020	6	Summary Report

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1 INTRODUCTION

The South African Revenue Service (SARS) constantly strives to improve its service offering to taxpayers. Changes introduced to SARS' systems are a vital part of our vision to have a more accurate reconciliation process. More information at SARS' disposal means a less cumbersome tax process, as returns/declarations are increasingly pre-populated.

Employers are required to submit an Employer Reconciliation Declaration (EMP501) to SARS twice a year. These are the:

- Interim reconciliation declaration for the six month period 1 March to 31 August that must be submitted by 31 October,
- Annual reconciliation declaration for the full year 1 March to 28/29 February that must be submitted by 31 May.

The opening of the Employer Filing Season will be communicated before the start of each filing period. The Employer Filing Season dates will be made available on the SARS website.

In these declarations employers must confirm or correct the amounts they declared for:

- Pay-As-You-Earn (PAYE), Skills Development Levy (SDL), the Unemployment Insurance Fund (UIF) and Employment Tax Incentive (ETI) in their Monthly Employer Declarations (EMP201s) submitted,
- Payments made,
- Tax values of the Employee Tax Certificates [IRP5/IT3(a)s].

Using e@syFile™ Employer, you can now:

Finalise and submit your EMP201 and make payments.

Finalise and submit your interim and annual reconciliation in five basic steps:



Figure 1: Reconciliation Submission Process

Step 1 Create Employer

The employer's payroll system generates electronic tax certificates in a CSV file which is imported into e@syFile[™] Employer. This import will create the employer record or if the employer record already exits will update the employer record. Please note that minimal information is updated and additional information will need to be added manually. Where no CSV file import is done, the user is required to manually create the employer using the "Employer Admin" functionality which will be discussed later in this manual. The employer is uniquely identified by the PAYE reference number.

Step 2 Process Certificates

The CSV file import will also create new or update existing employee details and create or update the relevant certificate information for the employee. An employee is uniquely identified by the ID number and / or employee number. Depending on the data contained on the e@syFile[™] Employer database and the CSV file import, e@syFile[™] Employer may create a new employee instead of updating an existing employee. This can be rectified by using the "Reassign Certificate" function which will

be discussed later in this manual. The certificate is uniquely identified by the Certificate Number.

Step 3 Capture EMP501

Where there is an online connection, the user can select to pre-populate the EMP501 PAYE, SDL, UIF and ETI values with the liability values (excluding penalty, interest and understatement penalty (USP)) as on the internal SARS systems. Where there is no connection, the liability values will be pre-populated from the EMP201 Declarations submitted via e@syFile[™] Employer, alternatively the user will be required to manually capture the liability values.

Please note: It is recommended that the pre-populated data from SARS internal system is accepted as various validations are performed in terms of liability amendments on the EMP501.

Should there be a tax shortfall, payment can be made via e@syFile™ Employer.

Step 4 Submit Reconciliation

Once the user is satisfied that the reconciliation balances, it can be submitted to SARS. All submissions must be made electronically which requires the user to enter the eFiling login name and password. The submission process will validate that the specific user-id has the necessary authorisation to make reconciliation declaration for the relevant employer.

The submission will only include all new and amended tax certificates. Existing unchanged certificates will not be included in the submission.

Step 5 Generate Certificates

The employer is required to furnish employees' with certificates to enable the completion and submission of the Income Tax Return and therefore this step is only applicable to the annual reconciliation. This is done by using the Generate IRP5/IT3(a) PDFs function under the Utilities menu. The generated certificates will be made available in PDF format which can be issued to the employees.

Where an employee's employment was terminated prior to the annual reconciliation period, the employee must be issued with a final certificate. In this instance the certificate number must reflect the full reconciliation period (02) and can be printed from the View/Edit Employees function.

The above process (Figure 1: Reconciliation Submission Process) depicts the normal flow of events during the reconciliation period, however subsequent to file import and/or submission to SARS changes may be required in which case certificates can be added, amended and/or deleted. Normally, changes to certificates impact the financial values on the EMP501 and users must ensure that they update the EMP501 and also ensure that the revised information is submitted to SARS, if applicable.

Register employees for Income Tax and obtain feedback

SARS announced in September 2010 that all individuals in formal employment, irrespective of their income, have to register for Income Tax. To help employers, three registration options are made available to register employees namely:

- Individual Income Tax Registration (ITREG), where an employer can register only one employee and get the tax number immediately.
- Bulk ITREG, where SARS registers employees using the latest reconciliation submissions provided by employers. The bulk registrations are done as required. The registration should be accompanied by the EMP501 certificates.
- Bundled ITREG process enables employers to register multiple employees (from one up to a thousand) at a time. With bundle registration, you can register employees **anytime** outside the reconciliation period and you do not require the EMP501 to register employees.

Previously SARS provided feedback to employers on the outcome of the registration process for employees that were successfully registered. SARS will now also inform employers where an employee could not be registered. The table below details the possible statuses which can be received, the description and the required steps to be taken.

STATUS	DESCRIPTION	STEPS TO BE TAKEN
Registered	New Income Tax reference number provided.	None
Existing Taxpayer	Taxpayer was found to be already registered.	The employee must provide the Income Tax reference number.
Unable to Register- Employee must Contact SARS	A problem was identified with the employee's data submitted, e.g. multiple Income Tax registration numbers exist for the employee	The employee must contact SARS to resolve the identified issue.
Insufficient Information	The employee has not been registered. e.g., incomplete personal details, invalid postal address, incomplete address details, etc.	all the necessary registration
Not Verified	Invalid or incorrect information provided and SARS is unable to verify the registration status of the employee, e.g. address provided with an invalid postal code	The employer is required to verify that the employee's information has been captured correctly.
Non-Individual	E.g. the identity number (ID) supplied belongs to a TRUST.	The employee must provide all the necessary registration details to the employer, for the registration request.

With the introduction of the e@syFile[™] Employer Notification Centre, there has been a minor change to the synchronisation process to obtain your individual/ bundled ITREG results. For more information on the registration of employees, refer to section 5 of this guide. Always ensure the latest version of e@syFile[™] Employer is being used, as any information submitted to SARS using previous versions of e@syFile[™] Employer, will not be accepted. The latest version of the software can be accessed by visiting the SARS eFiling website <u>www.sarsefiling.co.za</u> and downloading the latest version.

2 THE e@syFile[™] EMPLOYER PROCESS

2.1 INSTALLING OR UPDATING E@SYFILE™ EMPLOYER

Existing Users Updating e@syFile™ Employer

Step 1

Login to the current version of e@syFile™ Employer.

Step 2

If you are online a pop-up message will appear, which allows you to update to the latest version. Should the pop-up message not appear, access it by clicking Update on the left menu.



Click \mathbf{OK} to proceed with the update.



<u>Step 3</u>

Follow the pop-up messages to complete the installation process. You will be required to make a backup of your current database. Do not interrupt this process. Once the update has completed, the e@syFile[™] Employer application will reopen.

<u>New users installing e@syFile™ Employer</u>

<u>Step 1</u>

You will need internet access to download the latest version of e@syFile™ Employer. Go to the SARS eFiling website <u>www.sarsefiling.co.za</u> and click on this icon



<u>Step 2</u>

Click Download for Windows to start the download process.

<u>Step 3</u>

Double-click the Setup-Employer file to unzip and double click the extracted file to initiate the installation process. Pop-up messages will guide you through the remainder of the installation process. Once the software is installed, this will automatically open and a registration box will appear.

Please note: The e@syFile[™] Employer icon will be seen on your desktop, which allows quick access to the software.



Step 4

The default word ADMIN will appear by the username. Leave this as is.

application is being run, you are kind account to access this application. Thi password) will be used to access this be the same username and password data is to be transmitted to SARS, you ogin details, and only when this auth be submitted.	s login account (username and application only, and should not used to access SARS eFiling. When u will be asked for your eFiling
Admin User Name:	-alla
Admin Password:	*****
Repeat Admin Password:	******
Admin Password Hint:	P@ssword1
Nould you like to be able to edit nformation imported from a CSV ile?	Allow CSV editing
Please be aware that should you ose or forget your password, SARS Filing will not be able to retrieve or reset it.	☑ I understand

<u>Step 5</u>

Enter a unique password by Admin Password, using at least eight (8) characters. Your password must include one (1) capital letter, 1 number and 1 special character [e.g. dollar sign (\$) or an exclamation mark (!)].

Step 6

Repeat the password by Repeat Admin Password.

<u>Step 7</u>

Enter a hint to help you remember your password should you forget it, by Admin Password Hint.

<u>Step 8</u>

Select Allow CSV editing, where you wish to allow editing of imported certificates.

<u>Step 9</u>

Please note: Two (2) additional users must be added.

Select 'I understand' to acknowledge SARS will not be able to retrieve or reset your password should you lose it.

<u>Step 10</u>

Click Next to continue.

<u>Step 11</u>

Create a user account for those persons who will be using e@syFile™ Employer.

<u>Step 12</u>

Enter the user's name, as well as a password, using the criteria as stated above. Repeat the password and enter a hint.

<u>Step 13</u>

Click Next. You will be required to enter the second user's details.

<u>Step 14</u>

Click Login to Application

<u>Step 15</u>

You will be required to enter your e@syFile[™] Employer login details (username and password). This may be the ADMIN user, user 1 or user 2.

<u>Step 16</u>

Should you be unsure of your password, click Forgot Password? to see the hint which you entered. If you are a registered eFiler, click Secure Password and enter your eFiling login details (username and password).

2.2 ACCESSING THE E@SYFILE™ EMPLOYER SOFTWARE

Once you have clicked login, you will be directed to the home page. If you are working offline, you will see a red block with the word DISCONNECTED at the bottom of the screen. If you are online, the block will be green and will read CONNECTED. The menu on the left of the screen contains the following main menu items:



HOME

Notification Centre - This replaced the Inbox in the Utilities menu. The Notification Centre will automatically sort retrieved letters by PAYE reference number and letter type, making it easier to manage correspondence and related processes and includes a count for each letter type, displayed per employer/PAYE reference number.

Action Centre - This function allows you to respond to SARS communication requesting supporting documentation.

REGISTRATION

eFiling Registration – If you are not a registered eFiler, and you would like to submit your declarations and reconciliations to SARS electronically, you must first register for eFiling on <u>www.sarsefiling.co.za</u>. You will need access to the internet to use this function.

IMPORT

Import/Export Payroll File – Allows you to load payroll files into e@syFile[™] Employer or export payroll files (for ITREG only) for your records.

EMPLOYEE ADMIN

View/Edit Employees – Allows you to view employee details and tax certificates, add new employee records and capture manual certificates.

MONTHLY PROCESS

PAYE – This function allows you to capture and submit your Monthly EmployerDeclaration (EMP201) if you are required to file your EMP201 on eFiling.Payments - Payments may be submitted for your EMP201 using this function.

RECONCILIATION

PAYE Dashboard – An overview of the user's PAYE account, including summaries of AA88s, EMP201s, payments and EMP501s.

Declaration – This is where the reconciliation takes place, matching all the tax due with the tax paid and the total value of employee tax certificates issued.

Cancel Certificate Range – e@syFile[™] Employer allows you to cancel a range of certificates.

Adjustments – Reconciliation Declarations submitted on the pre-printed stationary (up to transaction year 2008) can be adjusted here.

SUBMISSION

Submit to SARS – This is where you submit your declarations to SARS.

THIRD PARTY APPOINTMENTS

Third Party Appointments – This function was introduced to process Third Party Appointment Notices issued to employers. Please refer to the Third Party Appointment (AA88) e@syFile[™] Employer user guide available on <u>www.sars.gov.za</u>.

EMPLOYER ADMIN

View/Edit/Change – Enter, edit and change the employer demographic details here.

UTILITIES

EXTERNAL GUIDE - e@SYFILE™ EMPLOYER USER GUIDE PAYE-easyFile-G001 *Utilities* – Various functions are available on this menu to manage your database, submissions as well as submit full re-submissions. The following sub-menus are listed on the horizontal tab:

- Database Utilities Use this menu to create, restore or merge back-ups.
- EMP501 Status Dashboard Track your submission status
- AA88 Payment Allocation Dashboard Track your AA88 history.
- Pre-Submission Validation Report See the reason for your submission to SARS not being processed.
- Import Payroll File Log This is a log of all import attempts which has been enhanced to include a separate listing of failures and warnings relating to discrepancies in the information from your CSV file.
- Delete Payroll File You may delete imported payroll files using this option.
- Reset Passwords The Admin user is able to reset passwords for users 1 and 2 using this sub-menu.
- Payroll File Editing Activate or deactivate the ability to edit certificates imported with your CSV file.
- Reassign Certificate Allows you to consolidate duplicate employee records.
- Generate IRP5/IT3(a) PDFs Allows you to generate PDFs.
- Full Resubmission Request Allows you to resubmit already submitted IRP5 Declarations and certificates to SARS.
- Disc Submission Allows the user to create a disk submission file for manual upload at a branch.

Synchronise Application – Allows you to synchronise your local e@syFile™ Employer database with the employer details registered on the eFiling profile.

HELP

The help section includes:

- *Application Help* You can click Help in any particular section of the software to see all the available Help topics.
- Update Compares your software version with the latest version available for download, and enables you to update if necessary.
- Log off Click here once you are sure all work has been completed and saved, and you wish to close the software.

3 INTRODUCING THE ADDITIONS TO THE MENU AND FUNCTIONS FOR e@syFile™ EMPLOYER

The following additional features exists within e@syFile™ Employer:

- Database encryption and decryption
- The ability to divide information, included in an existing database file, by PAYE reference number
- Creating, merging and restoring of databases

3.1 DATABASE ENCRYPTION AND DECRYPTION

Information security is becoming more and more important as risks of fraud, due to unauthorised access to information and phishing which has become increasingly common.

Given the sensitive information stored, relating to employees and payroll data within e@syFile™ Employer, the SARS has introduced security features to ensure the data is always protected and secure.

By incorporating industry-strength encryption and decryption standards, the latest e@syFile[™] Employer update will ensure your database and backup files are encrypted with a unique key when not in use. What this means is, only users with valid e@syFile[™] Employer login details, will be able to access the information.

Valid e@syFile[™] Employer login details must be provided which will allow users to select the specific PAYE reference number for that session. The database will be unlocked through a decryption process, while the other linked PAYE reference numbers (database files) not in use, will remain secured. When logging off or closing the software, all database files will be encrypted for protection once again.

Knowing your e@syFile[™] Employer login details is very important, as without these the database files cannot be accessed. This includes the administrator profile (ADMIN username), as well as the two user profiles setup during the first installation.

Please note: Due to stringent security used, SARS will not be able to recover data where valid login details have been lost or forgotten; therefore it will not be possible to access encrypted data again.

e@syFile[™] Employer login details will be required when restoring or merging database backups. During these operations, users will be requested to provide the username and password that is applicable to the database backup being used.

It is vitally important to protect your e@syFile[™] Employer login details, as the login details will be required whenever a database or backup file is opened, restored or merged.

3.2 DATABASE SPLIT BY PAYE REFERENCE NUMBER

Each user will have a master database file, and additional database files for each PAYE reference number or employer included in their current database. The split in data will enable users to manage their information per employer or PAYE reference number.

All correspondences received will be included in the master database file, and information relating to the EMP501s, EMP201s and payments will be included in the individual employer database files.

The user will therefore be required to select the employer which needs to be viewed/amended before any information will be accessible.

Step 1 Opening a database file

A selection box will be seen after login, listing the database (employers) files available in the e@syFile[™] Employer.

Select the database or employer you will be working with.

Click **Continue** to proceed with the decryption and opening of the database file.

A pop-up message will be displayed once decryption has completed.



Once a specific database file has been opened, the user will be able to access the e@syFile[™] Employer function or menu options for that specific employer.

Step 2 Changing to another employer

Users with multiple employer/PAYE reference numbers included in their existing e@syFile[™] Employer data may change between different database files if required.

Two options are available to navigate between data files:

1. Click **Change** on the task bar at the bottom of the screen to display the list of available database files.

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Notification Centre					
Action Centre					
REGISTRATION				# # TM	
etling Registration			0	ilä	
INPORT		\square	@sy		
Import/Export Payrol File		C	W Sy I		
ENPLOYEE ADMIN					
Ven/Edit Employees		Please select which com	pany you want to use		
HONTHLY PROCESS		Database	1 🖌 Se	lect	
Revel	-	EMPLOYER NAME B			
Taymeta	-	EMPLOYER NAME			
RECONCILIATION					
With Dashboard					
Declaration					
Canori Conflicto Range				- 1	
Adjustments					
SUBRISSION					
Submit to SARS					
THIRD PARTY APPOINTMENTS					
Third Party Appointments					
INPLOYER ADRIN					
Ver/Id/Change					
VELLETING					
Utilities		Continue	Close		
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corrent ra.	A 1681 1 201	a manang men n	EMPLO	ren in int	Strengte.

2. Click View/Edit/Change below EMPLOYER ADMIN on the left hand menu. Click Change Employer

Click **Change** to display the list of available database files.

syFile EMPLOYER 6.8.0	EMPLOYER ADMIN			
	ADD EMPLOYER			
	EDIT EMPLOYER			
	CHANGE EMPLOYER			
		Please select which company yo	ik to change	
		and the second		
		Database	Select	
		EMPLOYER NAME B		
		EMPLOYER NAME		
ID PARTY APPOINTMENTS				
			7	
		Continue		
	1000			

Select the relevant database file and click **Continue** to proceed.

When no employer is selected, the e@syFile™ Employer software can still be accessed, but some functionalities will be deactivated.



3.3 ADD EMPLOYER

Skip this step if you created an employer for previous submissions, or if you are going to import a payroll file as the software will automatically create an employer once your import is completed. You will however be required to add additional information which may not be contained in the CSV file import.

If you do not use payroll software or do not have a CSV file with certificate details, or submitted for this employer before, you need to create an employer before adding employees or capturing manual certificates.

<u>Step 1</u>

Click **View/Edit/Change** below **EMPLOYER ADMIN** (make sure that you select the tab called ADD EMPLOYER).



<u>Step 2</u>

Complete the Employer Information page.

Where the employer is not registered for PAYE, but is required to issue employees with certificates and/or have to declare SDL and UIF, the Employer's Income Tax Reference number must be entered in the PAYE Reference number field.

ADD EMPLOYER						
Trading or Other name:						
Reference Number:	PAYE:	SDL:	UIF:	-	7	
Activity within Major Division:						
Employer SIC7:						
Employer SEZ:		•				
Diplomatic Indemnity:	Yes					
a contra contra de	Business Address					
Unit Number:	Complex:					
Street Number:	Street/Farm				-	
Suburb:					-	
City:			ostal Code:	1	-	
Country Code:	-					
	Contact Person					
First Name:			_			
Surname:			_			
Business Tel No:	Cell No		Fax No:			
EMail Address:						
Position at Business:						
	Practitioner Informat	ion				
Registration No:						
Telephone No:						

- Complete ALL the required fields including:
 - Employer Information
 - Business Address
 - Contact Person
 - Practitioner Information (if applicable)
- Click Update Employer

Please note: The Reference numbers entered on this screen will determine which tax types must be completed on the EMP501 and IRP5/IT3(a) certificates.

3.4 EDIT EMPLOYER

Use this option if you need to change or update employer details. You may have to provide additional employer information before submitting your declaration to SARS.

To do this click **View/Edit/Change** below EMPLOYER ADMIN in the menu pane on the left of the screen.

Update the relevant information or fields and click on **Update Employer** when done.

ADD EMPLOYER	
EDIT EMPLOYER	
	Employer Information
Trading or Other name:	EMPLOYER NAME
Reference Number:	PAYE: SDL: UIF:
Activity within Major Division:	2572
Employer SIC7:	60200 - Television programming and broadcasting activil
Employer SEZ:	
Diplomatic Indemnity:	Yes
	Business Address
Unit Number:	Complex:
Street Number:	100 Street/Farm: CHURCH STREET
Suburb:	NEWLANDS
City:	CAPE TOWN Postal Code: 7000
Country Code:	South Africa
	Contact Person
First Name:	SURNAME
Surname:	SURNAME
Business Tel No:	0210000000 Cell No: Fax No:
EMail Address:	PERSON@MAIL.COM
Position at Business:	PERCONGINALLOOM
Position at business:	Practitioner Information

3.5 ADD EMPLOYEES

It is only necessary to create an employee when you need to capture the details for employees or companies not yet on e@syFile[™] Employer.

If certificates for an individual or a company were submitted using e@syFile[™] Employer, you need not create the Employee again, however you will be required to update any missing or incomplete information.

Please note: When you import a payroll file, the software will automatically create an employee.

<u>Step 1</u>

Click **View/Edit Employees** under **Employee Admin** in the menu pane on the left of the screen. To create a new record, click **Add Employee**.

	are able to obtain a quick vie	w of all Employees relating to a specific company Employee (including Cartificates). To add an Emp		_
	ion to view fun details of the	employee (mouding cardinales), no add an emp	loyee, the Add Employee.	-
Company Name:	EMPLOYER NAME		Tar Vear:	
Employee Search	Below	Add Employeet	Add Employee Bundled	IT Reg
Surna	ame	TD Number	-111	-
Firstna	1	Tax Reference Number	-1	
Employee Num	iber	Certificate Number		
Employee Sta	atus Active 🔻	Registration Status		
		Clear Sea	urch Search	
Status	Surname	First Names	Employee Number	View
_				_
				_
		1111		
				>>

<u>Step 2</u>

Complete all the required fields on the Employee Information page, including:

- Nature of Person
- Surname (or name of entity if not an individual)
- First Two Names
- Initials
- Date of Birth
- ID Number
- Income Tax Reference number
- Passport Number
- Country of Issue (for Passport)
- Alternate Identification Type
- Alternate Identification Number

- Employee Number (this field is mandatory for pensioners and individuals without an ID number).
- View Status (Active/Inactive)

indicates required field Nature of Person: Surname: Surname: First Two Names: Initials: Date Of Birth: Coury of Issue: Alternate Identification Type: Maternate Identification Number: View Status Quick Navigation Perv< Next	ployee Information			No.
Nature of Person: Surname: First Two Names: First Two Names: Initials: Date Of Birth: Date Of Birth: ID Number: ID Number: Income Tax Reference: Passport Number: Country of Issue: Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation	rsonal	indicates re	ruired field *	
First Two Names: Initials: Date Of Birth: Date Of Birth: ID Number: ID Number: Income Tax Reference: Passport Number: Country of Issue: Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation	Nature of Person:	indicates re		<u> </u>
Initials: Date Of Birth: Date Of Bir	Surname:		*	
Date Of Birth: CCYYMMDD ID Number: Income Tax Reference: * Passport Number: Country of Issue: Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation	First Two Names:		*	
ID Number: Income Tax Reference: Passport Number: Country of Issue: Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation	Initials:	*		
Income Tax Reference: Passport Number: Country of Issue: Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation Quick Navigation	Date Of Birth:	CCYYMMDD		Λ
Passport Number: Country of Issue: Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation	ID Number:			(
Country of Issue:	Income Tax Reference:		*	14
Alternate Identification Type: Alternate Identification Number: Employee Number: View Status Quick Navigation	Passport Number:			
Alternate Identification Number:	Country of Issue:		•	
Employee Number: View Status Quick Navigation	Alternate Identification Type:	[· ·	
View Status Quick Navigation	Alternate Identification Number:		×	
Quick Navigation	Employee Number:			
	View Status	Active		
				1
	ployee Contact Details ployee Bank Details			

Click Next.

<u>Step 3</u>

Complete all the required fields on the Employee Contact Details page, and click Next.

Employee Information		
Employee Contact Details		
Contact Numbers		-
Home Tel No:	Business Tel No:	
Home Tel No:	Business Tel No:	
Fax No:	Cell No:	
E-Mail Address:		
Work Address		
Unit No:	Complex:	
Street No:	Street/Farm:	-
Suburb/District:		
City:		
Country:	Postal Code:	
Residential Address		
Unit No:	Complex:	
Street No:	Street/Farm:	Ì
Suburb/District:		
City:		
Country:	Postal Code:	1
Postal Address		1
🖌 Same as residenti	al address?	
Employee Bank Details		-

Step 4

Complete the Employee Bank Details page unless "Not Paid Electronically" or "Foreign Account" has been selected from the Account Type drop-down. Click **Save**.

* indicates required field.
······································
4
4
Prev Save

3.6 CAPTURE MANUAL CERTIFICATES

<u>Step 1</u>

Click **View/Edit Employees** under **EMPLOYEE ADMIN** in the left menu pane. This should display the list of all available employees or companies.

	1	X	- le-	- / 1		
Surname		ID Number				
Firstname		Tax Reference Number	V			
imployee Number		Certificate Number				
Employee Status	Active	Registration Status	-	λ	0/	

<u>Step 2</u>

Select the relevant employee and click **View** next to the employee's name to open the relevant record.

ipany Name:	1	A		Tax Year	-	
loyee Search B	elow	E DOA	impleveer	Add Employee		d IT Reg
	1					-
Sumam	ie -	ID Number				
Firstnam	ie .	Tax Reference Number				
mployee Numb	er	Certificate Number				
Employee Statu	Active 🔻	Registration Status	4	λ	DI	
			1	TQ.		
			Clear Search	Search		
					10	
Status	Surname	First Name	5	Employee	e Number	View
Status Active	Surname	First Name	5		e Number	
	Surname	First Name	5	0	and a second second	View
Active	Surname	First Name		0	1	View View
Active Active	Surname	First Name		0	3	View View View View View
Active Active Active	Surname	First Name	5	0	1 3 4	View View View
Active Active Active	Surname	First Name	5	0	1 3 4	View View View
Active Active Active	Surname	First Name		0	1 3 4	View View View
Active Active Active	Surname	First Name		0	1 3 4	View View View
Active Active Active	Surname	First Name		0	1 3 4	View View View

Step 3

To capture a new manual certificate, click **Add Certificate** on the bottom right of the screen. You will see the history of all certificates created, submitted, or cancelled for that particular employee/company displayed on the top right hand corner of the screen.

Complete all the required fields on the Employee Information page to create the new certificate. Click **Next**

mployee Information				
cmployee Information			Certificate Number	
Personal		and the second second	2020080 Recon Period	00000000000004 Status
Nature of Person:	A - Individual with ID or Passport N	equired field. *	201908	CREATED
Surname:		7.		
First Two Names:		*		
Initials:	T *	-		
Date Of Birth:	CCYYMMDD			
ID Number:			1 6	
Income Tax Reference:				
Passport Number:				
Country of Issue:		•		
Alternate Identification Type:	[•		
Alternate Identification Number	ri l	*		
Employee Number:	04	- -		
View Status	Active			
	Quick Navigation			
	Prev			
Employee Contact Details				
Employee Bank Details			Add C	ertificate

Step 4

Complete all the required fields on the Certificate Details page to create the new certificate, including:

- Transaction Year
- Period of Reconciliation
- Certificate Number (this is generated automatically)
 - Radio button (checkbox) to indicate Final Certificate Submission
- Certificate Type (i.e. IRP5/IT3(a))

- Year of Assessment
- Pay Periods Worked
- Pay Periods in Tax Year
- Employment Date
- Certificate Tax Period Start Date
- Certificate Tax Period End Date
- Voluntary Over Deduction (Radio button/checkbox)
- Fixed Rate Taxation (Radio button/checkbox)
- Directive Numbers (where applicable)
- Employment Tax Incentive
 - ETI Radio Button (checkbox) to select
 - ETI Employee SIC7 Code
- Source codes and values (see Step 5 below)

Description Tot Description	Income Received Code at Income Received Code code code code code code code code c	Value	
Tot Description Dedu	code	ed Value ons	
Description	Code	Value	
Dedu	actions/Contributi	ons	
	1		
	1		
	1		
	1		
Description	Code	value	
Total Deductions/Contributions			
Description	Code	Value	
Description	code	Value	
Tax Credits and/or	Employer / Emplo	yee Contributions	
Description	Code	Value	
1	tage Source Cod		
	Description	Tax Credits and/or Employer / Emplo Description Code	

Please note: Certificate Tax Period Start Date is the start date of the tax period in the relevant Year of Assessment declared on the certificate. Similarly, the Certificate Tax

Period End Date must be the end date in the relevant Year of Assessment declared on the certificate.

Please note: If the Manage Source Code button is inactive, simply click Save Certificate to the bottom right of the page to activate it.

Step 5

To capture Source Codes and Values, click **Manage Source Codes**, and select the required Source Code from the drop-down list, or capture the code. Enter the amount under Value, and click **Add/Update Source Code**. Use Filter SOURCE CODES to search for a specific code, or select the Source Code from the Source Code drop-down list.

Step 6

Once you are done, click **Save Certificate again.** A pop-up message will appear which will either indicate that the tax certificate was successfully saved, click OK.



Or list warnings about mandatory fields that must be entered before the certificate can be finalised, click OK and complete the specified fields.



3.7 IMPORT PAYROLL FILE

<u>Step 1</u>

Click Import Payroll File on the left menu pane, and select the file you wish to import.



Click Open.

stification Centre	Select a CSV file		×
tion Centre	Computer →	👻 🍫 Search Computer	P
STRATION	Organize 🔻		
RT portExport Payroll File OVEE ADMIN eveRdat Enployees HLY PROCES NYF yments NCLLIATION VE Dashboard edaration hubtments HISTON hubmit to SARS D PARTY APPOINTMENTS hid Party Appointments INF A	 Hard Disk Drives (5) Deskop Downloads Recent Places Google Drive OneDrive Cond Disk (C:) Documents Documents Documents Music Pictures Videos Local Disk (C:) DVD RW Drive (G:) DVD RW Drive (G:) DVD RW Drive (G:) My Passport (H) 	System Reserved (D;) 11.5 MB free of 99.9 MB Terra (F:) 23.6 GB free of 931 GB (1)	
mchronise Application	File name:	✓ Payroll File	•
oplication Help		Open	Cancel

Step 2

A pop-up message will appear prompting you to initiate the import process. Click OK.



Step 3

A message will be displayed indicating whether or not the payroll has passed the validation process (i.e. whether the file can be imported or not). If your CSV file has passed the validation process, click **OK** to begin importing your records. Follow the on-screen messages to complete the import process.



Step 4

If e@syFile[™] Employer encounters any errors during the validation or import process, a message will appear directing you to the **Import Payroll File log**.



To access the **Import Payroll File log**, click **Utilities** on the left menu pane, and then click **Import Payroll File Log**. To open a specific error report, simply doubleclick any entry listed in the **log**.

SYSTEM UTILITIES		
On this streen you are able to run the system utilities		
Database Utilities		
EMP501 Status Dashboard		
AA88 Payment Allocation Dashboard		
Pre-Submission Validation Report		
Import Payroll File Log		
Here you are able to view a log of all the Payroll files that have been imported.		
Log Category Payroll Imports 🔹		
File Name	Date Imported	Status
F:\downloads\PAYE\Aug 2017 testing\Employer 2 _edited.txt -	2017/09/04 06:47:03	PASSED - IMPORTED
Fi\downloads\PAYE\Aug 2017 testing\employer 1 with warnings.txt -	2017/09/04 06:45:56	PASSED - IMPORTED
F:\downloads\PAYE\Aug 2017 testing\employer 1 fail val.bxt -	2017/09/04 06:45:46	FAILED
Fr\downloads\PAYE\Aug 2017 testing\Employer 1 _edited.bxt -	2017/09/04 06:45:29	PASSED - IMPORTED
F:\Users\\\\201702 csvs\Live+Submission\imported\\	2017/06/13 12:37:02	PASSED - IMPORTED
Delete Payroll File		
Reset Passwords		
Payroll File Editing		
Reassign Certificate		
Generate IRP5 / IT3(a) PDF's		
Full Resubmission Request		

Step 5

The Import Payroll File log has been enhanced to split **Failed** and **Warnings**. Only entries listed under Failed will result in an import failure.

Line		Status
2	2017020000050000016	: Employee Address Details - Postal: Country Code mandatory - code 3294
3	20170200000050000033	: Employee Address Details - Postal: Country Code mandatory - code 3294
4	2017020000050000510	: Employee Address Details - Postal: Country Code mandatory - code 3294
7	2017020000050001201	: Employee Address Details - Postal: Country Code mandatory - code 3294
9	2017020000050001542	Employee Address Details - Postal: Country Code mandatory - code 3294
13	2017020000050002728	Employee Address Details - Postal: Country Code mandatory - code 3294
14	20170200000050002943	: Employee Address Details - Postal: Country Code mandatory - code 3294
15	2017020000050002993	Employee Address Details - Postal: Country Code mandatory - code 3294
16	2017020000050003083	Employee Address Details - Postal: Country Code mandatory - code 3294
18	2017020000050003450	: Employee Address Details - Postal: Country Code mandatory - code 3294
23	2017020000050004076	Employee Address Details - Postal: Country Code mandatory - code 3294

PASS	ED (WITH WARNING)	WARNINGS			
The fo	llowing WARNINGS were	found in this file.			
ine			Status		
2	WARNING: POTENTIA	L PENALTY :	201702000005000016 PRINSLOO :	: Tax Reference number not completed - code 3100	

<u>Step 6</u>

You can still upload the file if there are items listed under 'Warnings' but you must pay attention to any warnings as they relate to the mandatory information required by SARS. If all mandatory fields are not completed, you may encounter the following error message regarding penalties when you try to import your CSV file.



You can continue to import and submit certificate(s) details without all mandatory fields completed. However, in order to avoid penalties the missing information should be obtained from the relevant employee(s) and completed. Details of specific certificates without mandatory information will be displayed on the Warnings tab in the **Import Payroll File log** under **Utilities**.

PASSE	D (WITH WARNING) WARNINGS		
The fol	llowing WARNINGS were found in this file.		
ine		Status	
2	WARNING: POTENTIAL PENALTY I	20170200000350000016 PRINALOO 1	1 Tax Reference number not completed - code 3100
			Save Report Close

3.8 CHECKING PAYROLL AND EMPLOYEE DETAILS

<u>Step 1</u>

Click View/Edit Employees under EMPLOYEE ADMIN on the left menu pane.

Select the relevant tax year from the Tax Year drop-down list to see a list of all the employees.

Select a specific employee from the list, and click View.

You can use the various filter and search options to locate a specific employee.

To the right of the screen, click on the certificate you wish to view, or alternatively if you wish to register a single employee for Income Tax, select the ITReg button at the bottom of the screen.
mployee Information				
mployee Information			Certificate Number	and the second se
Personal			Recon Period	0000000000004 Status
Nature of Person:	A - Individual with ID or Passport	required field. * Numb 🔻 *	201908	CREATED
Surname:		*		
First Two Names:		*		
Initials:	т *	_		
Date Of Birth:	ССУУММОО			
ID Number:				
Income Tax Reference:				
Passport Number:				
Country of Issue:		(•) *		
Alternate Identification Type:		•		
Alternate Identification Numbe	er:	*		
Employee Number:	04			
View Status	Active			
	Quick Navigation			
	Prev Next			
_				
mployee Contact Details			Add Ce	ertificate

<u>Step 2</u>

This will open the relevant IRP5/IT3(a).

					Inco	ome Received	
Transaction Year:				Description	- 1	Code	Value
Period of Reconciliation:							
Certificate Number:	000000000000000000000000000000000000000	000					
	Final Certific	ate Submission	-				
Certificate Type:	inter .				Total I	ncome Receive	ed
Year of Assessment:	···· ··· ··· ··· ··· ··· ··· ··· ··· ·			Description	T	Code	Value
Pay Periods Worked:							
Pay Periods in Tax Year:							
Employment Date:				-		10 11 1	
Cert. Tax Period Start:					Deductio	ons/Contributi	
Cert. Tax Period End:				Description		Code	Value
Voluntary Over Deduction							
Fixed Rate Taxation							
Directive Numbers:							
Directive Number 1:				Tol	tal Dedu	ctions/Contrib	utions
Directive Number 2:				Description	- [Code	Value
Directive Number 3:							
Employment Tax Incentiv	e			Tax Credits an	d/or Em	ployer / Emplo	yee Contributions
ETI				Description	1	Code	Value
Employee SIC7 Code			•				
Certificate Status:	Ce	rtificate Source:					
Date Created:		te Submitted:				e Source Cod	100

Click **View Certificate** at the bottom of the screen if you want to view or print the certificate in PDF format.

Tax Certificate Information		Income Received (continued)		Certificate Number: 7240777344201702000	
Amount	Source Code	Amount	Source Code	бле	
R 50000	3915	R R	3696	R PAYE	4101
R		Gross Retirement Funding Income		R 1	0.00 4102
R		R Gross Non-Retirement Funding Income	3 6 9 7	PAYE on Lump Sum Benefit R 135	0 0 4115
R		R Gross Employment Income (Taxable)	3 6 9 8	Employee and Employer UIF Contribution	
R		R 500	0 0 3 6 9 9	R Employer SDL Contribution	4141
R		Deductions / Contributions / Infor		R	4142
R		Amount	Source Code	Total Tax, SDL and UIF R 136	0.00 4149
R		R		Medical Scheme Fees Tax Credit	
R		R		R Additional Medical Expenses Tax Credit	4116
R		R		R	412
R		R		Reason for Non-Deduction of Employees' Tax	4150
R		R			
R	Щ	R			
R		R	+		
R		R			
8	HH.	R			
R	TTT .	R	+		
R		Total Deductions / Contributions / Information			
		R	4 4 9 7		

3.9 AMENDING CERTIFICATES WITHIN E@SYFILE™ EMPLOYER

<u>Step 1</u>

You will need to activate **Payroll File Editing** on the **System Utilities** menu to allow you to amend the imported certificates.

<u>Step 2</u>

To change certificate details on e@syFile[™] Employer, follow the steps listed in **3.8** CHECKING PAYROLL AND EMPLOYEE DETAILS in order to open a specific tax certificate.

<u>Step 3</u>

Once you have made all your amendments, click Save Certificate.

SDL contribution 4142 244 PAYE (Pay As You Earn) 4102 347 347	TIFICATE DETAILS		P-4-					
Period of Reconciliation: 2019 Destrificate Number: 7 202008 point about	this screen you are able to	view and edit Certificate	Data.		Inco	me Received		
Certificate Number: 7 202008 columnation control Certificate Number: 7 202008 columnation control Certificate Type: IRP5 • Commission (PAVE) 3606 Certificate Type: IRP5 • Code Value Pay Periods Worked: 012.0000 Description Code Value Pay Periods in Tax Year: 012.0000 Bescription Code Value Cert. Tax Period Start: 20190301 Bescription Code Value Cert. Tax Period End: 20200228 Bescription Code Value Voluntary Over Deduction Fixed Rate Taxation Description Code Value Directive Number 1: Directive Number 3: Description Code Value Directive Number 3: Directives Number 3: Description Code Value Employment Tax Incentive 60200 - Television programming and v VIF contribution (employ: 4141 22. Certificate Status: CREATED Certificate Source: FILE IMPORT-AMINT Taxal Tax. Scil and LITE 4142 247. <th>Transaction Year:</th> <th>2020 -</th> <th></th> <th></th> <th>Description</th> <th>Code</th> <th>Value</th> <th>k</th>	Transaction Year:	2020 -			Description	Code	Value	k
Certificate Number: 7 2020/3 Reimbursive Travel Allowar 3703 Certificate Type: IRP5 • Total Income Received Year of Assessment: 2020 • • Description Code Value Pay Periods in Tax Year: 012.0000 Gross non-taxable income 3699 Gross non-taxable income 3699 Employment Date: Image: Cert. Tax Period Start: 20190301 Image: Cert. Tax Period End: 20200228 Image: Cert. Tax Period End:	Period of Reconciliation: 2	2019 08 -			Income (PAYE)	3601		112000
Final Certificate Submission Certificate Type: Year of Assessment: 2020 • Pay Periods Worked: 012.0000 Pay Periods in Tax Year: 012.0000 Employment Date: Cert. Tax Period End: 20200228 Voluntary Over Deduction Fixed Rate Taxation Directive Number 1: Directive Number 2: Directive Number 3: Employment Tax Incentive Certificate Status: Cretificate Status: Cretificate Status: Certificate Status:	Certificate Number:	7 202008	noncano	unionizio 4	Commission (PAVE)	3606		134880
Certificate Type: IRPS Total Income Received Description Code Value Gross non-taxable income Gross non-taxable income Gross Remuneration Grode Value Gro					Reimbursive Travel Allowar	3703		21166
Year of Assessment: 2020 • Pay Periods Worked: 012.0000 Pay Periods in Tax Year: 012.0000 Employment Date: Image: Cert. Tax Period Start: 20190301 Cert. Tax Period End: 20200228 Voluntary Over Deduction Pixed Rate Taxation Description Code Value Directive Number 1: Image: Code Value Value Value Directive Number 1: Image: Code Value Value Directive Number 3: Image: Code Value Value Employment Tax Incentive Image: Code 60200 - Television programming and V Tax Credits and/or Employer / Employee Contribution Certificate Status: Credificate Source: FILE IMPORT-AMENT Value	27-0-1 S	Final Certificate Sub	bmission					
Pay Periods Worked: 012.0000 Pay Periods in Tax Year: 012.0000 Employment Date: Image: Cert. Tax Period Start: 20190301 Cert. Tax Period Start: 20190301 Image: Cert. Tax Period End: 20200228 Voluntary Over Deduction Image: Cert. Tax Period End: 20200228 Image: Cert. Tax Period End: 20200228 Directive Numbers: Image: Cert. Tax Period End: 20200228 Image: Cert. Tax Period End: Description Code Value Directive Numbers: Image: Cert. Tax Incentive Image: Cert. Tax Incentive Image: Cert. Tax Incentive Image: Cert. Tax Incentive Tax Credits and/or Employer / Employee Contributions Employment Tax Incentive Employment Tax Incentive Image: Certificate Source: FILE IMPORT-AMENC Tax Credits and/or Employer / Employee Contribute Certificate Status: Credificate Source: FILE IMPORT-AMENC UIF contribution 4142 244 PAYE (Pay As You Earn) 4102 3447 Certificate Status: Certificate Source: FILE IMPORT-AMENC Tax SOL and LIIE 4149 344	Certificate Type:	IRP5	•		Total I	ncome Receiv	ed	
Pay Periods Worked: 012.0000 Pay Periods in Tax Year: 012.0000 Employment Date: Deductions/Contributions Cert. Tax Period Start: 20190301 Cert. Tax Period End: 20200228 Voluntary Over Deduction Description Fixed Rate Taxation Directive Number 1: Directive Number 1: Total Deductions/Contributions Directive Number 2: Description Directive Number 3: Total Deductions/Contributions Employment Tax Incentive Tax Credits and/or Employer / Employee Contributions Employee SIC7 Code 60200 - Television programming and Tax Credits and/or Employee 4141 224 DATE: Description Code Value Certificate Status: Crediticate Source: FILE IMPORT-AMENE Description 4142 244 PAYE (Pay As You Earr) 4102 3447 Certificate Status: Crediticate Source: FILE IMPORT-AMENE Total Land UIF 4149 394	/ear of Assessment:	2020 🗸			Description	Code	Value	
Pay Periods in Tax Year: 012.0000 Employment Date: Imployment Date: Cert. Tax Period Start: 20190301 Cert. Tax Period End: 20200228 Voluntary Over Deduction Imployment Date: Fixed Rate Taxation Imployment Date: Directive Numbers: Imployment Tax Incentive Directive Number 2: Imployment Tax Incentive Directive Number 3: Imployment Tax Incentive Employment Tax Incentive Tax Credits and/or Employer / Employee Contribution Employee SIC7 Code 60200 - Television programming and V Certificate Status: Crediticate Source: File IMPORT-AMENE Tatal Tax, SOL and UIE Total Tax, SOL and UIE 4149 PAYE (Pay AS You Earr) 4142	Pay Periods Worked:	012.0000			Gross non-taxable income	3696		21166
Deductions/Contributions Cert. Tax Period End: 20190301 Cert. Tax Period End: 20200228 Voluntary Over Deduction Description Code Value Directive Numbers: Directive Number 1: Total Deductions/Contributions Directive Number 1: Directive Number 2: Description Code Value Directive Number 3: Total Deductions/Contributions Employment Tax Incentive Tax Credits and/or Employer / Employee Contribution Employee SIC7 Code 60200 - Television programming and Value Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENE	Pay Periods in Tax Year:	012.0000	1		Gross Remuneration	3699		246880
Cert. Tax Period Start: 20190301 Cert. Tax Period End: 20200228 Voluntary Over Deduction Description Code Value Directive Numbers: Directive Number 1: Directive Number 2: Directive Number 3: Description Code Value Directive Number 3: Directive Number 3: Description Code Value Employment Tax Incentive Tax Credits and/or Employer / Employee Contributions Description Code Value Employment Tax Incentive Employee SIC7 Code 60200 - Television programming and Mathematical Status: Credificate Source: FILE IMPORT-AMENC Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC Code Value	imployment Date:				Deductio	ons/Contribut	ions	
Cert. Tax Period End: 20200228 Voluntary Over Deduction	Cert. Tax Period Start:	20190301				1		ĩ
Fixed Rate Taxation Image: Control of the second secon	Cert. Tax Period End:	20200228			Description	Code	value	
Directive Numbers: Directive Number 1: Directive Number 2: Directive Number 3: Employment Tax Incentive ETI Employee SIC7 Code 60200 - Television programming and ▼ Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC Total Deductions/Contributions Description Code Value UIF contribution (employe 4141 224 SDL contribution 4142 244 PAYE (Pay As You Earn) 4102 3447: Total Tax SDL and UIF 4149 3944	/oluntary Over Deduction							
Directive Number 1: Total Deductions/Contributions Directive Number 2: Description Code Value Directive Number 3: Tax Credits and/or Employer / Employee Contribut Employment Tax Incentive Tax Credits and/or Employer / Employee Contribut ETI Description Code Value UIF contribution (employe 4141 224 SDL contribution 4142 244 PAYE (Pay As You Earn) 4102 3447 Total Tax_SDL and UIF 4149 3944	Fixed Rate Taxation							
Total Deductions/Contributions Total Deductions/Contributions Directive Number 2: Description Code Value Directive Number 3: Tax Credits and/or Employer / Employee Contribut Employee SIC7 Code 60200 - Television programming and Tax Credits and/or Employer / Employee Contribut UIF contribution (employe 4141 222 Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENE	ective Numbers:							
Directive Number 3: Description Code Value Employment Tax Incentive Tax Credits and/or Employer / Employee Contribut Employee SIC7 Code 60200 - Television programming and Description Code Value UIF contribution (employe 4141 224 SDL contribution 4142 244 PAYE (Pay As You Earn) 4102 347 Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENE	Directive Number 1:				Total Deduc	tions/Contril	outions	
Directive Number 3: Tax Credits and/or Employer / Employee Contribut Employment Tax Incentive Tax Credits and/or Employer / Employee Contribut ETI Description Code Value Employee SIC7 Code 60200 - Television programming and V UIF contribution (employe 4141 22 SDL contribution 4142 24 PAYE (Pay As You Earn) 4102 3447 Total Tax, SDL and UIF 4149 384	Directive Number 2:				Description	Code	Value	
ETI Description Code Value Employee SIC7 Code 60200 - Television programming and V UIF contribution (employe 4141 224 DDL contribution 4142 244 PAYE (Pay As You Earn) 4102 3447 Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC	Directive Number 3:							
Description Code Value Employee SIC7 Code 60200 - Television programming and V UIF contribution (employe 4141 224 SDL contribution 4142 244 PAYE (Pay As You Earn) 4102 347 Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC Total Tax, SDL and UIF 4149 384					Tax Credits and/or Emp	ployer / Empl	oyee Contributi	ons
Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC Total Tax, SDL and LITE 4149 394	ап <u>–</u> п				Description	Code	Value	
Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC	imployee SIC7 Code	60200 - Television pro	grammin	g and v	UIF contribution (employe	4141	224	40.00
Certificate Status: CREATED Certificate Source: FILE IMPORT-AMENC					SDL contribution	4142	246	58.80
Total Tay SOL and UIE + 4149 + 394	De dificado distante de consta			FUE INDONT AVEN	and a second second second	4102	3473	9.52
Date Created: 20190827 Date Submitted: Manage Source Codes				FILE IMPORT-AMEND	Total Tax SDI and LITE			18 32
	Jate Created: 2019	0827 Date Sub	omitted:		Manag	e Source Co	des	
Back to Employee Cancel Certificate View Certificate Save Cer		-					Save Cer	

3.10 CANCELLING CERTIFICATES WITHIN E@SYFILE™ EMPLOYER

e@syFile™ Employer allows you to cancel individual certificates or a range of certificates.

3.10.1 CANCELLING AN INDIVIDUAL CERTIFICATE

<u>Step 1</u>

You will need to activate **Payroll File Editing** in the **System Utilities** menu to allow you to cancel imported certificates.

<u>Step 2</u>

To cancel a certificate on e@syFile[™] Employer, follow the steps listed in **3.8** CHECKING PAYROLL AND EMPLOYEE DETAILS in order to open a specific tax certificate. Click **Cancel Certificate** at the bottom of the page.

				1	ncome Received	
Transaction Year:				Description	Code	Value
Period of Reconciliation:						
Certificate Number:	000000000000000000000000000000000000000					
	🔲 Final Certificate S	ubmission				
Certificate Type:			_	Tot	al Income Receiv	ed
Year of Assessment:	···· *			Description	Code	Value
Pay Periods Worked:						
Pay Periods in Tax Year:		1				
Employment Date:			_	D _1	10 11 1	
Cert. Tax Period Start:			-		ctions/Contributi	
Cert. Tax Period End:			-	Description	Code	Value
Voluntary Over Deduction						
Fixed Rate Taxation						
Directive Numbers:						
Directive Number 1:				Total De	ductions/Contrib	utions
Directive Number 2:				Description	Code	Value
Directive Number 3:						
Employment Tax Incentive	e			Tax Credits and/or	Employer / Emplo	yee Contributions
ETI				Description	Code	Value
Employee SIC7 Code			•			
Certificate Status:	Certific	ate Source:				
Date Created:	Date S	ubmitted:		Man	age Source Cod	ac.

Step 3

A pop-up message will appear to confirm cancellation. Click **Yes** to continue or **No** if you do not want to cancel the certificate.



<u>Step 4</u>

If you clicked **Yes**, you will see a pop-up message confirming that the certificate was successfully cancelled.



Step 5

If you go back to the **View Employee** page, the status of the certificate will now reflect as cancelled.



3.10.2 CANCELLING A RANGE OF CERTIFICATES

<u>Step 1</u>

Click Cancel Certificate Range under **RECONCILIATION** on the left menu pane.

<u>Step 2</u>

Select Cancel Certificate from the drop-down list.

Step 3

Select the Period of Recon.

e@syFile EMPLOYER номе		170-00
Notification Centre Attion		Period of Recon
Action Centre REGISTRATION eFiling Registration	Cancel Certificates Revive Certificates	
IMPORT		
Import/Export Payroll File EMPLOYEE ADMIN		
View/Edit Employees		
MONTHLY PROCESS PAYE Payments		
RECONCILIATION PAYE Dashboard		
Declaration		
Cancel Certificate Range Adjustments		

<u>Step 4</u>

Indicate the starting and ending numbers for the range of certificates you wish to cancel, and click on Add to list. More than one range of certificates can be selected and added.

ange Start:	1	Range Ends			-	
20180800000000015623			/	Add to	o list	
Start Range Certificate Number	End Range	2018080000	0000015624 0000015625 0000015626	e for ured icates	Certificate Range Count	Action
20180800000000015542	-	2018080000		1837.79	4	Remove
20180800000000015549	M	20180800000000015554	6	255018.48	58	Remove

Range Start - A list of all certificates found on the database will be displayed.

Range End - Only certificates which falls within the range selected will be displayed.

Please note: A range is any certificate number that follows consecutively from the previous number. Alpha characters will sort between numeric characters.

Step 5

Click Cancel Certificates.

inge Start:	Range End:	\sim		-	
			▼ Add te	blist	
start Range Certificate Number	End Range Certificate Number	Count for Captured Certificat es	Value for Captured Certificates	Certificate Range Count	Action
20180800000000015544	201808000000001554	8 5	106737.48	5	Remove
2018080000000015549	2018080000000001555	1 3	142934.54	55	Remove
		1	1	1	

Count for Captured Certificates - The number of certificates falling within the selected range which exists on the database will be displayed.

Value for Captured Certificates - The tax value of all certificates which exists on the database will be displayed.

Certificate Range Count - The number of certificate numbers which exist between the Start and End Range numbers is displayed.

Please note: Any certificates added to the database which falls within this range will show on the e@syFile application as active, but will however be cancelled once

submitted to SARS due to the inclusion of the numbers on the EMP601 which will be generated based on these certificate numbers.

Step 6

A pop up message will appear to confirm cancellation of all the certificates. Click Yes to continue or No if you do not want to cancel the certificates.

CANCEL CERTIFIC	TES			
You are about t 10 Certificates t Are you sure?		lue of R4	\$66856.27:	
Ye	s	No	1	

The message indicates the number of certificates and value for certificates found on the database.

Step 7

If you clicked **Yes**, you will see a pop-up message confirming that the certificate range was successfully cancelled, click **OK**.



3.10.3 REVIVING A CANCELLED RANGE OF CERTIFICATES

<u>Step 1</u>

Click Cancel Certificate Range under **RECONCILIATION** on the left menu pane.

<u>Step 2</u>

Select Revive Certificates from the drop-down list.

<u>Step 3</u>

Select the Period of Recon.



Step 4

Select the range of certificates that you want to revive.

		s screen?????			
Selec	Start Range Certificate Number	End Range Certificate Number	Count for Captured Certificat es	Date Cancelle.	Date Revived
	2018080000000015542	2018080000000015545	4	2018/09/11	
	2018080000000015549	2018080000000015554		2018/09/11	

Count for Captured Certificates - The number displayed here is the number of certificates which exists on the database which can be revived.

Step 5

Click on Revive Certificate Range.

Step 6

A pop-up message with a summary of the selected certificates will appear. Click **Yes** to continue.



Any certificate which is revived will be revalidated before submission and therefore must comply with the current validation rules. Where information is complete or missing, the certificates will fail during the pre-submission validation process.

<u>Step 7</u>

If you clicked **Yes**, you will see a pop-up message confirming that the Revive process is completed. The revived certificates are now set as '**CREATED**'.



3.11 COMPLETING THE EMP501 AND RECONCILING ANNUAL EMPLOYEES' TAX

The Reconciliation function includes:

 When requesting a reconciliation, the user will have the option to accept prepopulated data from SARS. Various validations rules will be performed during the completion of the reconciliation. For example, an employer may not decrease a SARS revised liability or increase an ETI already declared. If the SARS pre-populated data is not accepted the EMP501 will not be prepopulated with EMP201 values captured on e@syFile.

- It is important to note that upon submission of the reconciliation, SARS prepopulated data will be obtained and all validations will be applied which may result in the user having to amend the already completed EMP501.
- Once a reconciliation has been submitted, SARS feedback on the Status Dashboard under the Utilities menu must be updated before any further submission can be made.
- Blocking of duplicate submissions.

This is the process of matching employer financial declarations with employee financial information and the actual amounts paid to SARS.

<u>Step 1</u>

Click **Declaration** under **RECONCILIATION**.

<u>Step 2</u>

If all new required fields on the **EMPLOYER ADMIN** page were not captured, you will receive a warning message directing you to the EMPLOYER ADMIN page to complete the missing information before you can submit your declaration.



Please note: The PAYE, SDL and UIF reference numbers will only be populated if the employer is active for PAYE, SDL and UIF on the Employer Admin page within e@syFile[™] Employer. To update these particulars edit the employer account by entering the reference number on the Employer Admin page.

<u>Step 3</u>

Select the transaction year from the Transaction Year drop-down list.

<u>Step 4</u>

If you are opening the declaration for a new Reconciliation period for the first time, click on **Request**.

Notification Centre	EMP501					
Action Centre EGISTRATION eFiling Registration	EMP501 Declarations	For : EMPLOYER NAME		Select the tax year for t	he Declaration :	▼ Request
MPORT	PAYE	SDL	UIF	ETI	Status	View
Import/Export Payroll File						
MPLOYEE ADMIN						
View/Edit Employees						
PAYE	1					
Payments CONCILIATION						

Please note: If you select a future period you will be asked to provide a reason for the selection. When future periods are submitted accidentally, all related EMP201s are effectively blocked for submission too. Please be careful to ensure that you select the correct period.



<u>Step 5</u>

If you have previously requested and/or submitted the EMP501 for a specific period, you can open a saved or submitted version of the relevant EMP501, or again request a new form if a resubmission must be processed by clicking on **Revise**.

		Selec	t the tax year for the D	eclaration : 201708	Revise
1 Declarations for :	EMPLOYER NAME -				
PAYE	SDL	UIF	ETI	Status	View
PAYE 236338406.00	SDL R 8198567.00	UIF R 3792818.00	ETI R 0.00	Status SUBMITTED	View View

Step 6

If you click on Request or Revise, a pop-up message will display with an option to use SARS pre-populated values, or to use own values on the declaration. Employers are encouraged to use the SARS pre-populated values as this will also ensure that monthly liabilities on record are correct and match user data.

			Select the Law year for	the Declaration (205 700	* Arquet
FI Declarations	No : EMPLOYES MANE				
PAYE	SDL	UIF	611	Status	View
Online p	re-populate?				
SARS	might have financial v	alues for the EMP501. S	elect "Accept Data" in or	der to populate the return w	ith

Please note: If you have not recently synchronised your e@syFile[™] application, a pop-up message will display where you need to complete your eFiling credentials for authentication before the SARS pre-populated data can be retrieved.

ogin in to eFiling to verify yo	our credentials	·
	_	
SARS eFiling User Name:	i	
SARS eFiling User Name:		

REVISION:6

<u>Step 7</u>

If you click on Accept Data and completed the synchronisation process when needed, the EMP501 Declaration will open and should be populated with the relevant monthly liability amounts. Please capture the monthly payment amounts for each period.

Transaction Year (OCYY	2018 Paddad 0 201708 PAYE Rat No.	7	SDLRef L	LiFRef No.	U
	PAYE Liability SDL Rands only, no cents Rands only, no	a conta	LUF Rands only, no conts	Tetal Monthly Liability Rands only, no cents	Payments (end Paralies, Interact and Add lad) Ronds only, no cents
Marco	38764348 133	5 2 3 9	6 1 3 2 7 4	40712861	40712880
April	37581590 132	3 2 7 6	640199	3 9 5 4 5 0 6 5	3 9 5 4 5 0 6 5
¥Abiy		2 4 7 5	626912	3 8 8 9 4 7 4 0	3 8 8 9 4 7 4 0
June	Annual and	1643	632477	4 5 5 5 3 2 8 7	4 5 5 5 3 2 8 7
July		4964	634826	4 0 2 0 9 5 3 8	40209537
Nugusi	4 1 3 7 8 2 0 0 1 3 9	0 9 7 0	645130	4 3 4 1 4 3 0 0	43414300
September October					
November					
Depender					
January					
February					
Arrest Total	236338406 819	8 5 6 7	3792818	2 4 8 3 2 9 7 9 1	248329809
Difference-Total Untility & Jensel Total	- 2 3 1 7 7 8 1 4 7 - 7 9 7	0 0 5 6 -	3 5 7 3 1 0 0	- 2 4 3 3 2 1 3 0 3	
Total Link/My	4560259 22	8 5 1 1	2 1 9 7 1 8		
Tax Certificates Total	4 5 6 0 2 5 9 2 2	8 5 1 1	2 1 9 7 1 8		
Autit Result Not In Certification		TTOT	TITTT		
Tex Peld on					
Belial of Employee					
		Declaned Liability Rands only, no cen		lex	Due By / To You d. Penalties, Interest and Add tax)
					Rands only, no cents
		5008	4 8 8		2 4 3 3 2 1 3 2 1

Step 8

The Total Value of Electronic Tax Certificates is the sum total of the tax value for all imported certificates. e@syFile[™] Employer will automatically populate this field.

Step 9

The Total Value of Manual Tax Certificates is the sum total of the tax value for these certificates. e@syFile™ Employer will automatically populate this field.

Please note: Do NOT use cents in any of the fields as this will affect the calculation – round off all cents to the nearest Rand.

<u>Step 10</u>

The Total Value of Tax Certificates for PAYE is the sum total of the Total Value of Electronic Tax Certificates and the Total Value of Manual Tax Certificates. e@syFile[™] Employer will automatically populate this field.

<u>Step 11</u>

The Total Value of Tax Certificates for SDL is the sum total of the SDL contribution on each tax certificate (where applicable). Although this field will be automatically populated, you will be allowed to edit it if it is incorrect.

<u>Step 12</u>

The Total Value of Tax Certificates for UIF is the sum total of the UIF contribution on each tax certificate (where applicable). Although this field will be automatically populated, you will be allowed to edit it if it is incorrect.

Financial Par Transaction Year (CCYV)	2 0 1 8 Pater 2 0 1	8 0 2 PAYE Rar 7	SDU Raf	LIF-Rat No.	PRDF¥01
	PAYE Liability Rands only, no cents	SDL. Rands, only, no cents	UIF Rands only, no conts	Total Monthly Liability Rands only, no cents	Payments (real Permittee Interest and Asid text) Rands only, no cents
March	38764348	1335239	613274	40712861	40712860
April	37581590	1323276	640199	39545065	39545065
May	36955353	1 3 1 2 4 7 5	626912	3 8 8 9 4 7 4 0	3 8 8 9 4 7 4 0
June	4 3 5 0 9 1 6 7	1411643	632477	4 5 5 5 3 2 8 7	4 5 5 5 3 2 8 7
July	3 8 1 4 9 7 4 8	1 4 2 4 9 6 4	634826	4 0 2 0 9 5 3 8	40209538
Auguet	4 1 1 5 2 3 3 0	1320141	606011	4 3 0 7 8 4 8 2	4 2 8 3 3 6 7 0
September	4 2 0 9 6 2 8 0	1450545	6 5 5 5 6 5	4 4 2 0 2 3 9 0	44202390
Ociober	39970704	1361992	646060	4 1 9 7 8 7 5 6	4 1 9 7 8 7 5 6
November	4 3 0 4 2 0 3 8	1 4 5 5 0 9 5	6 4 3 6 6 6	4 5 1 4 0 7 9 9	4 5 1 4 0 7 9 9
December	4 3 4 3 0 1 7 4	1457446	6 5 5 9 3 2	4 5 5 4 3 5 5 2	4 5 5 4 3 5 5 2
danuary	30186338	1 1 2 8 1 1 5	5 9 7 7 9 8	3 1 9 1 2 2 5 1	3 1 9 1 2 2 5 0
February	4 1 2 9 8 4 8 8	1369107	6 3 1 4 9 0	43299085	43299084
Arrented Total	4 7 6 1 3 6 5 5 8	16350038	7 5 8 4 2 1 0	500070806	4 9 9 8 2 5 9 9 1
Officence-Total Linkliky & Armond Total	- 4 7 6 1 3 6 5 5 8	- 1 6 3 5 0 0 3 8	- 7 5 8 4 2 1 0	- 5 0 0 0 7 0 8 0 6	
Total Liability	0	0	0		
Tex Certification Total	0	0	0		
Austit Result Not In Contribution					
Tax Pald on Extell of Employee					
					Annual
			ed Liability nly, no acrits	(ax	Due By / To You cl. Penalties, Interest and Add tax) Rands only, no cents
			11110	100	499825991
÷		Construction over 1			

<u>Step 13</u>

Click on '**Save**' if you have edited or viewed the EMP501 and you are not ready to submit yet, or click on **File** if you want to proceed to submission.



<u>Step 14</u>

Click **OK** and then navigate to the Submit to SARS screen where you can submit your declaration.



<u>Step 15</u>

You will see the status of the submission you prepared change to "Ready to File" if you clicked on File.

		Color	ct the tax year for the D	eclaration : 201708	• Revise
		Contra Co	te the tax year for the t	201708	Kevise
1 Declarations for :	EMPLOYER NAME -				
PAYE	SDL	UIF	ETI	Status	View
R 236338406.00	R 8198567.00	R 3792818.00	R 0.00	SUBMITTED	View
		R 0.00	R 0.00	SUBMITTED	View
R 0.00	R 0.00	R 0.00			

<u>Step 16</u>

To submit your EMP501 to SARS, follow the process described in chapter **3.12 ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATIONS TO SARS** below.

<u>Step 17</u>

If you decide to use your own values on the EMP501 declaration, a second message will display to give you the option to go back to using SARS pre-populated values. Click on "Use my own values" again to proceed.



<u>Step 18</u>

e@syFile[™] Employer will attempt to retrieve EMP201 data from your database to insert on the EMP501, or leave the EMP501 blank for completion if no history is available. Click **OK** to proceed to the EMP501 where you will be able to capture the monthly liability and payment amounts.

EMP 501 Pre-Populate Process - OWN VALUES
e@syfile does not have EMP201's for the following periods (201703, 201704, 201705, 201706, 201707, 201708). • Please select OK to continue; or • Cancel to either • Synchronise e@syfile in order to update e@syfile with EMP201's previously submitted via e@syfile; or • Request a SARS pre-populated EMP501. OK Cancel

<u>Step 19</u>

Complete the outstanding liability and payment amounts on the EMP501 declaration, and click on **File** when you are ready to proceed to the submission process.

Titnsaction Vear (CCY)	(OCYYMM)	1 7 0 8 PAYE Rdf	SOL Ref	LIFRen	0
	PAYE Liability Rands only, no cents	SDL Rands only, no cents	UIF Rantis only, no cents	Tetal Monthly Liability Rands only, no cents	Payments (see Pensities, Interest and Add set) Rands only, no cents
March	0		0	0	
April	0			0	
May					
July					
August					
September					
October					
November					
December					
January February					
Arrual Total		0			
Otherence-Total Liability & Annual Total	4560259		219718	5008488	
Total Linking	4 5 6 0 2 5 9		219718		
Tax Certificates Total	4 5 6 0 2 5 9		219718		
Audit Result Not In Certification					
Time Paid on		1			
Bohalf of Employee		1			
			and Liability	les	Due By / To You
					Rands only, no cents
			only, no cents	(e)	cd. Penalties, Interest and Add tax) Rands only, no cents

<u>Step 20</u>

On the Declaration and Submission screens, the status of your EMP501 will show as "Online Validation Required" (ONLY if own values are used).

		Sel	ect the tax year for th	e Declaration : 201708 🔻	Revise
1 Declarations for	: EMPLOYER NAME -			No.	-
PAYE	SDL	UIF	ETI	Status	View
	SDL R 8198567.00	UIF R 3792818.00	ETI R 0.00	SUBMITTED	View
PAYE R 236338406.00 R 0.00					

You can now proceed to the Submit to the SARS page to finalise your EMP501 submission.

3.12 ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATIONS TO SARS

The Submission function includes:

- A revalidation of data being submitted. Due to changes in the validations and required information, it is necessary to revalidate the information
- An entry in the Utilities menu to create finalised certificates in PDF format upon selection (only for Full Tax Year Reconciliations)

<u>Step 1</u>

Once you have prepared your Declaration or Adjustment, click **Submit to SARS** under **SUBMISSION** in the left menu pane. A screen will appear listing all declarations or adjustments which are ready for submission.

Long to an a start of the	AT LODO AND	it documents to SARS	States and states				
lease select the	documents you wis	h to submit by clickir	ng on the Subr	nit check box			Submit
Туре	Reference	Company	Year	Status	Submit	1 1	
EMP501	(Income of the local data	EMPLOYER NAME /	201708	READY TO FILE		View	Remove
EMP501	i i	EMPLOYER NAME #	201702	ONLINE VALIDATION RE	É	View	Remove

<u>Step 2</u>

If you wish to view the document before sending it, click **View.** If you would like to revise the document, click **Remove** to delete it from the SUBMISSION list.

<u>Step 3</u>

Select the declaration you want to submit in the Submit column (check box), and click **Submit.**

<u>Step 4</u>

Once pre-submission validation passed successfully, you must select the destination on the local hard drive where you wish to store the electronic file, and click **Select Folder.** **Please note:** You cannot use a network drive to save the data but the local drive (usually C:/). Rather copy or move the data to a network folder once you receive the confirmation message.

Type	Reference	Company EMPLOYER NAME 4	Year 201708	Status READY TO FILE	Submit 1 A	View	Remov
Select	t Destination Folder				x	1	
GC) ▼] ≪ Terra (F;)	downloads + PAY	E 🕨 🔟 🐇	Search PAYE	٩		
Organ	ize 🔻 New folde				• 0		
	vorites	Name		Date modified	Туре		
	Desktop Downloads	Aug 2017 testin		2017/09/05 07:1			
	Recent Places	Setup_EIVIP_07	2_11111	2017/09/04 09:1	LU File told		
	Google Drive						
-	OneDrive						
	braries						
	Documents Music						
	Pictures						
	Videos 👻	<	Ш		*		
	Folder	PAYE					
				Select Folder	Cancel		
					<i>a</i> 4		

<u>Step 5</u>

If you used your own values, e@syFile[™] Employer will attempt to validate the EMP201 amounts you captured as part of the submission. This might result in a warning message that will list possible errors or discrepancies on your EMP501. It is important to review these possible errors in the right hand column before proceeding with the EMP501 submission.

EMP501 su	bmission	comparison	result
-----------	----------	------------	--------

On this screen you will find the results of the comparison of the EMP501 (created from own values) vs the data SARS has for the same p

Error/Warning	Field	Message	Resolution
Warning	SDL Liabilities : Amount declared for March	The value declared in SDL Liabilities : Amount declared for March (1000000) differs significantly from the amount previously declared (0).	Do you want to submit. the amount 1000000?
			O Yes O No
Warning	SDL Liabilities : Amount declared for April	The value declared in SDL Liabilities : Amount declared for April (100000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 100000?
			O Yes O No
Warning	SDL Liabilities : Amount declared	The value declared in SDL Liabilities : Amount	Do you want to submit
	for May	declared for May (10000) differs significantly from the amount previously declared (0).	the amount 10000?
			O Yes O No
Warning	SDL Liabilities : Amount declared	The value declared in SDL Liabilities : Amount declared for June (1010000) differs significantly	Do you want to submit
for June	for June	from the amount previously declared (0).	the amount 1010000?
			○ Yes ○ No
Warning	SDL Liabilities : Amount declared for July	The value declared in SDL Liabilities : Amount declared for July (10100) differs significantly from	Do you want to submit
	ion sorry	the amount previously declared (0).	the amount 10100?
			○ Yes ○ No
Varning Total Liabilities : Amount de		The value declared in Total Liabilities : Amount declared for March (1000000) differs significantly	Do you want to submit
	from the amount previously declared (0),		the amount 1000000?
			O Yes O No
Warning	Total Liabilities : Amount declared for April	The value declared in Total Liabilities : Amount declared for April (100000) differs significantly from	Do you want to submit
	1.00 80	the amount previously declared (0).	the amount 100000?
			O Yes O No
Warning	Total Liabilities : Amount declared for May	The value declared in Total Liabilities : Amount declared for May (10000) differs significantly from	Do you want to submit
		the amount previously declared (0).	the amount 10000?
			O Yes O No

Should you choose to proceed, a final message will display before the submission process starts. Click **OK** to continue with offline submission, or **Cance**I to attempt online validation and submission.

EMP501 Offline Submission			
		nected to the internet. If you wish to s re trying this submission again.	ubmit this offline
	Online Validation you need to be co click Cancel and connect online be OK		

<u>Step 6</u>

e@syFile™ Employer will generate the following folders and files in the destination folder specified:

- Subfolder with employer name
- EMP501 in PDF format
- EMP601 & EMP701 in PDF format (where applicable)

)rganize 🔻 Incl	ude in l	ibrary 🔻 Sha	re with 🔻 🛛 Burn	New folder		833	- 51 (
Favorites Desktop Downloads Recent Places Coogle Drive ConeDrive	* III	man .	NAME_A_201702 NAME_A_EMP501		Date modified 2017/09/05 07:11 2017/09/05 07:11	Type Compressed (zipp Adobe Acrobat D	Size 4 KB 273 KB

Step 7

You will be asked to provide your eFiling login name and password before your information can be submitted to SARS. A message will appear confirming that your declaration has been successfully submitted to SARS.

Step 8

You can monitor the status of your submission using the EMP501 Status Dashboard (see chapter 3.21 EMP501 STATUS DASHBOARD).

Please note: You need to retrieve SARS feedback (accepted/rejected) for your previous submission before you will be allowed to resubmit an EMP501 for a specific period.

3.13 RESUBMISSION OF EMP501

If you need to resubmit your EMP501, please follow the steps listed in Chapter **3.12 ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATION TO SARS** after making the necessary changes to the certificates or the EMP501 declaration.

<u>Step 1</u>

Make the necessary changes to certificates if applicable.

<u>Step 2</u>

Click on Declaration on the left, and select the relevant Reconciliation period from the drop-down list.

Step 3

Click on Revise to open a new EMP501 Declaration, and follow the steps as explained in Chapter 3.11 COMPLETING THE EMP501 AND RECONCILING ANNUAL EMPLOYEES' TAX and 3.12 ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATION TO SARS to access the Declaration form.

Please note: If you select the same destination folder as that of your first submission, your data will be replaced with the amended data.

			Select the tax year	for the Declaration : 2017	02 v Revise
01 Declarations	for : EMPLOYER NAM	1E-1	the second secon	X	
PAYE	SDL	UIF	ETI	Status	View
R 39045.00	R 0.00	R 0.00	R 0.00	SUBMITTED	View
R 0.00	R 0.00	R 0.00	R 0.00	SUBMITTED	View
R 0.00	R 0.00	R 0.00	R 0.00	SUBMITTED	View

Step 4

Change the monthly values entered for PAYE, SDL, UIF and Payments if necessary.

Step 5

Click **Save** to continue later , **or File** if you are ready to proceed.

Step 6

Follow Steps 1-6 in of 3.12 ELECTRONIC SUBMISSION OF A RECONCILIATION DECLARATION TO SARS.

Please note: Only certificates in a created status will be included in your resubmission.

3.14 COMPLETING A RECONCILIATION DECLARATION ADJUSTMENT (EMP701)

Complete an EMP701 if you need to make adjustments to the reconciliation declarations and payments in respect of prior years. This option should only be used where the amended submission relates to the submission made using pre-printed certificates (up to the year 2008).

Create new certificates for the certificates which need to be added or amended. Please note that any cancellations will have to be done manually.

<u>Step 1</u>

Click View Employees.

<u>Step 2</u>

Select the Company Name and Transaction Year for the certificate that you wish to change.

Step 3

Select the employee for whom you want to add or adjust a certificate, and then click on the relevant certificate to the top right of the screen. Where an EMP701 has been submitted previously, the submitted certificates can be cancelled during this step.

egrsyFile EMPLOYER 6.8.1 HOME Notification Centra	ENPLOYEE DETAILS				
Action Centre	On this screet you are able to your and a To your this Employee's Certificates, and				
RECISTRATION	Employee Information			Certificate Number	_
IMPORT Impart/Supert Paynul IIIa IMPLOYEE ADMIN View/166 Displayees	Personal Nature of Personi Sumames	A - Individual with ID or P	sticates required field	Recon Period 201706	Status CREATED
NONTINEY PROCESS DAYT Depresence NATE DOCCLLATION Deconcellation Deconcellation Cancel Certificate Range Adaptments SUBHISSION Subern for SARS Third, Pany Againmentents Third, Pany Againtenants UPILOYER ADDIN Venefield/Change UTILITIES Lightment		Active •	empp •		
HELP					
Application Help	Employee Contact Details			AM	Certificate
Update	Employee Bank Details				111
Log off			Back to View/Edit	17 Reg	Save Employee

Step 4

EXTERNAL GUIDE - e@SYFILE™ EMPLOYER USER GUIDE PAYE-easyFile-G001

	to vow and mit Certificate Data.			
IROOM		Inc	ome Received	
Transaction Year)	2020 *	Description	Code	Value
Period of Reconciliations	2019 00 +	Income (PAVE)	3601	196000
Certificate Number:	ACTION CONFIRMATION	simbursive Travel Allows	3703	21603
Certificate Type:	Are you sure you want to CANCEL this certific Click 'YES' if you wish to continue, or click 'N stop this action.	0.1	Income Receiv	red
Year of Assessments		Description	Code	Value
Pay Periods Workedi	Yes No	ross non-taxable income	2696	21603
Pay Periods in Tax Years	012.0000	Gross Remuneration	2699	198000
Employment Date:	10	Dedacti	oes/Contribut	linei
Cart. Tax Period Start:	20190301	Description	Code	Value
Cert. Tax Period Endi	20200228	OPERAPHONE	LODE	
Voluntary Over Deduction				
Fixed Rate Taxation				
Directive Numbers:				
Directive Number 1:		Total Della	ctions/Contri	butions
Directive Number 2:		Description	Code	Value
Directive Number 3:				
Employment Tax Incentiv	•	Tax Credits and/or En	ployer / Empl	oyne Contributions
en 🗌		Description	Code	Value
Employee SIC7 Code	60200 - Television programming and +	UTF contribution (employe	4141	3569.28
		SOL contribution	4142	1960.00
Certificate Status) CR	EATED Certificate Source: FILE IMPORT	PAYE (Pay As You Earn)		21860.00
	190827 Date Submitted: 20190906	Terst Tay Are section.		37479 38
Date Created: 20.	rade sopulation 20130306	Planay	re Source Co	oes.

Click Cancel Certificate to cancel the certificate you have selected.

To adjust the certificate you have selected, follow the steps listed in **3.9 AMENDING** CERTIFICATES WITHIN e@SYFILE™ EMPLOYER.

<u>Step 5</u>

To create a new certificate, follow the steps listed in **3.6 CAPTURE MANUAL** CERTIFICATES and **3.7 IMPORT PAYROLL FILE**.

<u>Step 6</u>

Click **Adjustments** under **RECONCILIATION** on the left menu pane for this screen to appear.

e@syFile EMPLOYER 6.8.1 номе	PREVIOUS YEAR ADJUSTMENT			
Notification Centre	Select a company and relevant tax year t	to start the adjustment		
Action Centre		Construction of Second Second	EMP701 STA	-
REGISTRATION	Company Filber:		General Size	
	Company Name:		Transaction Year	
IMPORT	PAYE Reference No.	SDL Reference No:	USP Reference No.	
Import/Export Payroll File				-
EMPLOYEE ADMIN	A Restored Designation			
View/Edit Employees	Adjustment Declaration	PAYE SDL	URF Tobal	
MONTHLY PROCESS	Previous Declaration			
				1 1
	Difference			10 11
RECONCILIATION	Adjusted Declaration			
			Due By/To You	
	Sum of Adjustments			
	Total			$1 + \lambda + \lambda = 1$
SUBMISSION			Contract to the total to	
			Total Due by/to you:	
THIRD PARTY APPOINTMENTS				
			Save	Ready To File
EMPLOYER ADMIN				
UTILITIES				
Mismatch				
HELP				
Application Help				
Update				

<u>Step 7</u>

Select the relevant Employer and Period from the drop-down lists. Capture or verify the liability fields and the Previous Declaration payment fields.

<u>Step 8</u>

If you made any subsequent payments to SARS since your last EMP701 submission, you need to now add this amount to the previous declaration Payment amount, and enter this new total in the Adjustment Declaration payment field.

Notification Centre	PREVIOUS YEAR ADJUSTMEN					
Action Centre	mparts File	ched and an an an an an an an an			ages-widely a	
GISTRATION			_		SAVED	
efiling Registration	Company Names		1.4		200802 *	
Import Export Payroll File	PAYL Reference Irays	All Address of the		of the second second	(
IPLOYEE ADHIN			-	-	-	
Verville Employees	Adjustment Declaration					
INTHLY PROCESS		and a second		-		
DATE	Previous Detlenition	A COLOR OF COLOR				
	Difference		-			N 8.
CONCILIATION	1000		-		-	
PAYE Dushboard	Adjusted Declaration				-	Die Internet
				Doe By/Yo Yes		
	Sum of Adjustments					
Cancel Certificate Range	Total		-	1000	-	n (* 1997)
			-			
BMISSION			Tota	al Due by/to you:		n v
					-	1
IRD PARTY APPOINTMENTS				Save	View EMP70	Ready In File
Third Party Appointments						
Vervicit/Change						
LETTES						
Velices						
LD .						
Update						
Logioli						

Please note: Do **NOT** use cents in any of the fields as this will affect the calculation. Please ensure that you round off all cents to the nearest Rand.

Step 9

e@syFile™ Employer will automatically calculate the Difference, Sum of Adjustments and Total Due by/to you fields.

<u>Step 10</u>

Click **Save.** A message will appear informing you that the Adjusted Declaration for that tax year has been successfully saved.

Click OK.

<u>Step 11</u>

Click **Ready to File** and follow the process described in **3.12 ELECTRONIC SUBMISSION OF A RECONCILIATION DECLARATION TO SARS** to submit your EMP701 to SARS.

3.15 SUMMARY REPORT

A new function was added to allow employers to extract previously submitted certificate data for from their database in PSV (Pipe Delimited/Separated Value) format. The layout of this report will be determined by the combination of source codes included in the certificates for a selected employer and Reconciliation Period. Please note: Data can only be exported if it is available on your database, it is not a request to obtain certificate data from the SARS systems if older backups or database files were lost or destroyed.

<u>Step 1</u>

Click on Summary Report on the left-hand side

<u>Step 2</u>

Select the Period of Recon from the drop-down menu in the right-hand corner and click on Export.



Step 3

Enter a filename and click on Save



3.16 PRINTING CERTIFICATES

You can also print certificates in bulk from the IRP5/IT3(a) subfolder (see steps in Chapter **3.28 GENERATE IRP5/IT3(a) PDFs**). Alternatively, you can print certificates one by one following the steps listed below.

<u>Step 1</u>

Click View/Edit Employees under EMPLOYEE ADMIN on the left menu pane.

<u>Step 2</u>

Select the Company Name and Transaction Year for the certificate that you wish to print.

Step 3

Select the employee from the list.

Step 4

Open the certificate.

EXTERNAL GUIDE - e@SYFILE™ EMPLOYER USER GUIDE PAYE-easyFile-G001

Step 5

Click View Certificate.

Step 6

The certificate will appear in PDF format. Click on the Print icon on the top left corner of the screen.



3.17 REGISTERING THE EMPLOYER FOR eFILING

If the employer wants to register for eFiling, follow this process. **Please note:** You must be online to use this function.

<u>Step 1</u>

Click **eFiling Registration** on the left menu pane.

Step 2

The Register for eFiling screen will be displayed. Click to accept the Terms and Conditions and then click **Continue.**

Step 3

Capture all the required information, and click Register.

3.18 CREATING A BACKUP OF YOUR DATABASE

It is important to make frequent backups of your reconciliation information. The backup process on e@syFile™ Employer is quick and simple.

<u>Step 1</u> Click **Utilities.**

<u>Step 2</u> Click Database Utilities.

<u>Step 3</u> Click Backup DB Directory.

<u>Step 4</u> Select a destination folder and click **OK**.



Step 5

A message will be displayed indicating that the database back-up was successful, click **OK**.

Please note: Back-up files are all named in the following manner to make it easy to locate the most recent back-up file: [EasyFile]+[date]+[time of backup]+[Backup]. New back-up files will be zipped (compressed) and will include data for all the PAYE reference numbers included in the e@syFile[™] Employer database.



Ensure the e@syFile[™] Employer login details, which created the back-up, are saved with the back-up files.

The e@syFileTM Employer login details, which created the back-up file, will be needed when restoring the back-up. The encrypted data contained in the back-up will not be accessible unless the e@syFileTM Employer login details which created the back-up are used, due to the new added precaution – New database encryption and decryption, to secure sensitive information – refer to **step 2** below for more information.

3.19 MERGE MULTIPLE DATABASES

This process should be used where:

- Multiple branches or different payroll/HR staff members complete manual certificates and payroll files, and these should be merged for the reconciliation.
- Data for different financial periods should be merged onto one single database.

With the introduction of split database files for each PAYE number within the e@syFile[™] Employer directory, the merge process has been amended to combine one employer database file at a time. When merging another user's data with your existing e@syFile[™] Employer database, one employer database will be selected, to merge with your data.

This will enable tax practitioners, payroll consultants and users with multiple PAYE reference numbers to create e@syFile[™] Employer database or back-up files for a single PAYE reference number.

Note 1: To ensure that no certificates are lost during the merge process, different certificate numbers or ranges should be assigned to the different staff members preparing manual certificates. Back-up all data to be merged, and transfer these files to a selected folder on the PC where the various databases will be merged.

Note 2: A new backup file (version 6.0.0 and later) will need to be 'unzipped' before the data can be merged with the existing e@syFile[™] Employer data. Access the folder where the back-up has been saved that you wish to restore. Extract or 'unzip' the file before proceeding with the merge process.

Note 3: Only certificate data will be merged. No EMP501 and/or other data will be moved.

<u>Step 1</u> Click Utilities

Step 2 Click Database Utilities

<u>Step 3</u> Click Merge

Step 4

1. Back-ups created on version 5.0.9 or prior: Select the relevant back-up file from the destination folder where it was saved. Click **Open** to begin the merge process.

2. Backups created on version 6.0.0 and later: Select the PAYE number file within the backup directory from the destination folder where it was saved. (You will need to "unzip" the back-up folder first) Click **Open** to begin the merge process.

SYSTEM UTILITI	ES			
	are able to run the system utilities.			
ION Database Utilitie				
egistration		1 10 11 1	1.1	
Here you are able t	o create a backup of your local Database or res	tore your local Database from .	a backup	
Export Payroll File	Backup DB Directory	Merge EasyFile DB	Restore EasyFile DB	
ADMIN				
Merge datab	arar l			X
ROCESS	/03E3			
Look in	: 🔒 e@syFile backups			
* (T-2)	Name	Date modified	Type Size	
ATION	DoNotDelete	2012/03/15 06:47	File folder	
Recent Places	75 dbz	2012/03/15 05:38	DBZ File	118 KB
	76 dbz	2012/03/15 05:38	DBZ File	118 KB
Desktop	EasyFile.dbz	2012/03/15 05:38	DBZ File	38 KB
				0.000
Libraries				
N AN				
C SARE Computer				
OINTMENTS				
ausintriaitas				
ADMIN Network				
t/Change				
	File name: 75			Open
nise Application	Files of type: Text		<u> </u>	Cancel
Delete Payroll Fi	la			
Reset Passwords				
Payroll File Editir				
on Help Reassign Certific Generate IRP5 /				
	tion/Penalty Service			

<u>Step 5</u>

Read the pop-up message carefully before proceeding with the merge process. If you do not have a back-up, click **Cancel** and first make a backup. If you already made a backup of your data, click **Yes** to continue.



Step 6

Merging a new, encrypted back-up file will require the e@syFile™ Employer login details to be completed.

Click Validate to proceed.

<u>Step 7</u>

- **Back-up file created on version 5.0.9 or prior:** Additional messages will reflect the status of the merging process, and prompt a restart of the software once the merge has been successfully completed.
- **Back-up file created on version 6.0.0 and later:** A pop-up message will appear once the process has been completed. To access the database file merged, use the Change Employer menu option to select the relevant database file.


To merge multiple database files, repeat step **4-7** above.

3.20 RESTORE DATABASE FROM A BACK-UP

Step 1 Click Utilities

<u>Step 2</u> Click Database Utilities

<u>Step 3</u> Click **Restore**

Step 4

Select the location from which to restore the database, and select the back-up file you wish to restore.

3.21 EMP501 STATUS DASHBOARD

The table on this page will list all successful submissions. You can also check the status of your submission using the Status Dashboard. The Status Dashboard includes two additional columns which reflect the date and time of your submission, as well as the method used for submission. This also serves as your proof of submission for both submission methods.

Please note: It is very important to retrieve your submission status (Accepted/Rejected) to ensure that your EMP501 submission was processed

successfully. Details regarding possible errors will be displayed here if your submission was rejected. If you encounter an unknown error code, please contact your nearest branch or the SARS Contact Centre for assistance. Correct these errors and do a full resubmission.

<u>Step 1</u>

Click Utilities on the menu pane.

<u>Step 2</u>

Click EMP501 Status Dashboard.

Step 3

Your submissions will be displayed on the screen.

YSTEM UTILITIES	and the second little					
Database Utilities	TEN SOR BESTERN REMERES					
MP501 Status Dashboard						
CHP301 Status Dashooard						
Please double click on a Con	npany record to view det	ailed status.				
Company Name	Reference N	Form	Year	Channel	Date/Time	Update
-		EMP501	201608	Online	2016/09/16 14:29:4	Update
		EMP501	201502	Online	2017/08/30 13:27:3	Update
	-	EMP501	201602	Online	2017/08/30 13:44:1	Update
	-	EMP501	201708	Online	2017/09/01 10:33:5	Update
		EMP501	201702	Online	2017/09/01 11:23:5	Update
-	-	EMP501	201602	Online	2017/09/01 11:43:4	Update
		EMP501	201602	Online	2017/09/01 14:27:4	Update
			_			_
AA88 Payment Allocation	Dashboard					
Pre-Submission Validation	Report					
mport Payroll File Log						
Delete Payroll File						
Reset Passwords Payroll File Editing						
Reassign Certificate						
Generate IRP5 / IT3(a) PD)F's					
Full Resubmission Request						

Step 4

If you submitted electronically using eFiling, double-click update (you must be online to receive an update of your submission status).

Status Update		
Updates Reci	eved! Click	: 'Ok' to view.
	ОК	I

<u>Step 5</u>

Click **OK** to view the returned status. Below are examples of an 'Accepted' status as well as a 'Rejected status'.

Please note: You will need to resubmit a corrected EMP501 if the original submission was rejected. The resubmission process is covered in section **3.29 FULL RESUBMISSION REQUEST**.

Cert Number	Form Type	Response
7010718437	EMP501	Please note that your return has been successfully submitted
7010718437	EMP501	Declaration Processed
7010718437	EMP501	[PAYE] Please note that your reconciliation has been finalised.

Please note: Until your status update reflects as Accepted or Rejected, you will not be able to resubmit your EMP501 (or an EMP701 where applicable).

Status Update	and the second	29100 Online 2017/00/30
Cert Number	Form Type	Response
7390758466	EMP501	EMP501 reconciliation processed. Please check your compliance status
7390758466	EMP501	Recon Failed Compliance
	Close	

3.22 EMPLOYMENT TAXES VALIDATION

Employment Taxes Validation (ETV) for IRP5/IT3(a) certificates were introduced after the 2019/08 Reconciliation period.

The income tax filing threshold determines that individuals who qualify are not required to submit an Income Tax Return for Individuals (ITR12) although Pay-As-You-Earn (PAYE) was deducted monthly by their employers. Previously, employers had to follow a laborious process to correct any errors that were made on the deduction of PAYE, Skills Development Levy (SDL) and Unemployment Insurance Fund (UIF). To ease the burden on employers, SARS is introducing a process to validate the PAYE, SDL and UIF deductions captured on the IRP5/IT3(a) certificates submitted with the EMP501 return. In addition, SARS is also checking if certificates have already been assessed by the Income Tax System, as well as the duplication of Income Tax Reference Numbers for multiple employees.

A set of criteria will be applied to include a limited number of certificates in the validation process. An algorithm will use the financial information captured on the certificate, re-calculate the PAYE, SDL and UIF and compare it with the values captured on the certificate. Any discrepancies will be communicated to the employer through a letter to the channel which was used for the submission. The detail of the certificates that failed the validation check will be communicated via a .TXT file which

can be downloaded from the submission channel. Employers must rectify any errors and re-submit the corrected certificates.

To retrieve your ETV Report, follow the steps below.

<u>Step 1</u>

Ensure that you retrieved the submissions status update under Utilities, on the EMP501 Status Dashboard in e@syFile Employer.

Click on Update, next to the relevant submission to retrieve an Accepted or Rejected status.

Cert Number	Form Type	Response
	EMP501	Please note that your return has been successfully submitted
-	EMP501	Declaration Processed
	EMP501	[PAYE] Please note that your reconciliating has been finalised.

Please note: ETV feedback will not be available for rejected EMP501 submissions.

Step 2

Click on Download Employment Taxes Validation to retrieve ETV feedback.

n bhis screen you a	are able to run the sy	estern utilities					
Database Utilities	5						
EMP501 Status D	ashboard						
Please double clici	k on a Company reco	rd to view detailed	status.		Download En	nployment Ta	xes Validation
Company N	Reference	Form	Year	Channel	Date/Time	Update	ETV
-		EMP501	in the second second	Online	2014/09/15 15:29	Update	

Complete your eFiling credentials for authentication and click on login.

SARS Secure Login	
Login in to eFiling to verify yo	our credentials.
SARS eFiling User Name:	
SARS eFiling User Name:	
SARS eFiling User Name: SARS eFiling Password:	
SARS eFiling User Name: SARS eFiling Password:	Login Cancel
SARS eFiling Password:	Login Cancel

<u>Step 4</u>

Click on the View button in the right hand column to view the ETV Report for an EMP501 Submission.

atabase Utilitie	5						
MP501 Status D	ashboard						
Please double clic	k on a Company reco	ord to view detailed	d status.		Download En	nployment Ta	xes Validation
Company N	Reference	Form	Year	Channel	Date/Time	Update	ETV
		EMP501	201408	Online	2014/09/15 15:29	Update	
-	-	EMP501	201502	Online	2015/04/16 12:16	Update	
		EMP501	201508	Online	2015/10/14 16:04	Update	
·	-	EMP501	201602	Online	2016/05/03 08:35	Update	
-		EMP501	201608	Online	2016/09/28 08:58	Update	
0		EMP501	201702	Online	2017/04/14 12:07	Update	
0		EMP501	201708	Online	2017/09/18 10:34	Update	
0	-	EMP501	201802	Online	2018/04/05 12:34	Update	
-	-	EMP501	201808	Online	2018/09/18 10:43	Update	
-	-	EMP501	201902	Online	2019/04/18 12:11	Update	
-	-	EMP501	201908	Online	2019/09/25 07:20	Update	
-		EMP501	202002	Online	2020/04/02 11:37	Update	View

<u>Step 5</u>

The details of certificates with errors will be displayed. You can also save the report to a text file format by clicking on the Save button



3.23 MANAGING PAYROLL FILE IMPORTS IN E@SYFILE™ EMPLOYER

e@syFile™ Employer keeps a log of all import attempts, including failures, warnings and successful imports.

Step 1 Click Utilities.

Step 2 Click Import Payroll File Log.

<u>Step 3</u>

To open a specific error report, simply double-click the entry listed in the log.

SYSTEM UTILITIES			
On this screen you are able to run the system utilities.			
Database Utilities			
EMP501 Status Dashboard			
AA88 Payment Allocation Dashboard			
Pre-Submission Validation Report			
Import Payroll File Log			
Here you are able to view a log of all the Payroll files that have been importe	d.		
Log Category Payroll Imports V			
File Name	Date Imported	Status	
C:\Users\	2019/09/04 12:26:29	FAILED	-
C:\Users\	2019/09/04 12:25:55	FAILED	
C:\Users\	2019/08/27 14:13:17	PASSED -	
C:\Users\	2019/08/27 14:12:52	FAILED	
C:\Users\	2019/08/27 14:12:08	FAILED	
C:\Users\	2019/08/27 14:09:48	FAILED	
C:\Users\	2019/08/27 14:04:08	FAILED	illi i
C:\Users\	2019/08/27 13:35:26	PASSED -	
C:\Users\	2019/08/27 13:33:42	FAILED	

3.24 MANAGE PAYROLL FILE EDITING IN E@SYFILE™ EMPLOYER

This option must be enabled by the ADMIN user before you can edit certificates imported from a CSV file.

<u>Step 1</u>

Click Utilities.

<u>Step 2</u>

Click Payroll File Editing.

Step 3

Tick to select Enable Editing of Imported Payroll File Data.



Click Apply.

3.25 DELETING PAYROLL FILES

Follow these steps to delete imported payroll files.

<u>Step 1</u>

Click Utilities.

<u>Step 2</u>

Click Delete Payroll File.

Step 3

Double-click the payroll file to be deleted, or click View.

<u>Step 4</u>

Tick the box next on the relevant payroll files to be deleted.

<u>Step 5</u>

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Click Delete.

Automatic Carlos	SYSTEM VIILITIES				
	No. of Concession, Name of Street, or other	and the surface of the local division of the			
Dele	te Employers				
strong Despectation	ENDING Status Desiries	nd .			
and and a second se	Company Name	Reference	Tax Year	Delete	
			2018	U	
NUTTE ADDRESS					
Section Section					
					View
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					View
					View
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A CONTRACTOR					
RILPAST APTON					
a contract of trees (inc					
				Close Delete	
				cose cosete	
		1000			
	Generate IRP3 / IT3(a)				
	Full Republicitation Respon				_

<u>Step 6</u>

A message will appear indicating that employee data associated with the relevant employer (as per the file to be deleted) will be deleted.



<u>Step 7</u>

Click **OK.** The payroll file is now deleted.

3.26 RESET PASSWORD

Do this to reset users' passwords.

Please Note: Only the ADMIN user can access this function.

Step 1

Click Utilities.

Step 2

Select the Reset Passwords tab.

Step 3

Select the Local Login User Name from the drop-down list.

Step 4

Enter a new Local Logon Password.

Step 5

Repeat the captured Local Login Password.

HOME		
Noblication Gentle	SYSTEM UTILITIES	
Action Central	The Resolution of the same	
REGISTRATION	Database Utilities	
arting Registration	ENP501 Status Dashboard	
HPORT	AA88 Payment Allocation Dashboard	
Internet Expert Newson File	Pre-Submission Validation Report	
EMPLOYEE ADMIN	Import Payroll File Log	
Vaud tell Employment	Delete Payroll File	
HONTHLY PROCESS	Reset Passwords	
	Here you are able to reset the user pasewords. This screen is only available to the ADMIN user.	
	Local Login User Name:	
RECONCILIATION		
PAVE Dashboerd	Local Login Password:	
Declaration	Repeat Local Login Password i	
Canon Campone Mange	Local Login Password hint: Apply C	anges
Adjustments		
SUBMISSION		
Suberit to SARS		
ININD PARTY APPOINTMENTS		
Third Party Appaintments OPPLOYER ADMIN		
Ven/Edil/Change		
Ulber		
Synchronice Application		
Manalah		
1011P		
Addication Help	Payrod File Editing	
Update	Reassign Certificate	
Log off	Generate IRP5 / IT3(a) PDF's	
	Full Resubmission Request	
	CTED Current Tex Year > 2018 Working With :	

REVISION:6

Please note: A pop-up message will appear prompting you to correct the information you entered (see Step 6 of 2.1 INSTALLING OR UPDATING e@SYFILE[™] EMPLOYER – New users installing e@syFile[™] Employer).

<u>Step 6</u>

Enter Local Login Password hint.

<u>Step 7</u>

Click Apply Changes. The user password has now been reset.

3.27 REASSIGN CERTIFICATE

If duplicate records have been created for an employee under **EMPLOYEE ADMIN**, you can now reassign the tax certificate(s) to the correct employee record. The duplicate record will then automatically be deleted.

Please note: Only an ADMIN user with CSV editing privileges (see 3.24 MANAGE PAYROLL FILE EDITING IN e@SYFILE™ EMPLOYER) can access this function.

<u>Step 1</u>

Click **Utilities** and then select the Reassign Certificate tab.

<u>Step 2</u>

Select the employer from the Company Name drop-down list.

<u>Step 3</u>

Select the first employee record from the Original Employee drop-down list.

Step 4

Select the second employee record from the New Employee drop-down list.

<u>Step 5</u>

Click **Reassign Certificate** to consolidate employee records, or to delete the duplicate employee.

	YSTEM UTILITIES				
ation Centre	this screen you are able to	o run the system utilities.			
Centre	atabase Utilities				
ATION	1P501 Status Dashboard	4			
Registration	A88 Payment Allocation				
The second s	e-Submission Validation				
t/Export Payroll File	nport Payroll File Log				
EADMIN	elete Payroll File				
dit Employees	eset Passwords				
PROCESS	ayroll File Editing				
	assign Certificate				
ents				and the second sec	
		gn certificates that have been importe e to the ADMIN user, and if Payroll fil		ect employees.	
and the second se	elect Company Name:		1.		
l Certificate Range	rignial Employee		New Employee		
	mployee:		• Employee:		-
	urname:	<surname></surname>	Sumamer	<surname></surname>	
it to SARS	irst Names:	<first names=""></first>	First Names:	<first names=""></first>	
ARTY APPOINTMENTS					
Party Appointments	mployee Number:	<employee number=""></employee>	Employee Number:	<employee number=""></employee>	
RADMIN	ax Reference Number:	<tax number="" reference=""></tax>	Tax Reference Number:	<tax number="" reference=""></tax>	
dit/Change	D Number:	<id number=""></id>	ID Number:	<id number=""></id>	
5					Reassign
s \					
ronise Application					
atch					
ation Help					
e 6	enerate IRP5 / IT3(a) P	DF's			
	Il Resubmission Reques				

3.28 GENERATE IRP5/IT3(A) PDFS

Once your file has been submitted to SARS the employer can create IRP5/IT3(a) PDFs as follows.

<u>Step 1</u>

Click Utilities and then select the Generate IRP5/IT3(a) PDFs tab.

	SYSTEM UTILITIES						
ation Centre	n this screen you are	able to run the system uti	lities				
Centre	Database Utilities						
ATION	EMP501 Status Dash						
Registration	AA88 Payment Alloc						
	Pre-Submission Valid						
t/Export Payroll File	Import Payroll File L						
EADMIN	elete Payroll File						
dit Employees	Reset Passwords						
PROCESS	Payroll File Editing						
	Reassign Certificate						
ents	Generate IRP5 / 1T3	(a) PDF's					
LIATION	TAX CERTIFICATE	CENED ATTON					
Dashboard							
ation		u are able to generate					
l Certificate Range	Please select the d	locuments you wish to	o generate by clickin	on the Export		E	xport
ments	Туре	Reference	Company	Year	Status	Export	
ION							
A REAL PROPERTY OF A REAL PROPER							
it to SARS							
It to SARS							
ARTY APPOINTMENTS							
ARTY APPOINTMENTS Party Appointments							
ARTY APPOINTMENTS Party Appointments R ADMIN							
ARTY APPOINTMENTS Party Appointments ER ADMIN Edit/Change							
ARTY APPOINTMENTS Party Appointments in ADMIN idit/Change S							
ARTY APPOINTMENTS Party Appointments ist ADMIN idit/Change S is							
ARTY APPOINTMENTS Party Appointments IR ADMIN Sdit/Change S S renise Application							
ARTY APPOINTMENTS Party Appointments IR ADMIN Sidt/Change 5 Is Is Internation Site							
ARTY APPOINTMENTS Party Appointments IR ADMIN Sdit/Change S Is S S Consise Application atch atch							
ARTY APPOINTMENTS Party Appointments IR ADMIN Sidt/Change 5 Is Is Internation Site							

<u>Step 2</u>

A list showing all completed submissions for which PDF certificates can be generated will be displayed.

<u>Step 3</u>

Mark the checkbox for the submission for which you would like to generate PDF certificates.

<u>Step 4</u>

Click **Generate.** You will be asked which certificates you would like to generate (All, Amended, Cancelled etc), and where you would like these certificates to be saved on your PC.

Please note: For the interim reconciliation employers must not issue IRP5/IT3(a) certificates to employees. Therefore no PDF certificates will be generated for this period. A final certificate for an employee can be viewed and printed by selecting "View Certificate" within the View/Edit Employees function.

3.29 FULL RESUBMISSION REQUEST

This function allows an employer to replace all prior EMP501 or incorrect data submitted to SARS with a new submission. Use this function only when you need to completely replace all previously submitted EMP501 data with a new submission.

Before you start this process, ensure that you have retrieved the SARS status for the previous submission(s) for this period – refer to Chapter 3.21 EMP501 STATUS DASHBOARD.

Step 1.

Select **Utilities** on the left hand menu pane, and click on **Full Resubmission Request** on the Utilities tabs.

SYSTEM UTIL	ITTES
On this screen	you are able to run the system utilities.
Database Uti	lities
EMP501 State	us Dashboard
AA88 Payme	nt Allocation Dashboard
Pre-Submissi	on Validation Report
Import Payro	ll File Log
Delete Payro	ll File
Reset Passwe	ards
Payroll File E	diting
Reassign Cer	lificate
Generate IRF	25 / IT3(a) PDF's
Full Resubmis	ssion Request
Company	Please select a company for resubmission Request

Step 2

Select a Company (relevant employer and submission) from the drop-down list and click on **Request**. This will redirect you to the Declaration page where you can complete the resubmission.

Please sele	ct a company for re	submission
mpany	- 7	
Request		

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Click on **Yes** to proceed. This will open the Declaration page. Select the relevant Reconciliation Period from the drop-down list. Repeat the steps explained in Chapter **3.11 COMPLETING THE EMP501 AND RECONCILING ANNUAL EMPLOYEES' TAX** and Chapter **3.12 ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATIONS TO SARS** to finalise the process.

3.30 DISK SUBMISSION

In cases where employers were unable to finalise and submit their EMP501 online due to eFiling profile or access related issues, a manual or disk submission can be processed to deliver to SARS. Please remember that the electronic file and signed copy of the EMP501 and EMP601 (if applicable), must be submitted at a SARS Branch before or on the filing season deadline.

<u>Step 1</u>

Complete the steps to prepare your EMP501 submission as explained in **Chapters 3.3 - 3.11** of this guide. Once your EMP501 is in a "Ready to file" status, you can proceed.

<u>Step 2</u>

Click on **Utilities** on the left hand menu pane and click on **Disk Submission**. This will display a list of EMP501s that are available to submit to SARS (Ready to File).

SYSTEM UTILITIES	5						
t this screen you ar	re able to run the system	utilities.					
Database Utilities							
MP501 Status Da	shboard						
A88 Payment Al	location Dashboard						
Pre-Submission Va	alidation Report						
mport Payroll File	e Log						
Delete Payroll File							
Reset Passwords							
Payroll File Editing	1						
Reassign Certificat	te						
Generate IRP5 / I	T3(a) PDF's						
ull Resubmission	Request						
Disk Submission							
Disk Submission							
DISK SUBILISSION						_	_
A 121	ou are able to submit	your EMP501 ar	nd IRP5/113(a) ce	ertificates via disk.			
On this screen y							
<u>On this screen y</u>						5	ave to Disk
<u>On this screen y</u> Type	Reference	Company	Year	Status	Select	5	ave to Disk
		Company	Year 201902	Status READY TO FILE	Select	View	ave to Disk

If you did not use pre-populated values from SARS, you will have to edit or confirm the amounts captured on the EMP501. Click on **Save to Disk** when all amounts have been verified.

n this screen you	will find the results of the comparison	of the EMP501 (created from own values) vs the dat	a SARS has for the same period.		
Error/Warning	Field	Message	Resolution		
Warning	PAYE Liabilities : Amount declared for March	The value declared in PAYE Liabilities : Amount declared for March (0) differs significantly from the amount previously declared (341516).	Do you want to submit the amount 0? • Yes O No		
Varning	PAYE Liabilities : Amount declared for April	Liabilities : Amount declared oril declared for April (0) differs significantly from the amount previously declared (312968).			
Varning	PAYE Liabilities : Amount declared for May	The value declared in PAYE Liabilities : Amount declared for May (0) differs significantly from the amount previously declared (569775).	Do you want to submit the amount 0? () Yes () No		
Varning	PAYE Liabilities : Amount declared for June	The value declared in PAYE Liabilities : Amount declared for June (0) differs significantly from the amount previously declared (322354).	Do you want to submit the amount 0? () Yes () No		
Narning	PAYE Liabilities : Amount declared for July	The value declared in PAYE Liabilities : Amount declared for July (0) differs significantly from the amount previously declared (338997).	Do you want to submit the amount 0? O Yes O No		
Varning	PAYE Liabilities : Amount declared for August	The value declared in PAYE Liabilities : Amount declared for August (0) differs significantly from the amount previously declared (334222).	Do you want to submit the amount 0? () Yes () No		
Varning	PAYE Liabilities : Amount declared for September	The value declared in PAYE Liabilities : Amount declared for September (0) differs significantly from the amount previously declared (328303).	Do you want to submit the amount 0? () Yes () No		
Varning	PAYE Liabilities : Amount declared for October	The value declared in PAYE Liabilities : Amount declared for October (0) differs significantly from the amount previously declared (345950).	Do you want to submit the amount 0? O Yes O No		

<u>Step 4</u>

Select the relevant transaction from the list as illustrated in step 2 above and click on **Save to Disk**.

<u>Step 5</u>

Indicate a destination folder on your computer and click on **Select Folder** to continue.

SYSTEM UTILITIES				
On this screen you are able to run the system utilities.				
Database Utilities				
EMP501 Status Dashboard				
AA88 Payment Allocation Dashboard				
Pre-Submission Validation Report				-
Import Payroll File Log				
Delete Payroll File				
R				
P 🔡 Select Destination Folder				×
$\mathbf{R} \leftarrow \rightarrow \forall \uparrow \blacksquare This PC \Rightarrow$		v 0	Search This PC	٩
Fi Organise 🕶				• 0
 > ③ 3D Objects > ◎ Desktop > ③ Documents > ④ Downloads > Music > ■ Pictures 	3D Objects Documents Music Videos drives (2)	Dow	ktop vnloads rures	A Nisk
Folder: This PC			Select Folder	Cancel

A pop-up message will display once the process completed successfully.



Remember to copy the submission file to electronic media, and deliver the disk or drive to SARS with signed copies of the EMP501 and EMP601s (if applicable). Failure to do so will result in certificates (IRP5/IT3(a) not being submitted to SARS.

3.31 NOTIFICATION CENTRE

The Notification Centre will automatically sort retrieved letters by PAYE reference number and letter type, making it easier to manage correspondence and related processes.

The Notification Centre will include a count for all correspondence requiring attention. This includes unread items, as well as new items that can be retrieved by synchronising. The count for each letter type is displayed per employer/PAYE reference number:

- The Tax Year column will now display the issue date of correspondence retrieved.
- Third Party Appointment correspondence will be added to individual employer database files once the notification has been opened from the menu. Details can be accessed and managed from the **Third Party Appointments** menu option, once the letter has been opened.
- Similarly, bulk ITREG results will be available for export after the ITREG notification letter has been opened.

<u>Step 1</u>

To access the new Notification Centre, users will have to synchronise in order to retrieve correspondence. Click **Synchronise Application** to initiate the process.

REFER TO CHAPTER 6 EFILING SYNCHRONISATION.

<u>Step 2</u>

Click **Notification Centre** on the left menu pane, to display all available correspondence, listed by employer/PAYE reference number.



Correspondence count numbers/indicators marked in red indicates important new correspondence that was retrieved during synchronisation requiring immediate attention.

If the mouse/cursor is moved over the correspondence counts displayed on the right, a pop-up message shows a description of further options available.



<u>Step 3</u>

To view available correspondence, click the line entry for the relevant employer listed in the notification centre. e@syFile[™] Employer will automatically open the correct employer database to access correspondence details for that PAYE reference number.



Click **OK** to view the available correspondence.

OME Notification Centre	Notification Cent									
EGISTRATION	Here you are able to v	Here you are able to view any correspondance from SARS								
eFiling Registration	To view any: of the lett	ers please dick on th	e applicable employer to available	e list of extern						
MPORT										
	Search using PAYE	Reference Number:		-						
IPLOYEE ADMIN	72					ITASS 5 EMPS	SA 1			
View/Edit Employees										
ONTHLY PROCESS	Letter ID	Tax Payer	Name	Tax Year	Message Type	Status				
	65			2011	PAYE_RECON_RESULT	READ				
	66	-		20110619	ITA88	READ				
CONCILIATION	67		Click on item to view letter	20110612	ITA88	ISSUED				
	68			20110612	ITASS	ISSUED				
	70	-		20110517	ITASS	ISSUED				
	71	-		20110511	ITA88	ISSUED				
	72	_		20110419	ITASS	ISSUED				
	69	_		2011/01/31	EMPSA	ISSUED				
BMISSION				2011/01/01	ENT WY	100000				
SENT APPOINTMENTS										
IPLOYER ADMIN										
ILITIES										
	74		1			EMPS	5A 1			
	74					EMPS	SA T			
	76					EMPS	5A 1			
LP	78					EMPS	SA 1			
Application Help	78					EMPS	SA 1			
Update	144		1 1 1 1			- Chirds				
Log off										

The details displayed include letter type and status for all available correspondence.

Please note: Third Party Appointment notifications must be opened to add the details to the Third Party Appointment menu for processing.

Step 4

To view any specific correspondence listed in the Notification Centre, double-click on the relevant line item. Once opened, the status will be updated from ISSUED to READ.



3.32 USING THE HELP FUNCTION

The help function can be easily accessed in any section.

<u>Step 1</u>

Click the **Application Help** button to the left of the screen.



Step 2

The main window will slide towards the left of the screen, and the list of Frequently Asked Questions (FAQs) for that particular page/ topic will be displayed to the right of the screen.

Select the Index tab to display a list of related topics.

Step 4

To close the Help function, click **Close Help** to the top right of the help page.

4 THE MONTHLY EMPLOYER DECLARATION (EMP201) USING e@syFile™ EMPLOYER

This section will help you understand how to access the features for the monthly process in order for you to be able to submit and pay your EMP201 using e@syFile[™] Employer.

You will need the following in order to use e@syFile[™] Employer to submit your EMP201 and make payment:

- Internet access
- An existing profile on eFiling (you must be registered and activated for the EMP201).

4.1 OVERVIEW

In order to make use of this function on e@syFile[™] Employer, you need to ensure that your EMP201 is registered and activated on your eFiling profile. You also need to ensure that user rights are set up correctly so that you can submit and pay your monthly return using e@syFile[™] Employer.

You will be able to synchronise your local software database with your SARS eFiling profile data. Each time you synchronise with the eFiling website, you will be required to enter your eFiling login name and password. When you synchronise your e@syFile™ Employer database with your eFiling profile for the first time, you will retrieve data for all the EMP201 reference numbers activated on your eFiling profile. You will also be able to access the monthly process on e@syFile™ Employer when your application is synchronised with your SARS eFiling profile.

In order to use the EMP201 function, you must synchronise your e@syFile™ Employer information with your SARS eFiling profile. Once your SARS eFiling profile is setup, and the relevant EMP201 reference number activated, click Synchronise Application (for detailed instructions refer to section 6 – eFiling synchronisation).

4.2 SUBMITTING YOUR EMP201

<u>Step 1</u>

Click **PAYE** in the left menu pane to open the selected employer's EMP201 profile.

Employers Taxpayer Details			
Select the appropriate calendar year for the	e period resurn you wish to complete:		
Select the appropriate calendar month for 1	the calendar year you wish to complete:		
Returns History Status D	Dashboard		Make Payment
Statement of Account			
Employer Details Trading as:			
PAYE Reference Number: 7	SDL Reference Numbers	UIF Reference Number	U
Particulars of Declarant			11 11
Surname: SURNAME			
First Name: NAME			
Initials N		10	
Position: ACCOUNTANT		1 100	
ID Number:			
Date of Birth:			
Contact Email: PERSON@MAIL.COM			
Bus Tel No: 0112000000 Fax No	0112000001		
Cell No:			
Sale of the owner owner owner owner owner owne			Save Details

<u>Step 2</u>

If this menu function is not active you will have to Synchronise your application with eFiling to authenticate and retrieve updated employer demographics.

Employers Tax	paver Details	
Select the appro	priate calendar year for the period return you wish to complete:	
Select the appro	priate calendar month for the calendar year you wish to complete:	
Returns Hi	story Status Dashboard	Make Payment
Statement of	Account	
_		
Employer Detail		
Trading as:		
PAYE Reference		U
Particulars of De		
Surname:	SURNAME	
First Name:	NAME	
Initials	NR	
Position:	ACCOUNTANT	
ID Number:		
Date oF Birth:		
Contact Email:	PERSON@MAIL.COM	
Bus Tel No:	0112000000 Fax No: 0112000001	
Cell No:		
-		Save Details
		Save Details

View all the particulars for the Declarant to ensure that they are completed and correct. You can edit some details on this page and click **Save Details**.

<u>Step 4</u>

To access a specific declaration, select the relevant tax year and period at the top of the page. You will see a list of EMP201 Declarations to the right of the screen with the status indicated for that period.

e@syFile EMPLOYER 6.8.1 B	uild 0.0.11 PRE-PROD				
Notification Centre	Employers Taxpayer Detail				
Attion Centre			205		Back to Taxpoyees
REGISTRATION	Soliet the Sourceaster bay ris		09		
etting Kepistration	Returns History	Status Dashboard			Make Payment
IMPORT	Statement of Account				
Import/Export Dayroil File	Thursday and a state of the sta			1	
ENPLOYEE ADRIE	Employee Distails				
View/Edit Employees	Trading art				
MONTHLY PROCESS	PAYE Reference Number	IDL Reflector III		Add and the summer of	
	Particulars of Declarant	1		Payment Reference III	mber Status
Páymenta	Sumama	- /			ISSUED UIF
RECONCILLATION					DL UIF
PAYE Deshboard	First Hames			Total	
	Droblada			THE A DESCRIPTION OF	Request Salt-1
	Position				
Adjustments	ID Number				
SUBM25STON	Data of Birth	Lai			
Submeto SARS	Contact 2mail				
THIRD PARTY APPOINTMENTS	Bur Tel hou	Fax Nor			
Third Party Appointments EMPLOYER ADMIN	Cell fiol	-	-		
View/Edit/Change					
UTILITIES					
Others					
Syntheoriae Application					
Hamatch					
HELP					
Application Help					
Update					
Log of	-				
					Save Details
children hurring and the second		2018 Working With		Change	LOGGED IN AS + ADMIN
CONNECTION STATUS: CONNEC	TED Current Tax Year 1	TATE MOUNTED MIDE		and the second se	CONSIGNED OF AS 1 ADMIN

<u>Step 5</u>

Click **View** to open a new declaration, which will open in a PDF format.

Step 6

The EMP201 has been enhanced to include additional fields for penalties and interest. If the amounts for penalties and interest are not populated when you open the declaration, you will be able to edit these fields.

Complete the amounts for PAYE, SDL and UIF (where applicable) in the Payment Details section. You can also complete or edit the penalty and interest amounts if necessary. The Payment Period and Total fields will be automatically populated, and the Payment Reference Number (PRN) will be generated by SARS on submission of your declaration.

SARS	Monthly Employer Declaration EMP201
Employer Datala	
Contact Dobals T E S T I N G T E S T I N G T E S T I N G T E S T I N G T E S T I N G T E S T I S A R S . G O V	
Promil Tax Caldulan	Interest incide the definition of the applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of rates, get to applicable preservation of the table of t
Employment Tax Incentive (ETI) Splandshild Mar en universite Programme Valuntary Disclosure Programme Pro	be identify get in Station and and

<u>Step 7</u>

Once you have completed the amounts, click **Save Online** where you need to save your information. Click **File** if you are ready to file your EMP201. This will update the status of your declaration in the EMP201 Declaration listing, and list the declaration on the Submissions page.



Click **Submit to SARS** in the left menu pane to submit your declaration. The status will read Ready to File.

OME												
Notication Centre	SUBMISSION											
Action Centre		or any agin to submit										
EGISTRATION	Please select the	documents you wis/	to submit by clicki	ng on the Subn	nit check box		Submit					
wFiling Registration	Туре	Reference	Company	Year	Status	Submit	-					
NPORT	Type	Reference	company	rear	READY TO FILE			1.0				
Import/Export Payroll File					READT TO FILE	2	View	Remove				
HELOYTE ADRIH												
View/Edit Employees												
ONTHLY PROCESS												
	1											
CONCILIATION												
PAVE Dualiscend	0											
Dellatation												
Consil Certificate Range												
Adjustments												
REMESSION	1											
Submit to SARS												
TRO PARTY APPOINTMENTS												
Third Party Appointments												
PLOYER ADMIN												
numes												
Utilities												
Bynchroniak Application												
Hematik												
E.F.												
Application Help												
Update												
Log off												

Step 9

Select the declaration and click **Submit** on the top right hand corner of the page.

<u>Step 10</u>

Click to accept the declaration, and enter your SARS eFiling login name and password to submit.

	conciliation is true and correct
The second se	en deducted and declared and
that all payments declared h	
accept liability for any different	
accept hability for any unrere	ence.
V Ad	ccept declaration
SARS Efiling User Name:	SARS eFiling login name
SARS Efiling User Name:	SARS eFiling login name
SARS Efiling User Name: SARS Efiling Password:	SARS eFiling login name
	Composition and a second second
	Composition and a second second

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<u>Step 11</u>

A pop-up message will confirm successful submission to SARS.



4.3 REVISING AN EMP201 DECLARATION

4.3.1 SCENARIO 1: INCREASING A PREVIOUS EMP201

<u>Step 1</u>

Follow steps **1-4** of **4.2 SUBMITTING YOUR EMP201** to select the relevant Employer and period. The declaration should be displayed to the right of the screen in the EMP201 Declaration status listing. Click **Revise.**

ayment Referen 7 LF020		Status FILED
PAYE R 25600.00	SDL R 2560.00	UIF R 2500.00
Total R 30660.00	Viev	Revise

Step 2

Complete the Declaration Revision fields with the correct amounts and click OK.

	FAYE	SDL	UIF	Total
ubmitted Declaration	25600.00	2560.00	2500.00	30660.00
lease enter correct amounts for ew declaration	30000.00	3000.00	3000.00	36000.00
mount to be Allocated	4400.00	440.00	500.00	5340.00

The revised EMP201 will automatically be listed on the Submissions page. Follow steps **8-11 of 4.2 SUBMITTING YOUR EMP201** to submit the increased EMP201 to SARS.

Step 4

An additional payment will have to be processed. Follow the steps listed below in **4.5 PAYING YOUR MONTHLY EMP201** to make the additional payment.

4.3.2 SCENARIO 2: DECREASING A PREVIOUS EMP201

<u>Step 1</u>

Follow steps **1-4** of **4.2 SUBMITTING YOUR EMP201** to select the relevant Employer and period. The declaration will be displayed to the right of the screen in the EMP201 Declaration status listing. Click **Revise.**

<u>Step 2</u>

Complete the Declaration Revision fields and click **OK**.

	PAYE	SDL	UIF	Total
Submitted Declaration	25600.00	2560.00	2500.00	30660.00
Please enter correct amounts for new declaration	20000.00	2000.00	2000.00	24000.00
Amount to be Allocated	-5600.00	-560.00	-500.00	-6660.00

Step 3

A pop-up message will appear indicating that the amounts entered have resulted in a credit. If your payment matches the revised declaration click **OK**. If your payment matches the previous declaration, click **Cancel** to allocate the resulting credit to another period.



Select a period and allocate the listed credit on the Payment Reallocation message, click **Next.**

5 d	A DESCRIPTION OF A DESC	and the second sec	· · · · · · · · · · · · · · · · · · ·
			tal amount in the new declaration is
	tal to other period	A REAL PROPERTY OF A REAL PROPER	I can now allocate the difference in
nese to	tal to other period	13,	
Orignal	amount to be real	llocated: R 6660.00	
ongilai i	announe co pe leo	nocaccal newswares	
		and the second sec	
Amount	remaining to be r	eallocated: R 6660.00	
Amount	remaining to be r	reallocated: R 6660.00	
	remaining to be r	reallocated: R 6660.00	
Period:		•	
Period:		reallocated: R 6660.00	UIF: 0.00
Amount Period: PAYE: Total:	2010-08	•	UIF: 0.00

<u>Step 5</u>

Once the full available credit has been allocated, you will receive another pop-up message reflecting R0.00 remaining to be allocated.

Click Done.

less than		sion to your declaratio ount in the previous o riods.			
Orignal a	mount to be i	reallocated: R 66	60.00		
Amount	remaining to b	pe reallocated: R 0.1	0.0		
	Succession of the second	CARLEND ADDIA OF ADDIA			
Pariod					
Period:		(v)			
		SDL:		UIF:	
Period: PAYE: Total:		(+)		UIF:	-

The revised EMP201, as well as the credit allocated to another period, will automatically be listed on the Submissions page.

Follow steps **8-11** of **4.2 SUBMITTING YOUR EMP201** to submit the decreased EMP201 to SARS.

4.3.3 SCENARIO 3: INCORRECT PERIOD SELECTED DURING ORIGINAL EMP201 SUBMISSION

<u>Step 1</u>

Follow steps **1-11** of **4.2 SUBMITTING YOUR EMP201**, taking care to select the correct period.

Step 2

Once you have submitted the declaration for the correct period, follow steps **1-4** of **4.2 SUBMITTING YOUR EMP201** to locate the declaration submitted for the incorrect period. Click **Revise.**

Step 3

Enter zeros in the fields for PAYE, SDL and UIF and click **OK**. This will ensure that you receive a new unique PRN when the declaration is due and must be revised.

	PAYE	SDL	UIF	Total
Submitted Declaration	25600.00	2560.00	2500.00	30660.00
Please enter correct amounts for new declaration	0.00	0.00	0.00	0.00
Amount to be Allocated	-25600.00	-2560.00	-2500.00	-30660.00

You will see a pop-up message indicating that you should reallocate the excess payment. Click **Cancel** to reallocate the credit.

<u>Step 5</u>

The full amount should be listed as a credit to reallocate. Take care to select the correct period and allocate the full amount to the correct period. Click **Next**.

	a secolar a contato a	the second of a standard with a second back	abot sectored to the second schemetres to
		The second	otal amount in the new declaration is u can now allocate the differer ce in
	tal to other period		a can now anocate the universitie in
mese to	al to other period.	2.	
Orignal a	amount to be reall	ocated: R 30660.00	
mount		AC DE AT CONSERVATION	
Amount	remaining to be re	AC DE AT CONSERVATION	
Amount		AC DE AT CONSERVATION	
Amount Period:		AC DE AT CONSERVATION	
Period:	remaining to be re 2010-08	eallocated: R 30660.00	
	remaining to be re	AC DE AT CONSERVATION	UIF: 2500.00

<u>Step 6</u>

Once the full credit available has been allocated, you will see another pop-up message reflecting R0.00 remaining to be allocated. Click **Done.**

less thar		ount in the previous decl	vhere the total amount in the new declaration aration. You can now allocate the difference
Drianal a	imount to be	reallocated: R 30660	0.00
p			
		be reallocated: R 0.00	
Amount		be reallocated: R 0.00	
		be reallocated: R 0.00	
Amount	remaining to l	be reallocated: R 0.00	UIF:

The revised declaration (for the incorrect period) and the credit allocated to the correct period will automatically be listed on the Submissions page. Follow steps **8-11** of **4.2 SUBMITTING YOUR EMP201** to submit the amended EMP201 to SARS.

4.4 UNALLOCATED CREDIT

You can reallocate the credit at a later stage following the steps below.

<u>Step 1</u>

In the Payment reallocation window, select **Period Zero** from the drop-down list next to Period.

less thar			e the total amount in the new declaration i on. You can now allocate the difference in
	mount to be realloc remaining to be real		
Should			
	PERIOD ZERO		
Period: PAYE:		SDL:	UIFi
<u>Step 2</u>

Click **Done**. A message will be displayed reminding you that the credit is unallocated. Click **Yes** if you do not want to allocate this credit.



4.5 PAYING YOUR MONTHLY EMP201

Once you have submitted your EMP201, your declaration status on eFiling will be updated to Submitted via e@syFile[™] Employer, and a payment will be generated for the relevant EMP201.

Please ensure that your banking details are correctly set up on eFiling before you make payment, and that the necessary access rights are allocated to your login name.

<u>Step 1</u>

Click Payments below Monthly Process on the left menu pane.

Step 2

Enter your eFiling login name and password.

<u>Step 3</u>

The remaining steps of the payment process are similar to the process on the SARS eFiling website:

- Select the declaration for which you want to make payment, and click **Make** electronic payment.
- Select the account from which you are making the payment, and follow the easy steps to make your payment.

		_	-							Onet
axpaye		_	4							
ayment	ts: Outstanding									
his nag	e allows you to:									
		and have	etum payments you have	almadu mada n	- Allen view					
+ Ch	sate payment instruction	s to the bank	t of your choice to do the a	actual payment	to SARS					
pa	yment will only be proces	ssed on the					Educate and			
			000 limit on payments un g. ABSA Direct - Internet							
Ba	nking, Internet Banking	g. Investor (Online Banking, NedTrea	sury (Nedbank). Netban	k Busine	ss (Nedbank)	or Star	dard	
Ba	nk Business Online (C	ATS).								
			EMP201 Decla	rations						
7	Namo	Reference	Payment Reference Num	Description	Tax Period	Status	Amount Due	View Return	Split Payment	
1	-	7.	LF0112013	EMP201	201005	UNPAID	8	View		
-		10.000	1	Payment		14,0,000	1			
ack to 1	00									
_										
_	t All Payments	_								
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4.6 DECLARATION HISTORY

All declarations submitted electronically are available to view under the PAYE tab, including any corrections made to submitted declarations. To access a specific EMP201:

<u>Step 1</u>

Click **PAYE** in the left menu pane to open a page listing all employers registered for EMP201 on your profile.

Step 2

Select the relevant employer or use the search function to locate a specific employer, and click **View.**

<u>Step 3</u>

Click **Returns History** and select the year of assessment from the drop-down list.

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<u>Step 4</u>

To open a specific declaration, simply double-click on the declaration to view it as a PDF.

<u>Step 5</u>

Click **Back to Tax Payer Details** to the top right of the screen to return to the Employer menu.

4.7 STATUS DASHBOARD

Declarations submitted using e@syFile[™] Employer are listed on the Status Dashboard.

<u>Step 1</u>

Click **PAYE** on the left menu pane to open a page listing all employers registered for EMP201 on your profile.

<u>Step 2</u>

Select the relevant employer or use the search function to locate a specific employer, and click **View.**

<u>Step 3</u>

Click **Status dashboard** to view a list of all declarations submitted using e@syFile™ Employer.

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To verify the status of a specific declaration, double-click the Update button next to the relevant entry on the list. The status for that declaration will be retrieved from the SARS database and displayed in a message block. If the declaration was submitted successfully, the status displayed should read Accepted. Click **Close** to exit.

4.8 MAKING PAYMENT

This menu option will divert you to the same payment link as the option in the left menu pane.

<u>Step 1</u>

Click Make Payment to view all outstanding payments for EMP201 on your profile.

<u>Step 2</u>

See **4.5 PAYING YOUR MONTHLY EMP201** for more information on sending a payment instruction to SARS.

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4.9 STATEMENT OF ACCOUNT

In order to use the Statement of Account request function, you must synchronise your e@syFile[™] Employer information with your SARS eFiling profile. For detailed instructions refer to **chapter 6 eFILING SYNCHRONISATION**.

<u>Step 1</u>

Click **PAYE** on the left menu pane.

<u>Step 2</u>

Click Statement of Account.

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Surname:	SURNAME	
First Name:	NAME	
Initials	N	
Position:	ACCOUNTANT	
ID Number:		
Date oF Birth:		
Contact Email:	PERSON@MAIL.COM	
Bus Tel No:	0112000000 Fax No: 0112000001	
Cell No:		
		Save Details
		Dave Decans

Step 3

Indicate the tax period for which you wish to request an EMPSA. You can either select an Employer Reconciliation Declaration (EMP501), transaction year (March to February), or a shorter period within a specific transaction year.

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<u>Step 4</u>

Enter your SARS eFiling login name and password to finalise your request. The requested EMPSA will be available within 48 hours of your request. To retrieve your EMPSA, synchronise your application again by clicking **Synchronise Application** in the left menu pane, refer to section **6 – eFILING SYNCHRONISATION**.

5 INCOME TAX REGISTRATION OF EMPLOYEES

Income Tax reference numbers are mandatory for registered employees when completing the Employer PAYE Reconciliation (interim and annual). If an employee is not registered and hence does not have an Income Tax reference number, this field must be left blank. SARS will automatically register the employee when processing the reconciliation submission.

The Income Tax Registration (ITREG) function has been added to e@syFile™ Employer to assist employers to obtain Income Tax reference numbers for individuals employed (please refer to section 1 –Register employees for Income Tax and obtain feedback) The ITREG functions enable you to register employees for Income Tax.

Please note: You must be connected to the internet to use any of these options.

5.1 INDIVIDUAL INCOME TAX REGISTRATION

This function enables an employer to apply to register employees individually.

<u>Step 1</u>

You have to create an employee on e@syFile[™] Employer before you will be able to use the Income Tax registration function.

Follow steps 1-4 of 3.5 ADD EMPLOYEE to create an employee.

Step 2

Click **IT Reg** to the bottom right of the EMPLOYEE DETAILS screen.

e@syFile EMPLOYER		_ X
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On this screen you are a	le to view and edit Employee Demographic Data. Sertificates, couble click the Certificate number in the Certificate L	ist.
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Log off	Back to Vie	ew/Edit IT Reg Save Employee
CONNECTION STATUS :		LOGGED IN AS : ADMIN

Step 3

You will receive electronic feedback from SARS verifying the status of the Income Tax registration application.

Registered (new Income Tax reference number provided): If the Income Tax registration is successful, you will receive a pop-up message indicating the employee's Income Tax reference number. The Income Tax Reference field on your Employee Details screen should also be populated.

Registration result for employee with ID Number	
Taxpayer registered successfully.	
Tax Reference Number is	
OK I	

Existing Taxpayer (employer to obtain Income Tax reference number from the individual): If an Income Tax reference number exists for the relevant employee, you will receive a similar notification in a pop-up message. However the Income Tax reference number will not be provided must be obtained from the employee.



Unable to Register – Employee must contact SARS (i.e. multiple registrations found): If the Income Tax registration request is unsuccessful, the relevant employee will be requested to contact SARS for further assistance.



Insufficient Information (i.e. invalid postal address, incomplete address details)/ Nonindividual: Where the employee details provided could not be verified, the request will not be processed.

<u>Step 4</u>

During peak times, expected results may be delayed. A pop-up message will appear for confirmation of a successful submission. These results may be retrieved by selecting Synchronise Application within 24 hours after submission. The synchronisation process is explained in **section 6 EFILING SYNCHRONISATION**.

5.2 BULK INCOME TAX REGISTRATION

Bulk ITREG will now be performed automatically, once a year after the annual PAYE reconciliation period. Where an employer submits the EMP501 a bulk registration process for employees, who are not registered for Income Tax, will be performed. This means employers will now be able to obtain Income Tax reference numbers for those employees that SARS could successfully register using the recent PAYE reconciliation submissions. To obtain the feedback received from SARS, concerning the registration of employees, refer to chapter **6 EFILING SYNCHRONISATION**.

5.3 BUNDLED INCOME TAX REGISTRATION

This function enables employers to register a maximum of 1 000 new employees in one application that were not part of the employer's previous PAYE Reconciliation submission. A maximum of 1 000 request may be submitted to SARS within a month.

The details of the employees to be registered can be captured directly on e@syFile[™] Employer or the employee records can be imported from the payroll application using a CSV file. Any employee, for whom certificates were included, in the previously submitted reconciliation may not be included in Bundled ITREG application again. Income Tax reference numbers for these individuals will automatically be generated as part of the Bulk ITREG done by SARS using the reconciliation submission data, and can be retrieved through the synchronisation process when available. The synchronisation process is explained in Chapter **6 EFILING SYNCHRONISATION**.

<u>Step 1</u>

Click on VIEW/EDIT EMPLOYEES.

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<u>Step 2</u>

You have to create an employee account on e@syFile[™] for new employees, employed from 1 March - 31 August.

Follow steps 1-4 of 3.5 ADD EMPLOYEE to create an employee.

Alternatively, import these records with a csv file from your payroll to automatically create the new employee records.

Please note: An ITREG import file can also be generated in your payroll software, containing only employee demographics without certificate details. Business Requirement Specifications (BRS) for these files are available in the latest SARS BRS PAYE Employer Reconciliation file structure document available on the SARS website <u>www.sars.gov.za</u>, or contact your payroll software provider for further assistance.

The abovementioned option will be useful for larger companies, as up to 1 000 new employee records can be imported on a monthly basis for Bundled ITREG applications to prepare for future reconciliation submissions.

Step 3

Once the new employee records have been created or imported, click on **"Bundled ITREG"** to display the Income Tax reference number status for each employee.

Select the employee records you wish to include in your Bundled ITREG application and click "**Register**". The application will be sent to SARS.

e@syFile EMPLOYER 3.4.7 HOME Application Home REGISTRATION	A VIEW/EDIT EMPLOYEES On this screen you gar able to obtain a quick view of all Employees relating to a specific company. Select a company to view related Employees. Click the 'View' bitton to view full details of the Employee (including Certificates). To add an Employee, click 'Add Employee'.						X
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Remember: Only new employees can be selected and included in Bundled ITREG application.

Enter your eFiling login name, password and select "Login".

	ur credentia s	5.
SARS eFiling User Name:		
SARS eFiling Password:		
a second s		

Results from Bundled ITREG application should be available via the synchronisation process in e@syFile[™] Employer within 24 hours, refer to **SECTION 6 eFILING SYNCHRONISATION.**



Please note: When you have exceeded the allowed limit of 1 000 Bundled ITREG applications, the following message will appear:



Should the following error message occur,



You are required to complete the eFiling synchronisation (refer to chapter **6 EFILING SYNCHRONISATION**) to retrieve the Bulk ITREG results, prior to submitting the Bundled ITREG application.

<u>Step 4</u>

Additional options are available to filter or sort employee records according to IncomeTax reference number status. Select from the drop-down list the "Registration Status"toviewalltheapplicableemployeerecords.

Complete step 3 above, to request the Bundled ITREG application to be submitted to SARS.

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	Displaying 100	pt 715						

<u>Step 5</u>

Clicking on **"View Summary"** will provide sub-totals for all applicable Income Tax reference number statuses, for employees who do not have an Income Tax reference number.

6 eFILING SYNCHRONISATION

The latest enhancements to the eFiling synchronisation function include the ability to synchronise the following:

• <u>eFiling profile and Employer information</u>: This will synchronise all employer information linked to the SARS eFiling profile. This information includes employer demographic information, EMP201 declaration details and which

Employer PAYE reference numbers can be accessed on the Status dashboard and Reconciliation Assistant. The EMP201 must be registered and active on eFiling. Employers must have the necessary access rights to the relevant EMP201 numbers on the eFiling profile.

- <u>Letters and Correspondence (including AA88 notices)</u>: AA88 correspondence, EMPSA and other letters.
- <u>Taxpayer Income Tax Registrations</u>: All results from the ITREG options: Individual, Bundle and Bulk. Bulk and Bundle ITREG results are retrieved through synchronisation. Individual ITREG results are usually available immediately; however during peak times results may be delayed and can then be retrieved through the synchronisation process within 24 hours.
- <u>All</u>: Where all information is required to be synchronised, e.g. employer information, letters and correspondence and result from ITREG.

Please note: You can only use the "All" option when using the eFiling login name for the first time, or when switching between eFiling login names.

The eFiling login name must be used to synchronise with e@syFile™ Employer data.

Before attempting to retrieve the electronic correspondence or start the synchronisation process it is important to take the following into account:

The eFiling login name used to synchronise must be enabled for the SARS Registration functionality on eFiling (Admin roles assigned to the login names):

- Where multiple PAYE reference numbers are registered on one eFiling profile, it is important to ensure that all the final reconciliations for these PAYE reference numbers were submitted using the same e@syFile[™] Employer database used for synchronisation. This will ensure that the contents of the Income Tax letters can be distributed correctly to the relevant employees, using the most recently submitted certificate number(s) linked to the employee record.
- If the Bundled ITREG applications were submitted, these employee records must also be included on the e@syFile[™] Employer database when synchronising.

6.1 EFILING PROFILE AND EMPLOYER INFORMATION, LETTER AND CORRESPONDENCE (INCLUDING AA88 NOTICES) AND ALL

<u>Step 1</u>

Click **SYNCHRONISE APPLICATION** on the left hand menu pane under **UTILITIES**. Select which items must be synchronised:

- eFiling profile and Employer information
- Letter and Correspondence (including AA88 notices)
- All

Please selec	ct which item you want to synchronise
Here you can s	select which item you wish to sync
🔘 eFiling Pro	ofile and Employer Information
🔘 Letters an	d Correspondence (including AA88 notices)
🔿 Taxpayer	Income Tax Registrations
	use the "All" or "eFiling Profile and
	ormation" option when using your eFiling • the first time or when switching between ames.

Click SYNC for the synchronisation process to start.

<u>Step 2</u>

Enter your eFiling login name and password, and click **LOGIN**.

ogin in to eFiling to verify yo	ur credentia s	
SARS eFiling User Name:		
SARS eFiling Password:		
		Cancel

A pop-up message will be displayed confirming the synchronisation has been completed.



Click OK.

Please note: Letters and Correspondence (including AA88 notices) will be listed in the Notification Centre. Simply double-click on the entry to open.

You may encounter error messages or the synchronisation might not be successful if your eFiling access, setup and authorisations have not been completed. See example below.



Follow the instructions on the pop-up message to assign access or add tax types to your profile when / if needed.

Please refer to the eFiling User guide for detailed instructions https://www.sars.gov.za/AllDocs/OpsDocs/Guides/GEN-ELEC-18-G01%20-%20How%20to%20Register%20for%20eFiling%20and%20Manage%20Your%20User%20Pr ofile%20-%20External%20Guide.pdf

6.2 TAXPAYER INCOME TAX REGISTRATIONS

<u>Step 1</u>

Click SYNCHRONISE APPLICATION on the left hand menu under UTILITIES.

Select Taxpayer Income Tax Registrations:

Please sele	ct which item you want to synchronise
Here you can	select which item you wish to sync
🔘 eFiling Pr	ofile and Employer Information
🔘 Letters ar	nd Correspondence (including AA88 notices)
🔿 Taxpayer	Income Tax Registrations
Employer Inf	use the "All" or "eFiling Profile and ormation" option when using your eFiling r the first time or when switching between ames.

REVISION:6

Click SYNC for the synchronisation process to start.

Step 2

Enter your eFiling login name and password, and click $\ensuremath{\textbf{LOGIN.}}$

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ARS eFiling User Name:		
SARS eFiling User Name: SARS eFiling Password:		

Step 3

A summary of synchronisation results will be displayed once the process has been completed.

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EXTERNAL GUIDE - e@SYFILE™ EMPLOYER USER GUIDE PAYE-easyFile-G001 **REVISION:6**

Synchronisation attempts to retrieve Bulk ITREG results without the certificate data will fail, resulting in an error message. The database used for the reconciliation submission must be restored or import the certificate data prior to attempting to synchronise again.



Step 4

Synchronisation results will update the Income Tax reference number status displayed in the Status column on the **VIEW/EDIT EMPLOYEES** page, when Bundle ITREG is selected.

One of the following statuses will be displayed for each employee record:

- Registered (new number provided)
- Existing Taxpayer (employer to obtain number from individual)
- Unable to Register Employee must contact SARS (i.e. multiple registration found)
- Insufficient Information (e.g. invalid postal address, incomplete address details)
- Non-Individual (e.g. ID number supplied belongs to a TRUST)
- Not verified The employer is required to verify that the employee's information has been captured correctly [i.e. Invalid or incorrect information provided and SARS is unable to verify the registration status of the employee. (e.g. address provided with an invalid postal code)].

Application Home REGISTRATION	On this screen		in a quick view of all Employees relating t details of the Employee (including Certifica			
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Income Tax reference numbers retrieved will automatically be populated in the INCOME TAX REFERENCE field on the relevant employee record.

<u>Step 5</u>

To view the letter contents or ITREG results retrieved during synchronisation, click **UTILITIES** on the left hand menu pane.

Click Notification Centre to view a list of available correspondence. The Income Tax reference number letters will be listed.

ch using PAYE	Reference Number or Company h	ante			
-EMPL	DYER NAME				AA88 Notification
Letter ID	Tax Payer Name	Tax Year	Message Type	Status	
51		2018	AA88 Notification	PROCESSED-U	NREAD
52	No. of Concession, Name	2018	ITREGVER	READ	

To view the content for a specific PAYE number or Individual, simply double-click on the line item to open the relevant letter.

Income Tax reference number details contained in the letter will be displayed in table format, reflecting the following information per employee:

- Certificate Number
- Surname
- First two names
- ID/ Passport number
- Tax reference number

Please note: The letter will display the first 50 results and additional results can be viewed using "View/edit employees" and/or export function, please refer below.

ear Employer				
an effort to simplify the nployment, irrespective o I IRP5/IT3(a)s received a	Income Tax process f of whether they are req as part of your most re	REQUESTED FOR EMPLOYEES or taxpayers, SARS introduce uired to submit an Income 1 cent reconciliation submissio e prompt the automatic regi	d a process of registering 'ax return or not. n has been checked to cor	firm the validity of the
ilidations were applied to	the Income Tax refer	ence numbers provided by y	ou, and the following action	n has been taken:
Where incorrect reference Where insufficient informa s returned to you Where sufficient informati rou.	e numbers were identif ation was received to d ion was received, to pr	correct, no action was requi led, the status "Taxpayer to etermine the correct referen ompt the automatic registrat numbers which will automatic	contact SARS" is returned to numbers, the status "in ion process, the new refere	sufficient information" ence number is provided to
Certificate Num	Sumame	First Two Names	ID/Passport	Tax Ref Num
AT	the process to register	erence numbers, and import employees for Income Tax, on www.sars.gov.za.		tre on 0800 00 7277,
SUED ON BEHALF OF THE	COMMISSIONER FOR	THE SOUTH AFRICAN REVENL	E SERVICE	
Close				

Note: This table is for illustration purposes only.

<u>Step 6</u>

The new Income Tax reference numbers can be exported to a CSV file, which can then be imported to your payroll software. This imported file will update your employee records with new Income Tax reference numbers.

Please note: The function within e@syFile[™] Employer has been enhanced to include Individual and Bundle ITREG results in the export file and not only the Bulk ITREG results retrieved with the synchronisation process.

You can export the CSV payroll file from:

- **IMPORT/EXPORT PAYROLL FILE** page (which will include only the Bulk ITREG results)
- VIEW/EDIT EMPLOYEES page (which will include all the ITREG results)

To generate CSV payroll file containing only the Bulk ITREG results:

Click IMPORT/EXPORT PAYROLL FILE on the left hand menu pane.

Click EXPORT PAYROLL FILE.

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To generate CSV payroll file including all ITREG results:

Click VIEW/EDIT EMPLOYEES

Select COMPANY NAME and TAX YEAR from the drop-down lists

Click EXPORT FOR PAYROLL.

Application Home REGISTRATION		ble to obtain a quick view	of all Employees relating to a s mployee (including Certificates)				ses.
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ECONCILIATION PAYE Dashboard	Employee Number		Certificate Numbe	er (
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Cancel Certificate Range Adiustments	IT Reg:	🕘 All (on page) 💿	Selected (on page) Reg	jister	Export	For Payroll	View Summa

From the drop-down list select the company or PAYE number.

Click EXPORT



<u>Step 7</u>

Select the folder where the CSV export file will be generated and saved, click **OK**.

Note: Ensure a local drive (e.g. C:/) is selected and not a network folder.



A pop-up message will be displayed, once the export file has been created successfully. This file can be imported into your payroll software to update the Income Tax reference number for employees.

Payroli CSV Expo	rt Operation
Export Success	sfull
File Location:	
C:\7	_20110817_20h49_EXPORT.CSV
	Ok

7 DEFINITIONS AND ACRONYMS

Term	Description
Annual period	The tax year transaction period 1 March to 28/29 February
Commissioner	The Commissioner of the South African Revenue Service
CSV file	Electronic data of your employee tax certificates [IRP5/IT3(a)s]
	which is generated using your payroll system
EMP201	Monthly Employer Declaration
EMP301	Underpayment on Account letter
EMP501	Employer Reconciliation Declaration
EMP601	Tax Certificate Cancellation Declaration
EMP701	Reconciliation Declaration Adjustment
EMPSA	Employer Statement of Account
ETI	Employment Tax Incentive
ETV	Employment Taxes Validation
FAQs	Frequently Asked Questions
ID	Identity number
Interim period	The six month transaction period 1 March to 31 August
IRP5/IT3(a)	Employee Tax Certificate
ITREG	Income Tax Registration
ITREG	Income Tax Registration certificate
certificate	
PAYE	Pay-As-You-Earn
PRN	Payment Reference Number
SARS	South African Revenue Service
SDL	Skills-Development-Levy
Tax liability	Amount of tax withheld from the employees, which is owed to
	SARS
UIF	Unemployment Insurance Fund

DISCLAIMER

The information contained in this guide is intended as guidance only and is not considered to be a legal reference, nor is it a binding ruling. The information does not take the place of legislation and readers who are in doubt regarding any aspect of the information displayed in the guide should refer to the relevant legislation, or seek a formal opinion from a suitably qualified individual.

For more information about the contents of this publication you may:

- Visit the SARS website at www.sars.gov.za
- Visit your nearest SARS branch
- Contact your own tax advisor/tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277)
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).