



# e@syFile™ EMPLOYER GUIDE

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# 1 INTRODUCTION

- a) 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.
- b) More information at SARS' disposal means a less cumbersome tax process, as returns/declarations are increasingly pre-populated.
- c) Employers are required to submit an Employer Reconciliation Declaration (EMP501) to SARS twice a year. These are the:
  - i) Interim reconciliation declaration for the six-month period,
  - ii) Annual reconciliation declaration for the full year.
- d) The opening and the submission date 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.

# 2 SUBMIT INTERIM AND ANNUAL RECONCILIATION

#### Figure 1: Reconciliation Submission Process



- External Guide

# 2.1 Create employer

- a) The employer's payroll system generates electronic tax certificates in a CSV file which is imported into e@syFile<sup>™</sup> 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. After each CSV import, verify the employer details to ensure they are correct, and that all necessary information is displayed and updated.
- b) 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.

# 2.2 Process certificates

- a) The CSV file import will also create new or update existing employee details and create or update the relevant certificate information for the employee.
- b) An employee is uniquely identified by a combination of the data on the Employee Information screen which will be discussed later in this guide, one of the Unique identifier numbers (ID/Passport etc), Date of Birth, Income Tax Reference number and 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 either using the "Reassign Certificate" or "Merge Employees" function depending on the conditions of the problem. The two functions will be discussed later in this guide. The certificate is uniquely identified by the Certificate Number.

# 2.3 Create PAYE Reconciliation return

- a) There are three options for creating the PAYE reconciliation return:
  - i) Request a pre-populated return from SARS ("Accept SARS Data"), alternatively,
  - ii) Request a blank form ("Own Values") and input your own financial data, with employer demographics auto populated from a local database (not to be used by employers declaring ETI) or
  - iii) ETI Reinstatement

## 2.4 Submit reconciliation

- a) Once satisfied that the reconciliation balances, it can be submitted to SARS. All submissions must be made electronically which requires 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.
- b) The submission will only include all new and amended tax certificates. Existing unchanged certificates in a "Submitted" status will not be included in the submission. e@syFile only processes certificates marked as 'CREATED' and does not include those marked as 'SUBMITTED'.
- c) If an employee's demographic details are updated after submission, make sure to save the certificate for the period you are resubmitting as 'CREATED' to ensure that the updated information is sent to SARS upon resubmission.
- d) Employers must update the Reconciliation status on the EMP501 Status Dashboard after submission and view the PAYE Dashboard to ensure that the EMP501 return was processed successfully.

PAYE-easyFile-G01-e@syFile™TC Employer Guide

## 2.5 Generate certificates

- a) The employer is required to furnish employees with certificates to enable the completion and submission of the Income Tax Return. This step is only applicable to the annual reconciliation.
- b) 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.
- c) 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 manual capture, changes may be required in which case certificates can be added, amended, and/or cancelled. Normally, changes to certificates impact the financial values on the EMP501 and users must ensure that they update the EMP501 and ensure that the revised information is submitted to SARS, if applicable.

# 2.6 Register employees for income tax and obtain feedback

- a) SARS announced in September 2010 that all individuals in formal employment, irrespective of their income, must register for Income Tax. To help employers, two registration options are made available to register employees namely:
  - i) Individual Income Tax Registration (ITREG), where an employer can register only one employee and get the tax number immediately. Please note that employees must exist as an employee on the e@syFile application before using the IT reg option.
  - ii) Bundled ITREG process enables employers to register multiple employees (from one up to a thousand) at a time. This process will also create employee on the e@syFile application.
- b) SARS provides feedback to employers on the outcome of the registration process for employees. Where an income tax number already exist or a new number was registered, the employee detail will be updated with the income tax number. 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 IT reference numbers	Taxpayer was found to be already registered.	None
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.



- c) For more information on the registration of employees, refer to section 5 of this guide. Always ensure the latest version of e@syFile<sup>™</sup> Employer is being used, as any information submitted to SARS using previous versions of e@syFile<sup>™</sup> Employer, will not be accepted.
- d) The latest version of the software can be accessed by visiting the SARS website <u>www.sarsefiling.co.za</u> and downloading the latest version.

# 3 THE E@SYFILE<sup>™</sup> EMPLOYER PROCESS

# 3.1 Installing or updating e@syFile<sup>™</sup> employer

## a) Existing Users Updating e@syFile™ Employer

i) Login to the current version of e@syFile<sup>™</sup> Employer.

#### b) New users installing e@syFile™ Employer

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



- ii) Click **Download for Windows** to start the download process.
- iii) 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.
- iv) The e@syFile<sup>™</sup> Employer icon will display on your desktop, allowing quick access.



v) When the Application is opened the first time after an update or first-time installation it may display a white screen with a message e@syFile Thin Client - System unavailable! This is not an error! Depending on your system there may be a short waiting period for the creation



of the main database or for the e@syFile server to Start up. You can either close the e@syFile Thin Client bowser page and reopen after a minute or two.

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	e asyFile Employer server cannot be reached. It is either still starting up or not			
	available			
	Please try again later. If the problem persist, please contact your administrator.			

vi) The registration screen will pop up requesting an eFiling user and Password with a PAYE/Income Tax number (if not registered for PAYE). Select Verify. Successful registration will then allow the ADMIN user registration screen to populate.

**Please note:** Keep a record of the eFiling profile and PAYE/Income Tax Reference number used during the setup process. This will be required when a user needs to use "Admin Forgot Password" function.

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Welcome to SARS e@syFile Employer As this is the first time that the application is being run, you are kindly asked to create a local login account to access this application. This login account (usernme and password) will be used to access this application only, and should not be the same username and password used to access SARS eFiling. When data is thramitted to SARS, you will be asked to your eFiling login details, and only when this authentication passes will information be submitted.	PAYE/Income Tax Reference Number SARS eFiling username: SARS eFiling password VERUPY			
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vii) The default word ADMIN will appear by the username. Leave this as is.



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Welcome to SARS eglsyFile Employer. As this is the first time that the application is being run, you are kindly asked to create a local login account to access this application. This login account (username and passwird) will be used to access the application end, and should not be the same username and password used to access SARS effing. When data is transmitted to SARS, you will be asked for your effing togin details, and only when this authentication passes will information be submitted.	Password Hint Would you like to be able to edit information imported from a CSV file? Allow cave editing Please be aware that should you lose or forget your password, SARS eFiling and EasyFile will not be able to retrieve or reset it. I understand RECONTER			
Vester telle at to you by				

- viii) Create a unique password using at least eight (8) characters. Your password must include one (1) capital letter, 1 small letter, 1 number and 1 special character [e.g. dollar sign (\$) or an exclamation mark (!)].
- ix) Confirm the password and capture password hint.
- x) Select Allow CSV editing, where you wish to allow editing of imported certificates.
- xi) Select 'I understand' to acknowledge SARS will not be able to retrieve or reset your password should you lose it.
- xii) Click **Register** to continue. Log in screen will pop up to log in.
- xiii) Enter your e@syFile<sup>™</sup> Employer login details (username and password). This is the ADMIN user.

31 July 2024 8:29 pm	
Welcome to	e@syFile
Username	
Password	
Password Hint	Admin Forgot Password
LOGIN TO E@S	YFILE

- xiv) If unsure of your password, click **Password Hint** to see the hint which you entered.
- xv) If you are an Admin user and the Password Hint is not useful, select "Admin Forgot Password" option. This will require authentication using the eFiling login name and PAYE Reference number used during the original setup process.

31 July 2024 8:30 pm	
Welcome t	o e@svFile
PAYE/Income Tax Reference	Number
SARS eFiling username	SARS eFiling password
BACK VERIFY	

xvi) Where additional users were added (not ADMIN) and these users forgot their password and the Password Hint does not suffice the ADMIN user needs to be requested to reset their password. This is discussed later in this guide under User Management

# 3.2 Accessing the e@syFile<sup>™</sup> Employer software

a) Once you clicked login, you will be directed to the home page. If working offline, you will see a red block with the word "Disconnected" at the Right Top of the screen. If online, the block will be green and will read "Connected". The menu on the left of the screen contains the following main menu items:



- i) **Dashboard** The e@syFile main dashboard is the landing page and is available from the main navigation menu and allows you to:
  - A) Import Payroll File,
  - B) Delete Payroll File,
  - C) Retrieve Certificate History,
  - D) View PAYE Dashboard and
  - E) View Correspondence.



- ii) **Employer Admin** Allows you to view employer details, add and edit employer records.
  - **Employee Admin** This function enables you to:
    - A) View employee details and tax certificates.
    - B) Add new employee records and manually capture certificates.
    - C) Reassign certificates from incorrect employees to the correct ones.
    - D) Merge two employees into a single employee record, while retaining certificates linked to both of the original employee records.
    - E) View certificate ranges with options to cancel or revive certificate ranges.
    - F) Bundle ITREG and

iii)

iv)

- G) Duplicate employees to another period of recon (POR).
- **Reconciliation –** This function allows you to
  - A) Create a new PAYE Reconciliation submission
  - B) Submit PAYE Reconciliation Return
  - C) View EMP501 Reconciliation status
  - D) View EMP501 submissions history
- v) Synchronise Application Allows you to synchronise your local e@syFile™ Employer database with the eFiling Profile and Employer information and to download Letters and Correspondence, AA88 notices and Taxpayer Income Tax Registrations.
- vi) **Notification Centre** This function enables you to access any correspondence from SARS, including the ability to download and view Tax Directive reports.
- vii) **Third Party Appointments** This function manages the processing of Third Party Appointment Notices sent to employers. Please refer to the Third Party Appointment (AA88) e@syFile<sup>™</sup> Employer user guide available on <u>www.sars.gov.za</u>.
- viii) **Utilities** Various functions are available on this menu. The following sub-menus are listed on the horizontal tab:
  - A) Database Utilities Use this menu to create or restore back-ups.
  - B) User Management Use this menu to create and edit and change user passwords.
  - C) Validations Logs Use this menu to review AA88 import logs, Payroll import logs, Pre-Submission validation logs.
  - D) Disk Submission Use this menu to submit your EMP501 and IRP5/IT3(a)'s via disk. This option should only be used in instances where online submission is not possible.

# 4 EMPLOYER ADMIN

- a) The system provides functionality to create a new employer, edit existing employer information and view employer information for one or more employers in the e@syFile database.
- b) 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.
- c) 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.
- d) The system will validate information to ensure it is complete and correct prior to data being saved to ensure that only valid and correct information is stored in the database.

# 4.1 Create an Employer

- a) The below screens and steps show how the employer is manually created:
  - i) Select "**Employer Admin**" from the left-hand navigational pane to open the respective sections to add employer records.
  - ii) Select the accordion called **Add Employer**, the system will display the employer capture screen.
  - iii) Capture employer details.



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- iv) Complete the Employer Information page.
- v) 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.



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- vi) Complete ALL the required fields including:
  - A) Employer Information
  - B) Business Address
  - C) Contact Person
  - D) Practitioner Information (if applicable)
- vii) Click Add Employer
- viii) **Please note**: The Reference numbers entered on this screen will determine which deduction types must be completed on the EMP501 and IRP5/IT3(a) certificates.

# 4.2 Edit Employer

- a) Use this option to change or update employer details. You may have to provide additional employer information before submitting your declaration to SARS.
- b) Below screens and steps show how to edit the employer manually:
  - i) Select the accordion called **Edit Employer**, the system will display the screen where employer information has been captured."
  - ii) Edit or update the employer details from the Edit Employer panel and click on **Update Employer** when done.



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# 5 EMPLOYEE ADMIN

- a) The system provide functionality to create a new employee, edit existing employee information and view employee information for one or more employees.
- b) It is only necessary to create an employee when you need to capture the details for employees or companies not yet on e@syFile<sup>™</sup> Employer.
- c) Employees can be added and updated manually or by importing payroll files.
- d) To add an employee, click the **Add Employee** button.
- e) To manually update an employee, click the View button next to the relevant employee or double click the employee.
- f) Employee records can be duplicated from one Period of Reconciliation to another by clicking on the slide next to Employee Selection.



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		ACTIVE	Employee B	Employee B	Employee Number	VIEW	
<b>▼</b> SARS							

- g) Clicking the slide next to 'Employee Selection' opens the 'Bundled ITREG' and 'Duplicate Employees' sections.
- h) Select All to duplicate all employees listed or select the employee(s) which must be duplicated and click on Duplicate Employees

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		ACTIVE En	nployee B Employe	e B Employee	Number VIEV	v
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i) Select the period of recon where the employee(s) must be duplicated to and click OK.



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# 5.1 Add Employees

- a) To add employees manually:
  - i) Select "**Employee Admin**" from the left-hand navigational pane to open the respective sections to add employee records.
  - ii) Select Add Employee tab

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iii) Complete Employee Information, Contact Details and Banking Details.

iv) Click SAVE

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<i>⊊</i> <sup>5</sup> Synchronisation	Nature of Person	Surname	First Two Names	Initials	
Third Party Appointments	yyyy/mm/dd	ID Number	Income Tax Reference	Passport Number	
¢ <sup>o</sup> Utilities	Country of Issue +	Employee Number	ACTIVE *		
	Employee: Contact Details Employee: Banking Details				* *
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# 5.2 Edit Employee

- a) Use this option to change or update employee details. Below screens and steps show how to edit the employee details manually:
  - i) Select Employer and Period of Reconciliation.
  - ii) Select "**Employee Admin**" from the left-hand navigational pane to view the list of employees added.
  - iii) Select employee by double clicking or clicking on View button.



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5 Synchronisation	Surname	First Name	Employee Number	ACTIVE
Notification Centre     Third Dort:	ID Number	Tax reference	Certificate Number	Registration Status
Appointments				
¢ <sup>0</sup> Utilities			CLEAR SEARCH SEARCH O	THER PERIODS SEARCH SELECTED PERIOD
	Freedom a Grand and			
	Employee : Search result			
	Employee Selection			
	Period: 202402			
	Status Surna	me First Name	Employee Number	View
	ACTIVE Employ	ee A Employee A	Employee number	VIEW
Proutly brought to you by	ACTIVE Employ	ee B Employee B	Employee Number	VIEW
<b>▼</b> SARS				

- Update the required information Click **SAVE** iv)
- v)

File View Help									-	o ×
e@syFilĕ	Poudo longet to vie tv ▼SARS		•		202202	Environment PRE-PROD	Connected	Version: 800.00.231	Logged in as: ADMIN	Logout
Employer										
A Dashboard	€ <sub>Add</sub>	Ø		© View						
Employer Admin	Certificate	Recon Period: 202202		Employee Certificates						
Employee Admin		Year Of Assessment: 2022	CREATED							
Reconciliations	Employee:	Information								~
	- Nature of P	Person	Sumame		First Two Names		nitials —			
Notification Centre					GABANTHONE					
third Party	Date Of Bir	th	ID Number		L Income Tax Reference -		Passport Number			
Appointments	- Country of	Issue	- Employee Number		Status					
¢ <sup>o</sup> Utilities					ACTIVE	*				
	Employee:	Contact Details								~
	Employee:	Banking Details								~
							BACK TO EMPLOYE	ES IT REGIS	STER SAVE	
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# 5.3 Creating and Editing Certificates Manually

- a) The system offers functionality for managing employee IRP5/IT3(a) Certificates, including:
  - i) Creating new certificates
  - ii) Editing existing certificate information
  - iii) Viewing certificate details
  - iv) Listing certificates stored in the database
  - v) Cancelling a single certificate
  - vi) Cancelling a range of certificates
  - vii) Reviving a range of certificates
- b) Below screens and steps show how to create and edit a manual certificate:
  - i) Select "**Employee Admin**" from the left-hand navigational pane.
  - ii) Select relevant Employer and period of recon. When a period of recon is selected a green tick will indicate if a period contains active employee data. If employees were manually captured during a previous reconciliation period, there is no need to recapture them in the next period. You can utilise the 'Duplicate Employees' function found under the 'Employee Admin' option for the relevant period to transfer these employees into the new period.

ashboard	⊕ <sub>Add</sub> Ø <sub>Reassign</sub> .	A Merge								
nployer Admin	Employee Certificates	Employee Ranges								
ployee Admin	Employee : Search									
econciliations						- Emoloyae	Status			
nchronisation	Surname		First Name	Emple	yee Number	ACTIVE			~	
Ification Centre	ID Number		Tay raferance	Certif	cala Number	Registratio	n Status		_	
ird Party pointments									-	
ities						CLEAR SEARCH	SEARCH OTHER PERIODS	SEARCH	SELECTED PER	dob
	Employee : Search result									
	Employee : Search result									
	Employee : Search result  Employee Selection Period: 202202									
	Employee : Search result Employee Selection Period: 202202 Status	Surname		First Name	Employee Numbe	r	View			
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	Employee : Search result  Employee Selection  Period: 202202  Status  ACTIVE  ACTIVE	Surname NGWENYA ARNOLD	_	First Name	Employee Numbe	r	View ViEW View			Î
	Employee 2 Search result  Employee 2 Search result  Period: 202202  Satiss  ACTive  ACTive  ACTive  ACTive	Sumane NGWENYA ARNOLD COMBRINCE		First Name	Employee Numbe	r	View VIEW VIEW			ĺ
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	Employee 5 Stanch result	Surtaine NGWEIYA ARNOLD COMBRINC MOPOKENG KOJOETZE		FestName	Engloyee Numbe		View NEW NEW NEW			ŕ
	Employee 5 Reach result	Surfaine NGVENVA ARRIQLC COMBRIDIC MOFORENG NJNGF7ZE NTTDRDA		First Name	Engloyee Northe		Vew Vew Vew Vew Vew Vew			

- iii) Select the relevant employee. and click **View** next to the employee's name or double click the employee to open the record.
- iv) Verify all the required fields on the Employee Information page.
- v) If changes are required, make the relevant updates and click Save



e@syFile Employer File View Help					- 0 ×
e@syFilĕ	Production and the set of the set	•	202202   Environment PRE-PROD	Connected Version: 800.00.231	Logged in as: ADMIN Logout
Employer					
A Dashboard	⊕ <sub>Add</sub> ⊘	© <sub>View</sub>			
Employer Admin	Certificate Certificate Number Recon Period: 202202	Employee Certificates			
Employee Admin	Year Of Assessment: 2022	CREATED			
Reconciliations	Employee: Information				^
	Nature of Person	Sumame	First Two Names		
Notification Centre			GABANTHONE		
Third Party Appointments	Date Of Birth	L ID Number	F Income Tax Reference	Passport Number	
trado Utilities	Country of Issue	C Employee Number	Status	]	
			ACTIVE		
	Employee: Contact Details				~
	Employee: Banking Details				· · · · · · · · · · · · · · · · · · ·
				BACK TO EMPLOYEES	GISTER SAVE
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vi) Click **OK** to confirm the updates employee details.

e@syFile Employer File View Help	- 0 X
e@syFilĕ	V SARS Connected Writes Logical and Logical
Employer	
Employer Admin	Add View Certificate Number Employee Employee
Employee Admin	Veiar of Assessment: 2022 CREATED
Reconciliations	Employee: Information
	Nature of Person C Surtaine First Two Names ( initials
Notification Centre	
Third Party Appointments	
¢ <sup>0</sup> Utilities	Country of Issue
	Employee: Contact Details Updated Successfully  Employee: Banking Details
	Employee details updated successfully. BACK TO EMPLOYEES IT REGISTER SAVE
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- vii) Select Add Certificate.
- viii) Capture details under the following sections: Certificate details; Income Received and Deductions; Tax Directives and ETI when specified under certificate details.



e@syFile Employer File View Help					- 0 ×
e@syFilĕ	Provide longet to one be	•	202202 • Environment PRE-PROD •	Connected Version: Logged in as: 800.00.231 ADMIN	Logout
Employer					
A Dashboard	© <sub>View</sub>				
Employer Admin	Employee Certificates				
Employee Admin	Surname/Trading Name: First Names:	Employee Number: Tax Reference Numl	ber: ID Number:		
Reconciliations	NGWENTA				
	Certificate details				^
Notification Centre Third Party	Certificate Number	Final Certificate Submission	Out fault Tree		
Appointments	000005000001		C ETI Employment Date	C Certificate Tax Period Start	•
¢ <sup>0</sup> Utilities	Pay Periods Worked	Pay Periods in Year of Assessment	yyyy/mm/dd	yyyy/mm/dd	
	yyyy/mm/dd	Voluntary Over Deduction	Fixed Rate Taxation	ETI Indicator	
	Employee SIC7 Code				
	Income Received and Deductions				~
	Tax Directives				~
	Certificate history				~
			BACK TO EMPLOYEE	CANCEL CERTIFICATE SAVE CERTI	IFICATE
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#### ix) Please note:

- A) Certificate Tax Period Start Date is the start date of the tax period in the relevant Year of Assessment declared on the certificate.
- B) Similarly, the Certificate Tax Period End Date must be the end date in the relevant Year of Assessment declared on the certificate.
- C) ETI Employment Date Only completed if ETI is claimed.
- x) To capture Source Codes and Values,
  - A) Click Manage Source Codes
  - B) Select the required Source Code from the drop-down list or capture the code.
  - C) Enter the amount under Value
  - D) Click **SAVE CODE**

e@syFile Employer	Manda Manda Na ana Na ▼SARS	✓ 202202 ✓ Environment	Mersion	
Employer			PRE-PROD - Connected 800.00.231	Logged in as: ADMIN
	Income Received and Deductions			^
Dashboard	Income Received			~
Employer Admin				
Employee Admin	Description	Code		Value (no cents)
Reconciliations	Income (PAYE)	3601		1000000
ynchronisation	Manage Source Code			
lotification Centre	- Saura Cada	- Filter Payres Carlas		
hird Party ppointments	3602 - Income (Excl)	Fitel source cools	CLEAR FILTER	
Itilities	Description			
	Vision		•	~
	Value		2500d	~
			CLOSE ADD CODE	×
			ма	NAGE SOURCE CODES
	Tax Directives			~
	Certificate history			~
		BACK		



- xi) When finished, click **SAVE CERTIFICATE.** 
  - A) This action will save the captured certificate particulars.
  - B) A validation error message will indicate if any data is missing.

## 5.4 Manage Payroll Files

- a) The e@syFile application allows the user to import a payroll file (exported from their payroll software) into e@syFile. This will create and/or update the Employer information, employee information and certificate information.
- b) A Payroll file can be imported at any time.
- c) Payroll files may also be deleted. Deleting a payroll file does not delete the employer or employee data from the e@syFile database, it will only delete the certificates that were imported.

#### 5.4.1 Import Payroll File

- a) Select "Dashboard" from the left-hand navigational pane.
- b) Click Import Payroll File
- c) Click **SELECT FILE**

e@syFile Employer	- 0	×
File View Help		
e@syFilĕ	Produktivent have been to the second of the	a.
Employer		_
	What's new on SARS e@syfile?	
A Dashboard	Voit the SARS website sars gov za for the latest news and announcements.	
Employer Admin	⊕ Import Payroll File     ⊖ Delete Payroll File     ⊕     Retrieve Certificate	
Employee Admin	History	
Reconciliations	Select an Employer and Period of Recon to view the following:	
Notification Centre	View PAYE Dashboard View	
Third Party Appointments	Corraspondence	
ధ <sup>ర</sup> Utilities	CSV File Import	
	Please click on "Select file" below and select the CSV file you want to import.	
	CANCEL SELECT FILE	
Denudla benabili to ana ba		
▼SARS		

d) Select the CSV to import.



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← → ✓ ↑ 🎦 → OneDriv	e - SARS > Desktop > e@syfile Re-Platform_2023-11-24 > 02_PP_Testing > PP_Test CSV Files > 15.5.2_Validation Logs	~ (	ڻ Sr	sarch 15.5.2_V	/alidation l	ogs	Q
Organise 👻 New folder					- :::		?
🖈 Quick access	▲ Name	Status Date m	odified	T	Гуре		
E Desktop		2023/10	0/10 10:2	27 T	TXT File		
🖶 Downloads	IS.5.2.1a1_eUSE0011_eREQ0040_Validation Log_7740804119_2015_TEST_TV2024_PoR202308_YoA2024_Pass	2024/05	5/24 08:3	38 T	TXT File		
Documents	15.5.2.1a2_eUSE0011_eREQ0040_Validation Log_7740804119_2015_LIVE_TV2024_PoR202308_VoA2024_Pass	2024/05	5/24 08:3	38 T	IXT File		
Distances	15.5.2.1b_eUSE0011_eREQ0040_Validation Log_7740804119_TV2024_PoR202308_VoA2024_Pass	2024/05	5/24 08:3	38 T	TXT File		
Fictures	15.5.2.1c_eUSE0011_eREQ0040_Validation Log_7740804119_TV2024_PoR202308_YoA2024_PwW	2024/05	5/24 08:3	38 T	IXT File		
AppData	I5.5.2.1d1_eUSE0011_eREQ0040_Validation Log_7740804119_TY2010_PoR201002_VoA2010_PwW	2024/05	5/24 07:4	40 T	TXT File		
o OneDrive - SARS	I5.5.2.1d2_eUSE0011_eREQ0040_Validation Log_7010702118_TY2010_PoR201002_VoA2010_PwW	2024/05	5/31 08:3	32 T	TXT File		
🎬 OS (C:)	# 25.5.2.1d2_eUSE0011_eREQ0040_Validation Log_7010702118_TY2010_PoR201002_YoA2010_PwW_NewLogFile	2024/05	5/31 08:1	13 T	IXT File		
00_Registrasie	15.5.2.1d2_eUSE0011_eREQ0040_Validation Log_7750804116_TY2010_PoR201002_VoA2010_PwW	2024/05	5/31 11:4	16 T	TXT File		
CSV Files	15.5.2.1d2_eUSE0011_eREQ0040_Validation Log_7750804116_TV2010_PoR201002_YoA2010_PwW_TEST	2024/05	5/31 08:3	39 F	ile		
TR12	15.5.2.1d2_eUSE0011_eREQ0040_Validation Log_9532977189_TY2010_PoR201002_VoA2010_PwW	2024/06	6/07 10:4	40 F	ile		
	15.5.2.1d2_eUSE0011_eREQ0040_Validation Log_9532977189_TY2010_PoR201002_VoA2010_PwW	2024/06	δ/07 10:3	38 T	TXT File		
V229	15.5.2.1e_eUSE0011_eREQ0040_Validation Log_7740804119_TV2024_PoR202308_VoA2024_Fail	2024/05	5/24 08:3	38 T	IXT File		
E Desktop	15.5.2.1f_eUSE0011_eREQ0040_Validation Log_7740804119_TY2024_PoR202308_VoA2024_FwW	2024/05	5/24 08:4	¥7 Т	TXT File		
neDrive - SARS	A IRP52814891384945819213	2024/05	5/31 14:3	35 🖌	Adobe Acr	obat D.	
Ina Engelbrecht	IRP56570174440882208151	2024/05	5/31 14:3	34 🖌 🖌	Adobe Acr	obat D.	
This BC	A IRP58136659919322264941_Defect 75372_Normal Income	2024/06	δ/03 12:3	38 /	Adobe Acr	obat D.	
= IIIS PC	IRP58983496101959048158_Defect 75372_Foreign Income	<ul> <li>2024/06</li> </ul>	5/03 12:3	39 /	Adobe Acr	obat D.	
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Documents							
Downloads							
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<b>F</b> 1							
File name:	15.5.2.1D_EUSEUUTT_EREQUU4U_Validation_L0g_7740804119_1Y2024_P0K202308_Y0A2024_Pass			ai riies			~
				Open	(	ancel	

## e) Click **OK** to initiate the process.

e@syFile Employer	×
	hadaugstandu
e@syl lie	V SARS
Employer	What's new on SARS e@svfile?
A Dashboard	() Visit the SARS website sars gor as for the latest news and announcements.
Employer Admin	Learned Descent File     On Database Descent File     Descent File
Employee Admin	Import Paytor File History History
Reconciliations	Select an Employer and Period of Recon to view the following:
	(i) View EMP501 PXYE Status Dashboard and all your correspondences from SARS.
Notification Centre	
Third Party	View PAYE Dashboard Correspondence
- Appointments	
¢ <sup>r</sup> Ublities	CSV File Import
	15.5.2.1b_eUSE0011_eREQ0040_Validation Log_7740
	Payroll File ready for import
	Please click OK to initiate the process.
	Please be patient while the process runs. Another message will alert you once the file import is successful.
	CANCEL OK
<b>▼</b> SARS	
and the second	

- f) The selected file to import needs to pass a validation check. A message will be displayed indicating whether 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.
- g) After the Payroll file has passed validation, Click **OK** to initiate imports records. Please note that this option is available for LIVE files only. TEST files will not be imported.



e@syFile Employer File View Help	- o x
e@syFilë	The second and the s
Employer	
A Dashboard	What's new on SARS e@syfile? <sup>1</sup> Visit the SARS website sars gozza for the latest news and announcements.
Employer Admin	O Import Payroll File O Retrieve Certificate
Employee Admin	History
Reconciliations	Select an Employer and Period of Recon to view the following:  () View EMP501 PAYE Status Darbbard and all your correspondences from SARS.
Synchronisation Notification Centre	
Third Party	View PAYE Dashboard View Correspondence
Appointments	File Import Validation Desuite
	Consecutive certificate numbers.txt
	Payroll File passed Validation
	Please click OK to initiate import records
	CANCEL
Proutly brought to your by	

h) You will be prompted to continue to import another file, view the imported employees or EMP501 declaration or to cancel.

e@syFile Employer File View Help	- 0 ×
e@syFilĕ	Nucl Neget to the Section → 202202 → Environment PRE-PRO → Connected Version: Logged in ac Logged in ac Logged in ac
Employer	What's new on S&RS e@syfile?
A Dashboard	Visit the SARS website sars gozza for the latest news and announcements.
Employer Admin	⊕ Import Payroll File     ⊖ Delete Payroll File     ⊕     Centrave Certificate     Hetrov
Employee Admin	Select as Employer and Device of Percento view the following:
C∫ Synchronisation	View EMPS01 PMR Status Deabloard and all your conspondences from SARS
Notification Centre	Wew PAYE Dashboard
Third Party Appointments	Correspondence
¢ <sup>0</sup> Utilities	CSV File Import
Providy brought to you by	The active e@syFile database you are working on has been changed to       for period 202202         Consecutive certificate numbers.txt       File Imported Successfully         Select one of the options below to proceed       CANCEL         IMPORT ANOTHER FILE       VIEW EMPLOYEES         EMP501 DECLARATION       EMP501 DECLARATION
Proudly brought to you by	

i) If e@syFile<sup>™</sup> Employer encounters any errors during the validation or import process, a message will appear directing you to the **Import Payroll File log**.

## 5.4.2 Delete payroll files

- a) Payroll files may be deleted by a user. The "Delete Payroll File" function is available from the main Dashboard in e@syFile.
- b) Deleting a payroll file does not delete the employer or employee data from the e@syFile database, it will only delete the certificates that were imported.



- c) Deletion of the certificate data by deleting a payroll file is not reversible.
- d) Steps to delete payroll file:
  - i) Select the Delete Payroll File function from the Dashboard once an Employer and Period of Reconciliation is selected.

e@syFile Employer	- o ×
File View Help	
e@syFilē	TSARS ■ 202202 ■ Uniformed #88.9800 ■ Convected Writer Logout
Employer	
	What's new on SARS e@syfile?
A Dashboard	• You we used on a start you as on the starts have a start way and a start start of the start
Employer Admin	
Employee Admin	Hatey
Reconciliations	Select an Employer and Period of Recon to view the following:
	<ul> <li>Verification (174) E danse destroyed and an an and consequences into dense.</li> </ul>
Notification Centre	III View PAVE Dushbrand
Appointments	Correspondence
¢ <sup>o</sup> Utilities	
V SMKS	

- ii) The system displays a list of imports in status "Passed Imported" or "Passed with Warnings"
- iii) Select one of the items to delete.
- iv) The system will display a warning message before imported data is deleted.

		Delete Payroll File						
Here you are able	e to delete Imported Payroll Fil	es. Only the Certificates imported in the file will be deleted.						
Select	FILENAME		DATE IM	PORTED	S	TATUS		
	Consecutive certificate numbers.txt		Consecutive certificate numbers bt 2024/07/21 23:01:01 F		PA	SSED - II	MPORTED	
	Consecutive certificate number	ers.txt	2024/07/21 21:04:52 PASSED - IMPORTED		MPORTED			
	Consecutive certificate number	ers.txt	2024/07/19	9 12:50:28	PA	SSED - IN	MPORTED	
	Consecutive certificate number	ers.bd	2024/07/19	9 12:10:35	PA	SSED - II	MPORTED	
	Consecutive certificate number	ers.txt	2024/07/18	8 23:25:01	PA	SSED - II	MPORTED	
					Rows per page:	5 🕶	1-5 of 11	< >
		Action Confirmation This will delete all the certificates imported in the selected files Are you sure?					CANCEL	DELETE

v) A confirmation message will be displayed when certificates are successfully deleted.



		Delete Payroll File	
Here you are ab	le to delete Imported Payroll Files. Only the Certificates imported in	the file will be deleted.	
Select	FILENAME	DATE IMPORTED	STATUS
	Consecutive certificate numbers.txt	2024/07/21 23:01:01	PASSED - IMPORTED
	Consecutive certificate numbers.txt	2024/07/21 21:04:52	PASSED - IMPORTED
	Consecutive certificate numbers.txt	2024/07/19 12:50:28	PASSED - IMPORTED
	Consecutive certificate numbers.txt	2024/07/19 12:10:35	PASSED - IMPORTED
	Consecutive certificate numbers.txt	2024/07/18 23:25:01	PASSED - IMPORTED
			Rows per page: 5 ▼ 1–5 of 11 < >
	Delete Payroll File I	Data	CANCEL DELETE
The selecte	d Payroll Files has been deleted		
		CLOSE	
			-

# 5.5 Retrieve Certificate History

- a) This function allows you to retrieve historical certificates data from old format e@syFile backup files.
- b) Certificate history can be retrieved for a specific PAYE Reference number and Period of Reconciliation.
- c) The below screens and steps show how to retrieve certificate history:
  - Select Retrieve Certificate History from the Dashboard. You may select an Employer and Period of Reconciliation but is not required to access this function.
     Please note: Employee records will be retrieved for a reconciliation period only if a certificate was created. As a result, an employee might appear in one reconciliation period but not in another.



e@syFile Employer File View Help	-	o ×
e@syFile	Pachaget see to 202202 Converse PEE-PROD Conversed Version: Logget in as:	Logout
Employer	Minute and the second	
A Dashboard	What's new on SAKS e@synle?  Visit the SARS website sans gov za for the latest news and announcements.	
Employer Admin		
Employee Admin	History	
Reconciliations	Select an Employer and Period of Recon to view the following:	
	П. лан систо съостал санар оканова и на дои сискропенска или очно.	
Notification Centre	Wew PAYE Dashboard         View	
Appointments	Correspondence	
¢ <sup>o</sup> Utilities		
SARS		

- ii) Select a backup file to retrieve historical data. The backup file must be saved on the local PC.
- iii) Provide the login name and password to allow decryption of the database. This login information is the same login information used to access the old e@syFile system.
- iv) Capture a PAYE Reference number for an employer contained within the backup database file and Period of Reconciliation for the period which must be imported.
- v) Select request "Request Certificate Data"

Eile View Help	-	o ×
e@syFilē	Restructioner FRE_PROD Convexted Version: Adjust in a:	Logout
Employer		
	Retrieve Certificate History	
A Dashboard	You can retrieve historical certificate date from old format e@syFile backup files. Please complete all fields below to proceed.	
Employer Admin		
Employee Admin	Select a hadron file	
Reconciliations	EasyFile20230421_15h41_Backup.zip.docx	
	Provide a username and password for the selected backup file.	
Notification Centre	Login name Password	
Third Party Appointments	PAYE Ref No	
¢ <sup>0</sup> Utilities	Select a period -	
	BACK REQUEST CERTIFICATE DATA	
Provide brought to you by		



## 5.6 Cancelling certificates within e@syFile<sup>™</sup> employer

- a) The application allows you to cancel individual certificates or a range of certificates.
- b) Certificates in CREATED or SUBMITTED or INCOMPLETE statuses can be cancelled using two methods: either by cancelling a single certificate or by cancelling a range of certificates.
- c) Select the specific employer and the reconciliation period associated with the certificates to be canceled.
- d) Once the employer and reconciliation period are identified, proceed to select individual certificates that need to be canceled or select one or more ranges of certificates that need to be canceled.

#### 5.6.1 Cancelling an individual certificate

- a) To cancel a certificate on e@syFile<sup>™</sup> Employer, follow the normal steps to view an employee record to access certificates:
  - i) Select Employer and Period of Reconciliation.
  - ii) Select "**Employee Admin**" from the left-hand navigational pane.
  - iii) Locate and select the relevant employee record.
- b) Below is the employee information screen showing that two certificates have been created for the individual:

File View Help				-	σ
e@syFilĕ	Pounds brought to one to SARS	<ul> <li>▼</li> </ul>	202402 - Connec	ted : PREPROD Version: Logged in ac: 800.00.241 ADMIN	Logout
Employer					
A Dashboard	⊕ <sub>Add</sub> ¢ <sub>Reassign</sub>	E			
Employer Admin	Employee Certificates Employee	Ranges			
Employee Admin	Employee : Search				
Reconciliations				Employee Status	1
Synchronisation     Notification Centre	Surname	First Name	Employee Number	ACTIVE	
Third Party	ID Number	Tax reference	Certificate Number	ALL -	
Appointments			CLEAR SEARCH SEARCH OTH	ER PERIODS SEARCH SELECTED PERIOD	
¢" Utilities					
	Employee : Search result				
	Employee Selection				1
	Period: 202402				
	Status Surn	name First Name	Employee Number	View	
	ACTIVE Emplo	oyee A Employee A	Employee number	VIEW	
	ACTIVE Emplo	oyee B Employee B	Employee Number	VIEW	
V SARS					

i) Select employee by double clicking or clicking on View button.

- ii) This screen will show the two certificates in green on the employee info screen. A maximum of 3 certificates can be displayed on the screen. If there are more than 3 certificates created.
- iii) Click the "View Employee Certificates" button to access all the certificates. If there are 3 or fewer certificates, you can still use the "View Employee Certificates" button,



e@syFile Employer File View Help		- a ×
e@syFilĕ	Valid variable and the second	282.482 Convected: PREPROD Version: Logard in an: Logard in an: Logard in an
Employer Admin	Add     Certificate     Certificate     Number     Priod     202402     Certificate     C	Certificate Number Recon Period 202402 Certificates View Employee Certificates
Employee Admin	Employee: Information	
	B - Individual without an identity or pa	Employee A EMP
Third Party	Date Of Bith  1978/11/05	Employee number Catulation ACTIVE
¢ <sup>0</sup> Utilities	Employee: Contact Details	* *
	Employee: Banking Details	·
		BACK TO EMPLOYEES IT REGISTER SAVE
Prought to you by		

iv) This screen will display when View Employee Certificate button is selected.

e@syFile Employer File View Help	- 0 ×
e@syFilĕ	Produktional from the Television to Logged in acc.
Employer	
A Dashboard	
Employer Admin	Certificate Certificate Number P Certificate Number
Employee Admin	Year Of Assessment: 2024 CREATED Year Of Assessment: 2024 CREATED
Reconciliations	Employee: Information
	Nature of Person     Contracts     Cont
Notification Centre	B - Individual without an identity or pa  Employee A
Appointments	Unit of a bit in         Introl in AA Newferster         Employee number         Sama           1978/11/05         Employee number         ACTIVE         •
¢ <sup>0</sup> Utilities	Employee Certificates
	Employee: Certificate Number Period Of Recon Status Certificate Type Year Of Assessment
	Chiphoyee,
	120240200000050000001 202402 CREATED IRPS 2024 VIEW DEMPLOYEES IT REGISTER SAVE
	Rows per page: 5 🛩 1–2 of 2 < >
Scoully herewhit to use he	Close
<b>▼</b> SARS	

v) There are two options available to view the certificate, either by selecting from the certificates displayed in green or from the popup. The following screen will display once selection is made and the selected certificate will appear in blue, while the unselected one remains green.



oard	0	0		© <sub>View</sub>		
yer Admin	Certificate Number: 2024020000 Recon Period: 202402 Vers Of Assessment: 2024	CERTIFICATE Number: Recon Period: 202402 Var: Of Accorement: 20	20240200000050000001	Employee Certificates		
yee Admin	real OFASSOSSIIIERE 2024	Teal OFASSessillerit. 20	GREATED			
nciliations	Employee A Employee A	Employee Number: Tax Reference N Employee number	lumber: ID Number:			
ronisation						
cation Centre	Certificate details					
Party intments	7060713148202402 Certificate Number 0000000S0000002	Final Certificate Submission	Certificate Type	•	Year Of Assessment	•
BS	Pay Periods Worked 12.0000	Pay Periods in Year of Assessment	ETI Employment Date yyyy/mm/dd	٥	Certificate Tax Period Start	•
	Certificate Tax Period End 2024/02/01	Voluntary Over Deduction	Fixed Rate Taxation		ETI Indicator	
	Employee SIC7 Code 01420 - Raising of horses and other e *					
	Income Received and Deductions					

vi) When a certificate is selected, it shifts to the first position. The screen below shows a certificate, originally in the second position, which has moved to the first position and is now highlighted in green. This movement does not alter the certificate number.

p					
	SARS		202402	Connected: PREPROD Version: 800.00.241	Logged in as: ADMIN
oard yer Admin yee Admin	Certificate Number: 102402000 Recon Period 202402 Year Of Assessment: 2024	Certificate Number T Recon Period 202402 Year 01 Assessment 202	View Employ 4 CREATED	ree ales	
nciliations	Surname/Trading Name: First Names: Employee A Employee A	Employee Number: Tax Reference Nu Employee number	mber: ID Number:		
ronisation					
ation Centre	Certificate defails				*
Party ntments	7060713148202402 Certificate Number	Final Certificate Submission	Certificate Type	✓ Year Of Assessment 2024	
PS	Pay Periods Worked 12.0000	Pay Periods in Year of Assessment	ETI Employment Date yyyy/mm/dd	Certificate Tax Period Start 2023/03/01	
	Certificate Tax Period End 2024/02/01 Employee SIC7 Code	Voluntary Over Deduction	Fixed Rate Taxation	ETI Indicator	
	01410 - Raising of cattle and buffaloes 👻				
	Income Received and Deductions				~
	Tax Directives				
	Certificate history				
brought to you by					

vii) Click **Cancel Certificate** at the bottom of the page. Note that an Individual certificate that has been cancelled cannot be revived.



e@syFile Employer File View Help					-	ð X
e@syFile	March brought to use to ▼SARS	-	202202 Environment PRE-PROC	Connected Version: 800.00.231	Logged in as: ADMIN	Logout
Employer						
A Dashboard	Ø	View				
Employer Admin	Certificate Number Recon Period: 202202 Vers Of Assessment: 2022	CREATED				
Employee Admin	Tear Of Assessment, 2022	CREATED				
Reconciliations	Surname/Trading Name: First Names:	Employee Number: Tax Reference N	umber: ID Number:			
Notification Centre	Certificate details					~
Third Party	tificate Number	Final Certificate Submission	Certificate Type	Year Of Assessment		
- Appointments	000005000008		IRFJ	2022	-	
¢ <sup>0</sup> Utilities	Pay Periods Worked	Pay Periods in Year of Assessment	ETI Employment Date	Certificate Tax Period Start	-	
	001.0000	001.0000	2021/03/02	2021/03/02		
	Certificate Tax Period End	Voluntary Over Deduction	Eived Pate Taxation	ETI Indicator		
	2021/03/03					
	Employee SIC7 Code					
	Income Received and Deductions					
	Tax Directives					
	IAA DIIGCUVOS					
	Certificate history					<u>e</u> ,
Proudly brought to you by			BACK TO EMPLOYEE CANCEL CERTI	VIEW CERTIFICATE	SAVE CERTIFICATE	

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

e@syFile Employer File View Help						-	Ø X
e@syFile	Norde longet to under ▼SARS	- 202202: - Environment	PRE-PROD -	Connected	Version: 800.00.231	Logged in as: ADMIN	Logout
Employer							_
😤 Dashboard	$\odot$	(O) View					
Employer Admin	Certificate Number Recon Period: 202202	Employee Certificates					
Employee Admin	Year Of Assessment: 2022	CREATED					
Reconciliations	Surname/Trading Name: First Names:	Employee Number: Tax Reference Number: ID Number:					
	Castillizate dataile						
Notification Centre		A					
Third Party Appointments	15fcate Number			2022	sent	•	
¢ <sup>0</sup> Utilities	Pay Periods Worked			Certificate Tax P	eriod Start		
	Certificate Tex Period End	Action Confirmation		LOLIVOUVL		5	
	2021/03/03	You are about to cancel 1 Certificate to the value of R 1 800,00.		ETI Indic	ator		
	Employee SIC7 Code	Click 'YES' if you wish to continue, or click 'NO' to stop this action					
			_				_
	Income Received and Deductions	NO YES					~
	Tax Directives						~
	Certificate history						~
		BACK TO EMPLOYEE CANO	EL CERTIFIC	ATE VIEW CI	ERTIFICATE	SAVE CERTIFICAT	E
<b>▼</b> SARS							

ix) If you click **Yes**, a pop-up message will appear confirming that the certificate has been successfully canceled.



e@syFile Employer File View Help					-	ð ×
e@syFile	™SARS		202202 - Environment PRE-PROD -	Connected Version: 800,00,231	Logged in as: ADMIN	Logout
Employer	Ø	©				
Employer Admin	Certificate Number	View Employee				
Employee Admin	Year Of Assessment: 2022 C	ANCELLED				
Reconciliations	Surname/Trading Name: First Names:	Employee Number: Tax Reference Nur	nber: ID Number:			
Notification Centre	Certificate details					×
Third Party Appointments	vrtificate Number	Final Certificate Submission	Certificate Type	- Year Of Assessment	-	
¢° Utilities	Pay Periods Worked	Pay Penods in Year of Assessment 001.0000	ETI Employment Date	Certificate Tax Period Start 2021/03/02		
	Certificate Tax Period End 2021/03/03	Voluntary Over Deduction	Fixed Rate Taxation	ETI Indicator		
	Employee SIC7 Code -					
	Income Received and Deductions					~
	Tax Directives					
	Certificate history					. ·
Provelly brought to you by			BACK TO EMPLOYEE	VIEW CERTIFICATE		

x) If you go back to the View Employee page, the status of the certificate will now reflect as cancelled on the certificate ribbon as well as the View Employee Certificates list. Note that once the certificate has been cancelled it still needs to be submitted to SARS for it to be updated on the SARS system.

🚼 e@syFile Employer		o ×
File View Help		
e@sy <b>Filĕ</b>	Victoria Converting Victor	Logout
Dashboard     Employer Admin	Certificate Number	
Employee Admin	Year Of Assessment: 2022 CANCELLED	
Reconciliations	Surname/Trading Name: First Names: Employee Number: Tax Reference Number: ID Number:	
<b>⊈</b> 5 Synchronisation	Employee Certificates	
Notification Centre	Certificate Number Period Of Recon Status Certificate Type Year Of Assessment	~
Appointments	795071217620220200000050000008 202202 CANCELLED IRP5 2022 VIEW	
<b>⇔</b> <sup>o</sup> Utilities		
	Rows ner name: 5 + 1-1 of 1 ( )	
		¥
	Close	-
	BACK TO EMPLOYEE CANCEL CERTIFICATE VIEW CERTIFICATE SAVE CERTIFICATE	
V SARS		

#### 5.6.2 Cancelling a range of certificates

- a) Select Employer and Period of Reconciliation.
- b) Select "**Employee**" from the left-hand navigational pane.
- c) Select Certificate Ranges from the Employee Admin screen.



e@syFile Employer File View Help										-	0 ×
e@syFilē	▼SARS			-			202202 -	Environment PRE-PROD 👻	Connected Version: 800000.231	Logged in as: ADMIN	Logou
Engloyer											
🐕 Dashboard		⊕ Add ♥ Reassign	A Merge								
Employer Admin		Employee Certificates	Employee Ranges								
Employee Admin		Employee : Search									
Reconciliations								- Employee Status			
() Synchronisation		Surname		First Name		Employee Number		ACTIVE		~	
Notification Centre		ID Number		Tax reference		Certificate Number		ALL		Ţ	
Appointments											
¢ <sup>0</sup> Utilities							CLEAR SE	SEARCH SEARCH OTHE	R PERIODS SEA	ICH SELECTED PER	800
		Employee : Search result									
		Employee Selection									
		Period: 202202									
		Status	Sumame		First Name		Employee Number	View	v .		
		ACTIVE	NGWENYA					Vie	W.		A
		ACTIVE	ARNOLD					VE	w		
		ACTIVE	COMBRING	¢.				VE	w.		
		ACTIVE	MOFOKENG					VE	w		
		ACTIVE	KNOETZE					VE	w		
		ACTIVE	NTONGA					ve	Rows ner name: 20 -	1-15 of 15	•
▼ SARS											

- d) From the Cancel Certificate Range panel indicate the starting and ending numbers for the range of certificates you wish to cancel. More than one range of certificates can be selected and added.
  - i) Range Start A list of all certificates found on the database will be displayed.
  - ii) Range End Only certificates which fall within the range selected will be displayed.
  - iii) **Note**: A range is any certificate number that follows consecutively from the previous number. Alpha characters will sort between numeric characters.
- iv) Click on Add to list. 🚼 e@syFile Employer - 0 × e@sy<u>Fil</u>ë Provertive localization of the local ▼SARS 202202 PRE-PROD -Version: 800.00.231 Logged i Emp -0 A Dashboard cel Certificate Rang 💾 Employer Admin ed on the certificate details screen Employee Admir Ŧ Reconciliations (5 Synchronisation BACK TO EMPLOYEES O Notification Centre Third Party ±<sup>o</sup> Utilities **V**SARS
- e) Click Cancel Certificates Ranges once satisfied with the list of ranges.



e@syFile Employer le View Help	- c
e@syFile	Notebandtranie ▼SARS • 202222 • Environment PRE-PROD • Connected Version: Logged in an: ADMIN
Employer	
Dashboard	Cancel Cattilizate Ranne
Employer Admin	
Employee Admin	an Period of Recon. Individual certificates can be cancelled on the certificate details screen.
Reconciliations	Range Start   Range End
Synchronisation	Start Certificate Number Captured Certificate Count Captured Certificate Value Certificate Range Count Action
Notification Centre	5 24300.00 5 <b>REMOVE</b>
Third Party Appointments	Rowsperpage: 5 + 1-1of1 < >
Utilities	
	BACK TO EMPLOYEES CANCEL CERTIFICATE RANGE
	Revive Centricate Range
Proudly brought to you by	

f) A pop-up message will appear to confirm cancellation of all the certificates falling within the selected range. Click **Yes** to continue or **No** if you do not want to cancel the certificates.

File View Help	- 0
e@syFilë	To share the state of the state
Employer	
A Dashboard	
Employer Admin	Cancel Certificate Range
Employee Admin	On this screen you are able to cancel a range of IRP5's/IT3(a) Certificates for an Employer an Period of Recon. Individual certificates can be cancelled on the certificate details screen.
Reconciliations	Range Start   Range End
	Start Certificate Number End Certificate Number Captured Certificate Count Captured Certificate Value Certificate Range Count Action
Notification Centre	5 24300.00 5 <b>REMOVE</b>
Third Party Appointments	Rows per page: 5 + 1-1 of 1 < >
¢° Utilities	RACK TO EMPLOYEES CANCEL CERTIFICATE RANCE
	Revive Certificate Range
	Action Confirmation
	You are about to cancel 5 Certificates to the value of R 24 300.00.
	Are you sure?
Proudly brought to you by	NO YES
V SARS	

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



fiew Help						-	0
@syFilë	Pradic bringht to see by	•	202202	▼ Environment PRE-PROD ▼	Connected Version: 800.00.2	Logged in as: 31 ADMIN	Log
rployer							
shhoard							
nlover Admin	Cancel Certificate Range						^
plovee Admin	On this screen you are able to cancel a r	ange of IRP5's/IT3(a) Certificates for an Employer an P	eriod of Recon. Individual certific	ates can be cancelled on the c	ertificate details screen.		
conciliations	Range Start - Range E	nd 👻					
chronisation						BACK TO EMP	LOYEES
tification Centre							
ird Party pointments	Revive Certificate Range						~
ilities		Certificate	Cancellation				
ilities		Certificate (	Cancellation				
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liños		Certificate (	Cancellation	OK			
liitles		Certificate (	Cancellation	ОК			
bildios		Certificate (	Cancellation	ок			

h) Note: If you intend to cancel a range and import a new one, ensure that the range of certificates newly imported range falls outside of the canceled range. Otherwise, the previously cancelled certificates will be reactivated and included on the EMP501, however because the cancelled range is still active an EMP601 will be submitted with the reconciliation which will result in the reconciliation failing balancing. This may lead to administrative penalties. It is advisable to use the 'Delete payroll import' option on the Dashboard when importing the same or overlapping certificate numbers.

#### 5.6.3 Reviving a cancelled range of certificates

- a) You can select one or more cancelled certificate ranges and request that these be revived.
- b) When you click "Revive Certificate Range", the system will:
  - i) Revive all certificates in the range (certificate's prior status will be set to CREATED or INCOMPLETE)
  - ii) An audit log entry for each range will be created.
- c) Under Employee Admin, select Certificate Ranges.



e@syFile	*SARS			•			202202	Environment PRE-F	R00 👻 👩 Connected	Version: 800:00.231	Logged in ac ADMIN	
Employer												
A Dashboard		Add Reassign Employee Certificates	Merge Certificate Employee Ranges									
Employer Admin				·								
		Employee : Search										
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Notification Centre		Surname		First Name		Employee Number		ACTIVE			Ť	
Third Party Appointments		ID Number		Tax reference		Certificate Number		ALL			~	
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¢ <sup>0</sup> Utilities												
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දා <sup>e</sup> URABes		Employee : Search result										
φ <sup>o</sup> Utables		Employee : Search result										
y <sup>o</sup> Unades		Employee : Search result Deprind : Search result Employee Selection Period : 202202 Stelue	Surname		First Name		Employee Number		View			
Q <sup>C</sup> URBRIES		Employee : Sourch result Employee : Sourch result Employee Selection Period. 202202 Seture Active	Surname NGVEN/A		First Name		Employee Number		View			
ç <sup>ρ</sup> υπατοκο		Employee : Search result  Employee Selection  Period: 202202  Emain ACTIVE ACTIVE	Sumane NOVENYA ARNOLD		First Name		Employee Number		View View View			
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ýř UMMes		Employee 1 Search result  Employee Selection Perfect 202202  Seture ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE ACTIVE	Sensee Norkeys ABIOLO CONSERIO MOTOREIG NOTOREIG TOTTATA	K 2	First Name		Employee Number		View View View View View View			

d) From the "Revive Cancelled Certificate Range" panel select the certificate range to revive. After making the selection, the "Revive Certificate Range" button will become enabled.

e@syFile Employer File View Help						- 0 ×
e@syFilĕ	Provide longight to see the SARS		•	202202   Environment PRE-PROD	Connected Version: 800.00.231	Logged in as: Logout
Employer						
A Dashboard	Cancel C	Certificate Range				~
Employer Admin	Revive C	Certificate Ranne				<u>^</u>
Employee Admin		sonanouto mango				
Reconciliations	Select	Start Range Certificate Number	End Range Certificate Number	Captured Certificate Count	Date Cancelled	Date Revived
				5	2024	07/22
Notification Centre					Rows per page: 5	
Appointments					BACK TO EMPLOYEES RE	VIVE CERTIFICATE RANGE
¢ <sup>¢</sup> Utilities						
Droutly broutht to you by						
<b>▼</b> SARS						

e) Select **REVIVE CERTIFICATE RANGE**, a pop-up message with a summary of the selected certificates will appear. Click **Yes** to continue.



File View Help										-	0 ×
e@syFilĕ	Novelle kenaget til vere br VSARS		· · · · · · · · · · · · · · · · · · ·	•	202202	- Environn	PRE-PROD -	Connected	Version: 800.00.231	Logged in as: ADMIN	Logout
Employer											
A Dashboard	Cancel Cer	tificate Range									~
Employer Admin											
Employee Admin	Revive Cer	tificate Range									^
Reconciliations	Select	Start Range Certificate N	umber	End Range Certificate Num	per	Captured Ce	ertificate Count		Date Cancelled	Date Revived	
							5		2024	/07/22	
Notification Centre								Row	is per page: 5		>
Third Party							ſ	BACK TO EMOL			
±° Utilities				<b>A</b>			l	BACK TO EMPER		VIVE CERTIFICATE	GANGE
Ť											
			A	Action Confirm	ation						
			You are abou	it to revive 5 certificates to th	e value of R 24300.	00					
				Are you sure?							
				NO YES							
Proudly brought to you by							1				
V SARS											

i) Click **Yes** to confirm, you will see a pop-up message confirming revive cancelled certificates, click **OK**.

e@syFile Employer								- 0	×
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Employer									
A Dashboard	Cano	cel Certificate Ran	<b>Je</b>					~	
Employer Admin									
Employee Admin	Revi	ve Certificate Ran	<b>1</b> 6					^	
Reconciliations	Sel	ect Start Ra	nge Certificate Number	End Range Certificate Number	Capture	d Certificate Count	Date Cancelled	Date Revived	
		]				5	2024/0	17/22	
Notification Centre							Rows per page: 5 +	1-1 of 1 < >	
Third Party									
- Appointments								BACK TO EMPLOYEES	
Ţ Ounites				Revive Cancelled Certificates					
			Revive process c	ompleted.					
			5 certificates set	as 'CREATED'.					
			0 certificates set	as 'INCOMPLETE'.					
					ок				
Proudly brought to you by			L			4			
<b>▼</b> SARS									

# 5.6.4 Reassign Certificates

- a) The e@syFile application allows a user to move (reassign) a certificate from one employee to another employee in cases where the certificate was incorrectly allocated to the wrong person.
- b) Follow the steps to reassign certificates:



- i) Select Employer and Period of Reconciliation.
- ii) Select **Employee Admin** from the left hand navigational pane.
- iii) Select **Reassign Certificates** from the Employee Admin screen.

e@syFile Employer											-	0
e@sy <u>Filĕ</u>	▼SARS			•			202202	Environment PRE-PR00	Connected	Version: B00.00.231	Logged in ac ADMIN	Lo
Employer												
者 Dashboard		⊕ Add <sup>©</sup> Reassign	.t. Merge ■									
Employer Admin		Employee Certificate	s Employee Ranges									
Employee Admin		Employee : Search										
Reconciliations								Employee Status				
() Synchronisation		Surname		First Name		Employee Number		ACTIVE			*	
Notification Centre		ID Number		Tax reference		Certificate Number		Registration Status -			Ţ	
Appointments												
‡⁰ Utilities							CLEAR	SEARCH	OTHER PERIODS	SEARCI	H SELECTED PE	RIOD
		Employee : Search result  Employee Selection Period: 202202 Status	Surname		First Name		Employee Number		View			
		ACTIVE	NGWENYA						VIEW			-11
		ACTIVE	ARNOLD	~					VEW			- 11
		ACTIVE	HOROVEN						VEW			
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		ACTIVE	NTONGA						NEW			-
									Rows per p	page: 20 🛩	1-15 of 15	$\langle \rangle$
route tought to contre ▼SARS												

iv) Select the "From Employee" and "To Employee" from drop down lists which show all employees in the currently selected Employer and Period of Recon.

e@syfileEmployer File View Help				- 0	×
e@syFile Visioneer Pre-Free	10 👻 🕒 Connected	Version: 800.00.231	Logged in as: ADMIN	Log	pout
Employer					_
A Dashboard Reassion Certificates					
Employer Admin					
Employee Admin This function allows you to reassign certificates that were linked to an incorrect employee to the correct employee. This screen is only available to the ADMIN user, and if the Payroll file editing is allowed.					
Reconciliations					
Notification Centre     Surname:     First Names:					
Appointments Employee Number:					
¢ <sup>o</sup> Utilities Tax Reference Number: ID Number:					
ID Number:					
	REASSIG		CANCEL	REASSIGN	
Provide formage that you by					

- v) Click **Reassign**, the system will display a list of the certificates linked to the "From" employee for the period of recon.
- vi) Select certificate to reassign and click Reassign.



🚼 e@syFile Employer						- ø ×
File View Help						
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Employer						
🐴 Dashboard	Reassign Certificate	s				
Employer Admin						
Employee Admin	This function allows you to rea This screen is only available to	ssign certificates that were linked to the ADMIN user, and if the Payroll fi	an incorrect employee to the corre life editing is allowed.	ct employee.		
Reconciliations						
	From Employee	Ť		To Employee	Ť	
Notification Centre	Surname:			Surname:		
. Third Party	First Names:			First Names:		
Appointments	Employee Number			Employee Number:		
A <sup>0</sup> Litition	Employee Number.			Tax Reference Number:		
T Condes	lax Reference Number:			ID Number:		
	ID Number:					
					REASSIGN LOGS CANCEL	REASSIGN
	Select Certificate to Rea	ssign				
	Select Certificate	Certificate Number	Surname	Initials	Employee Number	
				GV	98815716	
Provide brought to you by					CANCEL	

vii) Once the Reassign button is clicked a final confirmation box is presented and if confirmed selected certificates are moved to the selected employee.

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File View Help				
e@syFilĕ	TSARS		202202 - Environment PRE-PROD	Connected Version: Logged in as: Logout
Employee				
😤 Dashboard				
E Employer Admin	Reassign Cei	tificates		
	This formation allows			
Employee Admin	This screen is only a	rallable to the ADMIN user, and if the Payroll file editing is allow	ed.	
Reconciliations	From Employee		To Employee	
	- Tom Employee		to Employee	
Notification Centre	Surname:		Surname:	
Third Party	First Names:		First Names:	
Appointments	Employee Number:		Employee Number:	_
¢ <sup>0</sup> Utilities	Tax Reference Numl			
	ID Number:		A	
				REASSIGN LOGS CANCEL REASSIGN
	Select Certificate t	_		
		Confir	m Poassign	
		Comm	III Keassigii	
	Select Certificate	Are you sure you want to reassign all of the certif	ficates from employee NGWENYA to employee ARNOLD?	Employee Number
		Certificates t	that will be moved are:	98815716
		_		CANCEL REASSIGN
Proudly brought to you by		NO	D YES	
7 3747(3	L			

viii) Click OK on the confirmation mesaage





#### 5.6.5 Merge employee

- a) When importing Payroll files, if the minimum required demographic information is not identical for two individuals, the system might create a second employee record for the individual. The Merge functionality in e@syFile can be utilised to rectify this issue.
- b) This function allows you to merge certificates linked to multiple employee records to a single employee record.
- c) Follow the steps to merge employee:
  - i) Select Employer and Period of Reconciliation.
  - ii) Select Employee Admin from the left hand navigational pane.
  - iii) Select Merge Employee from the Employee Admin screen.
  - iv) Select the "From Employee" and "To Employee" from drop down lists which show all employees in the currently selected Employer and Period of Recon.
  - v) Click the Merge button.
  - vi) Once the Merge button is clicked a final confirmation box is presented and if confirmed selected employees will be merged.e

e@syFile Employer File View Help	- 0
e@syFilĕ	Nontring Starters ▼SARS  ▼ triving sets Place Non- Starters Place Non- Starters S
Employer	
A Dashboard	
Employer Admin	Merge Employee
Employee Admin	This function allows you to merge certificates linked to multiple employee records to a single employee record. This cream is not in will blue to the ADMIN more used if the Devel Records for a single employee record.
Reconciliations	Find Englopee
	ACUM V BACON V
Notification Centre	Surname: Surname: Elect Numeer RAPEND
Third Party Appointments	First Names:
∯ <sup>0</sup> Utilities	Employee Number:
	ID Number:
	Confirm Merge
	Are you sure you want to merge all of the certificates from employee COMBRINCK to employee KNOETZE?
	Certificates that will be moved are:
	NOYES
▼SARS	

vii) Upon confirmation all certificates linked to the "From Employee" for the selected period of recon will be moved to the "To Employee", and the "From Employee" removed from the selected period of recon.

	Jpdated Successfully	
Employees updated successfully		
	ОК	

# 6 PAYE RECONCILIATION RETURN MANAGEMENT

- a) The primary objective of e@syFile is to facilitate the submission and management of PAYE Reconciliation Returns, also known as EMP501's. There are two types of reconciliation returns that employers must submit to SARS:
  - i) Bi-Annual/Interim reconciliation return covering the period from 1 March to 31 August
  - ii) Annual/Final reconciliation return period from 1 March to 28/29 February.
- b) Both interim and final PAYE Reconciliation returns can be submitted multiple times to correct (normal submission) or replace (full resubmission) previously submitted information.
- c) Prepare the employer, employee, and certificate data before initiating the creation of an EMP501 return.
- d) Choose from three options to create EMP501 return once the data has been prepared:
  - i) Request a pre-populated return from SARS ("Accept SARS Data").
    - A) This is the preferred option.
    - B) This option is an online service requiring a synchronised eFiling profile.
  - Request a blank form ("Own Values") where financial data needs to be entered manually.
     A) ETI employers must not use this option.
    - B) If this option is used, ETI values cannot be captured and all ETI claimed via EMP201 will be removed.
  - iii) ETI Reinstatement.
    - A) This option is designed to correct ETI values that were incorrectly reversed in EMP201 forms from previous reconciliation submissions.
    - B) It can only be used for previously submitted PAYE Reconciliation returns for the current employer and reconciliation period.
    - C) This option is not applicable to future submissions. It will restore the ETI values declared on the EMP201, along with any internally revised (assessed) figures by SARS but will not include any reconciliation adjustment.
    - D) This functions in a similar way to the "Accept SARS Data" option, except for the benefit that that it also populates the ETI values as originally submitted/declared to SARS.

# 7 REQUEST EMP501 RETURN

- a) The EMP501 return can be requested using either SARS values, own values, or ETI Reinstate
- b) Select "Reconciliation" from the left-hand navigational pane and the either "Accept Data", "Own Values" or "Reinstate ETI".

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<b>▼</b> SARS								

# 7.1 Request EMP501 with SARS Values

- a) Select **Accept Data -** will require eFiling credentials and populate the return with the SARS data:
  - i) Enter your eFiling credentials.
  - ii) Once authenticated, an EMP501 return will be created, populated with employer demographic information as well as liabilities and payments for each month.

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# 7.2 Request EMP501 with Own Values

- a) Select **Own Values -** does not require eFiling credentials and allows you to manually enter your own values on the return.
- b) After selecting this option, a warning message will display with two options: request SARS data or use my own values.

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	You are about to capt being accepted by SA	ure your own data on the EMP501 form. No RS	ote that the data at SARS may be different	and may lead to the EMP501 form not	
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- c) After selecting 'Use My Own Values,' a warning message will appear to reconfirm your choice.
- d) Click 'OK' to proceed, a new EMP501 returns will be created and populates with employer, employee and certificate information from the prior submission.
- e) Edit the new EMP 501 return.

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Third Party Appointments	Using the "Own Valu need to be rectified o	e" option may lead to discrepancies between the v	values declared on the EMP501 and the em	ployer account liabilities which ma	y						
¢ <sup>9</sup> Utilities	If you have claimed E EMP501 reconciliati	need to be recrime dowing the submission process. If you have claimed ETI on your EMP201 returns, you must use pre-populated values to ensure that the correct ETI values are populated on the EMP501 reconciliation.									
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## 7.3 Request EMP501 with ETI reinstatement

- a) Select **Reinstate ETI -** will require eFiling credentials and is specifically for correcting mistakenly reversed ETI values declared on EMP201's in a previous reconciliation submission.
- b) Enter your eFiling credentials; once authenticated, an EMP501 return will be created, populated with employer demographic information, liabilities and payments for each month. ETI values are also populated in the return.
- c) Edit the new EMP 501 return.

# 7.4 Request EMP501 period in the future

- a) Employers who seize trading or no longer employs employees are required to submit reconciliation following such event and must submit a reconciliation during the full year/annual reconciliation before the end of the transaction year. In this instance the system will request verification that a future dated reconciliation is indeed required.
- b) Select "Reconciliation" from the left-hand navigational pane.
- c) Select employer and future period of recon.
- d) Select one of the following options: **Accept Data** or **Own values**. Note that the **Reinstate ETI** option is greyed out because is not available for future dated submissions.

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				Reconci	iliation period	in the future			
				You have selected a	a reconciliation period in th	e future.			
				Do you want to con	tinue with the request?				
					YES NO				
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e) Click **Yes** to continue from the displayed message.

- f) Complete the following information:
  - i) Reason: select one of the reasons from the drop-down list.
  - ii) Capture the cessation date.
  - iii) Additional information: This is an optional field.
  - iv) Click OK to continue.



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Employer Admin Employee Admin	Concerning in trave manual values for the Carrow Concerned and Accept Data	Reinstate ETI Own Values	EMP501 History
Reconciliations	EMP501 Reconciliatio	Reconciliation period in the future	· · · ·
Notification Centre     Third Party     Appointments	PAYE	You have selected a reconciliation period in the future. Do you want to continue with the request? YES NO	Action
¢ <sup>o</sup> Utilities	Channel	Reason: The employer ceased trading Employer ceased trading	5
		Date you ceased to be an Employer: Employer is insolvent Employer is insolvent Employer is insolvent	
		Additional Information Any Other Reason	
		Please note that should you continue with the submission of this reconciliation, you will be deregistered as an employer. If the submission date of this reconciliation is after, 14 days of the effective date completed, administrative penalities may be imposed. Should SARS find that you submitted this reconciliation with the intern to defraud SARS you will be held liable and may face criminal charges.	
Poully brought to you by		OK	

g) Enter your eFiling credentials; once authenticated, an EMP501 return will be created. Note that eFiling credentials will not be required if Own Value option was selected.

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V SARS								

h) Continue to Edit the EMP501.

# 7.5 Reconciliations Menu

- a) The top section of the **'EMP501 Reconciliation Work Page'** displays reconciliations that are not submitted for the selected employer and reconciliation period (i.e., those with statuses such as 'Saved,' 'Ready to File,' 'Online Validation Required,' or 'Pending'). Depending on the status of the EMP501, the EMP501 Reconciliation Work Page provides the following action options:
  - i) Open Return open the EMP501 form to view or edit.
  - ii) Refresh Return Users can at any time refresh.
  - iii) Summary Report extracts employee detail, certificate information and certificate status details in a text file which can be imported into other applications for analysis purposes.
  - iv) Submit to SARS:
    - A) Normal (delta) submissions: Include all certificates in a created, status and EMP601 which contains values for certificates in cancelled, cancelled-submitted as well as cancel certificate ranges to SARS (exclude certificates in a Submitted or Incomplete status)
  - v) Download EMP501 PDF View EMP501 PDF (Render the EMP501 Read Only PDF for user to view, save or print).
  - vi) Full Resubmission Request:
    - A) Selecting this option which will result in a complete replacement of prior information. This option should be used in instances where the employer selected disc submission, which was not submitted to SARS and uploaded or where the certificate ranges already submitted is no longer relevant and new ranges were issued and the certificates are no longer on the database to cancel. This submission is used in exceptional circumstances.
    - B) Use this function only when you need to completely replace all previously submitted EMP501 data with a new submission.

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Employer	Reconciliat	tions						
	SARS might have	ve financial values for the EMP501. Set	ect "Accept Data" in order to po	opulate the return with the SARS da	ta OR select "Own Values" in o	rder to capture your own values on th	he return.	
Employer Admin		Accept Data				Own Values		EMP501 History
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Reconciliations								
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Notification Centre	PAYE	SDL	UIF	ETI	Туре	Status		Action
Third Party Appointments	R 0.00	R 0.00	R 0.00	R 0.00		Ready To File		
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	EMP501 Reco	nciliation Status Dashboard						Refresh Summary Report
	Channel		Date & Time		Statu:		Actions	Submit to SARS
								Download EMP501 PDF
								Full Resubmission Request
Proudly brought to you by								

b) The 'Reconciliation Status Dashboard' displays reconciliations that have been submitted for the selected employer and reconciliation period, including those filed electronically through the e@syFile Flex application if EMP501 History was utilised (i.e., those with a 'Submitted' status). The EMP501 Status Dashboard provides the following action options for reconciliations submitted via the replatformed e@syFile system:

PAYE-easyFile-G01-e@syFile™TC Employer Guide



- i) Generate IRP5/IT3(a) PDF's.
- ii) PAYE Dashboard
- iii) Summary Report extracts employee detail, certificate information and certificate status details in a text file which can be imported into other applications for analysis purposes.
- iv) ETV Report
- View EMP501 PDF (Render the EMP501 Read Only PDF for user to view, save or print). Note that the EMP501 status and related data will determine which action items should be available.
- c) Once submission completed successfully, the status will update to submitted and EMP501 moved to Recon Status Dashboard. While in pending status it will remain in the Recon Work Page grid.



# 8 COMPLETE EMP501 RETURN

- a) Once an EMP501 return has been created:
  - i) Capture the required information and edit the return where required, ensuring all highlighted mandatory fields are corrected.
  - ii) Select one of the following options to complete the EMP501 return: Accept SARS Data, Use Own Values, or ETI Reinstate.
  - iii) Complete the specific steps for the selected option, the EMP501 return, will be displayed with or without prepopulated data, depending on the selected option.
  - iv) Select the any of the following options after completing the return:
    - A) Save This will save the return and remain on the return window.
      - B) File and Close This will save the return and close the return window. The user will be directed back to the main Reconciliations page. The status of the return will be set to 'ready to file'.
      - C) Exit This will save the return and close the return window (without filing the return) and navigate back to the main Reconciliations page. The status of the return will be set to 'saved.'
      - D) Download- the EMP501 return can be downloaded and saved.



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	Financial Particulars	
	Declaration v	
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# 8.1 PAYE Reconciliation return Submission to SARS

## 8.1.1 Online Submission of a PAYE Reconciliation return

- a) Online submission process:
  - i) From the left hand menu select "Reconciliation".
  - ii) The reconciliation must be in status "Ready to File".
  - iii) Select" Submit to SARS" from the action menu next to the reconciliation entry.

lashboard Employer Admin	() SARS might have financial vo	Nues for the EMP501. Select "Accept Data"	in order to populate the return with the SARS of	ata OR select "Own Values" in order to c	pture your own values on the return.	Over Molecce		
imployee Admin		Accept Data				Own values		EMP301 history
Reconciliations	EMP501 Reconciliation W	Vork Page						
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Juities	EMP501 Reconciliation St	tatus Dashboard						Open Return Refresh
	Channel	Date & Time		Str	tus			Summary Report
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iv) The system will perform pre- submission validation and if validations pass, the system sets the status of the PAYE Reconciliation return to "Pending Submission" and then later the status of the PAYE Reconciliation Return is set to "Submitted."

#### 8.1.2 Disc Submission of PAYE Reconciliation return

- a) Disk submission is generally discouraged; however, it is an available alternative in e@syFile to an online submission and only Payroll Administrators can perform this function, and the action to trigger it is placed under the Utilities menu.
- b) eFiling Authentication is also required to perform a Disk Submission.
- c) In the case of disk submission, a PSV (Pipe Delimited File) is created together with PDF versions of the EMP501 and EMP601 are also created and placed in the same destination folder selected by the user, with the aim that the user has to print and sign them and bring them to the branch together with the compressed file or Zipped file.
- d) After the submission file is created:
  - i) The EMP501 status will be set to "SUBMITTED"
  - ii) A record will be created in the Submission log which records the submission and displayed in the PAYE Reconciliation Status dashboard.
- e) Disk submission process:
  - i) Select "Utilities" from the left navigation pane.
  - ii) Select Disc submission and then select a submission in "Ready to File" status from the grid, and then select Save to Disk to generate an encrypted PSV file for manual submission at a SARS branch.
  - iii) Either a normal or full resubmission can be made by selecting the relevant option from the action dropdown menu.
  - iv) If the submission fails Pre-submission validation, the user will be directed to the Presubmission Validation Logs that can be accessed via the EMP501 Reconciliation Work Page or the Utilities menu.
  - v) If the submission file passes Pre-submission validation, the system will provide an option to indicate a destination folder for the encrypted PSV file and related documents.

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# 8.2 Generate report

- a) The e@syFile application provides functions within the EMP501 reconciliation status dashboard that allows users to extract the following reports:
  - i) Summary report
  - ii) Employment Taxes Validation (ETV) report

#### 8.2.1 Summary report

- a) The summary report extracts data from the local database, enabling users to generate a summary report. This report facilitates the export of certificate data based on employer and reconciliation period. Users can request the report, which can then be saved to their PC in text format.
- b) The report is available on PAYE Reconciliation Status Dashboard as an action next to each entry.



#### 8.2.2 ETV report

- a) SARS will perform the Employment Taxes validation on all IRP5/IT3(a) certificates submitted. The report is a text file which contains details of the certificates that failed validations.
- b) The option to save the ETV report will be visible only when there is an ETV report available for the specific PAYE reconciliation Return. These ETV reports are received during the synchronization process.
- c) Steps to view and download an ETV Report:
  - i) Select "Reconciliations" from the left navigation pane.
  - ii) From the "EMP501 Status Dashboard" panel, select "ETV Report" under the list of actions.
  - iii) The "ETV Reports" panel will appear below the "EMP501 Status Dashboard".
  - iv) Select a report to view.
  - v) Select "Download Reports" to download the available reports.



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										ETV Report View EMP501 I	PDF		

#### 8.2.3 Tax Directive Report

- a) SARS generates the Tax Directive report at specific dates and distributes to Retirement Fund Employers when they use the Synchronise functionality. The report contains calculated/suggested tax rate(s) given the employees other sources of income.
- b) The option button to download and view Tax Directive reports will only be available on the Notification Centre page.
- c) The user will receive a SARS Letter during synchronisation to alert them that Tax Directive feedback is available to download.
- d) Steps to view and download a Tax Directive Report:
  - i) Select "Notification Centre" from the left navigation pane.
  - ii) Select an Employer from the Letters grid.
  - iii) If SARS issued a Tax Directive Letter for the selected PAYE Reference number, a report will be available to retrieve by selecting the "Download" option.
  - iv) The "Tax Directive Report" grid will be populated with all available Tax Directive report for the selected Employer.
  - v) Reports must be available to view after downloading.
  - vi) Users must be able to save the tax directive report to their local environment.

## 8.3 Printing certificates

- a) Steps to view, download and print Employee Certificates:
  - i) Select "Employee Admin" from the left-hand navigational pane.
  - ii) Select the Company Name and Transaction Year for the certificate that you wish to print.
  - iii) Click **View** next to the employee's name to open record Open the certificate.
  - iv) Click View Employee Certificates, the employee certificate number will display.
  - v) Click VIEW CERTIFICATE



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Employer					
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Employer Admin	Certificate Number: Recon Period: 202202	Employee Certificates			
Employee Admin	Year Of Assessment: 2022	CREATED			
Reconciliations	Surname/Trading Name: First Names: NGWENYA	Employee Number: Tax Reference Num	ber: ID Number:		
Notification Centre	Certificate details				^
Third Party Appointments	7950712176202202 Certificate Number 00000050000008	Final Certificate Submission	Certificate Type	Year Of Assessment	•
¢ <sup>α</sup> Utilities	Pay Periods Worked 001.0000	Pay Periods in Year of Assessment 001.0000	ETI Employment Date 2021/03/02	Certificate Tax Period Start 2021/03/02	
	Certificate Tax Period End	Voluntary Over Deduction	Fixed Rate Taxation	ETI Indicator	
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vi) Download and save the certificate.

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>	Documents	SetupEasyFileEmployer 800-213	2024/05/22 13:06	File folder	
>	🚞 FDrive	Offline_Build_v8.0.0_52	2024/04/02 16:06	File folder	
>	Pictures	easyFile-ThinClient-0.0.2-bin	2024/04/02 16:06	File folder	
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	File name:	NGWENYA_IRP	5IT3a_PRINT_ONLY		
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# 8.4 Backup e@syFile database

- a) To back up the database, the system will prompt you to select a target folder. Subsequently, it will perform a full backup of all e@syFile databases and generate a single zipped file that contains backups of all databases. This backup file can be archived and later used to restore data into e@syFile.
- b) Only a system administrator can perform database backups.



- c) It is important to make frequent backups of your reconciliation information. The backup process on e@syFile™ Employer is quick and simple.
  - i) Click Utilities.
  - ii) Click Database Utilities.
  - iii) Select BACKUP DB.
  - iv) Select OK on the pop message.

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Employer		
	Utilities	
A Dashboard	Database Utilities	
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Employee Admin	Here you are able to create a backup of your database or restore your database from a backup	
Reconciliations		
<b>G</b> 5 Synchronisation	Backup DB	
Notification Centre	A back-up of you database has been created, please save the created back-up file.	
Third Party Appointments	NOTE: If you do not save, the back-up will be lost, and you will have to do another back-up.	
¢ <sup>0</sup> Utilities		
	ŬŔ	
Proudly brought to you by		

#### v) Select a destination folder and click OK.

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	Freed	1-20240722 141-47 Destant			
File name	Easyr	ne20240722_14n47_Backup			
Save as type	Comp	ressed (zipped) Folder			

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



- d) Ensure e@syFile<sup>™</sup> Employer login details, which created the back-up, are saved with back-up files.
- e) The e@syFile<sup>™</sup> 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<sup>™</sup> Employer login details which created the back-up are used.

## 8.5 Restore e@syFile database

- a) To restore the database, the system will prompt you for a source ZIP file from a prior backup and thereafter perform a full restore of all the e@syFile databases from that file.
- b) All current data is overwritten.
- c) Only a system administrator or Payroll Administrator can restore a database.
- d) Note that a restore of a prior database can only be done for a database with the correct structure:
  - i) If structural changes have been made to the databases between the e@syFile version on which the backup was made and the version in which the restore is being attempted the restore will fail as the data structures will not match what e@syFile is expecting.
  - ii) An example of this is that for the re-platformed version of e@syFile, only backups made in version e@syFile V8.0.0 or higher can be restored.
- e) The below steps show how restore the database:
  - i) Click **Utilities**
  - ii) Click Database Utilities
  - iii) Click Restore E@syFile DB
  - iv) Select location from which to restore the database and select the back-up file you wish to restore.

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VSARS									

# 8.6 Import payroll file validation logs

- a) Each time a validation of a Payroll File import or a PAYE Reconciliation is performed a validation log entry must be created.
- b) The purpose of the validation logs is to provide feedback to the user on the result of the validation, and most importantly list the errors found, so that the user may then correct these errors.
- c) A user must be able to view the listing of the validation logs and be able to view the errors in the log, as well export a validation log entry to a text file.
- d) Validation logs will record the following:
  - i) The fact that an import or validation was attempted.
  - ii) The outcome of the validation.
  - iii) Any validation errors that were detected.
- e) Steps to view validations logs:
  - i) Navigates to the Validations Logs screen under the Utilities Menu.
  - ii) Selects one of the validation log records, the system will display all available records.

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Notification Centre	Log Catego	Payroli Imports	J					
Third Party Appointments	FILENAM	Payroll Imports	DATE IMPORTED	STATUS	ACTIONS			
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	Consecutive	e certificate numbers.txt	2024/07/08 23:03:36	PASSED - IMPORTED	VIEW SAVE TO	FILE		
	Consecutive	e certificate numbers.txt	2024/07/05 02:38:13	PASSED - IMPORTED	VIEW SAVE TO	FILE		
	Consecutive	e certificate numbers.txt	2024/07/05 02:11:28	PASSED - IMPORTED	VIEW SAVE TO	FILE		
				Rows per page	e: 5 <del>√</del> 1–5 of 5	< >		
	Disc Submission						~	
7 S/4RS								

iii) Select **VIEW**, the system displays more details about the, including the content of the error messages.

## 8.7 User Management

👫 eØ5)

- a) After initial installation e@syFile will have a system administrator user setup with username ADMIN as configured during installation. This default user can then login and is able to create and manage the other required users.
- b) There are 2 roles in e@syFile (Payroll Administrator and Data Capturer)

i) **Payroll Administrator -** The payroll administrator has access to all the system functionalities including the System Admin Functionality listed above.

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Reconciliations								ADD	USER
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Notification Centre		ADMIN	ADMIN	ADMIN	000000000	Payroll Administrator	ACTIVE		
Third Party Appointments								Edit	
								Change Pass	vord
Oundes		Validation Logs **							~
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- ii) **Capturer -** A data capturer's task as the name implies is a person whose role is to capture information into e@syFile, but their role does not allow system administration or submission functionality. The Capturer has access to all functionality with the exception of:
  - A) Disk submission
  - B) Full resubmission
  - C) ETI Re-instatement
  - D) User Management
  - E) System administration

## 8.7.1 Create and Edit Users on e@syFile

- a) The system enables system administrators and payroll administrators to create, edit, activate/deactivate users, assign user roles, manage user permissions for payroll editing, and reset user passwords.
- b) Step to create and edit users:
  - i) Navigates to the User management screen under the Utilities Menu.
  - ii) Click on **ADD USER** button or click the Edit button for existing users.



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e@syFilĕ	resets to age to a	over br ₹S		•		202202 -	Environment PRE-PRCD 👻 🙆 C	onnected Version: 800.00.231	Logged in as: ADMIN	Logout
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¢ <sup>o</sup> Utilities									lange Password	
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Proudly brought to you by										
V SARS										

iii) Capture user information or edit existing users, including the required roles and password.iv) Click SAVE.

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e@syFile	▼SARS  • 202202 • Environment PBE_PAGD • Convected Prices Logged are LLC
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Dashboard	Database Utilities ~
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teconciliations	ADD USER
ynchronisation	Username First Name Surname Contact Number User Group Status Actions
lotification Centre	ADMIN ADMIN ADMIN 0211113934 Payroll Administrator ACTIVE ···
hird Party ppointments Itilities	Edit User
	ADMIN Email Address * admin@easyfile.gov.za
	First Name *ADMINADMIN
	Contact Number* 0211113934 Payroll Administrator
	Status     Payrol File Editing       Active     Allowed
Proudly brought to you by	CANCEL CLEAR SAVE
<b>SARS</b>	

# 8.7.2 Create e@syFile Password

- a) The e@syFile passwords must contain at least one capital letter, one small letter, one numerical character and one special character, with a minimum of 6 characters required.
- b) After first installation when a user opens e@syFile for the first time, the system will ask for a PAYE Reference number and SARS eFiling credentials for verification. Upon registration this information will be saved with the ADMIN user details for password verification, should the ADMIN user need to do a password reset in future.



🔛 e@syFile Employer		-	0	×
File View Help				
rie View Hep Employer	22 July 2024 3 30 pm Welcome to e@syFile PAYE/Income Tax Reference Number SARS eFiling password			
This software has been developed to help you, the employer, to do your PDT: reconciliations correctly afficiently and is a more user friendly you With this software you can all your PDT' reconciliation of the and then updately you refermation when you are hitly reconcilied and ready to submit Welcome to a new and easiler way of reconciling. SABS. At Your Service.	BACK			
▼ SARS				

- c) Creating first password and password hint on registration:
  - i) Capture password and password hint.

e@syfile Employer			
e@syFile Empoyee	Welcome to e	e@syFile	
	Password	Confirm Password	
Welcome to SARS edgsyFile Employer As this is the first time that the application is being run, you are kindly asked to create a local login account to access this application. This login accound (username and password) will be used to access this application only, and should not be the same username and password used to access SARS eFiling (When data is transmitted to SARS, you will be asked for your eFiling login details, and only when this authentication passes will information be submitted.	Password Hint Would you like to be able to edit informa Allow csv editing Please be aware that should you lose or I understand RECISTER	nation imported from a CSV file? or forget your pessword. SARS eFiling will not be able to retrieve or reset it.	
reache locade to you by			

#### 8.7.3 Reset Password

- a) Only the ADMIN user can access this function.
  - i) Navigates to the User management screen under the Utilities Menu.
  - ii) Select the Change Passwords.



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Employer Admin											
Employee Admin		User Management								^	
Reconciliations									~	DD USER	
		Username	First Name	Surname	Contact Number	User Group		Status	Actions		
Notification Centre		ADMIN	ADMIN	ADMIN	0211113934	Payroll Administrator		ACTIVE			
Appointments									Edit		
¢ <sup>¢</sup> Utilities									Change Pa	ssword	
		Validation Logs **									
		Disc Submission								~	
<b>V</b> SARS											

# iii) Supply new password and password hint.

# iv) Click CHANGE PASSWORD

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Third Party Appointments				(	Change Passv	vord			Edit		
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Pouchy brought to you by					CANCE	CHANGE PASS	VORD				

## 8.8 Notification centre

- a) The notification centre serves as central place where a user can view and manage all correspondence (messages) sent by SARS.
- b) There are two types of messages:
  - i) Notifications
  - ii) Letters
- c) The Notification Centre will show a count of all correspondence that needs attention, with a separate count for each letter type listed under each employer/PAYE reference number.



- d) To access the new Notification Centre, synchronise in order to retrieve correspondence.
  - i) Click Notification Centre on the left menu pane, to display all available correspondence.

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Employer					
A Dashboard	Notification Centre				
Employer Admin	Here you are able to view any correspondence from SARS. To view any of the letters, please cli     (New – available via synchronisation)     20 – a labele via synchronisation)	ck on the applicable employer to expand the list of letters.			
Employee Admin	Comessi court.				
Reconciliations	Search by PAYE Reference Number or Employer Name Q				
Synchronisation     Notification Centre	Employer Name 🛧	Items to Sync	Available Letters	Letter Type	
Third Party		0 new	Letters 26	Letter Types 16	
Appointments					
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				Tot	al Rows: 1
	Tax Directive Reports				
	Here you can download and view Tax Directive Reports.				
	TAX DIRECTIVE REPORTS				^
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7 SARS					

- ii) 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.
- iii) Click **OK** to view the available correspondence.
  - A) The details displayed include letter type and status for all available correspondence.
  - B) **Please note:** Third Party Appointment notifications must be opened to add the details to the Third Party Appointment menu for processing.
- iv) 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.

SARS			201202 - Environ	ment PRE-PROD - Connected	Version: Logged in as: 800.00.231 ADMIN
7060713148 - DEPT OF SA POLICE			11 new	Letters 26	Letter Types 16
		Employer Sele	t		
The ac	ive e@syFile Emple	oyer database you are w	orking on has been chang	ed to:	
		ок			
1 row selected					Tota
	(Dicplay ovpapdod d	atails for colocted Employer)			
Sei	d Form Type	etails for selected Employer)			
Show Read Only	LL				ARCHIVE
Letter Id	Tax year	Message Type	Audit Case Number	Status	Date Issued 🤟
20102034	202302	LEPAYE-IM0004	202850256 AUDIT	IN AUDIT	2024-05-20
20102029	202302	LEPAYE-IM0003	202850256 AUDIT	IN AUDIT	2024-05-20
20101977	202302	LEPAYE-IM0002	202850256 AUDIT	IN AUDIT	2024-05-20
20101947	202302	LEPAYE-IM0001	202850256 AUDIT	IN AUDIT	2024-05-20
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# 9 SYNCHRONISATION

- a) The e@syFile application includes an online functionality that requires an internet connection to retrieve SARS data and communication via the synchronisation process. During synchronisation the e@syFile database data will be updated and synchronised with what was received from SARS. The various data categories will be available as follows:
  - i) Correspondence will be visible in the Notification Centre
  - ii) AA88 Notices will be available in the Third Party Appointments menu.
  - iii) IT Registrations will be available in the Notification Centre, new and confirmed, existing IT reference numbers that are returned during the synchronisation process will be inserted in the IT Reference number field for the related Employee record, or updated status will show in the View employee tab under Bundle reg if the option was used for the registration.
  - iv) eFiling Profile and Employer information employer information will be updated into the local database.
- b) The eFiling synchronisation function include the ability to synchronise the following:
  - i) <u>eFiling profile and Employer information</u>: This will synchronise all employer information linked to the SARS eFiling profile.
  - ii) Letters and Correspondence
  - iii) <u>AA88 notices</u>: AA88 correspondence, EMPSA and other letters.
  - iv) Taxpayer Income Tax Registrations: `
  - v) <u>All</u>: Where all information is required to be synchronised, e.g. employer information, letters and correspondence and result from ITREG.
- c) **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.
- d) The eFiling login name must be used to synchronise with e@syFile<sup>™</sup> Employer data.
- e) Before attempting to retrieve the electronic correspondence or start the synchronisation process it is important to take the following into account:
- f) The eFiling login name used to synchronise must be enabled for the SARS Registration functionality on eFiling (Admin roles assigned to the login names):
  - i) 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<sup>™</sup> 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.
  - ii) If the Bundled ITREG applications were submitted, these employee records must also be included on the e@syFile<sup>™</sup> Employer database when synchronising.

## 9.1 Profile, employer information, letter, correspondence

- a) Click **SYNCHRONISE APPLICATION** on the left hand menu pane.
- b) Enter your eFiling login name and password and click LOGIN.



SARS Secure Login
Log in to eFiling to verify your credentials
SARS eFiling username
SARS eFiling Password
CANCEL

- c) Select which items must be synchronised:
  - i) eFiling profile and Employer information
  - ii) Letter and Correspondence
  - iii) AA88 notices
  - iv) Taxpayer Income Tax Registrations
  - v) All

e@syFile Synchronisation Service
Here you can select which item you wish to sync
eFiling Profile and Employer Information
O Letters and Correspondence
O AA88 notices
O Taxpayer Income Tax Registrations
All
Note: Please use the "All" or "eFiling Profile and Employer Information" option when using your eFiling username for the first time or when switching between eFiling usernames
SYNC CANCEL

- d) Click **SYNC** for the synchronisation process to start.
  - i) A pop-up message will be displayed confirming the synchronisation has been completed.
- e) Click **OK**.

## 9.2 Taxpayer income tax registrations

- a) Employers are required to include Income Tax reference numbers with employee demographics when submitting IRP5/IT3(a)'s to SARS. These numbers are assigned by SARS.
- b) The user will be able to create new IT Reference numbers is by submitting an IT Registration request to SARS for one or more employees, and then SARS will allocate new Number(s) and respond back with the allocated numbers. The requests can be performed singly or in bundles per submission up to 1000 per month.
- c) IT Registration process for Single requests:

PAYE-easyFile-G01-e@syFile™TC Employer Guide



- i) Access employee records via the "Employer Admin" link in the left navigational pane or via Dashboard
- ii) Select View Employees
- iii) Selects specific employee.
- iv) Select **IT Register button** to initiates IT registration request. Note: If new employee is added it must be saved before the IT reg function is selected.
- v) Capture eFiling credentials.

File Employer ew Help					-
-ilė ▼sars				202202 🗸 Environment PRE-PROD 🗸 🦉 Correct	d Version: Logged in ac 800.00.228 ADMIN
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ition Centre	Date Of Birth	Diversion 10 Number	0725829154	Passport Number	
imens i		00071583	ACTIVE		
	Employee: Banking Details				
				EALK 10 EXP	II REGISTER SAVE

- d) IT Registration process for Bundled requests:
  - i) Access employee records via "Employer Admin" link in the left navigational pane or via Dashboard
  - ii) Select View Employees
  - iii) Activate the Employee selection tool.
  - iv) Select all or specific Employees records, select up to 100 employees to include in the list.
  - v) Select Bundled IT REGISTRATION button
  - vi) Capture eFiling credentials.

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		Employee Selection BUNDL	ED IT REGISTRATION	UPLICATE EMPLOYEES					
		Registration Status	Status	Surname	First Name	Employee Number	View		
		EXISTING TAXPAYER	ACTIVE	NGWENYA	GABANTHONE	98815716	VIEW	<u>^</u>	
		NOT VERIFIED	ACTIVE	ARNOLD	CHRISTIAAN	CP95513011	VIEW		
		NOT VERIFIED	ACTIVE	COMBRINCK	KEVIN	CPA5304881	VIEW		
		NOT VERIFIED	ACTIVE	MOFORENG	DANIEL	96400303	VIEW		
		NOT VERIFIED	ACTIVE	KNOETZE	BAREND	CPA9369991	VIEW		
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Provide brivaget birana by									

vii) The response may occur immediately or be delayed. If immediate, the screen updates immediately. If delayed, you will be notified that the response will be returned later as part of the synchronization process.

Bundled IT Registration	
Thank you for submitting your registration applications.	
Please Note This registration application is not immediately available, it is awaiting SARS verification and it made available by selecting 'Synchronise Application' from the menu after 24 hours.	will be
	ОК

# 10 DEFINITIONS AND ACRONYMS

Link for centralised definitions, acronyms, and abbreviations: <u>Glossary A-M | South African Revenue</u> <u>Service (sars.gov.za)</u>

## 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 .
- Make a booking to visit the 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) or
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).