EXTERNAL GUIDE

e@syFileTM EMPLOYER 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
12-11-2020	7	AA88 Updated
10-09-2021	8	2021/2022 PAYE BRS for Employer Reconciliation

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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.

1.1 FINALISE AND SUBMIT YOUR INTERIM AND ANNUAL RECONCILIATION



Figure 1: Reconciliation Submission Process

1.1.1 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.

1.1.2 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.

1.1.3 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.

1.1.4 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.

1.1.5 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.

1.2 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.	The employee must provide all the necessary registration details to the employer, for the registration request.
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
 - Login to the current version of e@syFile™ Employer.
 - If you are online a pop-up message will appear, allowing you to update to the latest version. Should the pop-up message not appear, access it by clicking **Update** on the left menu.

e@syFile Empl	yer
	is out of date please click update or download on from the SARS website www.sarsefiling.co.za
	OK Update
	Restore Backup

• Click **OK** to proceed with the update.

e@syFile Update Service
There is an update available!
e@syFile will ask for you to select a location to backup your database before updating.
Details:
VERSION Content UPDATE. If you are upgrading from any previous version, please make sure that you back up your data before updating to this version.
Yes No

- Follow the pop-up messages to complete installation process. You are 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.
- New users installing e@syFile™ Employer
 - You 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



- Click Download for Windows to start the download process.
- 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.
- The e@syFile[™] Employer icon will display on your desktop, allowing quick access.



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

account to access this applicatio password) will be used to access be the same username and pas	 kindly asked to create a local logir n. This login account (username an this application only, and should n sword used to access SARS eFiling. S, you will be asked for your eFiling. 	d ot Wher
	authentication passes will informat	
Admin User Name:	ADMIN	
Admin Password:	*****	
Repeat Admin Pass	word: *******	
Admin Password Hin	t: P@ssword1	
Nould you like to be able to ed nformation imported from a CS ile?		
Please be aware that should you ose or forget your password, SA Filing will not be able to retriev or reset it.	RS I understand	

- 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 (!)].
- Repeat the password by Repeat Admin Password.
- Enter a hint to help you remember your password should you forget it, by Admin Password Hint.
- Select Allow CSV editing, where you wish to allow editing of imported certificates.
- 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.
- Click Next to continue.
- Create a user account for those persons who will be using e@syFile™ Employer.
- Enter the user's name, as well as a password, using the criteria as stated above. Repeat the
 password and enter a hint.
- Click **Next.** You will be required to enter the second user's details.
- Click Login to Application
- 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.
- 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 Employer Declaration (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

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 Here you are able to reassign certificates that have been imported and are not linked to the correct employee.
- Merge Employee Allows you to merge 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

- *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 THE MENU AND FUNCTIONS FOR e@syFile™ EMPLOYER

3.1 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.
 - Click View/Edit/Change below EMPLOYER ADMIN (make sure that you select the tab called ADD EMPLOYER).



- 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.

On this screen you are able to creat Imployer 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:	···· IV
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:	

- 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.

3.2 EDIT EMPLOYER

- Use this option to change or update employer details. You may have to provide additional employer information before submitting your declaration to SARS.
- Click View/Edit/Change below EMPLOYER ADMIN in the menu pane on left of screen.
 - ^D Update the relevant information or fields and click on **Update Employer** when done.

ADD EMPLOYER	
DITEMPLOYER	
	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 activit
Employer SEZ:	The second secon
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
country couct	Contact Person
First Name:	SURNAME
Surname:	SURNAME
Business Tel No:	0210000000 Cell No: Fax No:
EMail Address:	PERSON@MAIL.COM
Position at Business:	
	Practitioner Information

3.3 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.
- For certificates submitted using e@syFile™ Employer, don't create the Employee again, only update any missing or incomplete information.
 - Click View/Edit Employees under Employee Admin. To create a new record, click Add Employee.

VIEW/EDIT EMPL	OYEES					
On this screen you a Click the 'View' butto	re able to obtain a quick view n to view full details of the En	of all Employees relating to a specific co nployee (including Cartificates). To add a	ompany. Select a con an Employee, click 'A	npany to view related dd Employee'.		
KI	1.1	XZ 22				-
Company Name:	EMPLOYER NAME			Year:		
Employee Search B	elow	Add Emp	aloyae: Add	Employee	Bundled IT	Reg
1/	/		1			
Surnam	ie 👘	ID Number				
Firstnam	ie in the second s	Tax Reference Number				
Employee Numb	er.	Certificate Number	X		X	
Employee Statu	s Active 🔻	Registration Status		$\langle \rangle$		
1						
1/2/1		Cle	ear Search	Search		
+				-		
Status	Surname	First Names		Employee N	umber	View
						_
1/						>>

• Complete all the required fields on the Employee Information page, and click **Next.**

EMPLOYEE DETAILS		
On this screen you are able to view and e To view this Employee's Certificates, doub	dit Employee Demographic Data. ble click the Certificate number in the Certificate List.	
Employee Information		
Personal	indicates required field. *	
Nature of Person:	innucaces required ried. ↓ ▼	101.1
Surname:	*	$\sim 1/7$
First Two Names:		
Initials:	*	
Date Of Birth:	* ссууммоо	
ID Number:	*	$(-\varphi)$
Income Tax Reference:	*	$ Q\rangle$
Passport Number:	*	
Country of Issue:	*	
Alternate Identification Type:	···· ··· ··· ··· ··· ··· ··· ··· ··· ·	
Alternate Identification Number:	*	
Employee Number:	*	
View Status	Active	
	rev Next	
Employee Contact Details		Add Certificate
Employee Bank Details		

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

Employee Information		
Employee Contact Deta	lils	
Contact Numbers		
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:	
Suburb/District:		
City:		
Country:	Postal Code:	
Postal Address		
Same as reside	intial address?	
Employee Bank Details		

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

Employee Contact Details	
Employee Bank Details	
Bank Account Type	* indicates required field
Account Type:	· · · · · · · · · · · · · · · · · · ·
Account Holder Relationship:	···· · · · · · · · · · · · · · · · · ·
Bank Account Details	
Bank Name:	
Branch Name:	
Branch Code:	*
Account Holder Name:	
Account Number:	*

3.4 CAPTURE MANUAL CERTIFICATES

- Click View/Edit Employees under EMPLOYEE ADMIN in the left menu pane.
 - This should display the list of all available employees or companies.
- Select the relevant employee and click **View** next to the employee's name to open record.

ipany Name:	1-			Tax Yeari	
loyee Search Belo	W	Add E	nployee:		led IT Reg
<u> </u>					
Surname		ID Number	-1		
Firstname		Tax Reference Number		<u> </u>	N 1 1
mployee Number		Certificate Number			$-\pi + \pi$
Employee Status	Active 🔹	Registration Status			
			Clear Search	Search	
Status	Surname	First Names	And Discourses	Employee Number	View
Status Active	Surname	First Names	-	Employee Number 01	View
	Surname	First Names			
Active	Surname	First Names		01	View
Active Active	Surname	First Names		01 03	View
Active Active Active	Surname	First Names		01 03 04	View View View
Active Active Active	Surname	First Names		01 03 04	View View View
Active Active Active	Surname	First Names		01 03 04	View View View
Active Active Active	Surname	First Names		01 03 04	View View View
Active Active Active	Surname	First Names		01 03 04	View View View

- 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

On this screen you are able to view an To view this Employee's Certificates, o	d edit Employee Demographic Data. Jouble click the Certificate number in	the Certificate List.	dd -	
Employee Information				
Personal			Certificate Number 202008 Recon Period	300000000000004 Status
Nature of Person:	A - Individual with ID or Pa	dicates required field. * ssport Numb	201908	CREATED
Surname:		*		
First Two Names:		*		
Initials:	т *			
Date Of Birth:	ссуум	MDD		
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			
Employee Contact Details			Add	Certificate
Employee Bank Details				

- Complete all 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 below)

CERTIFICATE DETAILS								
On this screen you are able	to view and edit Ce	rtificate Data.						
JANSEN					1	Income Received		
Transaction Year:	🛛 🔻				Description	Code	Value	1
Period of Reconciliation:								
Certificate Number:	00000000000	0000						
	Final Certific	ate Submiss	ion					
Certificate Type:			•		Tot	al Income Receive	ьq	
Year of Assessment:	((v)				Description	Code	Value	1
Pay Periods Worked:								
Pay Periods in Tax Year:	1							
Employment Date:	1					-		
Cert. Tax Period Start:	-			-	Dedu	ctions/Contributi	ons	
Cert. Tax Period End:	2			-	Description	Code	Value	
Voluntary Over Deduction								
Fixed Rate Taxation								
Directive Information:								
Directive Number	Issue Date	Code	Value	+	Total De	eductions/Contrib	utions	
					Description	Code	Value	1
Employment Tax Incentiv	e				Tax Credits and/or	Employer / Emplo	yee Contribution	5
ETI					Description	Code	Value	1.1
Employee SIC7 Code			•					
Certificate Status:	-	ertificate Sou						
	-					lage Source Cod		
Date Created:	D	ate Submitte	d:		Plan	lage Source Cod	es	

- 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.
- 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.
- 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.

CERTIFI	CATE SAVE
Certif	
	ок

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

FIEL	DVALIDATION	
	he following highlighted field(s) are incomplete r invalid	
	ource Code 3696, 3697 or 3698 is a mandaton eld if an amount is specified under the income ource codes.	
	OK Cancel	

3.5 IMPORT PAYROLL FILE

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



Click Open.

Filing Registration	Computer Organize ▼ Favorites Desktop Downloads S Recent Places	Hard Disk Drives (5) Local Disk (C:)	✓ 🍫 📕 Search Compu § System Reserved (D:)		م 9
aFiling Registration ORT Import/Export Payroll File PLOYEE ADMIN //ew/Edit Employees	Favorites	Local Disk (C;)		¥ • □ •	0
Import/Export Payroll File PLOYEE ADMIN Jiew/Edit Employees	🛠 Favorites 💻 Desktop 😺 Downloads	Local Disk (C;)	System Reserved (D:)		
VIOYEE ADMIN /iew/Edit Employees	🚺 Downloads		System Reserved (D:)		
/iew/Edit Employees					
	Secent Places				
THLY PROCESS		34.2 GB free of 111 GB	71.5 MB free of 99.9 MB		
	L Google Drive	Local Disk (E:)	Terra (F:)		
PAYE	ConeDrive	NTFS	23.6 GB free of 931 GB	•	
Payments		My Passport (H:)	200 00 1122 01 004 00	-	
	词 Libraries	My Passport (H:)			
PAYE Dashboard	Documents	693 GB free of 1.81 TB			
	🖻 🌙 Music 🛛 🗏	 Devices with Removable Storage (1) 			
	🖻 🔚 Pictures	DVD RW Drive (G:) Aug 20 2016			
Cancel Certificate Range	🖻 🔣 Videos				
Adjustments	-	4.20 GB free of 4.37 GB			
MISSION	🖳 Computer				
Submit to SARS	🛛 🚢 Local Disk (C:)				
RD PARTY APPOINTMENTS	🕨 🧫 System Reserved (I				
Third Party Appointments	🖻 🔞 Local Disk (E:)				
LOYER ADMIN	🗅 👝 Terra (F:)				
/iew/Edit/Change	DVD RW Drive (G:)				
LITTES	My Passport (H:)				
Itilities	+				
Synchronise Application	- File nan		Payroll File		•
Mismatch	File nan	ne	Payroll File		
P			Open	Cancel	
Application Help					
					-
Jpdate .og off				SA	2

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



• 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.



• 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**.

CSV File Import
Payroll File failed validation. Please consult the Import Payroll log to see where failures occurred.
Ok
CSV File Import
Payroll File failed validation with WARNINGS. Please consult the Import Payroll log to see where failures and warnings occurred.
Ok

• 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 double-click any 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 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
F:\downloads\PAYE\Aug 2017 testing\employer 1 with warnings.bxt -	2017/09/04 06:45:56	PASSED - IMPORTED
F:\downloads\PAYE\Aug 2017 testing\employer 1 fail val.txt -	2017/09/04 06:45:46	FAILED
F:\downloads\PAYE\Aug 2017 testing\Employer 1 _edited.txt -	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		1
Reset Passwords		
Payroll File Editing		
Reassign Certificate		
Generate IRP5 / IT3(a) PDF's		
Full Resubmission Request		

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

FAILED	WARNINGS		
ine		Status	
2 #	2017020000050000016	: Employee Address Details - Postal: Country Code mandatory - code 3294	
3	201702000005000033	: 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 1	2017020000050001542	: Employee Address Details - Postal: Country Code mandatory - code 3294	
13	2017020000050002728	Employee Address Details - Postal: Country Code mandatory - code 3294	
14	2017020000050002943	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	
		Save Report Clos	_

PASSE	ED (WITH WARNING) WA	ARNINGS			
The fo	llowing WARNINGS were found	d in this file.			
ine			Status		
2	WARNING: POTENTIAL PEN	ALTY :	20170200000050000016 PRINSLOO ;	: Tax Reference number not completed - co	de 3100
				Save Report	Close

 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.

Payroll Fil	e passed Validation with WARNINGS.
Please no	ote that data which is mandatory in terms of the
SARS Rec	uirements and is required by law has not been
supplied.	Failure to submit this data will result in
	ative or other penalties being imposed.
administr	
	nsult the Import Log to view these warnings.
Please co	nsult the Import Log to view these warnings.
Please co	

• 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			
'he fo	llowing WARNINGS were	found in this file.			
ne			Status		
2	WARNING: POTENTIA	L PENALTY :	20170200000050000016 PRINSLOO :	: Tax Reference number not completed - code 3100	0

3.6 CHECKING PAYROLL AND EMPLOYEE DETAILS

- 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.

EMPLOYEE DETAILS				
On this screen you are able to view and a	edit Employee Demographic Data. ble click the Certificate number in the Cert	tificate (litt.		
To view this cuppoyee's certificates, use	the click bje certificate humber in the cert	incate class		
Employee Information			Certificate Number	
Personal	indicates re	equired field. 🔺		00000000000004 Status CREATED
Nature of Person:	A - Individual with ID or Passport N	Numb 🛛 🔹	201900	CREATED
Surname:		*		
First Two Names:		*		
Initials:	т *	_		
Date Of Birth:	CCYYMMDD			
ID Number:	*		$ (\cdot) $	
Income Tax Reference:		*		
Passport Number:	*			
Country of Issue:		▼]*		
Alternate Identification Type:		•		
Alternate Identification Number:		*		
Employee Number:	04	*		
View Status	Active			
	uick Navigation			
	Next			
Employee Contact Details		_	Add C	ertificate
Employee Bank Details				1/ /
	Bac	ck to View/Edit	IT Reg	Save Employee

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

									<u> </u>
ANSEN						Incom	e Received		
Transaction Year:	(IV)				Description		Code	Value	
Period of Reconciliation:									
Oertificate Number:	00000000000000000	0000							
	Final Certific	ate Submiss	ion						
Certificate Type:		1	•			Total Inc	ome Receive	d	
Year of Assessment:					Description	1	Code	Value	
Pay Periods Worked:									
Pay Periods in Tax Year:									
Employment Date:									
Cert. Tax Period Start:				-		Constant is	/Contributio		
Cert. Tax Period End:					Description		Code	Value	
Voluntary Over Deduction									
Fixed Rate Taxation									
Directive Information:									
Directive Number	Issue Date	Code	Value	+	Tota	Deduction	ons/Contribu	utions	
				1	Description	1	Code	Value	
Employment Tax Incentiv					Tax Credits and	/or Emplo	yer / Employ	yee Contribution	5
ETI					Description	1 3	Code	Value	
Employee SIC7 Code			· · ·)						
		ertificate Sou							
Certificate Status:									

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

Tax Certificate Information				Certificate Number: 72407773442017020000050000033	
Income Received	Source Code	Income Received (continued)	Source Code	Tax Credits and/or Employer's/Employee Contrib	utions
R 50000	3915	Non-Taxable Income		R	4101
	3 9 1 5	R Gross Retirement Funding Income	3 6 9 6	PAYE R 1 1 1 1 1 1 0 . 0 0	4102
		R	3 6 9 7	PAYE on Lump Sum Benefit	1000000
		Gross Non-Retirement Funding Income R	3 6 9 8	R 1 3 5 0 0 0 Employee and Employee UIF Contribution	4115
		Gross Employment income (Taxable)		R , , ,	4141
R		R 5 0 0 0 0 Deductions / Contributions / Information	3699	Employer SDL Contribution	1 4442
R		Amount	Source Code	Total Tax, SDL and UIF	4142
R		R		R 1360,00	4149
R		R		R , , ,	4116
R		R		Additional Medical Expenses Tax Credit	-
R		R		R	4120
R		R		Reason for Non-Deduction of Employees' Tax	4150
R		R			
		R			
R					
R		Total Deductions / Contributions / Information			
		R	4 4 9 7		

3.7 AMENDING CERTIFICATES WITHIN e@syFile™ EMPLOYER

- You will need to activate **Payroll File Editing** on the **System Utilities** menu to allow you to amend the imported certificates.
- To change certificate details on e@syFile[™] Employer, follow the steps listed in **CHECKING PAYROLL AND EMPLOYEE DETAILS** in order to open a specific tax certificate.
- Once you have made all your amendments, click Save Certificate.

CERTIFICATE DETAILS				_			
On this screen you are able t	to view and edit Ce	ertificate Data					
ANSEN						Income Received	
Transaction Year:	🔻				Description	Code	Value
Period of Reconciliation:		-					
Oertificate Number:	00000000000	00000					
	Final Certifi	cate Submis	sion				
Certificate Type:			*		Το	tal Income Receiv	ed
Year of Assessment:				1	Description	Code	Value
Pay Periods Worked:							
Pay Periods in Tax Year:	-						
Employment Date:	1			-		-	
Cert. Tax Period Start:					Ded	luctions/Contribut	ions
Cert. Tax Period Start					Description	Code	Value
Voluntary Over Deduction			1111				
Fixed Rate Taxation	- C1						
Directive Information:	hand.						
Directive Number	Issue Date	Code	Value	+	Total (Deductions/Contrib	utions
				11	Description	Code	Value
Employment Tax Incentiv	•				Tax Credits and/o	r Employer / Emplo	oyee Contributions
ETI					Description	Code	Value
Employee SIC7 Code			•				
Certificate Status:		Certificate So					
	110						1
Date Created:	D	ate Submitte	ed:		Pta	inage Source Cor	les

3.8 CANCELLING CERTIFICATES WITHIN e@syFile™ EMPLOYER

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

3.8.1 CANCELLING AN INDIVIDUAL CERTIFICATE

- You will need to activate **Payroll File Editing** in the **System Utilities** menu to allow you to cancel imported certificates.
- To cancel a certificate on e@syFile[™] Employer, follow the steps listed in CHECKING PAYROLL AND EMPLOYEE DETAILS in order to open a specific tax certificate. Click Cancel Certificate at the bottom of the page.

On this screen you are able	to view and edit Cen	tificate Data.						
ANSEN			har an			Income Received		
Transaction Year:	🔻				Description	Code	Value	1
Period of Reconciliation:								
Certificate Number:	0000000000000	000						
	Final Certifica	te Submissi	ion					
Certificate Type:			3		Tot	al Income Receive	d	
Year of Assessment:	(-		Description	Code	Value	1
Pay Periods Worked:								
Pay Periods in Tax Year:								
Employment Date:								
Cert. Tax Period Start:					Dedu	ctions/Contribution	ons	
24.55					Description	Code	Value	
Cert. Tax Period End:	100							
Voluntary Over Deduction								
Directive Information:	- Local							
Directive Number	Issue Date	Code	Value	+	Total D	eductions/Contribu	utions	
				-	Description	Code	Value	1
							deserve.	
								ns
Employment Tax Incentiv	e				Tax Credits and/or	Employer / Employ	yee Contributio	
Employment Tax Incentiv	e				Tax Credits and/or Description	Employer / Employ	Value	1
Employment Tax Incentiv ETI	•		v)			20.00		1
ETI	6		•			20.00		1
ETI 🛄		rtificate Sou				20.00		1

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

ACTION CON	FIRMATION	
Click YES	ure you want to ' if you wish to ;	
stop this	acuun.	

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



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

Certificate Number 20170	200000050000610
Recon Period 201702	Status CREATED
Certificate Number 20170	200000050000510

3.8.2 CANCELLING A RANGE OF CERTIFICATES

- Click Cancel Certificate Range under **RECONCILIATION** on the left menu pane.
- Select Cancel Certificate from the drop-down list.
- Select the Period of Recon.

e@syFile EMPLOYER		
HOME		and the second state of the second
Notification Centre	Action :	Period of Recon
Action Centre		
REGISTRATION	Cancel Certificates	
eFiling Registration	Revive Certificates	
IMPORT		
Import/Export Payroll File		
EMPLOYEE ADMIN		
View/Edit Employees		
MONTHLY PROCESS		$(\rightarrow) $ $(\rightarrow) $
PAYE		
Payments		
RECONCILIATION		
PAYE Dashboard		(\cdot, φ)
Declaration		
Cancel Certificate Range		
Adjustments	S. S. m.K.	

• 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.

nge Start: 20180800000000015623		Range End:				
2018080000000015623			-			
			1	Add to	blist	
Start Range Certificate Number	End Range	2018080000	0000015624	e for ured icates	Certificate Range Count	Action
2018080000000015542			0000015626	1837.79	4	Remove
2018080000000015549		20180800000000015554	6	255018.48	58	Remove

- Range Start A list of all certificates found on the database will display
- Range End Only certificates which falls within the range selected will display
- Please note: A range is any certificate number that follows consecutively from the previous number. Alpha characters will sort between numeric characters.
- Click Cancel Certificates.

ate e t 5 Remove
Remove
5 Remove

- 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.
- 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.



- The message indicates the number of certificates and value for certificates found on the database.
- If you clicked **Yes**, you will see a pop-up message confirming that the certificate range was successfully cancelled, click **OK**.



3.8.3 REVIVING A CANCELLED RANGE OF CERTIFICATES

- Click Cancel Certificate Range under **RECONCILIATION** on the left menu pane.
 - Select Revive Certificates from the drop-down list and then the **Period of Recon**.

Action :		1 the	Period of Recon	201708
1	Cancel Certificates			
1	Revive Certificates			

Select the range of certificates that you want to revive.

Individual	Certificate can be revived on the certificate detail	RP5/IT3(a) Certificates for a company and trans 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	

- Count for Captured Certificates The number displayed here is the number of certificates which exists on the database which can be revived.
- Click on **Revive Certificate Range**.
- A pop-up message with a summary of the selected certificates will appear. Click **Yes** to continue.

REVIVE CANCELLED CERTIFICATES	
You are about to "Revive" 6 Certificates to the value of R255018.48. Are you sure?	
Yes No	

- 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.
- 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**'.



3.9 COMPLETING THE EMP501 AND RECONCILING ANNUAL EMPLOYEES' TAX

- The Reconciliation function includes:
 - When requesting a reconciliation, the user will have the option to accept pre-populated 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 pre-populated with EMP201 values captured on e@syFile.
 - It is important to note that upon submission of the reconciliation, SARS pre-populated 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.
- Click **Declaration** under **RECONCILIATION**.
- 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.
- Select the transaction year from the **Transaction Year** drop-down list.
- If you are opening the declaration for a new Reconciliation period for the first time, click on **Request**.

Action Centre REGISTRATION eFiling Registration HPDO1 Declarations for : EMPLOYER NAME HPDO1 Declaration for	HOME Notification Centre	EMP501					
Description EMP501 Declarations for : EMPLOYER NAME - Import/Export Payroll file PAYE SDL UIF ETI Status View View/Edit Employees View/Edit Employees View/Edit Employees View/Edit Employees View/Edit Employees View/Edit Employees PAYE Payrents View/Edit Employees View/Edit Employees View/Edit Employees View/Edit Employees	Action Centre						
PAYE SDL UIF ETI Status View Import/Export Payroll File PAYE SDL UIF ETI Status View Wiew/Edit Employees Import Payroll File PAYE PAYE Import Payroll File Import Payroll File Import Payroll File Import Payroll File Payrents Import Payroll File Payrents Import Payroll File Import Payroll File Import Payroll File Import Payroll File	REGISTRATION				Select the tax year for I	he Declaration :	▼ Request
Import/Export Payroll File PAYE SDL UIF ETI Status View MPLOYEE ADMIN </th <th>eFiling Registration</th> <th>EMP501 Declarations</th> <th>for : EMPLOYER NAME</th> <th></th> <th></th> <th></th> <th></th>	eFiling Registration	EMP501 Declarations	for : EMPLOYER NAME				
Import/Export Payroll File MPLOYEE ADMIN View/Edit Employees View	MPORT					Ch. L	N
View/Edit Employees ONTHLY PROCESS PAYE Payments ECONCILIATION		PAYE	SDL	110	EII	Status	View
ONTILLY PROCESS PAYE Payments ECONCILIATION	MPLOYEE ADMIN						
PAYE Payments ECONCILIATION							
Payments econcilitation	ONTHLY PROCESS						
ECONCILLATION							
	CONCILIATION						
PAYE Dashboard	PAYE Dashboard						

- Deregistration with future-dated EMP501's
 - Functionality changed for future-dated EMP501 submissions a deregistration request will be included in the submission that will start the deregistration of the PAYE reference number.
 - Request future dated request

1.00000000					
Do you	want to continu	e with the red	juest? Y	es No	

If you click on yes, a message will display with a drop-down list of reasons for deregistration options, and a deregistration date that must be selected

You have s	selected a reconciliation period in the futu	ire.
Do you want t	o continue with the request? Yes	No
Reason:		•
Date you	ceased to be an Employer:	
Please note that should you	continue with the submission of this reco	nciliation, you will be
deregistered as an employer.	. If the submission date of this reconcilia	tion is after, 14 days
of the effective date complete	d, administrative penalties may be impo	sed. Should SARS find
that you submitted this recon	ciliation with the intent to defraud SARS,	you will be held liable
	and may face criminal charges.	
	relected a reconciliation period in the fut o continue with the request? Yes	No
	The employer ceased trading	•
Date you	Employer ceased to be an employer	-
Please note that should you	Employer is deceased	iation, you will be
deregistered as an employer	employer is madivene	i is after, 14 days
of the effective date complete		Should SARS find
that you submitted this recon	ciliation with the intent to defraud SARS, and may face criminal charges.	you will be held liable

• 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 :					
01 Declarations for :	EMPLOYER NAME -				
PAYE	SDL	UIF	ETI	Status	View
PAYE R 236338406.00	SDL R 8198567.00	UIF R 3792818.00	ETI R 0.00	Status SUBMITTED	View

- If you click on Request or Revise, a pop-up message will display with an option to use SARS prepopulated 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.
- ETI Re-instatement Request
 - If an employer submitted an incorrect EMP501 (eg. future dated or without claiming ETI), they will now be able to request a Reinstatement of ETI without requiring manual intervention. A new option was added on the Declaration page when you click on Request on the Declaration page: "Re-instate ETI"

501 Declarations	for :	X	Select the tax year for 1	the Declaration : 202108	Request
РАУЕ	SDL	UIF	ETI	Status	View

 This will be a real-time request that will return pre-populated values as per the original EMP201's submitted where ETI was stated correctly.

Own Values

Re-instate ETI

- Standard checks will be performed (compliance, assessments raised etc) and Request may be declined. A pop-up message will provide reason if Re-instate request was unsuccessful.
- 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.

Accept Data

ogin in to eFiling to verify y	our credentials	
SARS eFiling User Name:		

• 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.

	Tra	insaction Year: 2022	Period of Reconciliation: 20210
SOL REF NO	Â	UIF REF NO	â
SIC Code		SEZ Code	
	SURNAME*		
	TEST		
	BUS TEL NO		
	0123232323		
	SOL REF NO	SOC REF NO	SOL Transaction Year: 2022 ER NAME

- 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.
- 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.
- 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.
- 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.
- 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.

iouth African Revenue	KS Decl	oyer Reconciliation laration EMP50 Name: EMPLOYER	-			Transa	ction Year: 2022	Period of Reconciliation	on: 202108
March R	0.00	March *	0.00	March *	0.00	R March	0.00	R March	
April	0.00	R April *	0.00	R April *	0.00	R April	0.00	R April	
R May	0.00	R May*	0.00	R May*	0.00	R May	0.00	R May	
June	0.00	June *	0.00	June *	0.00	R	0.00	R June	
R July	0.00	July *	0.00	R July*	0.00	R	0.00	R July	
August	0.00	August *	0.00	R August *	0.00	August R	0.00	R August	
R September		R September	Ê	R September	Ê	R September	0.00	R September	Ô
R October	e	R October	Ê	R October	Ê	R October	0.00	R October	Ê
R November	£	R November		R November	Ê	R November	0.00	R November	Â

• 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.

ease Note			
the relevar will howeve	t certificates	he EMP501 retur to your local disl submit your ret d.	
	0	ĸ	

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



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

		Selec	t the tax year for the D	eclaration : 201708	Revise
1 Declarations for :				\mathcal{A}	
PAYE	SDL	UIF	ETI	Status	View
	R 8198567.00	R 3792818.00	R 0.00	SUBMITTED	View
R 236338406.00	K 8198567.00				-
R 236338406.00 R 0.00	R 0.00	R 0.00	R 0.00	SUBMITTED	View

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

Are you sure you don't wa	ant to pre-populate?		
	ire your own data on the EMP50 MP501 form not being accepted		: SARS may be different
	Request SARS Data	Use my own values	

• 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
 Cancer to entrem 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

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

		Select the tax year for the Declaration : 201708					
01 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	SUBMITTED	View		

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

3.10 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)
- 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.

On this screen you are able to submit documents to SARS							
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		EMPLOYER NAME /	201708	READY TO FILE		View	Remove
EMP501	No. of Concession, Name	EMPLOYER NAME /	201702	ONLINE VALIDATION RE		View	Remove

- 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.
- Select the declaration you want to submit in the Submit column (check box), and click **Submit**.
- 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	Year	Status	Submit 1 A		
IP501		EMPLOYER NAME /	201708	READY TO FILE	 Image: A start of the start of	View	Remov
Sele	ect Destination Folder				×	L	
G	🗢 📕 « Terra (F:)	 downloads PAY 	′E ▶ →	Search PAYE	٩		
Orga	anize 🔻 New folder			- 199475 -	HE • 🕡		
*	Favorites	Name	^	Date modifie	ed Type		
	Desktop	📕 Aug 2017 testi	ng	2017/09/05 0	17:11 File fold		
	Downloads	Setup_EMP_67	5_WIN	2017/09/04 0	9:10 File fold		
	Recent Places						
	OneDrive						
-							
	Libraries Documents						
	Music						
	Pictures		m				
	Videos Taldas	PAYE					
	Folder	PALL .		Select Folder	Cancel		
				Select Polder	Cancel		
_							

 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.

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 per	iod.
rror/Warning	Field	Message	Resolution	1
Varning	SDL Liabilities : Amount declared for March	The value declared in SDL Liabilities : Amount declared for March (100000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 1000000? O Yes O No	
Varning	SDL Liabilities : Amount declared for April	The value declared in SDL Liabilities : Amount declared for April (10000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 100000? () Yes () No	
/arning	SDL Liabilities : Amount declared for May	The value declared in SDL Liabilities : Amount declared for May (10000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 10000? () Yes () No	
/arning	SDL Liabilities : Amount declared for June	The value declared in SDL Liabilities : Amount declared for June (1010000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 1010000? () Yes () No	
/arning	SDL Liabilities : Amount declared for July	The value declared in SDL Liabilities : Amount declared for July (10100) differs significantly from the amount previously declared (0).	Do you want to submit the amount 10100? () Yes () No	
'arning	Total Liabilities : Amount declared for March	The value declared in Total Liabilities : Amount declared for March (100000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 1000000? () Yes () No	
/arning	Total Liabilities : Amount declared for April	The value declared in Total Liabilities : Amount declared for April (10000) differs significantly from the amount previously declared (0).	Do you want to submit the amount 100000? • Yes • No	
'arning	Total Liabilities : Amount declared for May	The value declared in Total Liabilities : Amount declared for May (10000) differs significantly from the amount previously declared (0).	Do you want to submit 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 Cancel to attempt online validation and submission.

MP501 Offline Submission			
then click OK else click Car	icel and connect online befo	re trying this submission again.	

- 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 PD
 - EMP601 & EMP701 in PDF format (where applicable)

Organize 🔻 Includ	le in library 🔻	Share with 👻 🛛 Burn	New folder		333	(
🚖 Favorites	Name	^		Date modified	Туре	Size
E Desktop	E EMPLO	YER_NAME_A_201702		2017/09/05 07:11	Compressed (zipp	4 KB
 Downloads Recent Places Google Drive OneDrive 	T EMPLO	YER_NAME_A_EMP501		2017/09/05 07:11	Adobe Acrobat D	273 KB
- 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.
- You can monitor the status of your submission using the 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.

3.11 RESUBMISSION OF EMP501

- If you need to resubmit your EMP501, please follow the steps listed in ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATION TO SARS after making the necessary changes to the certificates or the EMP501 declaration.
- Make the necessary changes to certificates if applicable.
- Click on **Declaration**, and select the relevant Reconciliation period from the drop-down list.
- Click on Revise to open a new EMP501 Declaration, and follow the steps as explained in COMPLETING THE EMP501 AND RECONCILING ANNUAL EMPLOYEES' TAX and 3.10 ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATION TO SARS to access the Declaration form.
 - 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 :	201702 🔻 Revise
01 Declarations	for : EMPLOYER NAM	1E -			
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

- Change the monthly values entered for PAYE, SDL, UIF and Payments if necessary.
- Click **Save** to continue later , **or File** if you are ready to proceed.
 - Please note: Only certificates in a created status will be included in your resubmission.

3.12 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. Cancellations will have to be done manually.
 - Click View Employees.
 - Select the Company Name and Transaction Year for the certificate that you wish to change.
 - 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.

Notification Centre Action Centre Contractions CETERATION withing Registration Point Impart/Seport Baywell Mile Personal Nature of Personi Sumaries Priot Edit Simplayees Nature of Bersoni Sumaries Priot Edit Simplayees Priot Edit Simplayees Nature of Bersoni Sumaries Priot Edit Sumaries Priot Edit Simplayees Priot Edit Date of Birthi Nome Tax Reference: Passport Number: Namate Identification Number: Passport Number: Namate Identification Number: Namate Identification Number: Passport Number: Namate Identification Number: Namate Identification Number: Passport Number: Namate Identification Number: Passport Number: Namate Identification Number: Passport Number: Vend Idit/Ravigation Namate Identification Number: Priot Ravigation Namate Identification Number: Passport Number: Vend Idit/Ravigation Priot Ravigation Numate Identification Number: Priot Number: Numate Identification Number: Priot Ravigation Numate Identification Number: <t< th=""><th></th><th>EMPLOYEE DETAILS</th><th></th><th></th><th></th><th></th></t<>		EMPLOYEE DETAILS				
SISRATION af ling Registration Point Point (Saport Reyring File Poyrea Po	fication Centre					
Import Registration OFI Import Registration OFI Import Registration OPI Import Registration Import Registration OPI Import Registration OPI Import Registration Import Registration Optime Registra	on Centre	To view this Employee's Certificates, cool	Sie citch the Certificate number in the Ce	etoficate List		
Find Registration OHI mon/Logon/ Payma find Novel Apprint find Novel Apprint find Name of Parsoni Sumames Parsonal Sumames Part Too Itamesi Sumames Su	RATION		and the second			
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Natch Katch Hele Employee Contact Details Add Certificate					/	
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Add Certificate						
Add Certificate						
Add Certificata	feation Help	Fourier and Contact Datails			1. James	
Employee Bank Decase					Add	ertificate.
		employee care cecaes				

Description: Click Cancel Certificate to cancel the certificate you have selected.

CERTIFICATE DETAILS					
BROOM			Inco	me Received	
Transaction Years	2020 *		Description	Code	Value
Period of Reconciliation:	2019 08 -		Income (PAVE)	3601	198000
Certificate Numberi	ACTION CONFIRMATION	corrorsk	eimbursive Travel Allowar	3703	21603
Certificate Type:	Are you sure you want to CA Click 'YES' if you wish to con stop this action.		Total D	scome Receiv	ed
Year of Assessment:	Yes	No	Description	Code	Value
Pay Periods Worked:	Tes	NO	ross non-taxable income	3696	21603
Pay Periods in Tax Year:	012.0000		Gross Remuneration	3699	198000
Employment Date:		3	Dadartia	ns/Contribut	
Cert. Tax Period Start:	20190301				
Cert. Tax Period End:	20200228	100	Description	Code	Value
Voluntary Over Deduction					
Fixed Rate Taxation					
Directive Numbers:					
Directive Number 1:			Total Deduc	tions/Contrib	utions
Directive Number 2:			Description	Code	Value
Directive Number 3:			Contractor	cour	
Employment Tax Incentive			Tax Credits and/or Emg	oloyer / Emplo	over Contributions
m 📃			Description	Code	Value
Employee S1C7 Code	60200 - Television programmi	ing and	UIF contribution (employe	4141	3569.28
			SDL contribution	4142	1980.00 🗄
Certificate Status: CRI	EATED Certificate Source	FILE IMPORT-AMENC	PAYE (Pay As You Earn)		21880.00
	190827 Date Submitted:		TAPALTRY SITE AND THE		97479.78
Date Greated1 201	Date submitted)	20130306	Hanage	e Source Col	ies
	Add ETI Back to Emplo	oyee Cancel Cert	ficate View Certi	ficate	Save Certificate

- To adjust the certificate you have selected, follow the steps listed in AMENDING CERTIFICATES WITHIN e@SYFILE™ EMPLOYER.
- To create a new certificate, follow the steps listed in CAPTURE MANUAL CERTIFICATES and IMPORT PAYROLL FILE.
- Click Adjustments under RECONCILIATION on the left menu pane for this screen to appear.

e@syFile EMPLOYER 6.8.1 номе	PREVIOUS YEAR ADJUSTMENT				_ X
Notification Centre	Select a company and relevant tax	vear to start the adjustment.			
REGISTRATION	Company Filter:			EMP701 STATUS	
eFiling Registration	Company Name:		Transact	ion Year	
IMPORT	PAYE Reference No:	SDL Reference No:	UIF Re	farence No:	
		-			
EMPLOYEE ADMIN View/Edit Employees	Adjustment Declaration				
MONTHLY PROCESS		PAYE SDL		otal Payme	int
PAYE	Previous Declaration				
	Difference				
RECONCILIATION	Adjusted Declaration				
	/		Due B	Sy/To You	
	Sum of Adjustments		Sec Sec.		
	Total				
SUBMISSION			Total Due b	v/to vou:	
THIRD PARTY APPOINTMENTS				Save	EMP701 Ready To File
Third Party Appointments EMPLOYER ADMIN				Jave	Seasy to Fac
View/Edit/Change					
UTILITIES					
HELP					
Application Help					
Update					
Log off					
					1
CONNECTION STATUS : CONNECT	TED Current Tax Yea	r: 2018 Working With: 77	00709019 - E VAN DER WE	STHUIZEN Change	LOGGED IN AS : ADMIN

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

e@syFile EMPLOYER 6.8.1				100 March 100 Ma
IOME	PREVIOUS YEAR ADJUSTNEN	n -		
Notification Centre				and the second
Action Centre	Chimpletly Filters		EMMAN	STATUS
REGISTRATION	And the second s	- The second second second second second		VED
efiling Registration	Company Names		Transaction (Year	200802
IMPORT Import/Export Payroli File	PAYE Reference Nor-	101 Calebook No.	(DP Reference No.)	
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ViewEdit Employees	Adjustment Declaration	PAYE ISL		
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PAYE Dashboard		- /	Des By/To You	21. 1
Declaration:				
Cancel Certificate Range	Sum of Adjustments			
Adjustments	Total			= -X I = X
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Submit to SARS			Total Due by/to you:	
HIRD PARTY APPOINTMENTS				
Third Party Appointments			Save	View EMP701 Ready To File
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ViewEdit/Change				
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Application Help				
Update				
Log off				1 1
CONNECTION STATUS : CONNECT	TED Current Tax Year i 2	018 Working With		Change LODGED IN AS ADMIN

- **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.
- e@syFile[™] Employer will automatically calculate the Difference, Sum of Adjustments and Total Due by/to you fields.
- Click Save. A message will appear informing you that the Adjusted Declaration for that tax year has been successfully saved.
- Click OK.
- Click Ready to File and follow the process described in ELECTRONIC SUBMISSION OF A RECONCILIATION DECLARATION TO SARS to submit your EMP701 to SARS.

3.13 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.
- Click on Summary Report on the left-hand side
- Select the Period of Recon from the drop-down menu in the right-hand corner and click on Export.

EMP501				
	Select Period of Recon:			Export
EMPLOYER NAME -		202002	•	
		201908	Ĩ.	
		201902 201808	•	

• Enter a filename and click on Save

EMP50	1				
			Select Period of	Recon: 202002 T	Export
MPLOY	Select where to save the Summar	y Report			×
	← → × ↑ 📙 « Documents	s > 2020 > SARS > Summary Report	ڻ ~	Search Summary Repo	rt ,o
12	Organise 👻 New folder				• 0
	A Quick access This PC ③ 3D Objects ⑤ Desktop ⑦ Documents		Date modified match your search	Туре	Size
	🕹 Downloads 🗸 🤟				>
	File name: Name Export Save as type: All Files (*.*)	ile			~
	∧ Hide Folders			Save	Cancel

3.14 PRINTING CERTIFICATES

- You can also print certificates in bulk from the IRP5/IT3(a) subfolder (see steps in GENERATE IRP5/IT3(a) PDFs). Alternatively, you can print certificates one by one following the steps listed below.
 - Click View/Edit Employees under EMPLOYEE ADMIN on the left menu pane.
 - Select the Company Name and Transaction Year for the certificate that you wish to print.
 - Select the employee from the list.
 - Open the certificate.
 - Click View Certificate.
 - Click on the Print icon on the top left corner of the screen.

5	Transaction Trans 2022 Transaction Trans Employee Income Tax IRPS/IT3(a) South African Revenue Service Certificate 0000008000100 Transaction Transaction Transaction Important of the control of the	
	2100005	
	Names ELTON Income Tag	
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	Altrage Implication No. Ammiliation No. Passport Country of . Passport Country of . Home . Permit No. Crigit (e.g. South Anka > 2M) . Tet No. Tet No.	
	645 Ter 0118792045 Cell No. Cell No.	
	Employee Address Details - Residential	
4	Unit No. Complete (F Street No. 115 Street No. 115 MBENTANE STREET	
	Sunt KNYSNA	
	City (Tour) Peak 6571 Covery ZA Employee Address Betails - Pestal	
	PostAl ADDRESS SAME AS RESIDENTIAL ADDRESS	<
	Care of reameday	
	Bank Account Details	
	Caw of reameday	×)

3.15 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.
 - Click Utilities.
 - Click Database Utilities.
 - Click Backup DB Directory.
 - Select a destination folder and click OK.

e@syFile EMPLOYER	
номе	SYSTEM UTILITIES
Notification Centre	On this screen you are able to run the system utilities.
REGISTRATION	Database Utilities
eFiling Registration	Here you are able to create a backup of your local Database or restore your local Database from a backup
IMPORT	nen you are and to charte a backup of your four bacabase of racing your four bacabase from a backup
Import/Export Payroll File	Backup DB Directory Merge EasyFile DB Restore EasyFile DB
EMPLOYEE ADMIN	
	Browse For Folder
IONTHLY PROCESS	
	Backup
RECONCILIATION	Desktop ^
	District Contractions
	D 🕺 Homegroup
	▶ B. User E
	A 🖼 Computer
	> 🚣 Local Disk (C:)
	▷ 🔮 DVD RW Drive (D:)
SUBMISSION	▷ _ Elements (E:)
	👂 👝 Removable Disk (G:)
AGENT APPOINTMENTS	▷ 🔤 LG External HDD (Ŀ)
	Die Safa Run charged folder
MPLOYER ADMIN	Make New Folder OK Cancel
	EMP501 Status Dashboard
JTILITIES	Case Status Dashboard
	Pre-Submission Validation Report
Synchronise Application	Import Payroll File Log
	Delete Payroll File
	Reset Passwords
IELP	Payroll File Editing
Application Help	Reassign Certificate
	Generate IRP5 / IT3(a) PDF's
	Certificate Rejection/Penalty Service
Log off	

- 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.

Database	Backup
	se successfully backed up to: /File20120315_05h39_Backup
	ОК

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

3.16 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.
- 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.
- A new backup file (version 6.0.0 and later) will need to be 'unzipped' before 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.
- Only certificate data will be merged. No EMP501 and/or other data will be moved.
 - Click Utilities
 - Click Database Utilities
 - Click Merge

- 1. Back-ups created on version 5.0.9 or prior:
 - a. Select the relevant back-up file from the destination folder where it was saved.
 - b. Click **Open** to begin the merge process.
- 2. Backups created on version 6.0.0 and later:
 - a. 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)
 - b. Click **Open** to begin the merge process.



- 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.



- Merging a new, encrypted back-up file will require the e@syFile[™] Employer login details to be completed.
- Click **Validate** to proceed.
- 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.

e@syFile Databas	e Merge
	e is complete. Please use the 4IN' utility to change to the desired
	ОК

3.17 RESTORE DATABASE FROM A BACK-UP

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

3.18 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 important to retrieve your submission status (Accepted/Rejected) to ensure your EMP501 submission was processed successfully. Details regarding possible errors will be displayed here if submission was rejected. If you encounter an unknown error code, contact nearest branch or SARS Contact Centre for assistance. Correct errors and do a full resubmission.
- Click **Utilities** on the menu pane.
- Click EMP501 Status Dashboard.

atabase Utilities						
MP501 Status Dashboard						
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
A88 Payment Allocation						
re-Submission Validation mport Payroll File Log	Report					
Delete Payroll File						
leset Passwords						
Payroll File Editing						
Reassign Certificate						
Generate IRP5 / IT3(a) PD)F's					

Your submissions will be displayed on the screen.

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

Status Update	1	-
Updates Rec	ieved! Click 'Ok'	
	ок	

• 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.

	EMPSOI	201502 Online 2017/08/3
Cert Number	Form Type	Response
7010718437	EMP501	Please note that your return has been successfully submitted
010718437	EMP501	Declaration Processed
010718437	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		EMP501	201502	Online	2017/08/30 1
Cert Number	1	Form Type	1	Respons	e
7390758466	EMP501			501 reconciliation p k your compliance :	
7390758466	EMP501		Reco	on Failed Compliand	e
		Close			

3.19 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.
 - 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.
 Please note: ETV feedback will not be available for rejected EMP501 submissions.

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

Dick on Download Employment Taxes Validation to retrieve ETV feedback.

SYSTEM UTILITIE	S						
On this screen you a	re able to run the sy	vstem utilities.	1.5.1 - 14				
Database Utilities							
EMP501 Status Da	ashboard						
Please double click	c on a Company reco	ord to view detailed s	tatus.		Download En	nployment Ta	xes Validation
Company N	Reference	Form	Year	Channel	Date/Time	Update	ETV
-	3	EMP501		Online	2014/09/15 15:29	Update	-

Description of the second seco

Login in	to eFiling to verify yo	ur credential	s.
20	174		
SARS	eFiling User Name		
SARS	eFiling User Name:		
	eFiling User Name:		
	-		Cancel

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

100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100 - 100	are able to run the sy	er utilities.	fif the					_
atabase Utilitie	5							
MP501 Status D	ashboard							
Please double clic	k on a Company reco	Download En	ployment Ta	xes Validat	ion			
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		
p		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		I
		EMP501	202002	Online	2020/04/02 11:37	Update	View	

• 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.

3.20 MANAGING PAYROLL FILE IMPORTS IN e@syFile™ EMPLOYER

- e@syFile™ Employer keeps a log of all import attempts, including failures, warnings and successful imports.
- Click Utilities.
- Click Import Payroll File Log.
- 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 imported.			
Log Category Payroll Imports			
File Name	Date Imported	Status	
C:\Users\	2019/09/04 12:26:29	FAILED	4
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	
C:\Users\	2019/08/27 13:35:26	PASSED -	
C:\Users\	2019/08/27 13:33:42	FAILED	

3.21 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.
 - Click Utilities.
 - Click Payroll File Editing.
 - Tick to select Enable Editing of Imported Payroll File Data.

e@syFile EMPLOYER 6.8.1	_ X
НОМЕ	SYSTEM UTILITIES
Notification Centre	On this screen you are able to run the system utilities.
Action Centre	Database Utilities
REGISTRATION	EMP501 Status Dashboard
eFiling Registration	AA88 Payment Allocation Dashboard
IMPORT	Pre-Submission Validation Report
Import/Export Payroll File	Import Payroll File Log
EMPLOYEE ADMIN	Delete Payroll File
View/Edit Employees	Reset Passwords
MONTHLY PROCESS	Payroll File Editing
PAYE	
Payments	Here you are able to enable editing of data imported from the Payroll file. This screen is only available to the ADMIN user.
RECONCILIATION	By selecting this checkbox, you will be able to edit the information imported from the Payroll File
PAYE Dashboard	▼ Enable Editing of Imported Payroll File Data
Declaration	
Cancel Certificate Range	Apply
Adjustments	
SUBMISSION	
Submit to SARS	
THIRD PARTY APPOINTMENTS	
Third Party Appointments	
EMPLOYER ADMIN	
View/Edit/Change	
UTILITIES	
Utilities	
N.	
Synchronise Application	
Mismatch	
HELP	
Application Help	
Update	Reassign Certificate
Log off	Generate IRP5 / IT3(a) PDF's
	Full Resubmission Request
CONNECTION STATUS : CONNECT	TED Current Tax Year : 2018 Working With : 7470790595-CONSTELLATION FINANCIAL SERVI Change LOGGED IN AS : ADMIN
Parata and a second	

• Click Apply.

3.22 DELETING PAYROLL FILES

- Follow these steps to delete imported payroll files.
 - Click Utilities.
 - Click Delete Payroll File.
 - Double-click the payroll file to be deleted, or click **View.**
 - Tick the box next on the relevant payroll files to be deleted.
 - Click **Delete.**

Notification Centre					
		of it for the system sector.		 	_
	Database Utilities				
effing Registrate	EMP501 Status Dashb	sanl			
PORT	Company Name	Reference	Tax Year	Delete	
Import/Export Page			2018		
LOYEE ADHIN					
Candles Simpley					
NTHLY PROCESS					
PAYE					
Paymente					
CONCILIATION					
PAYE Deshboard					
Outeration /					
Carron Cartificate					
Aquatmenta					
BHISSION					
Submit to SARS					
IND PARTY APPS					
Third Party Appen					
PLOYER ADMIN					
View/Edit/Change					
LITTES					
Unities					
Synchroniae Apple					
Neumaten					
LP I					
Application Hato				Close Delete	
Update	Reassign Certificate				
	Generate IRP5 / IT3(
	Full Resubmission Re-	puest			

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

DELETE WAR	NING	
	s for Employe	deletion will remove all es associated with these
	-	and the second se

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

3.23 RESET PASSWORD

- Do this to reset users' passwords.
- **Please Note**: Only the ADMIN user can access this function.
 - Click Utilities.
 - Select the Reset Passwords tab.
 - Select the Local Login User Name from the drop-down list.
 - Enter a new Local Logon Password.
 - Repeat the captured Local Login Password.

Notification Centre	SYSTEM UTILITIES	
Action Centre	On this screen you are able to not the system upliture	
GISTRATION	Database Utilities	
eFiling Registration	EMP501 Status Dashboard	
PORT	AA88 Payment Allocation Dashboard	
	Pre-Submission Validation Report	
	Import Payroll File Log	
IPLOYEE ADHIN	Delete Payroll File	
	Reset Passwords	
DATIALY PROCESS	Here you are able to reset the user passwords. This screen is only available to the ADMIN user.	
	Local Login User Name:	
CONCILIATION	Local Login Password:	
Oederation	Repeat Local Login Passwords	
Cencel Certificate Range	Local Login Password hint:	Apply Changes
		Contraction
BHISSION		
IRD PARTY APPOINTMENTS		
IPLOYER ADMIN		
Mamatch		
LP		
Application Help	Payroll File Editing	
Update	Reassign Certificate	
	Generate IRP5 / IT3(a) PDF's	
Log off		
	Full Resubmission Request	

- Enter Local Login Password hint.
- Click Apply Changes. The user password has now been reset.

3.24 MERGE EMPLOYEE

- If duplicate records have been created for an employee under **EMPLOYEE ADMIN**, you can merge the duplicate records and consolidate certificates to one employee record.
 - Click Utilities and then select the Merge Employee tab.
 - Select the first employee record from the From Employee drop-down list.
 - Select the second employee record from the To Employee drop-down list.
 - Click **Merge** to consolidate employee records and to delete the duplicate employee.

•
mber>
e Number>
Merge

3.25 REASSIGN CERTIFICATE

- You can now reassign certificates from one employee to another if certificates are not linked to the correct employee.
 - Click Utilities and then select the Reassign Certificate tab.

 - Select the first employee record from the From Employee drop-down list. Select the second employee record from the To Employee drop-down list.
 - Click on Reassign to display a list of available certificates to transfer between employees

	ign certificates that have been im, le to the ADMIN user, and if Payro			ect employees.	
	e to the Abmin user, and it rayin	n me e	uning is anowed.		
Period of Recon	•				
From Employee			To Employee		
From Employee:		•	To Employee:		•
Surname:	<surname></surname>		Surname:	<surname></surname>	
irst Names:	<first names=""></first>		First Names:	<first names=""></first>	
mployee Number:	<employee number=""></employee>		Employee Number:	<employee number=""></employee>	
ax Reference Number:	<tax number="" reference=""></tax>		Tax Reference Number:	<tax number="" reference=""></tax>	
D Number:	<id number=""></id>		ID Number:	<id number=""></id>	
					Reassign
					Reassignment log

Select the relevant certificate(s) from the list displayed and click on Reassign to transfer the certificate to the selected employee

elect Certil	icate to Reassign	First Names (HELENA	HELENA
Select	Certificate Number	Surname	Initials	Employee Number
	78107192212022080000008000100	JANSEN	E	2100005
	Rea	ssign Close		

3.26 GENERATE IRP5/IT3(A) PDFS

- Once your file has been submitted to SARS the employer can create IRP5/IT3(a) PDFs as follows.
 - Click Utilities and then select the Generate IRP5/IT3(a) PDFs tab.

e@syFile EMPLOYER 6.8.1						_ 2
HOME	SYSTEM UTILITIES					
Notification Centre	On this screen you are	e able to run the system util	lities.	111 - 1		
Action Centre	Database Utilities					
REGISTRATION	EMP501 Status Das	shboard				
eFiling Registration	AA88 Payment All	ocation Dashboard				
IMPORT	Pre-Submission Va	lidation Report				
Import/Export Payroll File	Import Payroll File	Log				
EMPLOYEE ADMIN	Delete Payroll File					
View/Edit Employees	Reset Passwords					
MONTHLY PROCESS	Payroll File Editing					
	Reassign Certificat	e				
	Generate IRP5 / II	r3(a) PDF's				
RECONCILIATION		T CENERATION				
	TAX CERTIFICAT					
		ou are able to generate				
Cancel Certificate Range	Please select the	documents you wish to	generate by clicking	on the Export		Export
	Туре	Reference	Company	Year	Status	Export
SUBMISSION	Type	Reference	company	Tear	Status	Export
Submit to SARS						
THIRD PARTY APPOINTMENTS						
Third Party Appointments						
EMPLOYER ADMIN						
View/Edit/Change						
UTILITIES						
Utilities						
HELP						
Application Help						
Update						
Log off						
	Full Resubmission F	Request				
CONNECTION STATUS : CONNECT	ED Current Ta	ax Year : 2018 Working	With : 7470790595-C	ONSTELLATION FINANCI	AL SERVI Change	LOGGED IN AS : ADM

- A list showing all completed submissions for which PDF certificates can be generated will be displayed.
- Mark the checkbox for the submission for which you would like to generate PDF certificates.
 Click Generate.
 - You will be asked which certificates you would like to generate (All, Amended, Cancelled etc), and where you would like these certificates 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.

3.27 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 EMP501 STATUS DASHBOARD.
 - Select Utilities on the left hand menu pane, and click on Full Resubmission Request on the Utilities tabs.

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
Reset Passwords
Payroll File Editing
Reassign Certificate
Generate IRP5 / IT3(a) PDF's
Full Resubmission Request
Please select a company for resubmission
Company
Request

 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	ect a company for resub	mission
ompany	- 7	•
Request		

 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 COMPLETING THE EMP501 AND RECONCILING ANNUAL EMPLOYEES' TAX and ELECTRONIC SUBMISSION OF RECONCILIATION DECLARATIONS TO SARS to finalise the process.

3.28 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.
 - Complete the steps to prepare your EMP501 submission. Once your EMP501 is in a "Ready to file" status, you can proceed.
 - 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).

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 Reset Passwords Payroll File Editing Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk. Save	
EMP501 Status Dashboard 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 Disk Submission Disk Submission Otion	
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 Disk Submission Disk Submission Other Screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Pre-Submission Validation Report Import Payroll File Log Delete Payroll File Log Reset Passwords Payroll File Editing Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Request Disk Submission Disk Submission Othis screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Import Payroll File Log Delete Payroll File Reset Passwords Payroll File Editing Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Request Disk Submission Disk Submission Oithis screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Delete Payroll File Reset Passwords Payroll File Editing Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Reset Passwords Payroll File Editing Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Request Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Payroll File Editing Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Reassign Certificate Generate IRP5 / IT3(a) PDF's Full Resubmission Request Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Generate IRP5 / IT3(a) PDF's Full Resubmission Request Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Full Resubmission Request Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Disk Submission Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
Disk Submission On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	
On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk.	_
Save	
	to Disk
Type Reference Company Year Status Select	
	temove
EMP501 7 201902 READY TO FILE View R	emove

 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.

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
Varning	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	The value declared in PAYE Liabilities : Amount declared for April (0) differs significantly from the amount previously declared (312968).	Do you want to submit the amount 0? • Yes O No
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? O Yes O No
Varning	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? O Yes O 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? O Yes O 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?

- Select the relevant transaction from the list as illustrated in step 2 above and click on Save to Disk.
- 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	the state of the s				
EMP501 Status Dashboard					
AA88 Payment Allocation Dashboard					
Pre-Submission Validation Report					
Import Payroll File Log					
Delete Payroll File					
Reation					-
P Select Destination Folder				×	
$\stackrel{R}{\leftarrow} \rightarrow \checkmark \uparrow \blacksquare \land This PC \land G$		~ Č	Search This PC	Q	
Fr Organise 🔻				· · ?	
	3D Objects Documents Music Videos drives (2)	Deskt	nloads		lisk
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.

3.29 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.
- To access the new Notification Centre, users will have to synchronise in order to retrieve correspondence.

Click Synchronise Application to initiate the process.

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

OME Notification Centre	Notification Centre	
EGISTRATION	Here you are able to view any correspondance from SARS	
eFiling Registration	To view any of the letters, please click on the applicable employer to	expand the list of letters
IPORT		
	Search using PAYE Reference Number:	
	79	ITREGVER 1 EMPSA 1
ONTHLY PROCESS		PAYE_RECON_RESULT
	72	EMPSA 🚺
	72	PAYE_RECON_RESULT 1 ITA88
ECONCILIATION		
	74	ENPSA 1
	74	ENPSA 1
	76	ENPSA 1
	78	ENPSA 1
UBMISSION	78	EMPSA 🔰
GENT APPOINTMENTS		
MPLOYER ADMIN		
TILITTES		

- 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.



□ 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.

Notification Centre	Notification Centre						
GISTRATION							
		Information Metalahoren 1					
				AVE RECON RESULT			
					- X X		
	Letter ID	Tax Payer Barns	Jan Year	Massage Type		Status	
	43						
	41		2011/01/31				
		e@syFile Company Select					
			database vou are				
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Click **OK** to view the available correspondence.

IE Iotification Centre ISTRATION	Notification Centre Here you are able to view any correspondance from SARS							
ISTRATION Filing Registration ORT mport/Export Payroll File	To view any of the letter		applicable entployer to expand the	: (ist. of letters	Xe.			
LOYEE ADMIN	72	-	< $+$			17A88	5 ENPSA	1
THLY PROCESS	Letter ID	Tax Payer N		Tax Year	Message Type		Status	
	65		ame	2011	9.0000000000000000000000000000000000000		READ	
	2 1 <u>800</u>				PAYE_RECON_RESULT			
NCILIATION	66	_	Click on item to view letter	20110619	ITA88		READ	
	67		1	20110612	ITA88		ISSUED	
	68			20110612	ITASS		ISSUED	
ancel Certificate Range	70	and the second s		20110517	ITASS		ISSUED	
	71			20110511	ITASS		ISSUED	
	72	-		20110419	ITA88		ISSUED	
	69	-		2011/01/31	EMPSA		ISSUED	
IISSION								
T APPOINTMENTS								
OYER ADMIN								
						-		
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	74						EMPSA	1
	76						EMPSA	1
	78						EHPSA	1
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og 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.
- 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.

4 MONTHLY EMPLOYER DECLARATION (EMP201)

- 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

- To perform this functionality:
 - Click **PAYE** in the left menu pane to open the selected employer's EMP201 profile.



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

Returns His		Status Da	<u> </u>			•	Make Payment
		Status Da	siboard				Hake Payment
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osition:	ACCOUNTANT						
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us Tel No:	0112000000	Fax No:	011200000	D1			
Cell No:							

- 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.
 - 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.



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

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Demographics							
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Employer Details				PAYE Ref No.			
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 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.

Payment Referenc	e Number	READ	tatus Y TO FILE
PAYE R 10000.00	SDL R 100.00		UIF R 100.00
Total R 10200.00	Vi	iew	Revise

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

DME	SUBMISSION							
Notification Centre	On this screen va	u are able to submit	documents to SARS					
		documents you wish			nit check box			
EGISTRATION								Submit
	Type	Reference	Company	Year	Status	Submit	lu lu	L
IPORT					READY TO FILE	2	View	Remove
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INTHLY PROCESS	8							
MINTSSTON	/							
IRO PARTY APPOINTMENTS								
PLOYERADMIN								
	8							
Log off								

Select the declaration and click Submit on the top right hand corner of the page.
 Click to accept the declaration, and enter your SARS eFiling login name and password to submit.



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



4.3 REVISING AN EMP201 DECLARATION

4.3.1 ADJUSTING A PREVIOUS EMP201

• Follow steps **1-4** of **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	ice Number	Status
7 LF02	03016	FILED
PAYE	SDL	UIF
R 25600.00	R 2560.00	R 2500.00
Total R 30660.00	View	Revise

- The revised EMP201 will automatically be listed on the Submissions page. Follow steps **8-11 of SUBMITTING YOUR EMP201** to submit the increased EMP201 to SARS.
- An additional payment will have to be processed. Follow the steps listed below in **PAYING YOUR MONTHLY EMP201** to make the additional payment.

4.4 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.
 - Click **Payments** below **Monthly Process** on the left menu pane.
 - Enter your eFiling login name and password.
 - Remaining steps of payment process are similar to the process on 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.

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	al Payments - Ca		alls of payments m	ade outsid	e of th	is syste	m			

4.5 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:
 - Click PAYE in the left menu pane to open a page listing all employers registered for EMP201 on your profile.
 - Select the relevant employer or use the search function to locate a specific employer, and click View.
 - Click Returns History and select the year of assessment from the drop-down list.

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Notification Centre	EMP201 Returns History		
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CONNECTION STATUS : CONNECT	TED Current Tax Year : 2018 Workin	ng with r	Change LOOGED IN AS 1 ADMIN

To open a specific declaration, simply double-click on the declaration to view it as a PDF.
 Click Back to Tax Payer Details to the top right of the screen to return to the Employer menu.

4.6 STATUS DASHBOARD

- Declarations submitted using e@syFile[™] Employer are listed on the Status Dashboard.
 - Click PAYE on the left menu pane to open a page listing all employers registered for EMP201 on your profile.
 - Select the relevant employer or use the search function to locate a specific employer, and click View.
 - Click Status dashboard to view a list of all declarations submitted using e@syFile™ Employer.

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destimation (Pealakian	201004	LE0000014		SUBMITTED	Update	
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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.

4.7 MAKING PAYMENT

- This menu option will divert you to the same payment link as the option in the left menu pane.
 - Click Make Payment to view all outstanding payments for EMP201 on your profile.
 - See PAYING YOUR MONTHLY EMP201 for more information on sending a payment instruction to SARS.

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4.8 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 eFILING SYNCHRONISATION
 - Click **PAYE** on the left menu pane.
 - Click Statement of Account.

Employers Tax		No and the second			
Select the appro	priate calendar ye	ar for the period return you wish	to complete:	· · · · · · · · · · · · · · · · · · ·	
Select the appro	opriate calendar mo	onth for the calendar year you w	ish to complete:		
Returns H	listory	Status Dashboard			Make Payment
Statement of	Account				
Employer Detai	ls				17.
Trading as:					
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Particulars of D	eclarant				X = X
Sumame:	SURNAME				
First Name:	NAME				
Initials	N		1	10	
Position:	ACCOUNTANT				
ID Number:	-				
Date oF Birth:					
Contact Email:	PERSON@MAIL.C	OM			
Bus Tel No:	0112000000	Fax No: 0112000001			
Cell No:					
-			1		
					Save Details

 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.

estigiFile EMPLOYER 3.2.4.0				
	Statement of Account			Eack to Tangayor Ortaks
	Request Material of Account			
	Accessment Statement of A Please select Transact P Per	the period for which you would like to request:	- Shather	

 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 **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.
 - 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 ADD EMPLOYEE to create an employee.
 - Click **IT Reg** to the bottom right of the EMPLOYEE DETAILS screen.

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- 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.



• 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.
- 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 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 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 EFILING SYNCHRONISATION.



Click on VIEW/EDIT EMPLOYEES.

- You have to create an employee account on e@syFile[™] for new employees, employed from 1 March - 31 August.
- Follow steps 1-4 of 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 www.sars.gov.za, 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.
- 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 3.4.7.1 HOME Application Home REGISTRATION	VIEW/EDIT EMPLOYE	le to obtain a quick	view of all Employees relating to a spe he Employee (including Certificates). T			Noyees.
eFiling Registration IMPORT	Company Name Filter:				100	
Import/Export Payroll File EMPLOYEE ADMIN	Company Name: Employee Search Below			Itt Proplovasi	Add Employee	Bundled IT Reg
Viev/Edit Employees	employee or drain below			an artification.		Sanata tring
MONTHLY PROCESS		Statement of	-	- tr	11	
	Surname		10 Number			
Payments RECONCILIATION	Firstname		Tex Reference Number			
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CONNECTION STATUS : CONNEC	TED					GGED IN AS : ADMI

- **Remember:** Only new employees can be selected and included in Bundled ITREG application.
- Enter your eFiling login name, password and select "Login".

-910,000 - F - 1000 - F - 1000 / -	ur credentia	s.
SARS eFiling User Name:		
SARS eFiling User Name: SARS eFiling Password:	_	

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

Registrations	
	ration request has already been r this employee from a 501
	ronise to get the result.
	OK

- You are required to complete the eFiling synchronisation (refer to e**FILING SYNCHRONISATION**) to retrieve the Bulk ITREG results, prior to submitting the Bundled ITREG application.
- Additional options are available to filter or sort employee records according to Income Tax reference number status. Select from the drop-down list the "Registration Status" to view all the applicable employee records.

	n this screen you are able to obtain a quick view of all Employees relating to a specific company. Select a company to view related Employees. Ick the 'View' button to view full details of the Employee (including Certificates). To add an Employee, click 'Add Employee'.					
Company Nam	e Filter:					
Company Nam		-7				
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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.
 - Letters and Correspondence (including AA88 notices): 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 PROFILE, EMPLOYER INFORMATION, LETTER, CORRESPONDENCE AND ALL

- 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)
 - Taxpayer Income Tax Registrations
 - All



- Click **SYNC** for the synchronisation process to start.
- Enter your eFiling login name and password, and click LOGIN.

	ur credentia	5.
F		
SARS eFiling User Name:		
SARS eFiling Oser Name:		

- 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.

SY	NC Error
	PAYE tax type was not found on the eFiling profile.
	ок

- 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

6.2 TAXPAYER INCOME TAX REGISTRATIONS

- Click SYNCHRONISE APPLICATION on the left hand menu under UTILITIES.
 - Select Taxpayer Income Tax Registrations:



- Click **SYNC** for the synchronisation process to start.
 - Enter your eFiling login name and password, and click LOGIN.

5	ur credentia s	
SARS eFiling User Name:		
SARS eFiling Password:		
SARS er ning Password.		

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

	Synchronisation complete.
The Fol	lowing Errors or Warnings Were Reported :
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70	has no certificates and was not synced
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70	has no certificates and was not synced
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- 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)].

OME Application Home EGISTRATION	On this screen		a quick view of all Employees relating to alls of the Employee (including Certificate				
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Import/Export Payroll File	Company real				TRAFT THE TYPE		
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					A A		
	IT Reg:	🔘 All (on	page) 💽 Selected (on page) R	Register	Export For Payroll	View Summa	ary
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		FURGIE	BIG WHITE BOY	586306577	REGISTERED	View	
ENT APPOINTMENTS		FURRY BOY	ASHES TOO ASHES	568885919	REGISTERED	View	5
							=
		FURRY GIRL	RICKY TICKY TABBY	816903134	REGISTERED	View	
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APLOYER ADMIN Add/Edit Employer		GEEL	LEON ADR.AAN	816903134	UNABLE TO REGISTER - E	View	
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- Income Tax reference numbers retrieved will automatically be populated in the INCOME TAX REFERENCE field on the relevant employee record.
- 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.

Notifi	cation Centre						
tere yo	u are able to vi	iew any c	orrespondance from SARS.	To view any of the letters,	please click on the appl	icable employer to	expand the list of letters.
Saarch	using DAVE F	aferen	e Number or Company Na				
						× .	
	-EMPLO	YER NAM	-				AAB8 Notification
	Letter ID	Tax P	ayer Name	Tax Year	Message Type	Status	
	51			2018	AA88 Notification	PROCESSED	UNREAD
	52	-		2018	ITREGVER	READ	
							2
						Double clic	k on item to view letter
Sele	ct Form Type	-	Show Unread Messages	Only Show Read Me	essages Only Arch	ive Restore	

- 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.

EDBACK ON INCOME TAX REFERENCE NUMBERS REQUESTED FOR EMPLOYEES an effort to simplify the Income Tax process for taxpayers, SARS introduced a process of registering all individuals in formal moment, irrespective of whether they are required to submits an Income Tax returne row of individuals for Income Tax. IIRS/IT313/as received as part of your most recent reconciliation submission has been checked to confirm the validity of the come Tax reference numbers provided by you, and the following action has been taken: Where the reference numbers were identified as correct, no action was required Where incorrect reference numbers were identified, the status "Taxpayer to contact SARS" is returned to you where insufficient information was received to determine the correct reference numbers, the status "insufficient information was received to determine the correct reference numbers, insufficient information was received to determine the correct reference numbers is insufficient information was received, to prompt the automatic registration process, the new reference number is provided to you. where sufficient information was received, to prompt the automatic ality be updated to the IRPS/IT3(a) within your gayfile" Employer. Certificate Num Sumame First Two Names ID/Passport Tax Ref Num CSV file can be created, with these updated reference numbers, and imported to your payroll system or purposes to register employees for Income Tax, call the SARS Contact Centre on 0800 0D 7277, sit your local SARS branch or the SARS website on www.sars.gov.za.	S Auto Registration Resu	its			
Where the reference numbers were identified, so correct, no action was required Where insufficient information was received to determine the correct reference numbers, the status "insufficient information" is returned to you Where sufficient information was received, to prompt the automatic registration process, the new reference number is provided to you. where sufficient information was received, to prompt the automatic registration process, the new reference number is provided to you. he list below details the Income Tax reference numbers which will automatically be updated to the IRP5/IT3(a) within your @syFile"* Employer. Certificate Num Surname First Two Names ID/Passport Tax Ref Num Certificate Num Surname First Two Names ID/Passport Tax Ref Num CSV file can be created, with these updated reference numbers, and imported to your payroll system or further information on the process to register employees for Income Tax, call the SARS Contact Centre on 0800 00 7277, isit your local SARS branch or the SARS website on www.sars.gov.za.	ear Employer				
Where incorrect reference numbers were identified, the status "Taxpayer to contact SARS" is returned to you Where insufficient information was received to determine the correct reference numbers, the status "insufficient information" is returned to you Where sufficient information was received, to prompt the automatic registration process, the new reference number is provided to you. where sufficient information was received, to prompt the automatic registration process, the new reference number is provided to you. he list below details the Income Tax reference numbers which will automatically be updated to the IRP5/IT3(a) within your @syFile "* Employer. Certificate Num Surmame First Two Names ID/Passport Tax Ref Num Certificate Num Surmame First Two Names ID/Passport Tax Ref Num NCSV file can be created, with these updated reference numbers, and imported to your payroll system or further information on the process to register employees for Income Tax, call the SARS Contact Centre on 0800 00 7277, isit your local SARS branch or the SARS website on www.sars.gov.za.	n an effort to simplify the mployment, irrespective o ill IRP5/IT3(a)s received a	Income Tax process for f whether they are required and the second	r taxpayers, SARS introduced lired to submit an Income Ta tent reconciliation submission	x return or not. has been checked to con	firm the validity of the
Where sufficient information was received, to prompt the automatic registration process, the new reference number is provided to you. The list below details the Income Tax reference numbers which will automatically be updated to the IRPS/IT3(a) within your (a) (a) (b) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	alidations were applied to	the Income Tax refere	nce numbers provided by you	, and the following action	has been taken:
A CSV file can be created, with these updated reference numbers, and imported to your payroll system For further information on the process to register employees for Income Tax, call the SARS Contact Centre on 0800 00 7277, isit your local SARS branch or the SARS website on www.sars.gov.za.	Where incorrect reference Where insufficient information is returned to you Where sufficient information you.	numbers were identifi ation was received to de on was received, to pro	ed, the status "Taxpayer to co atermine the correct reference ampt the automatic registratio	ontact SARS" is returned t numbers, the status "ins n process, the new refere	ufficient information" nce number is provided to
or further information on the process to register employees for Income Tax, call the SARS Contact Centre on 0800 00 7277, Isit your local SARS branch or the SARS website on www.sars.gov.za. incerely	Certificate Num	Surname	First Two Names	1D/Passport	Tax Ref Num
or further information on the process to register employees for Income Tax, call the SARS Contact Centre on 0800 00 7277, isit your local SARS branch or the SARS website on www.sars.gov.za. incerely					
or further information on the process to register employees for Income Tax, call the SARS Contact Centre on 0800 00 7277, isit your local SARS branch or the SARS website on www.sars.gov.za. incerely					
SSUED ON BEHALF OF THE COMMISSIONER FOR THE SOUTH AFRICAN REVENUE SERVICE	CSV file can be created,	with these updated refe	rence numbers, and imported	to your payroll system	
SSUED ON BEHALF OF THE COMMISSIONER FOR THE SOUTH AFRICAN REVENUE SERVICE	or further information on t visit your local SARS branch	he process to register	employees for Income Tax, c		rre on 0800 00 7277,
	For further information on 1	he process to register	employees for Income Tax, c		rre on 0800 00 7277,
	for further information on t risit your local SARS branch Sincerely	he process to register or the SARS website o	employees for Income Tax, c n www.sars.gov.za.	all the SARS Contact Cent	rre on 0800 00 7277,

- Note: This table is for illustration purposes only.
- 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**.



- 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.

ADME Application Home REGISTRATION	VIEW/EDIT EMPLOYEES On this screen you are able to obtain a quick view of all Employees relating to a specific company. Select a company to view related Employees. Click the 'New' button to view full details of the Employee (including Certificates). To add an Employee, click 'Add Employee'.						
eFiling Registration	Company Name Filter:						
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	Employee Search Below				Add Employee	Back	
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			Registration Stat				
Declaration			Registration stat	.us			
Cancel Certificate Range					- Lot		
Adjustments	IT Reg:	All (on page)	Selected (on page) Re	gister	Export For Payrol	I View Summar	

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

Click **EXPORT**

e@syFile EMPLOYER						_ X	
HOME	Company Employee Expo	rt					
Application Home REGISTRATION	Please select a company and then click 'Export' to Export the Employee Details into a CSV file for your Payroll System.						
eFilling Registration	A Company		Sec. 1		_		
IMPORT/EXPORT	Company:			- 7		Export	
Import/Export Payroll File							
EMPLOYEE ADMIN							
View/Edit Employees							
MONTHLY PROCESS							
PAYE							

- 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.

e@syFile EMPLOYER		-			_ X
номе	Company Empk	oyee Expor	t		
Application Home	Please select a co	mnany and t	hen click 'Export' to Export the Employee Details into a CSV file for y	vour Pavroli System	
REGISTRATION	Trease select a con	mpany and c	nen chck Export of Export the Employee Details into a COV me for y	our rayion System.	
eFiling Registration			EAST SHALL AND A		
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Import/Export Payroll File					
EMPLOYEE ADMIN					
View/Edit Employees					
MONTHLY PROCESS			Browse For Folder		
PAYE			CSV File Location		
Payments			Cavinie Edication		
RECONCILIATION					
PAYE Dashboard			Desktop 🔺		
Declaration			D 🛜 Libraries		
Cancel Certificate Range			▶ 🐝 Homegroup		X = 1 = X
Adjustments			Computer		X = I = I
Recon Assistant			A Local Disk (C:)		$\pm \chi$
SUBMISSION			DVD RW Drive (D:) Bonus		$= \chi_I = 1$
Submit to SARS			🖻 🧫 CipherWave (E:)		$\gamma = \gamma$
AGENT APPOINTMENTS			🖻 👝 Removable Disk (F:)		$-\Lambda$
Agent Appointments			Elements (G:)		
EMPLOYER ADMIN			Safe Run chared folder		
Add/Edit Employer			Make New Folder OK Cancel		Z = 1
UTILITIES					
Utilities					
Synchronise Application					
Mismatch					
HELP					
Application Help					
Update					
Log off					
CONNECTION STATUS :				LOG	GED IN AS : ADMIN

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.

7_20h49_EXPORT.CSV

7 DEFINITIONS AND ACRONYMS

—	Description		
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 certificate	Income Tax Registration 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).