

SARS Tax Practitioner Readiness Programme

Module 7 Part 2 : Employer Tax Season

Made Easy on eFiling and e@syFile

Learning Objectives

At the end of this module, you are expected to understand:

- EMP501 Tax Type Activation Process on eFiling,
- EMP501 Reconciliation Process on eFiling,
- How to use eFiling to Submit EMP501 (bi-annual and annual reconciliations),
- How to Download and Install e@syFile,
- Reconciliation Process on e@syFile.

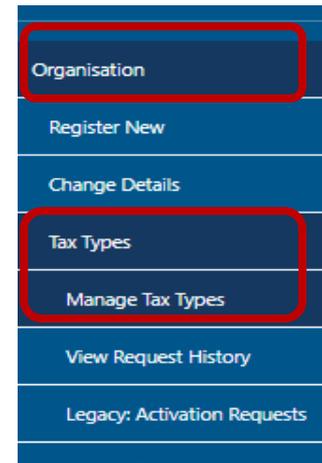
EMP501 Tax Type Activation Process

- Activation/Deactivation of specific tax types – In order to transact on eFiling (e.g. Submit returns, make payments, request statement of account) the applicable tax type must be activated on your profile.
- Transfer of tax types (All tax products) between the organisation and tax practitioner profiles. (To be reviewed by the Taxpayer/Registered Representative).

To activate/deactivate/Request Transfer of tax types of the Entity click on:

- Organisation (Top menu)
- Organisation (Left menu)
- Tax Types
- Manage Tax Types

Select the items that you want to activate/deactivate and click on “Submit”



EMP501 Tax Type Activation Process

Click on “Manage Tax Types” A table will display with the information. Please make sure the EMP501 is successfully activated by selecting under Action and then “Submit” at the bottom.

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
EMP201 - PAYE	7.	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
EMP501 - Submission	7.	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Provisional Tax (IRP6)	9.	Not Active.	<input type="checkbox"/> Request Activation

Submit

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
EMP201 - PAYE	7.	Successfully Activated.	<input type="checkbox"/> Deactivate
EMP501 - Submission	7.	Successfully Activated.	<input type="checkbox"/> Deactivate
Provisional Tax (IRP6)	9.	Successfully Activated.	<input type="checkbox"/> Deactivate

EMP501 Reconciliation Process

To request a return for the applicable reconciliation period for the steps below:

- Select 'Returns' that will be on the top menu,
- Select 'Returns Issued' from the left menu and select 'Employees Tax (EMP501)',
- Select the period of reconciliation from the drop-down list, and click on 'Request Return',
- Click on 'Open' to access the EMP501 work page.

The screenshot displays the SARS Filing portal interface. The top navigation bar includes 'Home', 'User', 'Organisations', 'Returns' (highlighted with a red box), 'Customs', 'Duties & Levies', 'Services', 'Tax Status', 'Contact', and 'Log Out'. The left sidebar menu shows 'Returns Issued' and 'Employee s Tax (EMP501)' (both highlighted with red boxes). The main content area features a 'Return Search' section with a dropdown menu set to '2021-02' (highlighted with a red box) and a 'Request Return' button. Below this is a table with the following data:

Name	Reference Num	Period	Return Type	Status	Amount Due	Due Date	Open
1		TaxPeriod: 201302	EMP501	Issued on 23/08/2013	0.00		Open

At the bottom right of the page, there is a 'ASK A QUESTION?' link.

EMP501 Reconciliation Process

Please Note: If you have selected a final reconciliation before the 1st of March, the following screen will be displayed. You will be required to confirm that you wish to continue and provide a reason as this is only used in exceptional cases where the company is in Liquidation/Winding up the company/Insolvency/Estate cases/Dormant etc.

The screenshot displays the SARS eFiling user interface. On the left is a dark blue sidebar with a user profile for 'Mrs' and a list of navigation options including 'My Profile', 'SARS Correspondence', 'Returns Issued', 'Employee's Tax (EMP201)', 'Employee's Tax (EMP501)', 'Returns History', 'Returns Search', and 'Levies and Duties'. The main content area features a top navigation bar with 'SARS eFILING' and various menu items like 'Home', 'User', 'Organisations', 'Returns', 'Customs', 'Duties & Levies', 'Services', 'Tax Status', 'Contact', and 'Log Out'. Below this is a search area with 'Portfolio' and 'Taxpayer' dropdowns, and a 'Return Search' section with a date selector set to '2021-02' and a 'Request Return' button. A table with columns 'Name', 'Reference Num', 'Period', 'Return Type', 'Status', 'Amount Due', 'Due Date', and 'Open' is visible, with one entry for 'Absa Bank' and reference number '732071'. A modal dialog titled 'Employee's Tax (EMP501)' is overlaid on the table, containing the message: 'You have selected a reconciliation period in the future'. Below the message are the questions 'Do you want to continue?' with 'Yes' and 'No' radio buttons, and 'Please provide a reason' with a text input field. A 'Submit' button is at the bottom of the dialog. In the bottom right corner of the page, there is an 'ASK A QUESTION?' link.

EMP501 Reconciliation Process

After accessing the EMP501 work page, Click on the 'EMP501' link to open the return. The employer will be able to complete the Tax Certificates once the EMP501 is opened. If the reconciliation has already been submitted via e@syFile for this filing period, there will be an error message and the employer will not be allowed to submit the reconciliation on eFiling. Click on "Continue" to continue to the EMP501 work page and to complete the EMP501.

Employee's Tax (EMP501)

Request EMP501

Dear Taxpayer,

In order for SARS to successfully process your EMP501 reconciliation, you need to adhere to the following:

1. You must submit your EMP501 Reconciliation for a specific period through one channel only, i.e. if you elect to submit your EMP501 Reconciliation through e@syFile for period 201302, you cannot revise the submission through eFiling, or vice versa. You do however have the option to elect a different channel for the submission of the next filing period.
2. eFiling will allow a maximum of 50 IRP5/IT3(a) certificates to be submitted. If you are submitting more than 50 IRP5/IT3(a) certificates, please use e@syfile.

Failure to adhere to the above will result in your submission being rejected.

Sincerely
SARS

[Back to eFiling](#)

[Download E@syfile](#)

[Continue](#)

EMP501 Reconciliation Process

The EMP501 Declaration is divided into the following main headings, namely:

- My Reconciliation Declaration
- My Tax Certificates.

The following sub-headings will be available under “My Reconciliation Declaration”:

- Employer Information;
- Tax Practitioner Details (if applicable);
- Employment Tax Incentive;
- Financial Particulars.

The screenshot shows the SARS EMP501 Reconciliation Declaration interface. At the top, there are navigation buttons: "Back", "Save", "Submit", and a numeric keypad with "-", "0", and "+" buttons. Below this is a breadcrumb trail with "My Reconciliation Declaration" (highlighted in red) and "My Tax Certificates". The version number "Version - 2020.00.10" is displayed on the right. The main header features the SARS logo and the text "Employer Reconciliation Declaration EMP501". To the right of the header, it shows "Transaction Year: 2021" and "Period of Reconciliation: 202008". Below the header, there is a "Trading Name:" label. The main content area consists of three expandable sections: "Employer Information" (highlighted in dark red), "Tax Practitioner Details (if applicable)" (highlighted in dark blue), and "Financial Particulars" (highlighted in dark blue). Each section has a downward arrow on the right side.

EMP501 Reconciliation Process

When everything is successfully completed on the EMP501, the colour will change to “Blue”.

Back Save Submit - 0 +

My Reconciliation Declaration  My Tax Certificates  Version - 2020.00.10

 **Employer Reconciliation Declaration EMP501** Transaction Year: 2021 Period of Reconciliation: 202008
South African Revenue Service Trading Name:

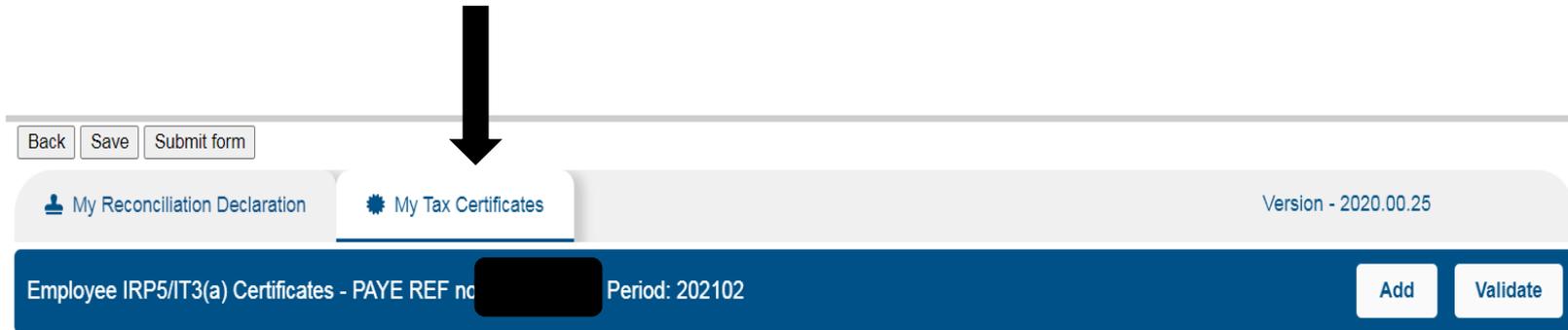
Employer Information 

Tax Practitioner Details (if applicable) 

Financial Particulars 

EMP501 Reconciliation Process

Select “My Tax Certificate” heading at the top



The screenshot shows the top navigation bar of the EMP501 Reconciliation Process. At the top left, there are three buttons: "Back", "Save", and "Submit form". Below these, there are two tabs: "My Reconciliation Declaration" and "My Tax Certificates". A large black arrow points down to the "My Tax Certificates" tab, which is currently selected. To the right of the tabs, the text "Version - 2020.00.25" is displayed. Below the tabs, there is a dark blue bar containing the text "Employee IRP5/IT3(a) Certificates - PAYE REF no [REDACTED] Period: 202102". On the right side of this bar, there are two buttons: "Add" and "Validate".

Select “Add” on the right hand side



The screenshot shows a close-up of the bottom right corner of the interface. It features a light gray bar with the text "Version - 2020.00.25" in the center. Below this bar, there is a dark blue bar containing two buttons: "Add" and "Validate".

EMP501 Reconciliation Process

After selecting “Add”, the certificate will be available on the left-hand side. Select the “Certificate” to open.

The screenshot displays the SARS EMP501 Reconciliation Process interface. At the top, there are three buttons: "Back", "Save", and "Submit form". Below these are two tabs: "My Reconciliation Declaration" and "My Tax Certificates" (with a red exclamation mark icon). The main heading is "Employee IRP5/IT3(a) Certificates - PAYE REF no: [REDACTED]". A search modal is open, featuring a search input field and a table of certificates. The table has the following data:

	Certificate No.	
1	[REDACTED] 202102	
	ID Number	N/A
	Tax Ref No	N/A
	Employee Name	N/A
	Status	NEW

The background interface shows a card for the selected certificate with fields for "Name: N/A", "Year of Ass...", and "2021". There is also a "Certificate" label and a red exclamation mark icon.

EMP501 Reconciliation Process

The IRP5/IT3(a) certificate form is divided into the following main headings, namely:

- Employee Information,
- Employer Information,
- Tax Certificate Information,
- Employment Tax Incentive (ETI) Details (If Applicable).

The screenshot displays the SARS EMP501 Reconciliation Process web interface. At the top, there are navigation buttons: 'Back', 'Save', 'Submit', and a numeric keypad with '0' and '+' signs. Below this, the user is logged in as 'My Reconciliation Declaration' and 'My Tax Certificates'. The version number is '2020.00.11'. The main heading is 'Employee IRP5/IT3(a) Certificates - PAYE REF no: 7: Period: 202008'. The title of the form is 'Employee Tax Certificate: [IRP5/IT3(a)]'. The SARS logo is visible on the left. The form fields include: 'Transaction Year *' (2021), 'Year of Assessment *' (2021), and 'Period Of Reconciliation *' (202008). There are also fields for 'Type of Certificate *' (N/A), 'Certificate Number *' (with an error message: 'Value does not equal minimum required length (30)'), 'Nature of Person *' (with an error message: 'Nature of Person is a mandatory field.'), and 'Employment Tax Incentive Indicator' (Y, N, O). A red error message 'Value is not valid.' is displayed below the indicator. At the bottom, there are four main headings: 'Employee Information', 'Employer Information', 'Tax Certificate Information', and 'Employment Tax Incentive (ETI) Details', each with a dropdown arrow and a warning icon.

EMP501 Reconciliation Process

After the “Certificate” is completed, click on “Validate” on the right-hand side.

Back Save Submit form

My Reconciliation Declaration My Tax Certificates Version - 2020.00.25

Employee IRP5/IT3(a) Certificates - PAYE REF no [REDACTED] Period: 202102 Add Validate

Employee Information

Employer Information

Tax Certificate Information

EMP501 Reconciliation Process

Select “Yes” to continue.

Transaction Year * 2021  Year of Assessment * 2021  Period Of Reconciliation * 202102 

Type of Certificate * IT3(a)

Nature of Person * A - Individual with an ID or passport number

Incentive Indicator Y N

 **Warning**

Do you really want to update all the Certificates?

YES NO

Employee Information 

Employer Information 

Tax Certificate Information 

EMP501 Reconciliation Process

The eFiling system will validate all the certificates created.

Processed 0 certificates out of 0

Successful: 0

Failed: 0

OK

Processed 1 certificates out of 1

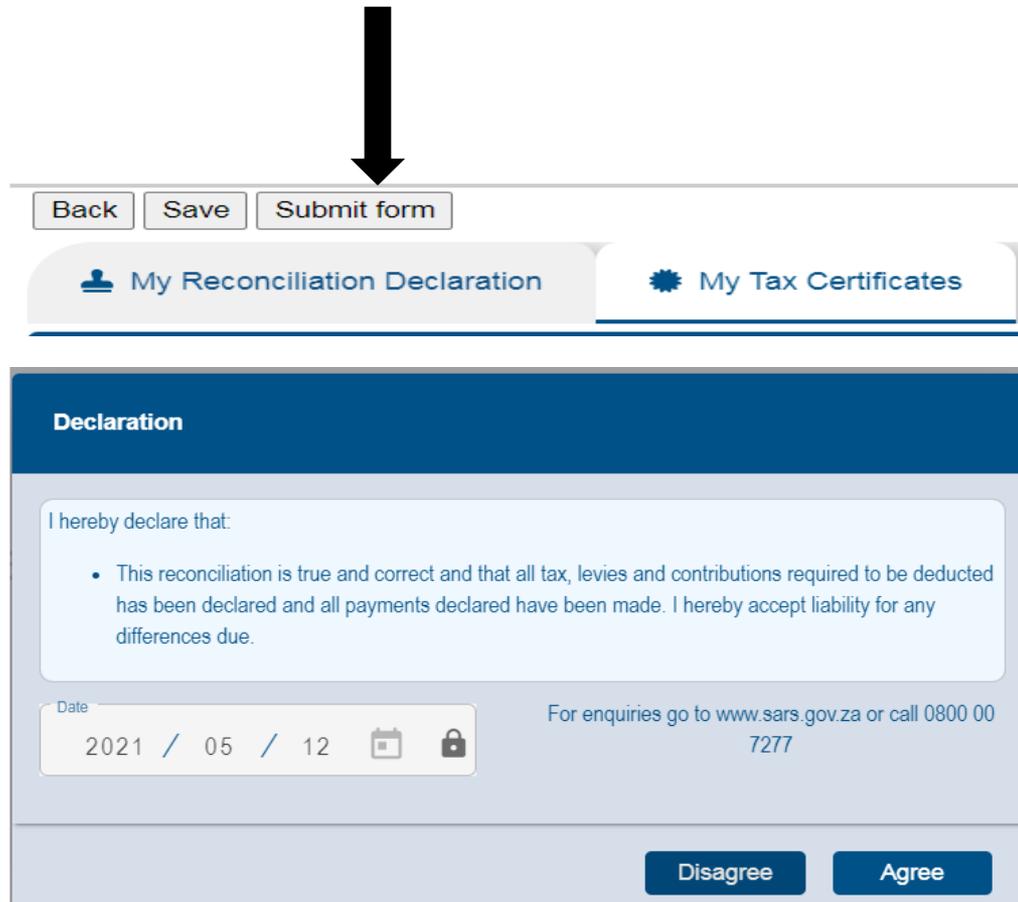
Successful: 1

Failed: 0

OK

EMP501 Reconciliation Process

When clicking “Submit Form” the system will require a date of submission if not completed. Select “Agree” to submit the Reconciliation.



A large black arrow points down from the text above to the 'Submit form' button in the screenshot below.

The screenshot shows a web interface with a navigation bar at the top containing three buttons: 'Back', 'Save', and 'Submit form'. Below the navigation bar are two tabs: 'My Reconciliation Declaration' (selected) and 'My Tax Certificates'. The main content area is titled 'Declaration' and contains a text box with the following text:

I hereby declare that:

- This reconciliation is true and correct and that all tax, levies and contributions required to be deducted has been declared and all payments declared have been made. I hereby accept liability for any differences due.

Below the text box is a date selection field showing '2021 / 05 / 12' with a calendar icon and a lock icon. To the right of the date field is the text: 'For enquiries go to www.sars.gov.za or call 0800 00 7277'. At the bottom of the form are two buttons: 'Disagree' and 'Agree'.

EMP501 Reconciliation Process

The screen below will display indicating that your return has been successfully submitted. Click on the “Continue”, button.

DETAILS

Tax Reference Number	72	Period	202102
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RESULT

Your return has been successfully submitted.

Please note that you may follow up with SARS on the processing of your Data submission on the EMP501 Work Page.

Continue

EMP501 Reconciliation Process

The screen below will display indicating that your return has been successfully submitted. Click on the “Continue”, button.

DETAILS

Tax Reference Number	72	Period	202102
----------------------	----	--------	--------

RESULT

Your return has been successfully submitted.

Please note that you may follow up with SARS on the processing of your Data submission on the EMP501 Work Page.

Continue

How to submit EMP501 on eFiling

YouTube Link

Please visit the following link on the SARS TV channel on YouTube to access the video:

<https://youtu.be/i95muVWhOQg>

- Employers are required to submit an Employer Reconciliation Declaration (EMP501) to SARS twice a year.
- Interim reconciliation declaration for the six-month period, 1 March to 31 August must be submitted by 31 October.
- Annual reconciliation declaration for the full year, 1 March to 28/29 February 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.
- By using e@syFile, an employer can now submit and make payments.

In the event that the employer has more than 50 employees, employers need to make use of e@syFile software that can be downloaded from the SARS website.

Important things to remember:

- Ensure that your PC is compatible to download and operate e@syFile,
- e@syFile is an offline system. In order to submit to SARS you will need to insert your eFiling login details,
- When creating the login details, the main username will be defaulted “ADMIN”,
- Make sure that you back up your database on e@syFile,
- Always update your software when prompted to do so,
- Always read pop up messages before clicking “OK”.

Download and Installation

- You can download the e@syfile application from the sars eFiling (www.sarsefiling.co.za) landing page.

Welcome to the SARS eFiling Landing Page.

SARS eFiling is a free, online process for the submission of returns and declarations and other related services. This free service allows taxpayers, tax practitioners and businesses to register free of charge and submit returns and declarations, make payments and perform a number of other interactions with SARS in a secure online environment.



- Or from the SARS website (www.sars.gov.za) > Business & Employers > e@syfile.

- **To download the latest version of e@syFile, click here.**

- **Release Notes:**

- 16 October 2023 – [e@syFile version 7.4.1](#) was released.
- 18 September 2023 – [e@syFile version 7.4.0](#) was released.
- 24 July 2023 – [e@syFile version 7.3.9](#) was released.



How to download and install @syFile

Welcome to e@syFile™ Employer - Software designed by SARS

Proudly brought to you by
SARS
At Your Service



- ❗ We help you, the taxpayer to manage your engagement with SARS quickly, easily & conveniently on desktop.
- ❗ Download e@syFile™ Employer onto your desktop to import and validate declarations in offline mode.
- ❗ Only go online to submit returns, reconciliations and tax certificates, or manage agent appointments (AA88).
- ❗ Remember, for time-saving and hassle-free submissions, electronic filing is just a click away.

Windows Download

Important: Backup the PAYE information on your PC before installing this version as the installation may delete your current information.

 [Download](#)

Other Downloads

 [Adobe Reader](#)

 [ZipUTILITY](#)

User Docs

Get the User Manual:

 [Download](#)

Minimum System Requirements:

Java 7
Windows 7 (32 bit & 64 bit)
Adobe Reader 9
Adobe AIR 3.1
200MB hard drive space (for download and installation to C:/ drive; additional space will be required as employer data increases)

Additional Notes:

Java & AIR is included in e@syFile™ Employer setup. Later versions of Java may be used, but version 7 must be installed as well.

Troubleshooting and additional info:

 [Java Info](#)

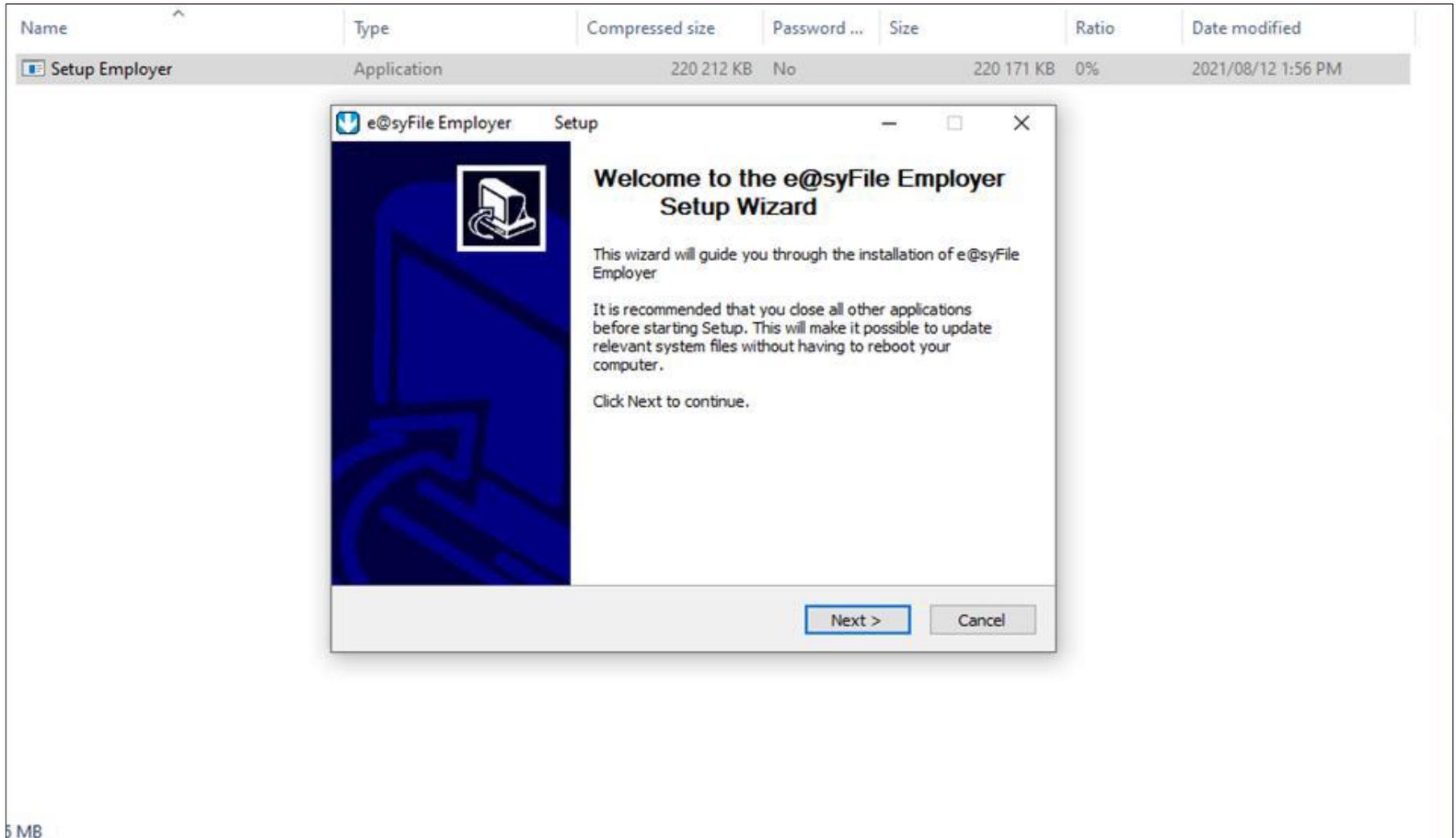
How to download and install @syFile

e@syFile Employer setup

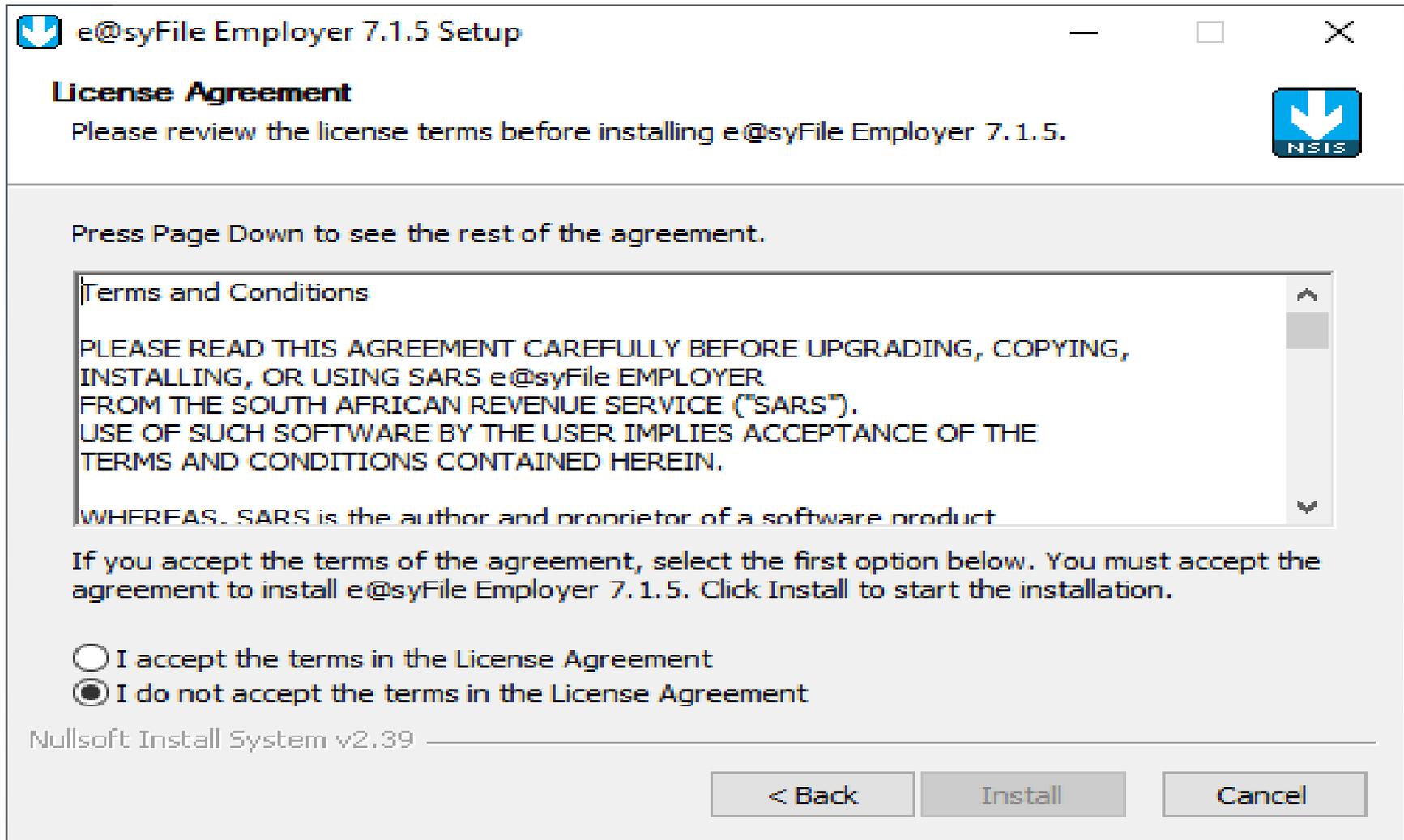
- First time users will have to complete a quick user registration after installing the application.
- Existing users do not need to repeat the registration setup after updating or installing/re-installing the application.
- Your e@syFile Employer database will not be removed during un-installation or re-installation.

***TIP:** Always ensure that you have a current backup as a precaution when you update or re-install the software.*

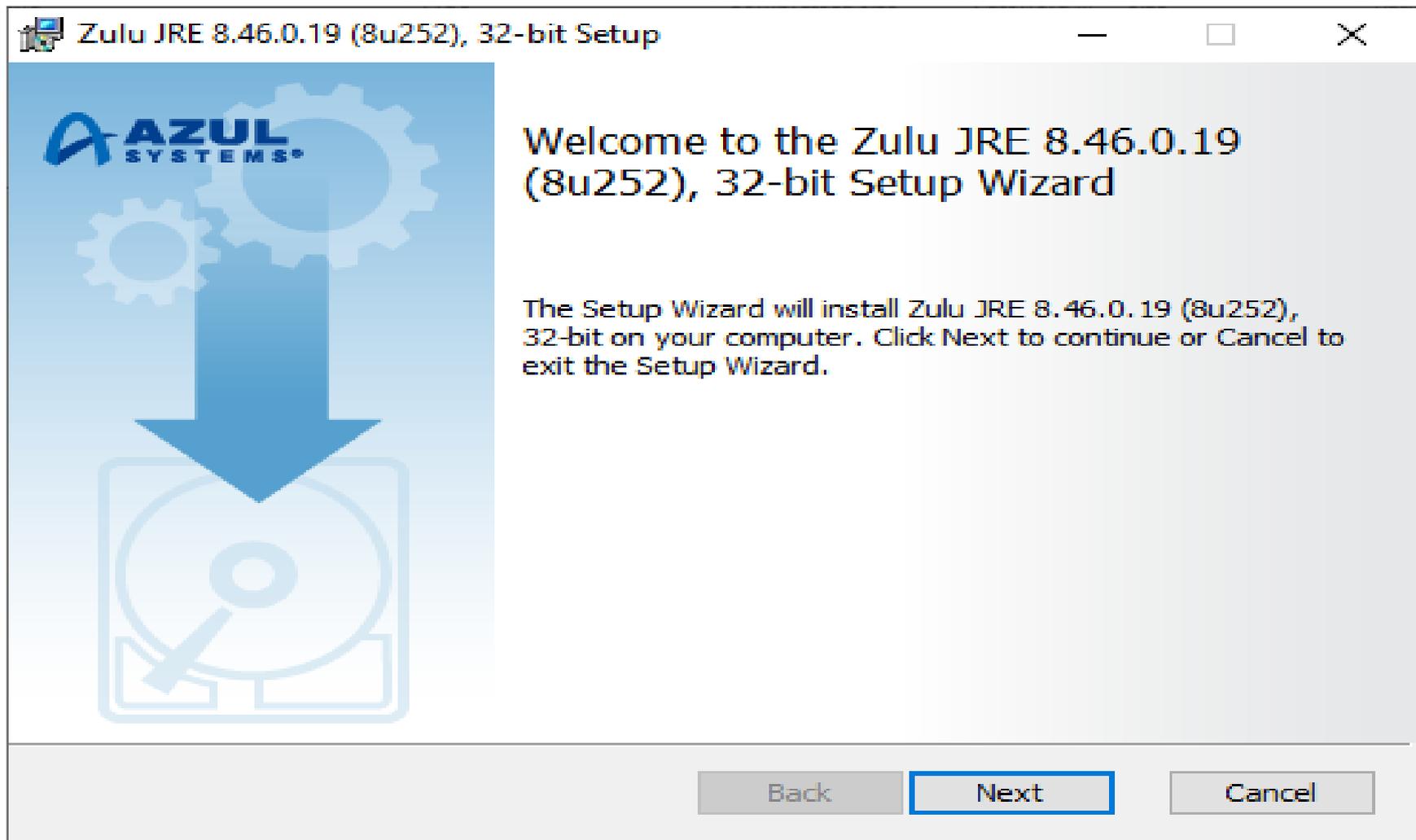
How to download and install @syFile



How to download and install @syFile



How to download and install @syFile



How to download and install @syFile

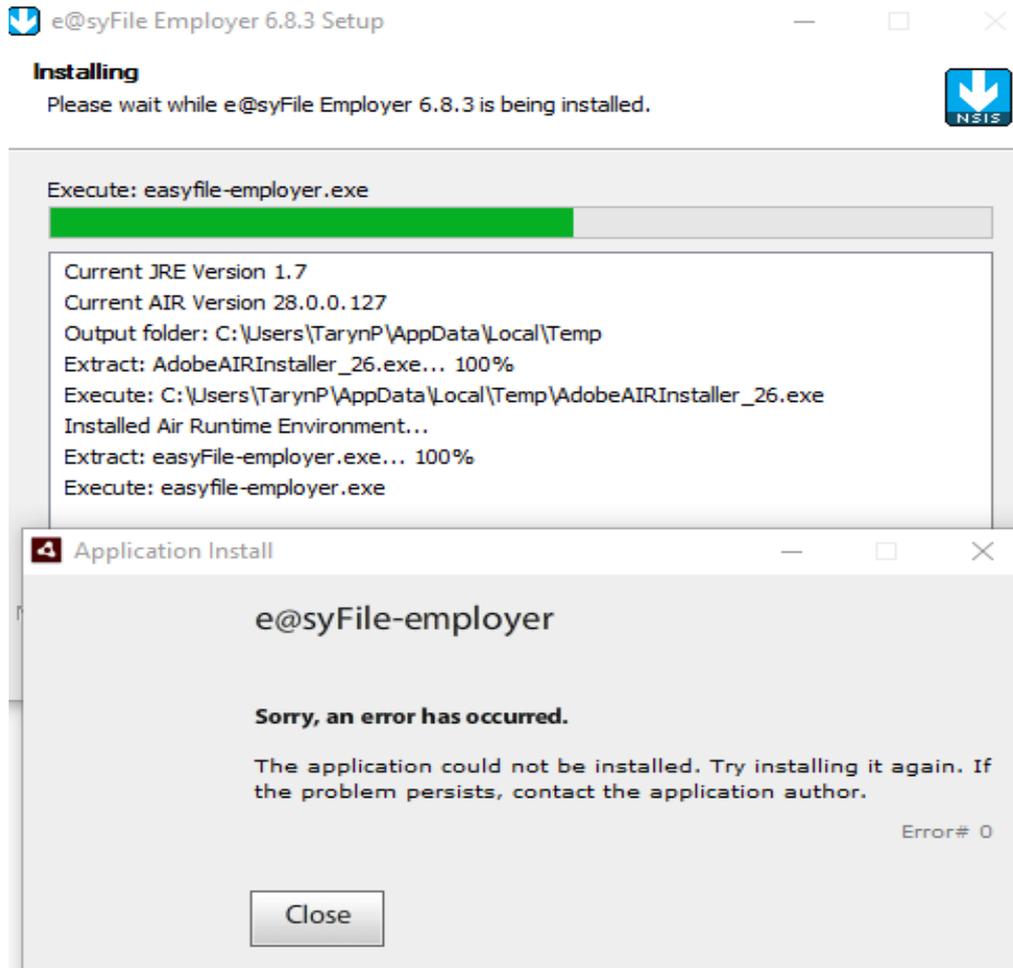
The screenshot shows a Windows file explorer window with the path `Eugene Joubert > Downloads > Setup_EMP_698_WIN`. The file list contains one entry:

Compressed size	Password ...	Size	Ratio	Date modified
141 430 KB	No	141 412 KB	0%	2019/10/02 01:34 PM

Two dialog boxes are overlaid on the file explorer:

- Application Install:** A dialog box for `e@syFile-employer`. It displays the application icon and the text: "The application you are about to install already exists on this system. Would you like to replace the currently installed version with this one?". It shows the **Installed Version: 0.0.0.1** and the **Version to be Installed: 0.0.0.6**. There are **Replace** and **Cancel** buttons, and a **More Options >** link.
- Nullsoft Install System v2.39:** An installation progress dialog box. It shows a progress bar and a list of actions: "Output folder: C:\Users\EUGENE~1.JOU\AppData\Local\Temp", "Extract: AdobeAIRInstaller_31.exe... 100%", "Execute: C:\Users\EUGENE~1.JOU\AppData\Local\Temp\AdobeAIRInstaller_31.exe", "Installed Air Runtime Environment...", "Extract: easyFile-employer.exe... 100%", and "Execute: easyfile-employer.exe". It has **< Back**, **Next >**, and **Cancel** buttons.

How to download and install @syFile



Follow the steps below in case of an installation error:

- Remove previous version
- Disable Virus Program to successfully Install e@syFile.

How to download and install @syFile

0.1.7

HOME
Notification Centre
Action Centre

REGISTRATION
eFiling Registration

IMPORT
Import/Export Payroll File

EMPLOYEE ADMIN
View/Edit Employees

MONTHLY PROCESS
PAYE
Payments

RECONCILIATION
PAYE Dashboard
Declaration
Cancel Certificate Range
Adjustments
Summary Report

SUBMISSION
Submit to SARS

THIRD PARTY APPOINTMENTS
Third Party Appointments

EMPLOYER ADMIN
View/Edit/Change

UTILITIES
Utilities
Synchronise Application

HELP
Application Help
Update
Log off

Welcome to e@syFile - employer

User Name:

Password:

Login **Close**

Forgot Password? **Secure Reminder**

Restore Backup

With the software you can do all your PAYE reconciliations online and then upload your information when you are fully reconciled and ready to submit.

Welcome to a new and easier way of reconciling. SARS. At Your Service.

Proudly brought to you by
SARS
At Your Service

CONNECTION STATUS : **CONNECTED** ■ Current Tax Year : 2022 Working With : No Company Selected **Change** LOGGED IN AS :

How to download and install @syFile

User registration/setup

Welcome to SARS e@syFile - Employer. As this is the first time that the application is being run, you are kindly asked to create a local login account to access this application. This login account (username and password) will be used to access this application only, and should not be the same username and password used to access SARS eFiling. When data is to be transmitted to SARS, you will be asked for your eFiling login details, and only when this authentication passes will information be submitted.

Admin User Name: ADMIN

Admin Password: *****

Repeat Admin Password: *****

Admin Password Hint: P@ssword1

Would you like to be able to edit information imported from a CSV file?
 Allow CSV editing

Please be aware that should you lose or forget your password, SARS eFiling will not be able to retrieve or reset it.
 I understand

Cancel Next

- You cannot change the ADMIN username, simply provide a password and useful password hint.
- Select logins for a second and third user and provide passwords and password hints to finalise the setup.
- Password format: Use at least 8 characters, including 1 capital letter, 1 small letter, 1 number and 1 special character.

Please note: A full stop or a comma are not considered special characters.

Reconciliation Process on e@syFile

- Creating an employer
 - It is important to first create an employer to be able to activate the tab on the home screen.
- Processing certificates
 - You can import your payroll CSV files or you can create the IRP5s manually on e@syFile to be able to balance your submission.
- Capturing the EMP501
 - SARS data needs to be accepted,
 - Compare Financial figures between IRP5 and the EMP201 on the declaration,
 - Validation.
- Submitting the reconciliation declaration
 - To file the declaration, eFiling login details are required,
 - Validation of the EMP501 and certificates.
- Generating the certificates
 - Only available on the final recon & not available on bi-annual recon.

Reconciliation Process on e@syFile

EMPLOYER ADMIN
On this screen you are able to create or edit an employer.
Employer details entered and saved will be used to manage and complete employee tax certificates.

ADD EMPLOYER

Trading or Other name:

Reference Number: PAYE: SDL: UIF:

Activity within Major Division: ...

Employer SIC7: :

Employer SEZ: ▼

Diplomatic Indemnity: Yes

Business Address

Unit Number: Complex:

Street Number: Street/Farm:

Suburb:

City: Postal Code:

Country Code: ▼

Contact Person

First Name:

Surname:

Business Tel No: Cell No: Fax No:

Email Address:

Position at Business:

Practitioner Information

Registration No:

Telephone No:

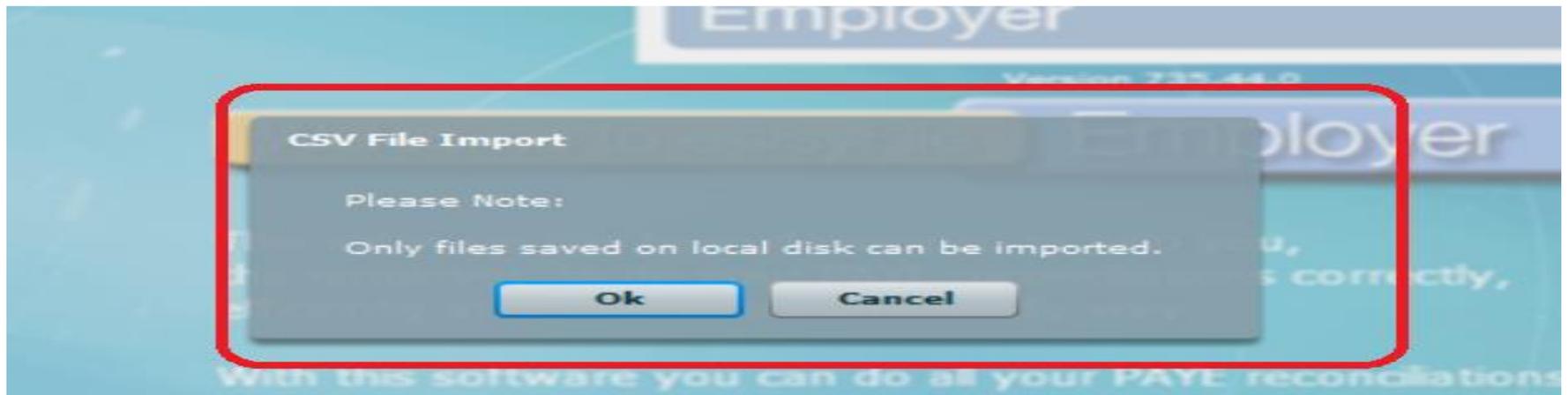
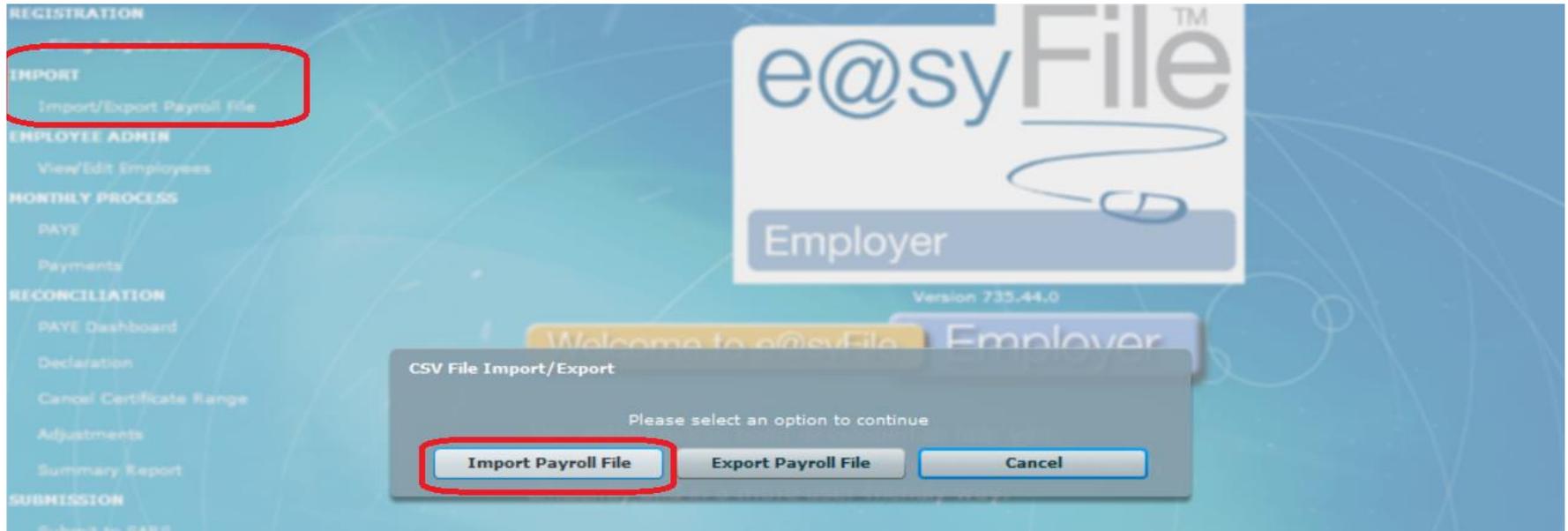
EDIT EMPLOYER

CHANGE EMPLOYER

ZAR Code Error Older Submissions

COE - COEGA SEZ

Reconciliation Process on e@syFile



Reconciliation Process on e@syFile

The screenshot displays the e@syFile software interface. On the left, a navigation menu lists various functions: Notification Centre, Action Centre, REGISTRATION (eFiling Registration), EXPORT (Import/Export Payroll File), EMPLOYEE ADMIN (View/Edit Employees), MONTHLY PROCESS, PAYE (Payments), RECONCILIATION (PAYE Dashboard, Declaration, Cancel Certificate Range, Adjustments, Summary Report), SUBMISSION (Submit to SARS), THIRD PARTY APPOINTMENTS (Third Party Appointments), EMPLOYER ADMIN (View/Edit/Change), and UTILITIES. The main area features the e@syFile logo and the text 'Employer' and 'Version 735.44.0'. A red-bordered dialog box titled 'CSV File Import' is centered on the screen, containing the message: 'Payroll File failed validation with WARNINGS. Please consult the Import Payroll log to see where failures and warnings occurred.' with an 'Ok' button.

Reconciliation Process on e@syFile

EMPLOYEE DETAILS

*On this screen you are able to view and edit Employee Demographic Data.
To view this Employee's Certificates, double click the Certificate number in the Certificate List.*

Employee Information

Personal *indicates required field.*

Nature of Person: **A - Individual with ID or Passport Numb** *

Surname: *

First Two Names: *

Initials: T *

Date Of Birth: * CCYYMMDD

ID Number: *

Income Tax Reference: *

Passport Number: *

Country of Issue: ... *

Alternate Identification Type: ... *

Alternate Identification Number: *

Employee Number: 04 *

View Status: **Active**

Quick Navigation
Prev Next

Certificate Number: 20200800000000000004
Recon Period: 201908
Status: **CREATED**

Add Certificate

Employee Contact Details

Employee Bank Details

Back to View/Edit **IT Reg** **Save Employee**

Reconciliation Process on e@syFile

CERTIFICATE DETAILS
On this screen you are able to view and edit Certificate Data.

Transaction Year: ...
Period of Reconciliation: ...
Certificate Number: 0000000000000000
 Final Certificate Submission
Certificate Type: ...
Year of Assessment: ...
Pay Periods Worked: ...
Pay Periods in Tax Year: ...
Employment Date: ...
Cert. Tax Period Start: ...
Cert. Tax Period End: ...
Voluntary Over Deduction
Fixed Rate Taxation
Directive Numbers:
Directive Number 1: ...
Directive Number 2: ...
Directive Number 3: ...
Employment Tax Incentive
ETI
Employee SIC7 Code: ...
Certificate Status: Certificate Source:
Date Created: Date Submitted:

Income Received

Description	Code	Value

Total Income Received

Description	Code	Value

Deductions/Contributions

Description	Code	Value

Total Deductions/Contributions

Description	Code	Value

Tax Credits and/or Employer / Employee Contributions

Description	Code	Value

Manage Source Codes

Back to Employee Cancel Certificate View Certificate Save Certificate

Cancelling and Reviving Certificates

e@syFile EMPLOYER

HOME

- Notification Centre
- Action Centre

REGISTRATION

- eFiling Registration

IMPORT

- Import/Export Payroll File

EMPLOYEE ADMIN

- View/Edit Employees

MONTHLY PROCESS

- PAYE
- Payments

RECONCILIATION

- PAYE Dashboard
- Declaration
- Cancel Certificate Range
- Adjustments

Action: ...

- ...
- Cancel Certificates
- Revive Certificates

Period of Recon: ...

Action: **Cancel Certificates** | Period of Recon: **201708**

CANCEL CERTIFICATE RANGE

On this screen you are able to cancel a range of IRP5/IT3(a) Certificates for a company and transaction year. Individual Certificate can be cancelled on the certificate details screen.

Range Start: 20180800000000015623 | Range End: ... | Add to list

Start Range Certificate Number	End Range	Number of Certificates	Certificate Range Count	Action
20180800000000015542	20180800000000015623	1837.79	4	Remove
20180800000000015549	20180800000000015554	6	58	Remove

Cancelling and Reviving Certificates

EMP501

Select the tax year for the Declaration : 202108

EMP501 Declarations for :

PAYE	SDL	UIF	ETI	Status	View

Online pre-populate?

SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.

SARS Secure Login

Login in to eFiling to verify your credentials.

SARS eFiling User Name:

SARS eFiling Password:

Cancelling and Reviving Certificates

e@syFile Employer 7.3.4

EMP501

Select the Period of Reconciliation for the Declaration : 202302 Request

EMP501 Declarations for : TRAINING PTY LTD - 7180716450

PAYE	SDL	UIF	ETI	Status	View
------	-----	-----	-----	--------	------

Validation Failed

eFiling user does not exist.

OK

User Rights

Organisations,
Tax types,
Manage tax types and ensure that EMP501 is successfully active.

Go to organisation (Top)
Rights groups (Left)
Manage groups and ensure that the company is ticked under **manage payers**/update
Manage groups, click open and ensure that EMP501 is ticked.

User (Top),
User (left)
Change details
Update rights, ensure you have the correct right and the correct group is ticked (System default if the company is under that group)

Go to organisations, change details, access right and ensure the system default is ticked,

Cancelling and Reviving Certificates

e@syFile Forms Viewer v1.2.8 - SARS WPAYE

File View Help



Employer Reconciliation
Declaration EMP501

South African Revenue Service Trading Name: BOELA SE VIS WINKEL

Transaction Year: 2022 Period of Reconciliation: 202108

Employer Information

DATE REF NO 7950769390	SDL REF NO	UIF REF NO U950769390
TRADING NAME BOELA SE VIS WINKEL		
Diplomatic Indemnity Indicator? * <input type="radio"/> Y <input checked="" type="radio"/> N	SIC Code	SEZ Code

Contact Person Details

FIRST NAME * LANGOOR	SURNAME * BOELA	POSITION HELD AT BUSINESS * BOSS
BUS TEL NO 0214471000	CELL NO	EMAIL INFO@BOELA.CO.ZA

Payroll Systems Details

Payroll Software Provider	Payroll Software Package
Other Specify	

Tax Practitioner Details (if applicable)

Financial Particulars

Declaration

Cancelling and Reviving Certificates

Financial Particulars PRDFY01

Transaction Year (CCYY) Period of Reconciliation (CCYYMM) PAYE Ref No. SDL Ref No. UIF Ref No.

	PAYE Liability	SDL	UIF	Total Monthly Liability	Payments (excl. Penalties, Interest and Add tax)
March	0.00		0.00	0.00	
April	0.00		0.00	0.00	
May	0.00	0.00	0.00	0.00	
June	0.00	0.00	0.00	0.00	
July	0.00	0.00	0.00	0.00	
August	10000	0.00	0.00	10000.00	
September					
October					
November					
December					
January					
February					
Annual Total	10000			10000.00	
Difference- Total Liability & Annual Total	-10000			10000.00	
Total Liability	0.00	0.00	0.00		
Tax Certificates Total	0.00	0.00	0.00		
Audit Result Not in Certificates					
Tax Paid on Behalf of Employee					

Error

The total liability for PAYE cannot be zero if annual total for PAYE is greater than zero.

Declared Liability

Due By / To You
(excl. Penalties, Interest and Add tax)

BNP501 1 PV 2020.04.01 SV 2001 CF EASY... NO 7950769390 P 202008 Y 2021 002/003

Cancelling and Reviving Certificates

Annual Total R 0.00				
------------------------	------------------------	------------------------	------------------------	------------------------

Difference Total Liability & Annual Total R 0.00			
-----------------------------------------------------	-----------------------------------------------------	-----------------------------------------------------	-----------------------------------------------------

Total Liability R 0.00	Total Liability R 0.00	Total Liability R 0.00
---------------------------	---------------------------	---------------------------

Tax Certificates Total R 0.00	Tax Certificates Total R 0.00	Tax Certificates Total R 0.00
----------------------------------	----------------------------------	----------------------------------

R Audit Result not in Certificates	R Audit Result not in Certificates	R Audit Result not in Certificates
------------------------------------	------------------------------------	------------------------------------

R Tax Paid on Behalf of Employee

Declared Liability

Amount
R 0.00

Due By / To You

Amount
R 0.00

Cancelling and Reviving Certificates

SYSTEM UTILITIES
On this screen you are able to run the system utilities.

Database Utilities
EMP501 Status Dashboard

Please double click on a Company record to view detailed status.

Company Name	Reference N...	Form	Year	Channel	Date/Time	Update
		EMP501	201608	Online	2016/09/16 14:29:4	<input type="button" value="Update"/>
		EMP501	201502	Online	2017/08/30 13:27:3	<input type="button" value="Update"/>
		EMP501	201602	Online	2017/08/30 13:44:1	<input type="button" value="Update"/>
		EMP501	201708	Online	2017/09/01 10:33:5	<input type="button" value="Update"/>
		EMP501	201702	Online	2017/09/01 11:23:5	<input type="button" value="Update"/>
		EMP501	201602	Online	2017/09/01 11:43:4	<input type="button" value="Update"/>
		EMP501	201602	Online	2017/09/01 14:27:4	<input type="button" value="Update"/>

Status Update

Updates Recieved! Click 'Ok' to view.

AA88 Payment Allocation Dashboard

Pre-Submission Validation Report

Import Payroll File Log

Delete Payroll File

Reset Passwords

Payroll File Editing

Reassign Certificate

Generate IRP5 / IT3(a) PDF's

Full Resubmission Request

Cancelling and Reviving Certificates

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.

Close

Cert Number	Form Type	Response
7390758466	EMP501	EMP501 reconciliation processed. Please check your compliance status
7390758466	EMP501	Recon Failed Compliance

Close

Cancelling and Reviving Certificates

e@syFile EMPLOYER 7.4.1

HOME

Notification Centre

Action Centre

REGISTRATION

eFiling Registration

IMPORT

Import/Export Payroll File

EMPLOYEE ADMIN

View/Edit Employees

MONTHLY PROCESS

PAYE

Payments

RECONCILIATION

PAYE Dashboard

Declaration

Cancel Certificate Range

Adjustments

Summary Report

SUBMISSION

Submit to SARS

THIRD PARTY APPOINTMENTS

Third Party Appointments

EMPLOYER ADMIN

View/Edit/Change

UTILITIES

Utilities

Synchronise Application

HELP

Application Help

Update

Log off

Welcome to the e@syFile Employer PAYE Status Dashboard

The PAYE dashboard provides a consolidated view of the Employer's PAYE tax affairs.

Select Company : Select Period : 202402 Show

EMP201 Returns and Payments allocated

Item	Amount
EMP201 Liabilities	R458,060.35
Payments Allocated	R458,060.35
Difference	R0.00

Certificates

Item	Amount
EMP501 Certificate Value	R458,060.35
Certificates received by SARS	R458,060.35
Difference	R0.00

EMP201 and EMP501 liabilities

Item	Amount
EMP201 Liabilities	R458,060.35
EMP501 Liabilities	R458,060.35
Difference	R0.00

Certificates received and payments allocated

Item	Amount
Certificates received by SARS	R458,060.35
Payments Allocated	R458,060.35
Difference	R0.00

Certificates

This Period	
Active Certificates received by SARS	5
Active Certificate Values	R458,060.35

Account summary for Period of reconciliation

Item	Amount
Total EMP201 Liabilities	R458,060.35
Additional EMP501 Liabilities	R0.00
Certificate Adjustment	R0.00
Add. Penalties, Interest & Add. Tax	R0.00
Total Liabilities	R458,060.35
less Payments Allocated to tax	R458,060.35
less Payments Allocated to other	R0.00
Total Amount Due	R0.00

AA88 Information (Admin Penalty and Assessed Tax)

Description	# of Transactions	Amount

CONNECTION STATUS : CONNECTED Current Tax Year : 2025 Working With : Change LOGGED IN AS :

e@syFile Employer: Introducing ETV (Employee Tax Validation)

- Ensure that you retrieved the submissions status update under Utilities, on the EMP501 Dashboard in e@syFile Employer.
- Click on Update next to the relevant submission to retrieve an Accepted or Rejected status.
- Please note: ETV feedback will not be available for rejected EMP501 submissions.

SYSTEM UTILITIES
On this screen you are able to run the system utilities.

Database Utilities
EMP501 Status Dashboard

Please double click on a Company record to view detailed status.

Download Employment Taxes Validation

Company N...	Reference ...	Form	Year	Channel	Date/Time	Update	ETV
		EMP501		Online	2014/09/15 15:29	Update	

SARS Secure Login

Login in to eFiling to verify your credentials.

SARS eFiling User Name:

SARS eFiling Password:

Login Cancel

e@syFile Employer: Introducing ETV (Employee Tax Validation)

SYSTEM UTILITIES

On this screen you are able to run the system utilities.

Database Utilities

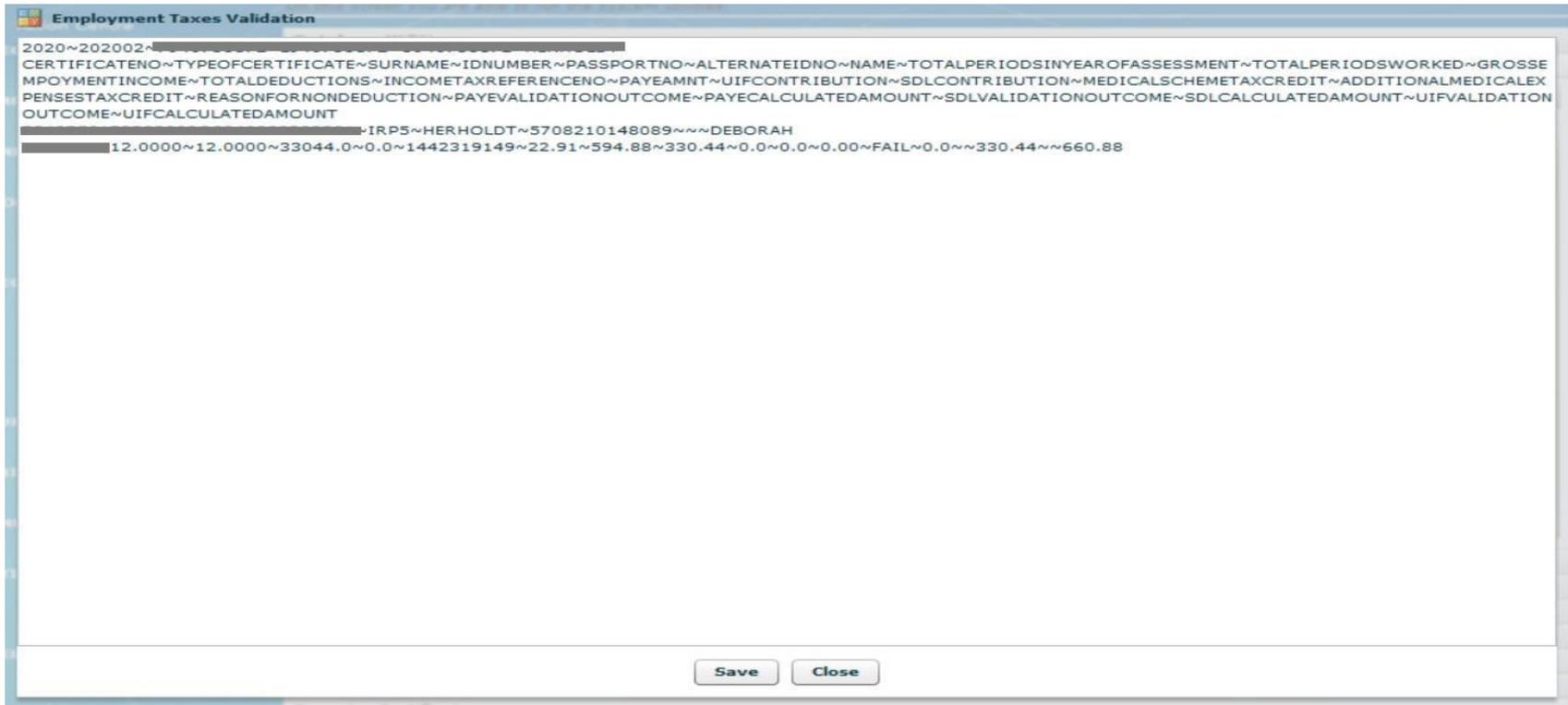
EMP501 Status Dashboard

Please double click on a Company record to view detailed status.

[Download Employment Taxes 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	
		EMP501	201702	Online	2017/04/14 12:07	Update	
		EMP501	201708	Online	2017/09/18 10:34	Update	
		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

e@syFile Employer: Introducing ETV (Employee Tax Validation)



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.

Adobe Reader DC

Reader Error

PDF cannot be displayed. Error code: Adobe Reader is detected, but the version is too old.

OK

Letter ID	Tax Payer Name	Tax Year	Message Type	Status
12780	101 MEADE STREET	2021	EMP222	READ
11742	101 MEADE STREET	2021/02/28	EMPSA	READ
11749	101 MEADE STREET		ITRECOVER	READ
11942	101 MEADE STREET	202102	LEPAYE-DM0001	READ
12561	101 MEADE STREET		LEPAYE-DM0001	IN AUDIT
12782	101 MEADE STREET		LEPAYE-DM0002	IN AUDIT
11943	101 MEADE STREET		LEPAYE-DM0002	READ

Adobe Reader DC

The screenshot shows the 'System Configuration' dialog box in Adobe Reader DC. The 'System Configuration' tab is selected and highlighted with a red box. The 'Utilities' option in the left-hand navigation pane is also highlighted with a red box. The 'PDF Rendering' section contains a checked checkbox for 'Render PDF with default application.' The 'Java JRE' section shows a text box with the path 'C:\Program Files (x86)\Zulu\zulu-8-jre\bin\java.exe' and a 'Change Java Path' button. Below this are three buttons: 'Test Java', 'Check System Parameters', and 'Check Validation Rules Version'. The 'e@syFile Forms Viewer Application' section shows a text box with the path 'C:\Users\nokhutula.mbatha\AppData\Local\Programs\easyfileformsviewer' and 'Change Path' and 'Install' buttons.

System Configuration

Here you are able change System Configuration.

PDF Rendering:

Render PDF with default application.

Java JRE:

Path: C:\Program Files (x86)\Zulu\zulu-8-jre\bin\java.exe Change Java Path

Test Java Check System Parameters Check Validation Rules Version

e@syFile Forms Viewer Application:

Path: C:\Users\nokhutula.mbatha\AppData\Local\Programs\easyfileformsviewer Change Path Install

ETI (Employer Tax Incentive) Reinstatement

Online pre-populate?

SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.

ETI Re-instatement Request:

If an employer incorrectly submits an incorrect EMP501 (future dated or without claiming ETI), they will now be able to request a Reinstatement of ETI without going through the Debt Management process or manual intervention. A new option was added on the Declaration page when you click on Request: This will be a real-time request that will return pre-populated values as per the original EMP201's submitted where ETI was stated. All the standard checks will still be performed (compliance and any assessments raised etc.) and the request may also be declined. A pop-up message will provide a reason if the re-instate request was unsuccessful.

Pre-Submission Validation Report

Detail Import Status Report Pre-Submission Validation Report

FAILED WARNINGS

Line	Status
2	20170200000050000016 : Employee Address Details - Postal: Country Code mandatory - code 3294
3	20170200000050000033 : Employee Address Details - Postal: Country Code mandatory - code 3294
4	201702000000500000510 : Employee Address Details - Postal: Country Code mandatory - code 3294
7	20170200000050001201 : Employee Address Details - Postal: Country Code mandatory - code 3294
9	20170200000050001542 : Employee Address Details - Postal: Country Code mandatory - code 3294
13	20170200000050002728 : Employee Address Details - Postal: Country Code mandatory - code 3294
14	20170200000050002943 : Employee Address Details - Postal: Country Code mandatory - code 3294
15	20170200000050002993 : Employee Address Details - Postal: Country Code mandatory - code 3294
16	20170200000050003083 : Employee Address Details - Postal: Country Code mandatory - code 3294
18	20170200000050003450 : Employee Address Details - Postal: Country Code mandatory - code 3294
2	: Employee Address Details - Postal: Country Code mandatory - code 3294

80.1%

Find 3294

Previous Next

- If field "Employee Postal Address Details Country Code" (Code 3294) is ZA and Nature of Person is mandatory and:
 - Must consist 4 numeric characters (if not, it should be written to the import file as "0040" and not as "40");
 - Must not be "0000"
 - In case there is no postal code for the postal address, use the nearest postal code
- If field "Employee Postal Address Details Country Code" (Code 3294) is not ZA, then this field is optional
- If Nature of Person is N, then this field is optional

Save Report Close

Page 34 of 113

Technical e@syFile Queries eFiling setup problems

Technical e@syFile Queries eFiling setup problems should be referred to support@sarsefiling.co.za for attention.

*Thank you
Re a leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza*