Effective Date: 22 September 2025

SARS External Guide

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.

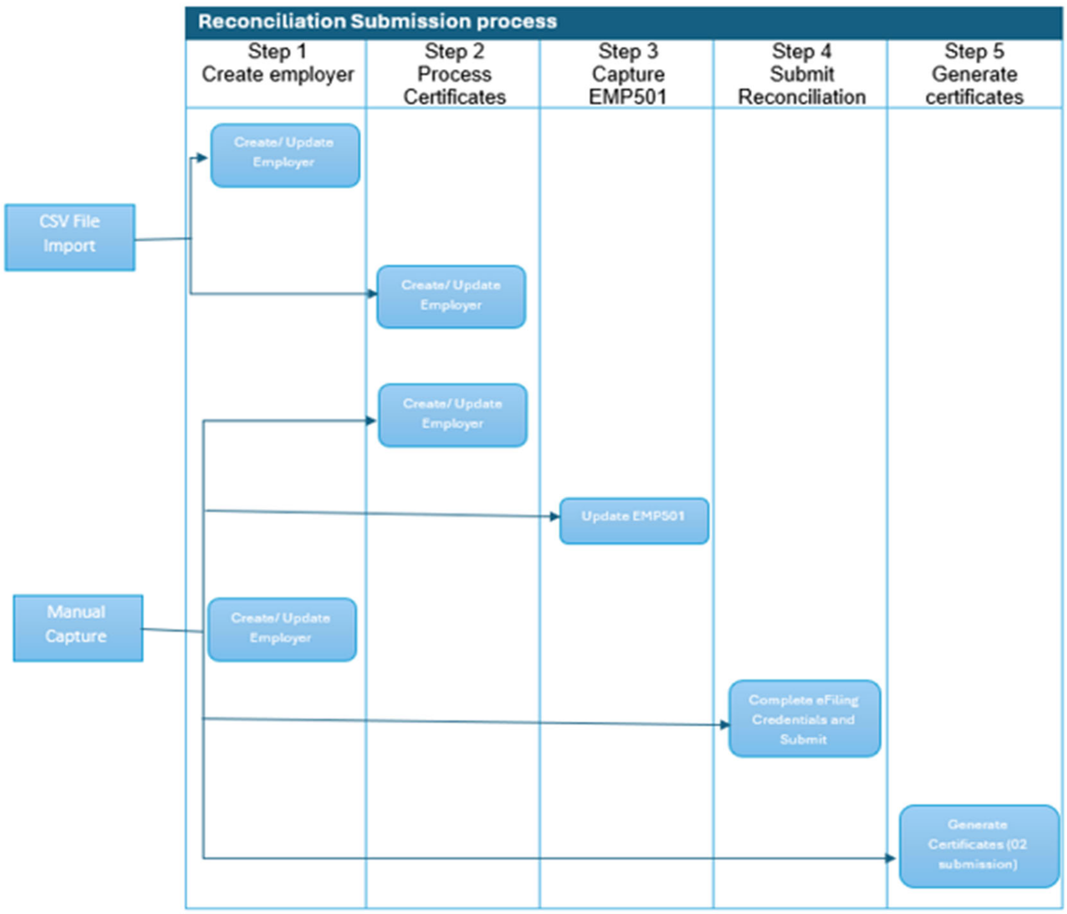
c) Employers are required to submit an Employer Reconciliation Declaration (EMP501) to SARS twice a year. These are the:

   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



2.1 Create employer

a) The employer's payroll system generates electronic tax certificates in a CSV file which is imported into e@syFile™ Employer. This import will create the employer record or if the employer record already exits will update the employer record. Please note that minimal information is updated, and additional information will need to be added manually. 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.

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) Figure 1: Reconciliation Submission Process above 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™ Employer is being used, as any information submitted to SARS using previous versions of e@syFile™ Employer, will not be accepted.

d) The latest version of the software can be accessed by visiting the SARS website www.sarsefiling.co.za and downloading the latest version.

3 THE E@SYFILE™ EMPLOYER PROCESS

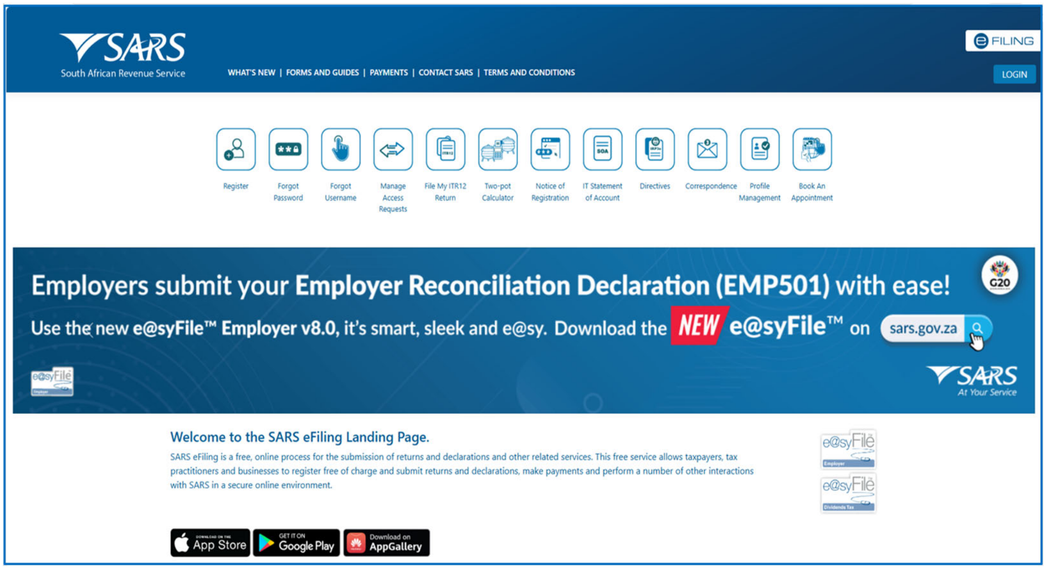
3.1 Installing or updating e@syFile™ employer

a) Existing Users Updating e@syFile™ Employer

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

b) New users installing e@syFile™ Employer

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

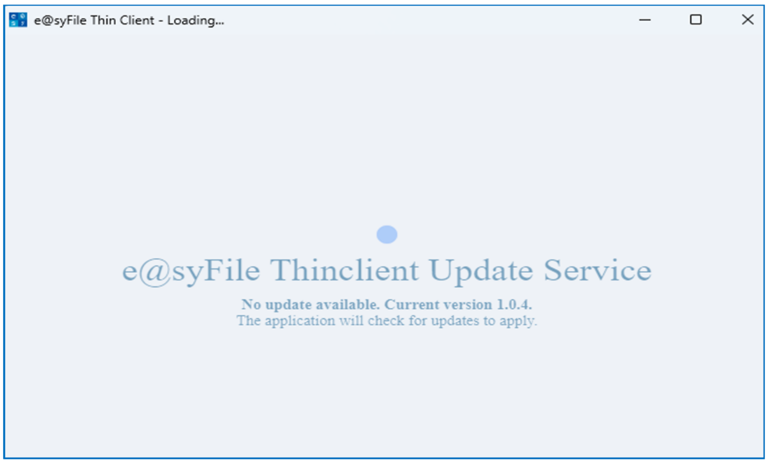


ii) Click **Download for Windows** to start the download process.

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.

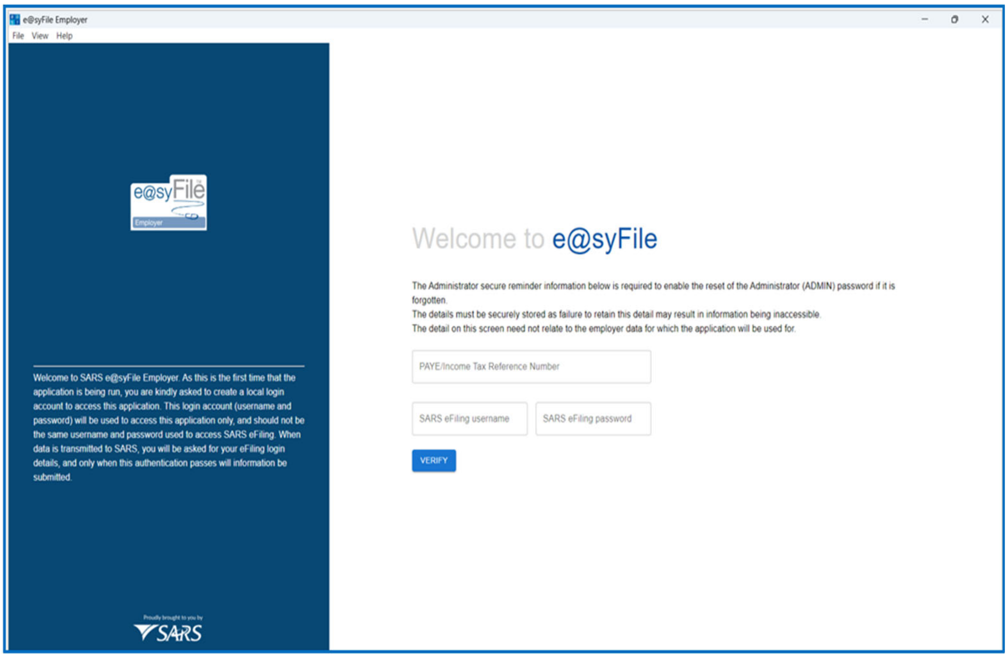
iv) The e@syFile™ Employer icon will display on your desktop, allowing quick access.

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 Thinclient – Update Service! **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 Thinclient bowser page and reopen after a minute or two.

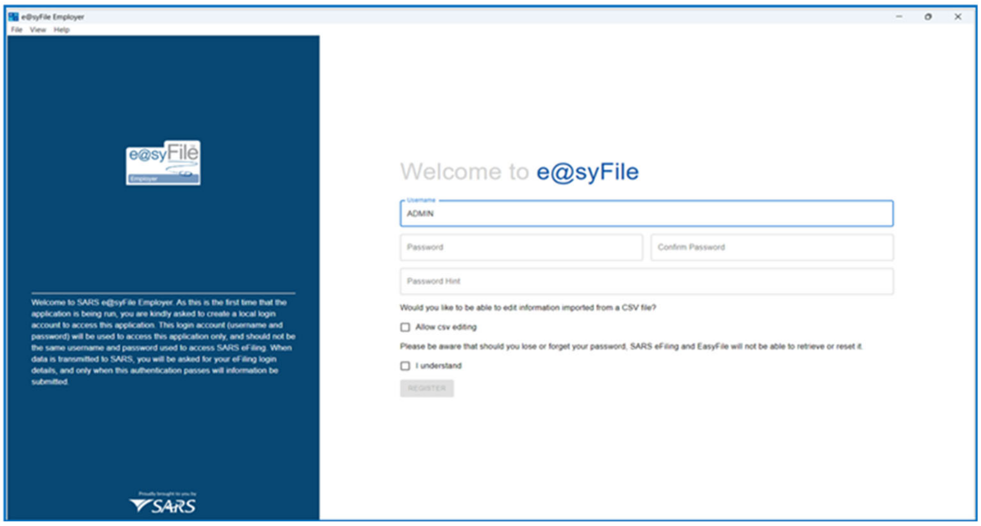


vi) The registration screen will pop up requesting an eFiling user and Password with a PAYE/Income Tax number (if not registered for PAYE). Select Verify. Successful registration will then allow the ADMIN user registration screen to populate. Note: This is for database security registration related to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

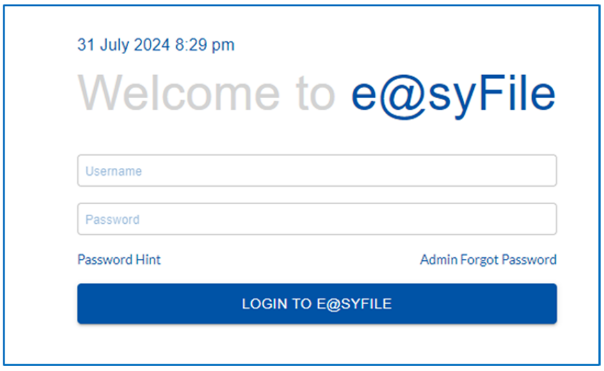
Please note: Keep a record of the eFiling profile and PAYE/Income Tax Reference number used during the setup process. This will be required when a user needs to use “Admin Forgot Password” function.



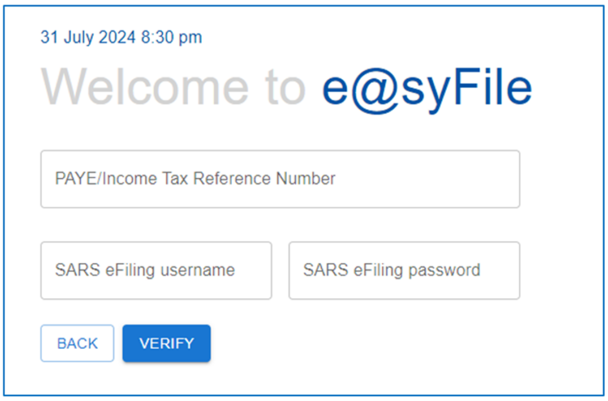
vii) The default word ADMIN will appear by the username. Leave this as is.



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™ Employer login details (username and password). This is the ADMIN user.



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.

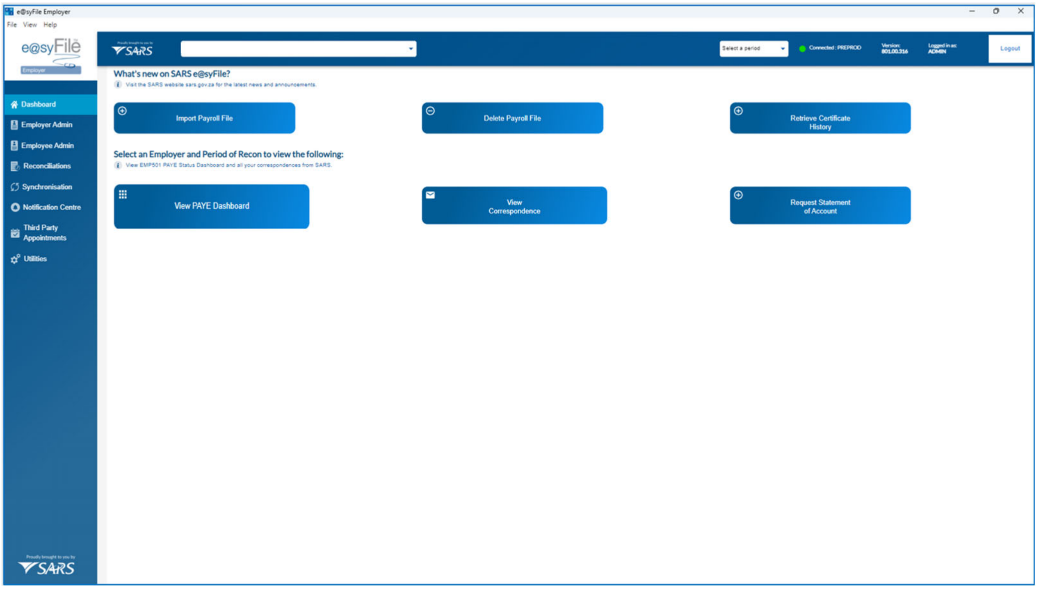


xvi) Where additional users were added (not ADMIN) and these users forgot their password and the Password Hint does not suffice the ADMIN user needs to be requested to reset their password. This is discussed later in this guide under User Management

3.2 Accessing the e@syFile™ Employer software

a) After clicking “Login,” you will be directed to the home page.
   i) If you are working **offline**, a red block labelled **“Disconnected”** will appear at the top right of the screen.
   ii) If you are **online**, the block will be green and display **“Connected.”**

b) The menu on the left side of the screen will display the 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
      E) View Correspondence and
      F) Request Statement of Account.
   ii) **Employer Admin** – Allows you to view employer details, add and edit employer records.
   iii) **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
      G) Duplicate employees to another period of recon (POR).
   iv) **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™ Employer user guide available on www.sars.gov.za.

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 back up the database, restore from a backup and extract & import a single Data Base.

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) Disc 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.

E) Update – Use this menu if the e@syFile™ application needs to be updated.

4 DASHBOARD

a) The e@syFile main dashboard is the landing page and is available from the main navigation menu and allows a user to:

i) Import Payroll File,

ii) Delete Payroll File,

iii) Retrieve Certificate History,

iv) View PAYE Dashboard

v) View Correspondence and

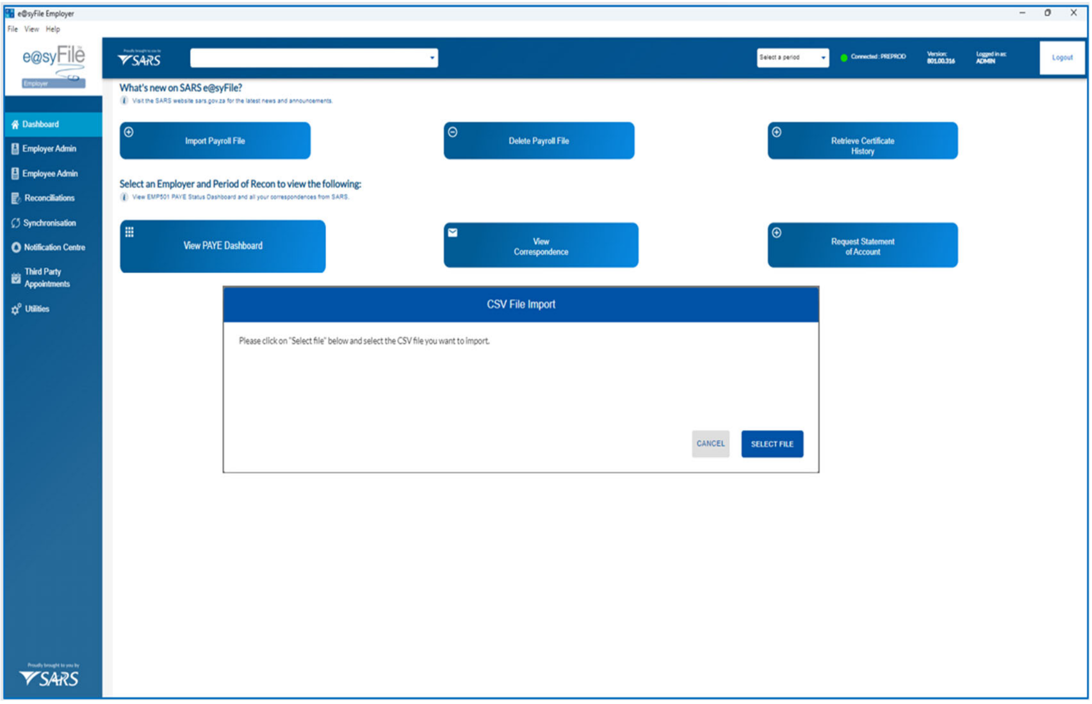
vi) Request Statement of Account.

4.1 Import Payroll File

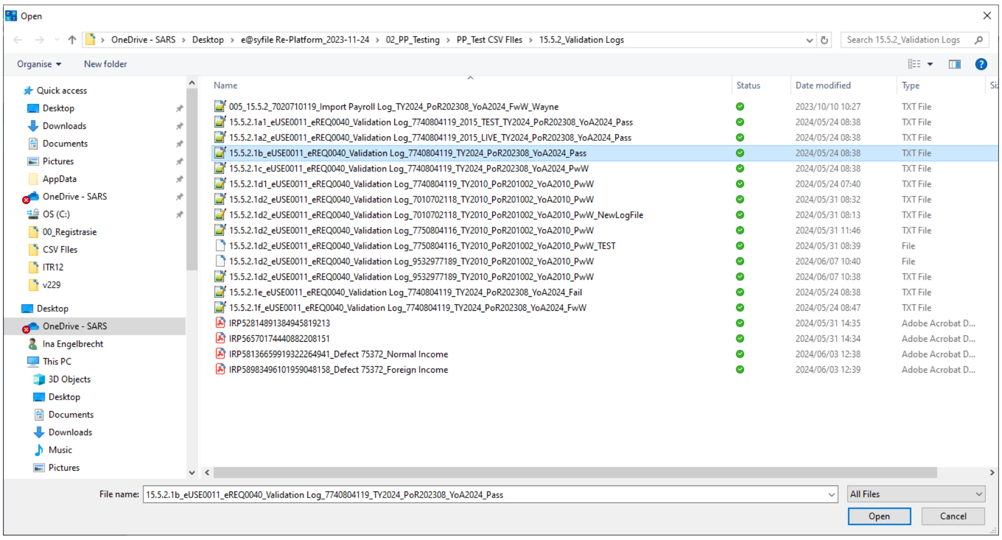
a) Select "Dashboard" from the left-hand navigational pane.

b) Click **Import Payroll File**

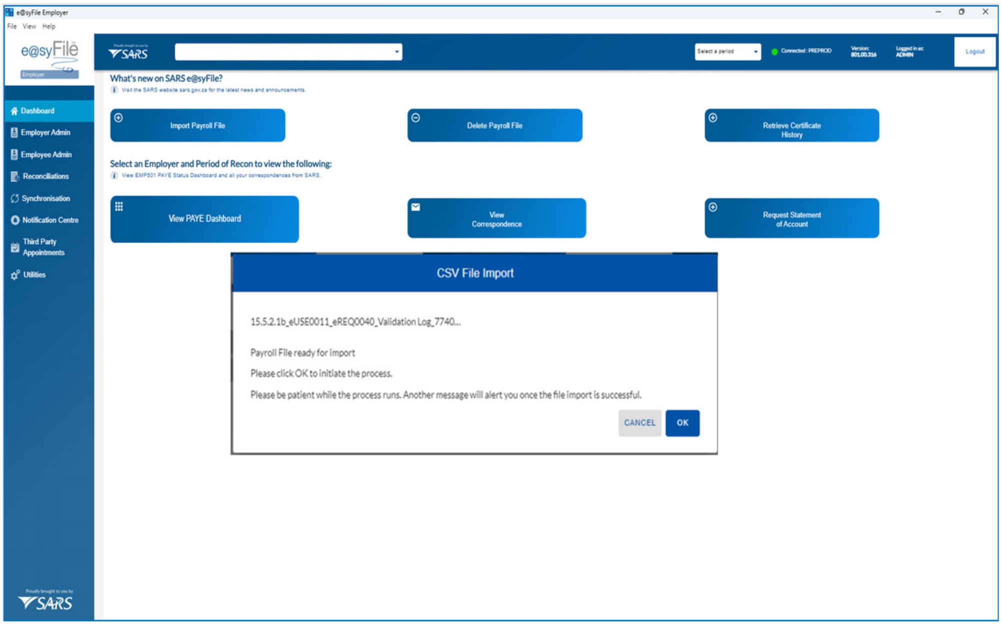
c) Click **SELECT FILE**



d) Select the CSV to import.

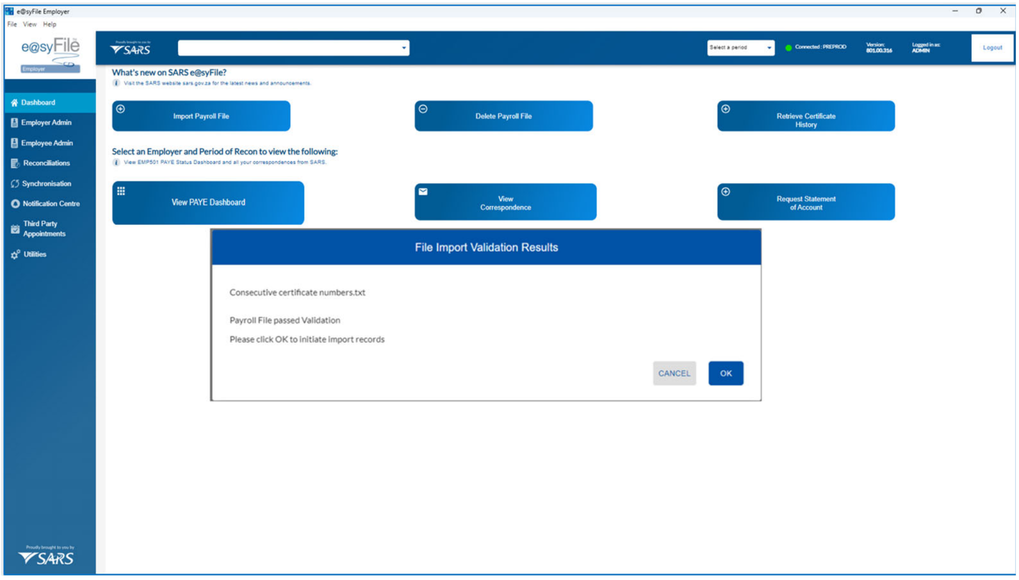


e) Click **OK** to initiate the process.

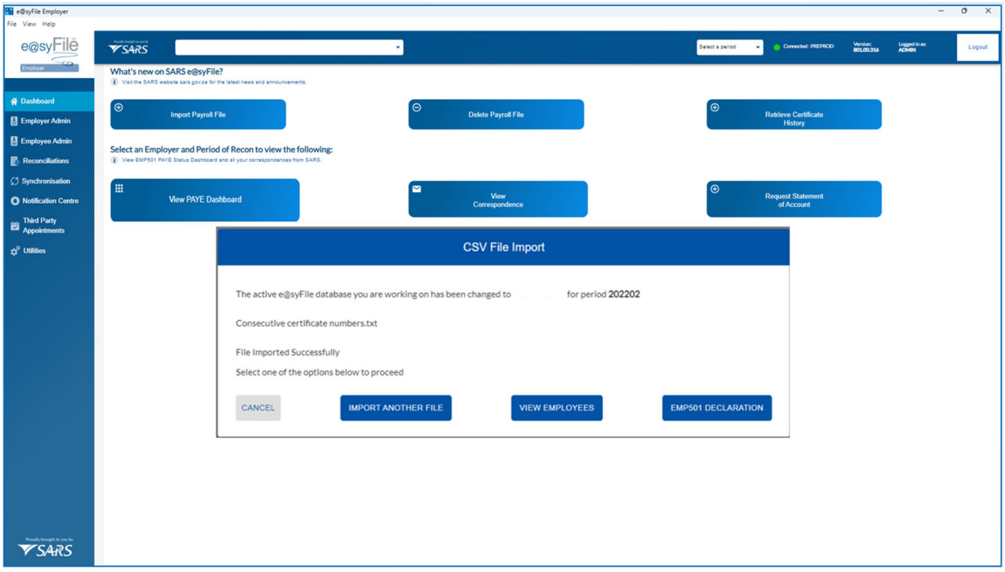


f) The selected file to import needs to pass a validation check. A message will be displayed indicating whether the payroll has passed the validation process (i.e. whether the file can be imported or not). If your CSV file has passed the validation process.

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.



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



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

4.2 Delete payroll files

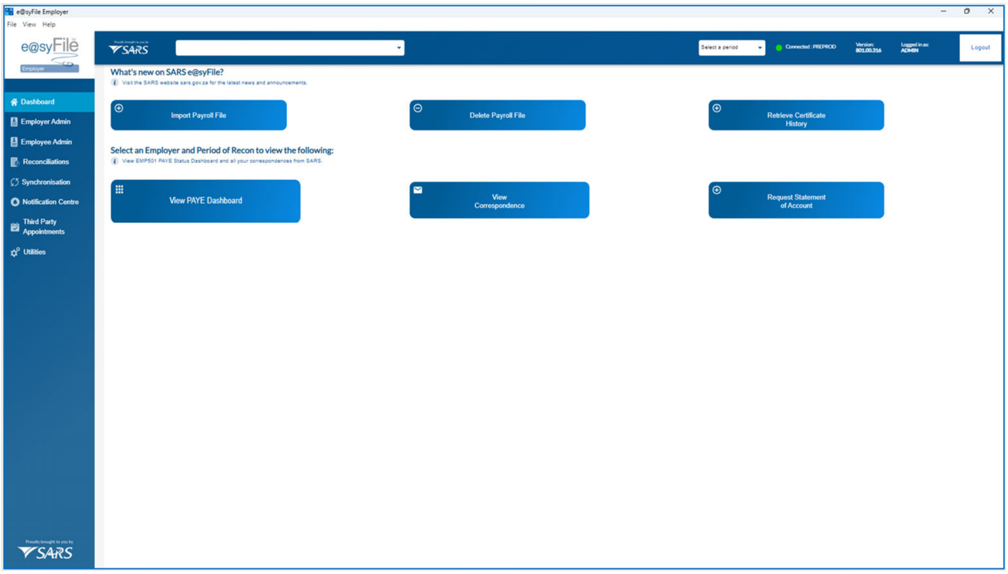
a) Payroll files may be deleted by a user. The "Delete Payroll File" function is available from the main Dashboard in e@syFile.

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:

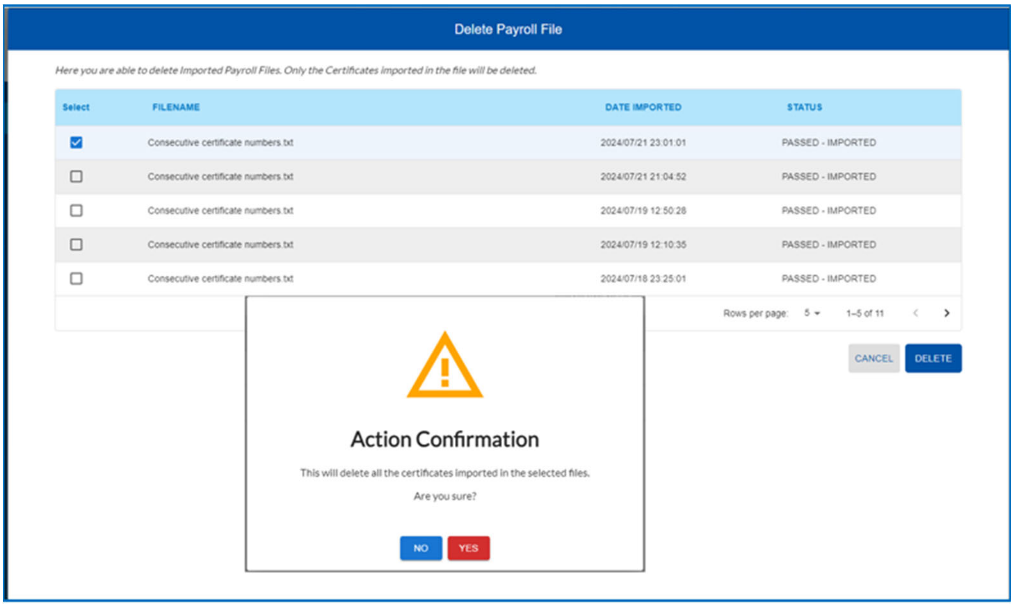
  i) Select the Delete Payroll File function from the Dashboard once an Employer and Period of Reconciliation is selected.



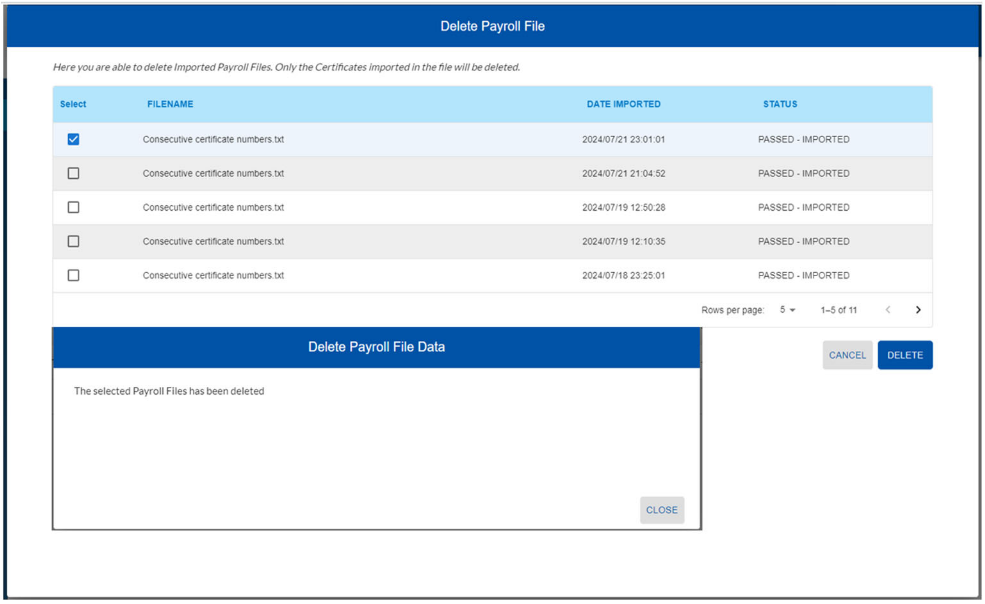
ii) The system displays a list of imports in status "Passed - Imported" or "Passed with Warnings"

iii) Select one of the items to delete.

iv) The system will display a warning message before imported data is deleted.



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



4.3 Retrieve Certificate History

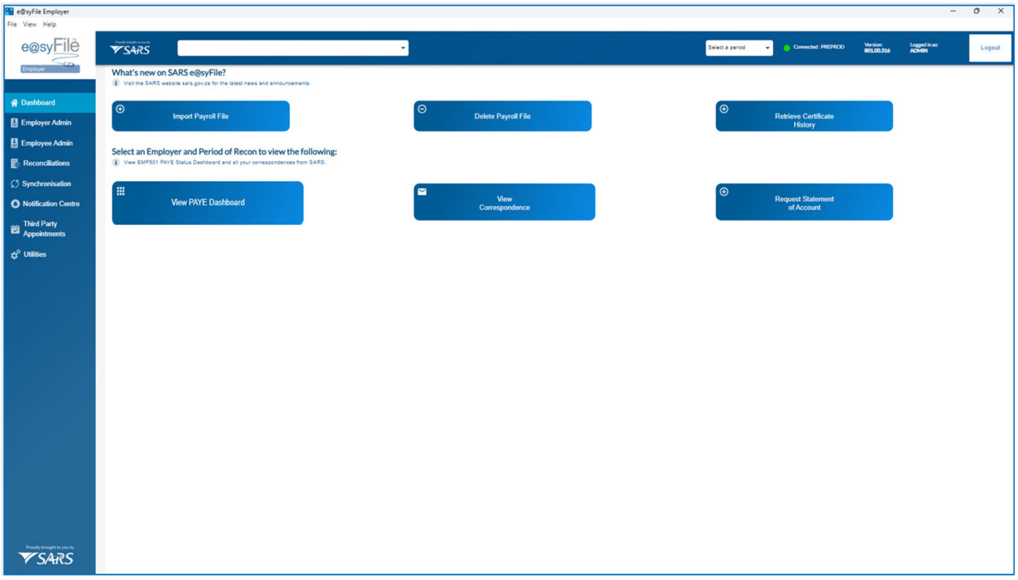
a) This function allows you to retrieve historical certificates data from old format e@syFile backup files.

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:

i) Select **Retrieve Certificate History** from the Dashboard. You may select an Employer and Period of Reconciliation but is not required to access this function.

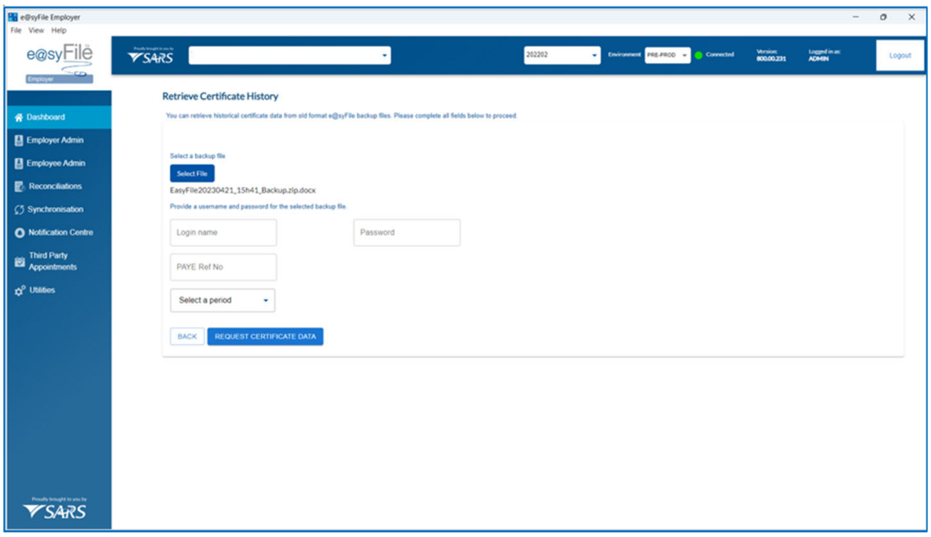
Please note: Employee records will be retrieved for a reconciliation period only if a certificate was created. As a result, an employee might appear in one reconciliation period but not in another.



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”



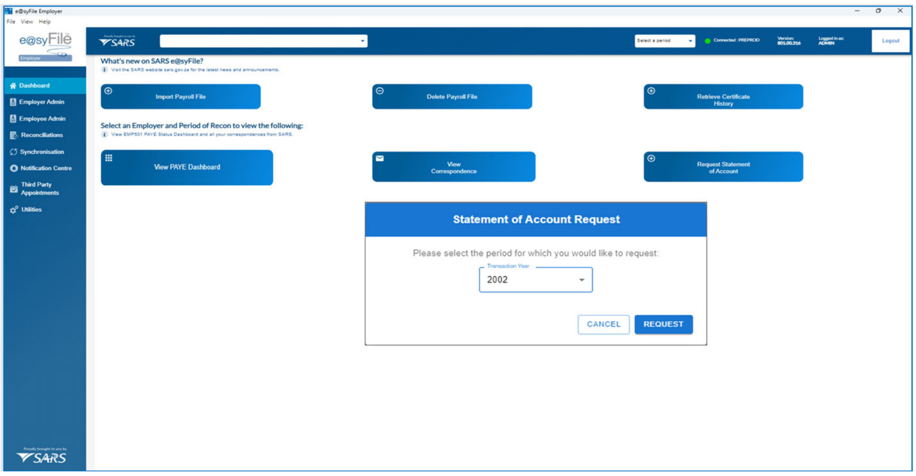
4.4 Request Statement of Account

a) This function allows you to access the Statement of Account (EMPSA) for a specified employer ranging from 1999 up to and including the current transaction year.

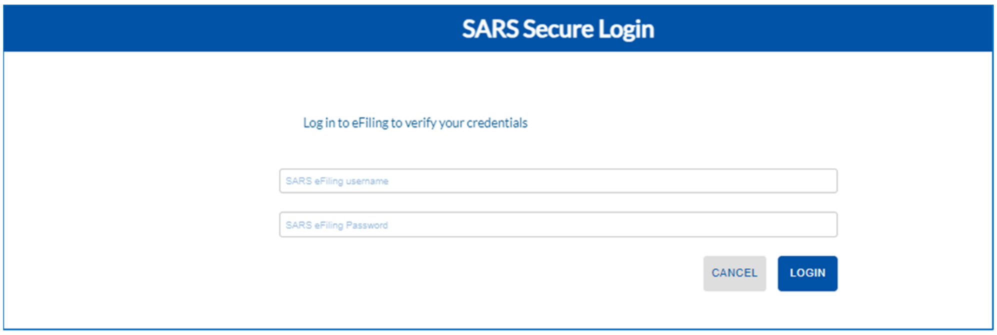
b) The EMPSA will be retrieved in real time and delivered via the Notification Centre. If there are real-time delays, the EMPSA must be stored in the back-end database when requested. The user must then perform a synchronization to receive the EMPSA.

c) The below screens and steps show how to retrieve statement of account:

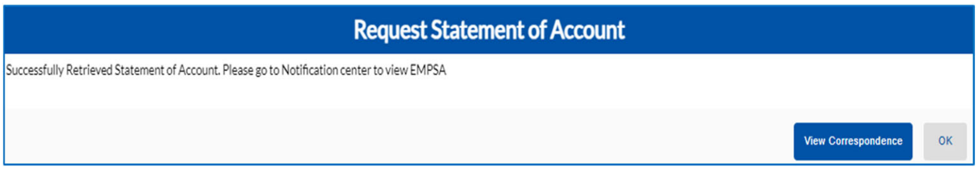
i) Select **Request Statement of Account** from the Dashboard.
ii) Select the transaction year.
iii) Click Request.



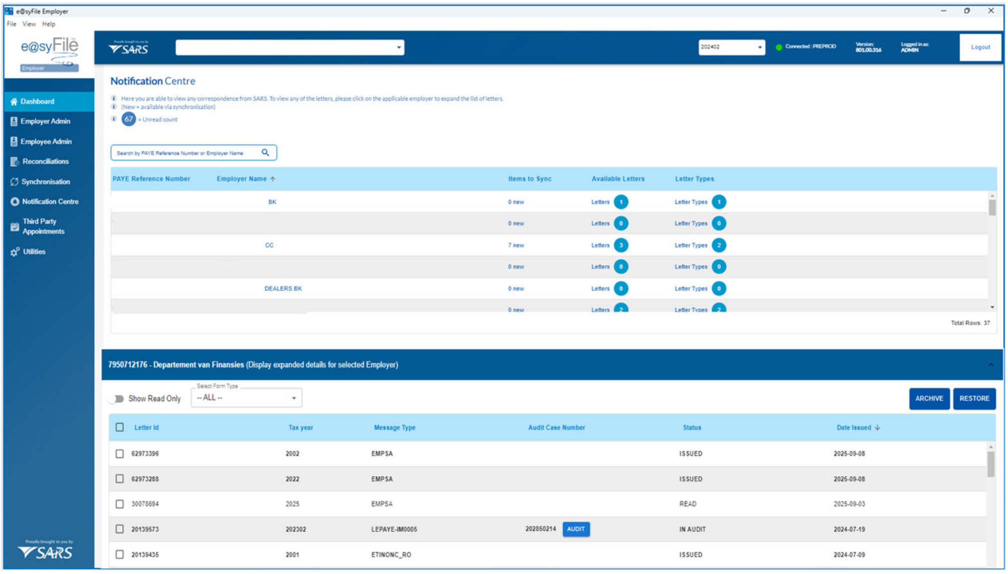
iv) Enter your eFiling login name and password and click LOGIN.



v) The requested EMPSA will be received in the Notification center.



vi) Click on View Correspondence, then you be directed to the Notification centre. Refer Section 9 (Notification Centre). The EMPSA needs to be saved in a folder to enable it to be opened and viewed in PDF format.



5 EMPLOYER ADMIN

b) 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.

c) 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.

d) 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.

e) 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.

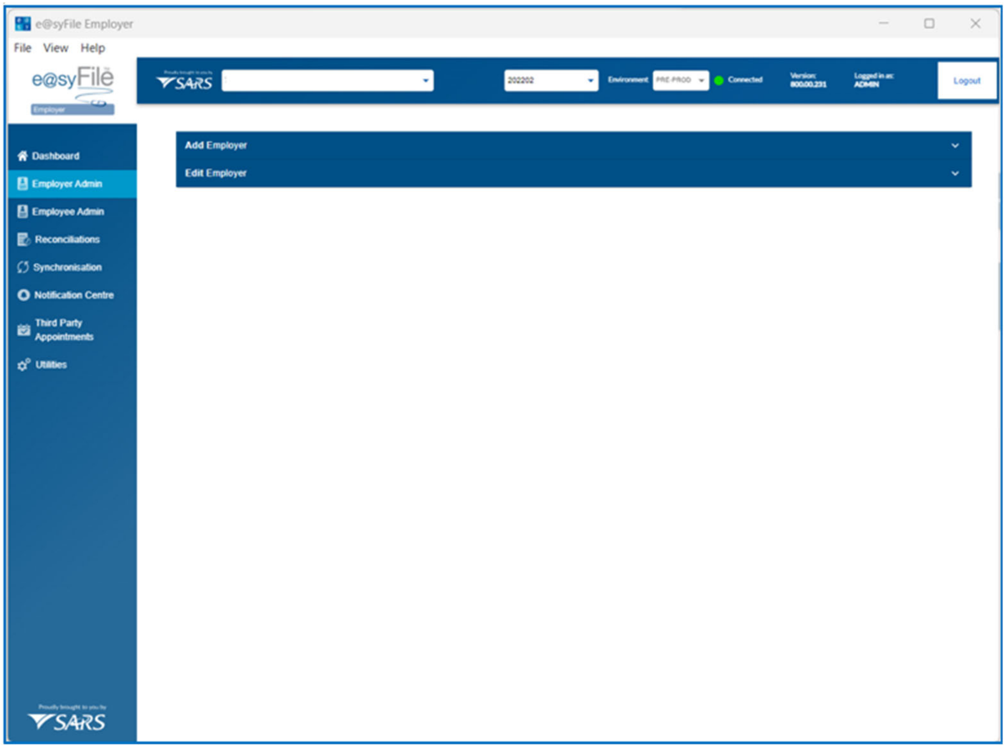
5.1 Create an Employer

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.

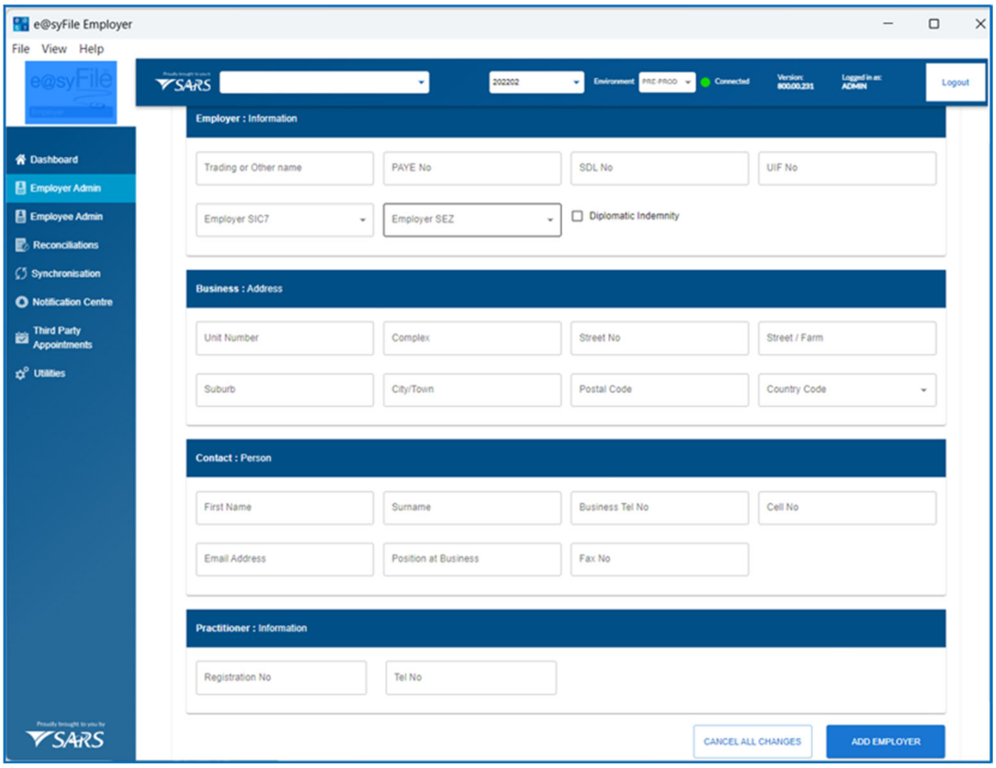
ii) Select the accordion called **Add Employer,** the system will display the employer capture screen.

iii) Capture employer details.



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.



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.

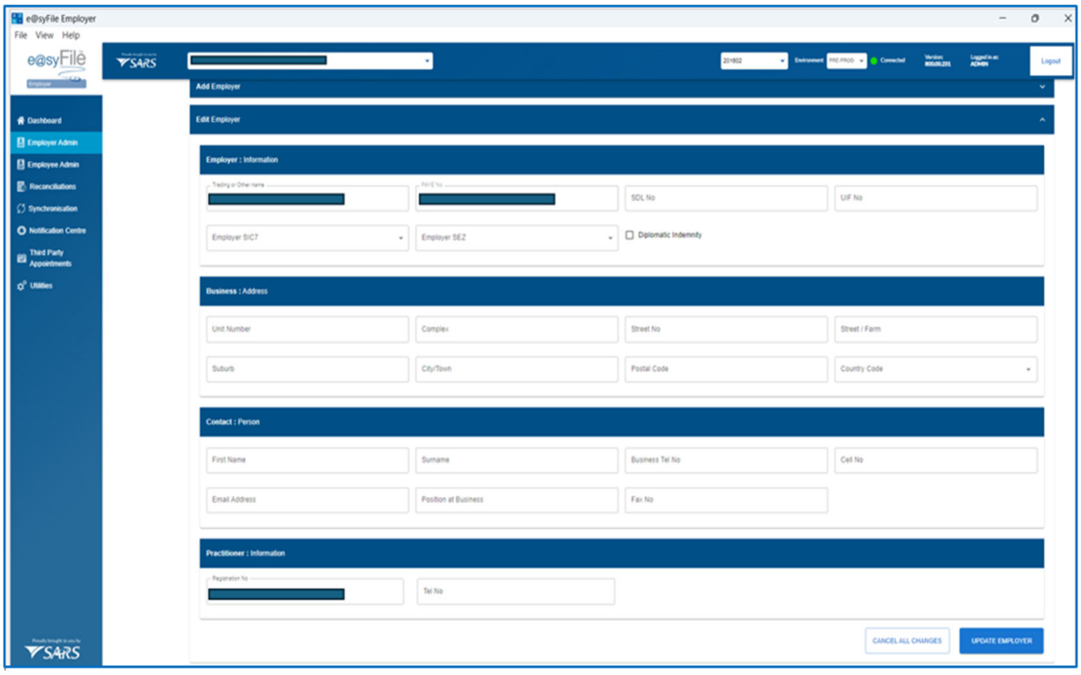
5.2 Edit Employer

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.



6 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.

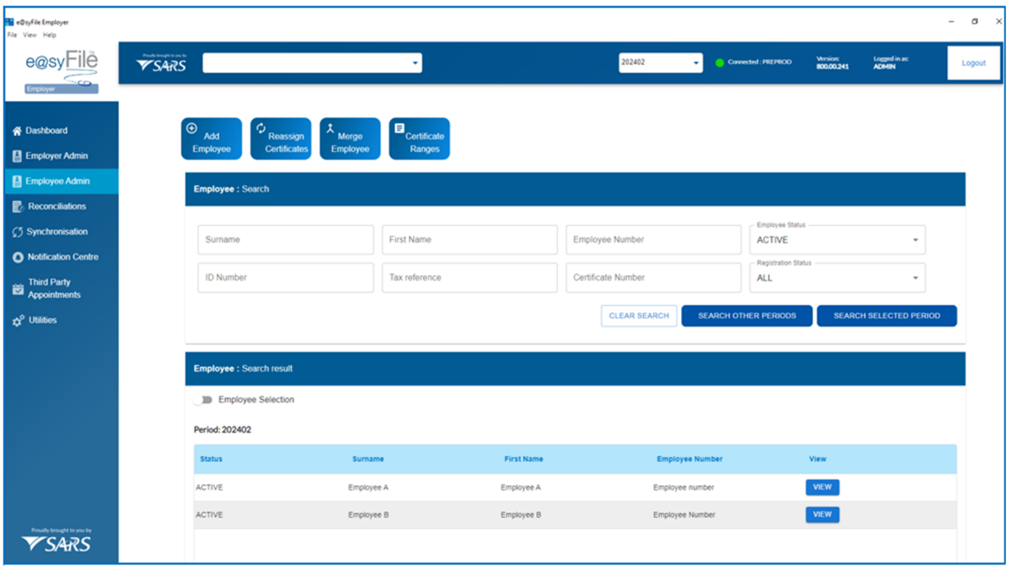
b) It is only necessary to create an employee when you need to capture the details for employees or companies not yet on e@syFile™ Employer.

c) Employees can be added and updated manually or by importing payroll files.

d) To add an employee, click the **Add Employee** button.

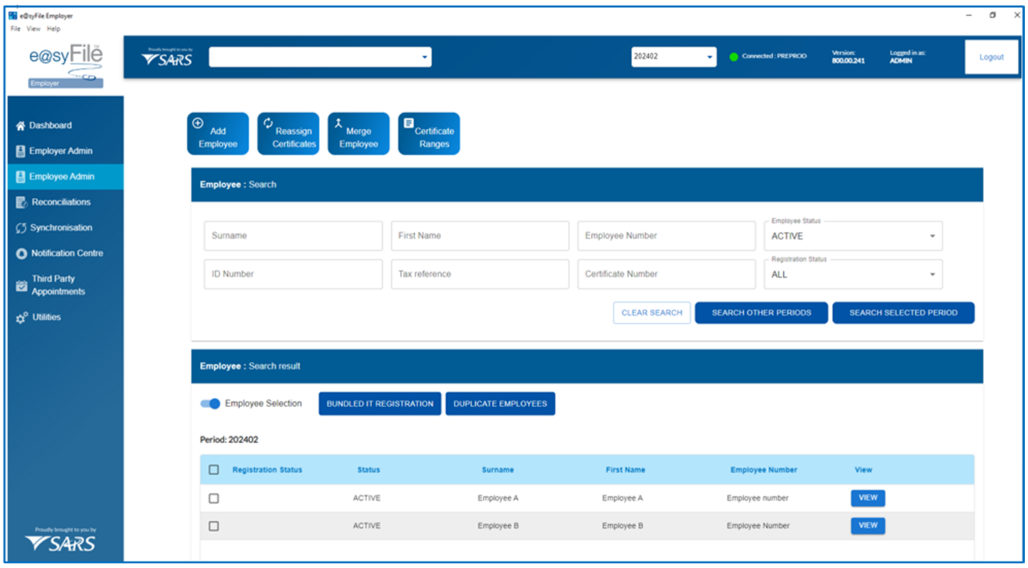
e) To manually update an employee, click the View button next to the relevant employee or double click the employee.

f) Employee records can be duplicated from one Period of Reconciliation to another by clicking on the slide next to Employee Selection.

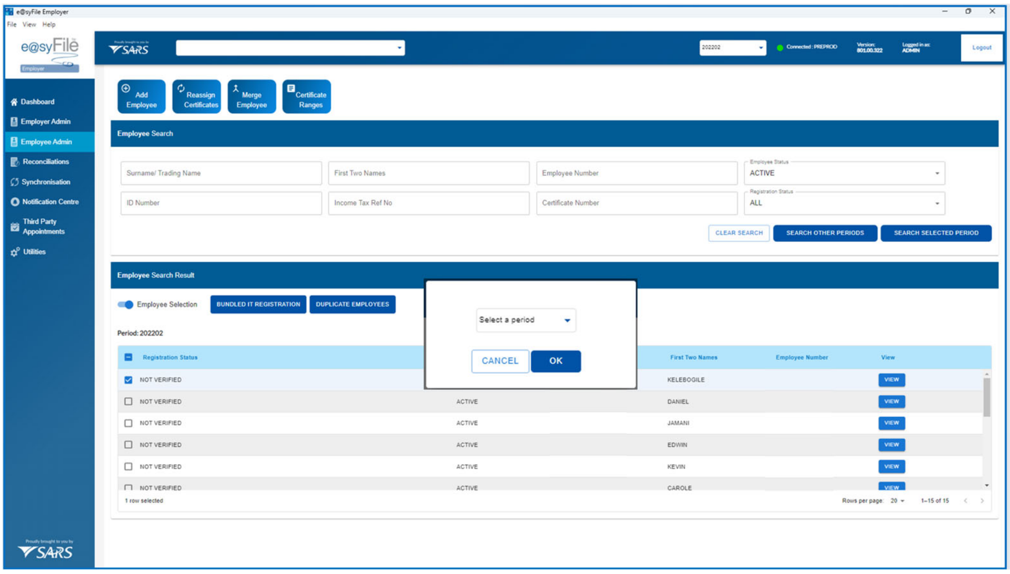


g) Clicking the slide next to 'Employee Selection' opens the 'Bundled ITREG' and 'Duplicate Employees' sections.

h) Select "All" to duplicate all employees listed or select the employee(s) which must be duplicated and click on Duplicate "Employees".



i) Select the period of recon where the employee(s) must be duplicated to and click OK.

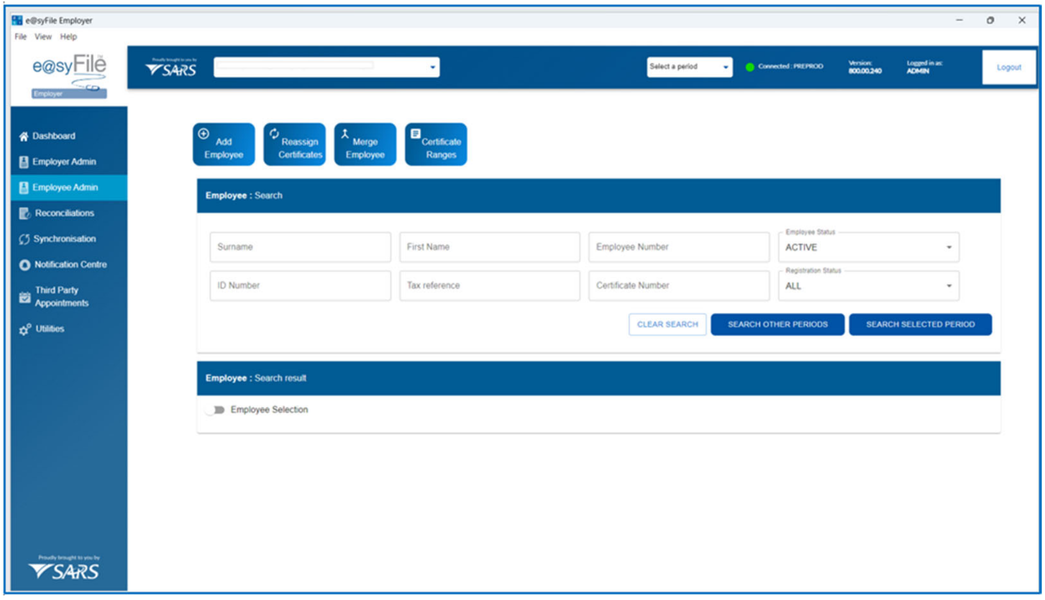


6.1 Add Employees

a) To add employees manually:

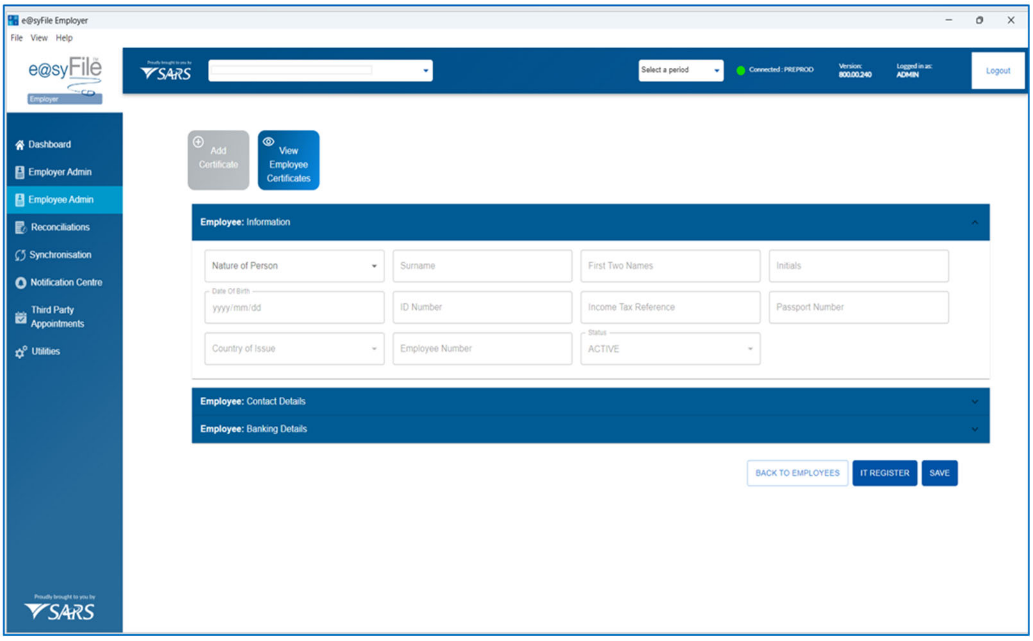
i) Select "**Employee Admin**" from the left-hand navigational pane to open the respective sections to add employee records.

ii) Select **Add Employee tab**



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

iv) Click **SAVE**



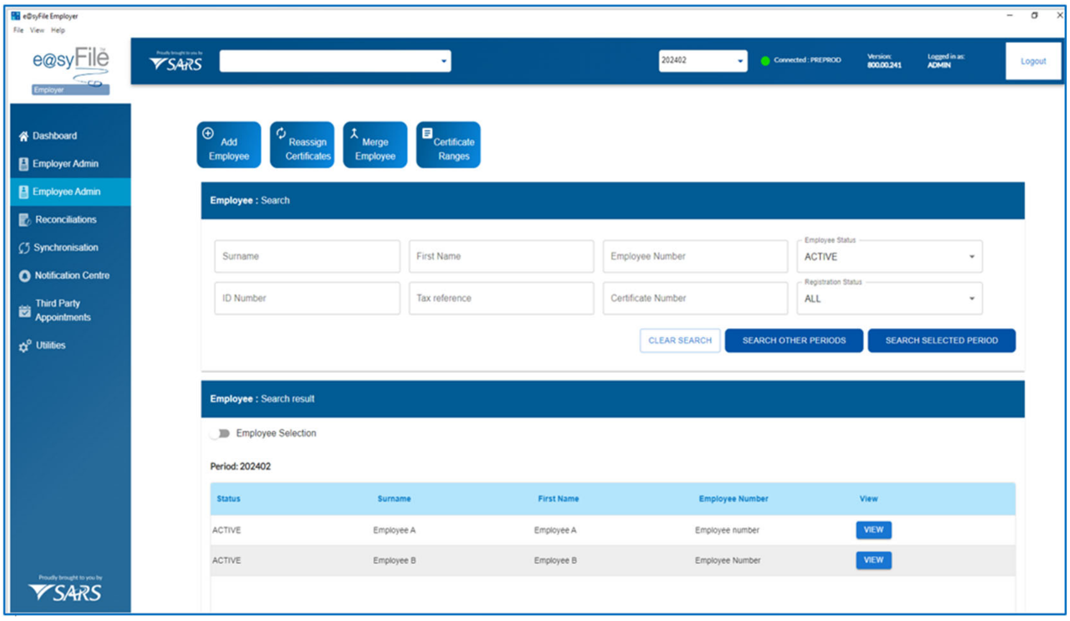
6.2 Edit Employee

a) Use this option to change or update employee details. Below screens and steps show how to edit the employee details manually:

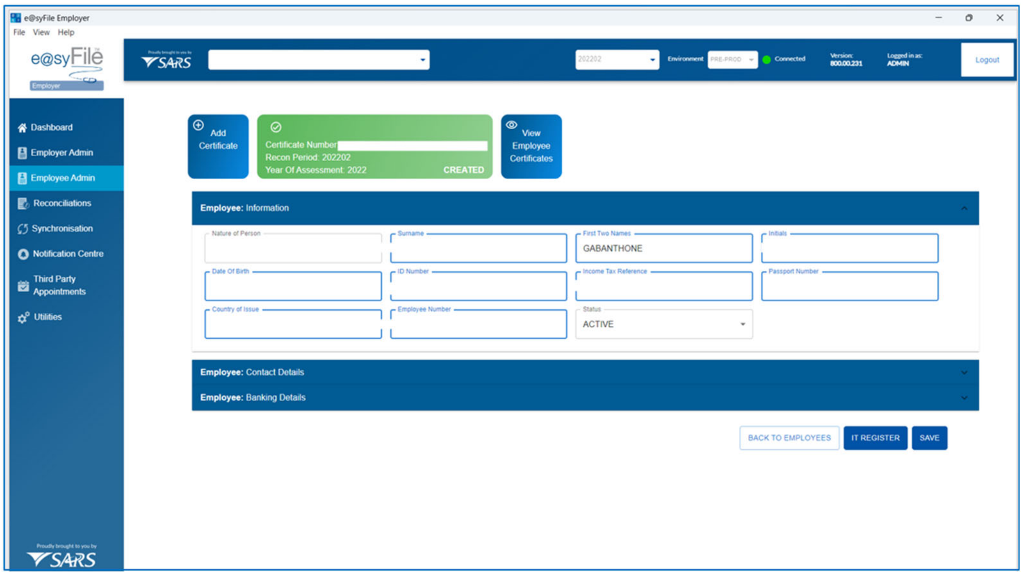
i) Select Employer and Period of Reconciliation.

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.



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



6.3 Creating and Editing Certificates Manually

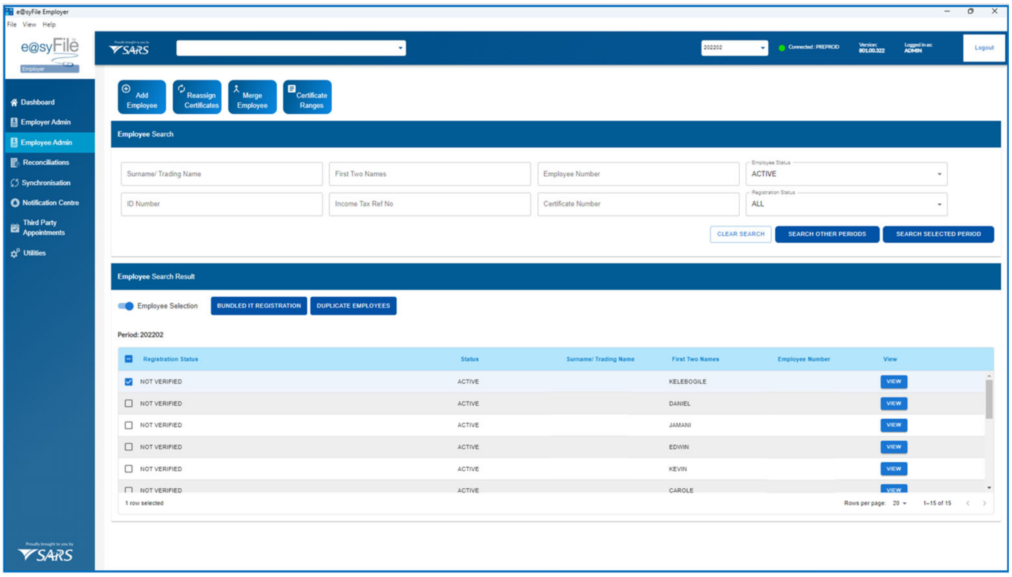
a) The system offers functionality for managing employee IRP5/IT3(a) Certificates, including:

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.

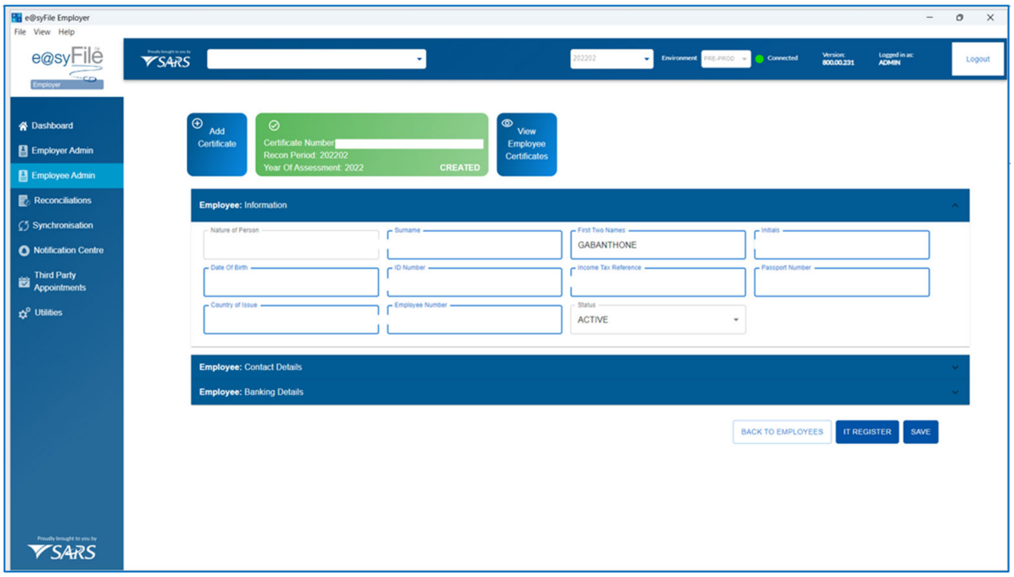
ii) Select relevant Employer and period of recon. When a period of recon is selected a green tick will indicate if a period contains active employee data. If employees were manually captured during a previous reconciliation period, there is no need to recapture them in the next period. You can utilise the 'Duplicate Employees' function found under the ' Employee Admin' option for the relevant period to transfer these employees into the new period.



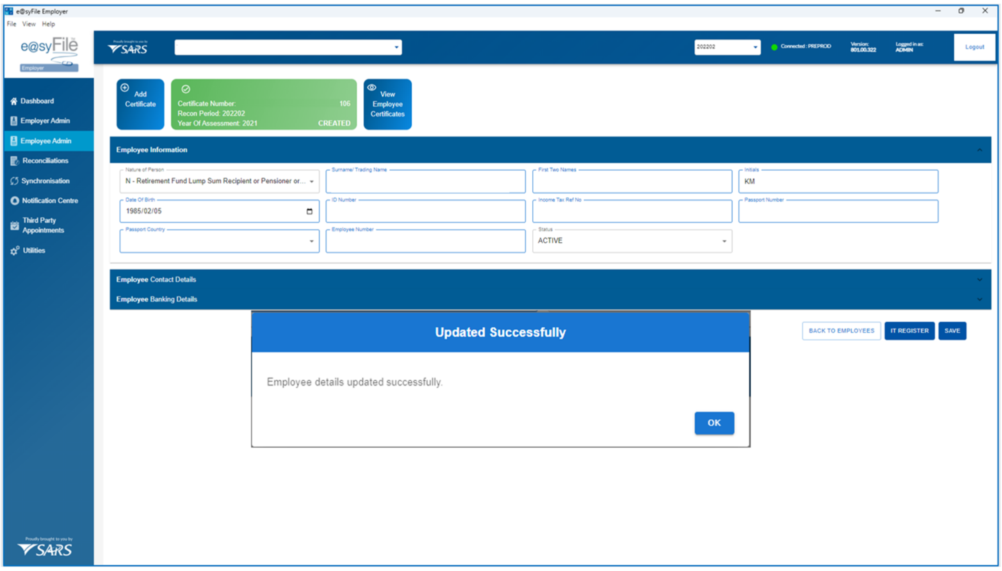
iii) Select the relevant employee. and click **View** next to the employee's name or double click the employee to open the record.

iv) Verify all the required fields on the Employee Information page.

v) If changes are required, make the relevant updates and click **Save**

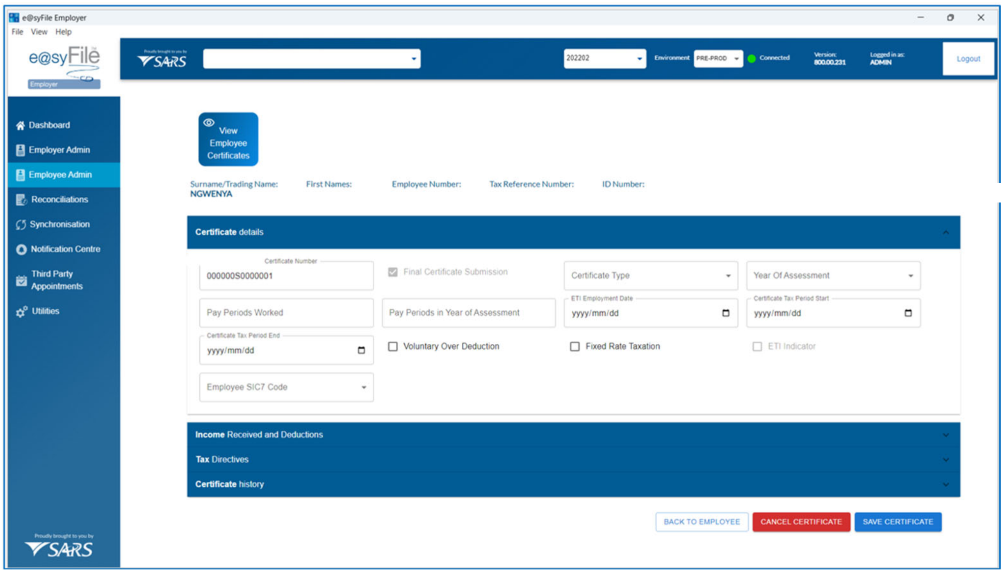


vi) Click **OK** to confirm the updates employee details.



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.



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.

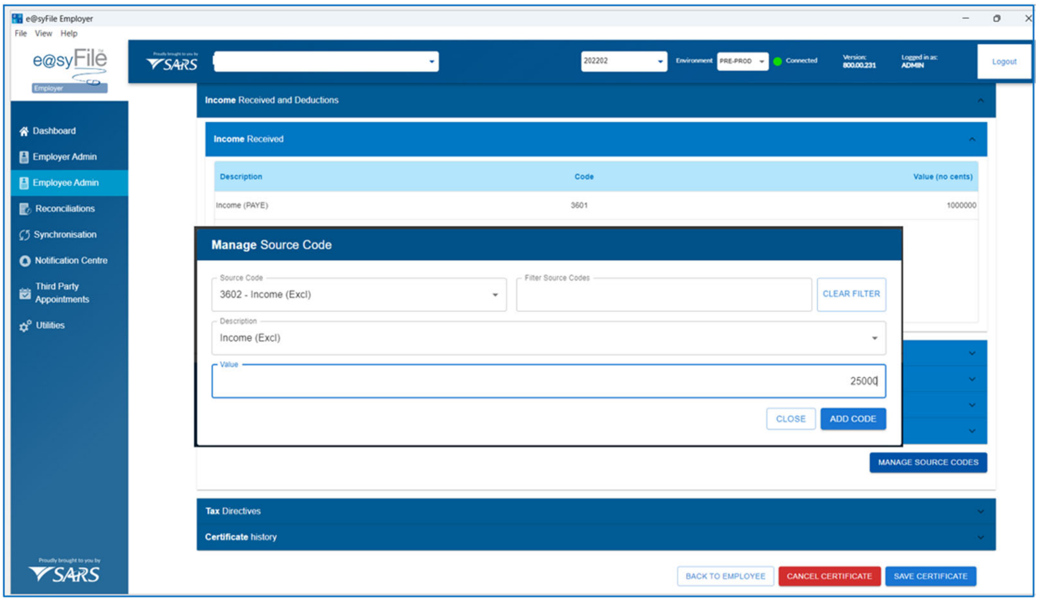
x) To capture Source Codes and Values,

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 **ADD CODE**



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.

6.4 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.

6.5 Cancelling certificates within e@syFile™ 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.

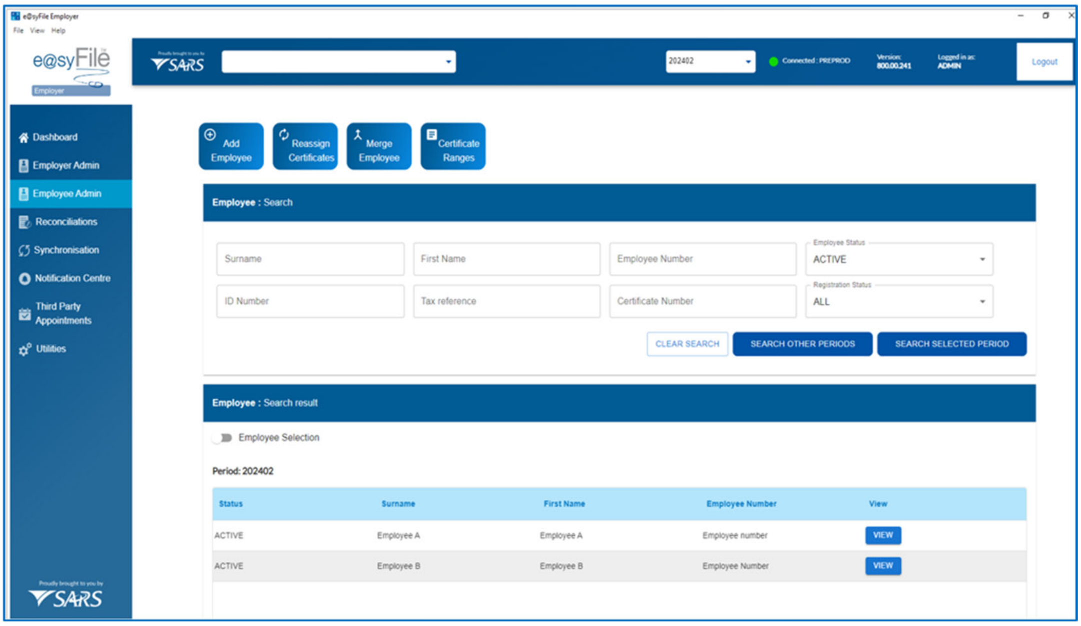
6.5.1 Cancelling an individual certificate

a) To cancel a certificate on e@syFile™ Employer, follow the normal steps to view an employee record to access certificates:

  vii) Select Employer and Period of Reconciliation.
  viii) Select **"Employee Admin"** from the left-hand navigational pane.
  ix) Locate and select the relevant employee record.

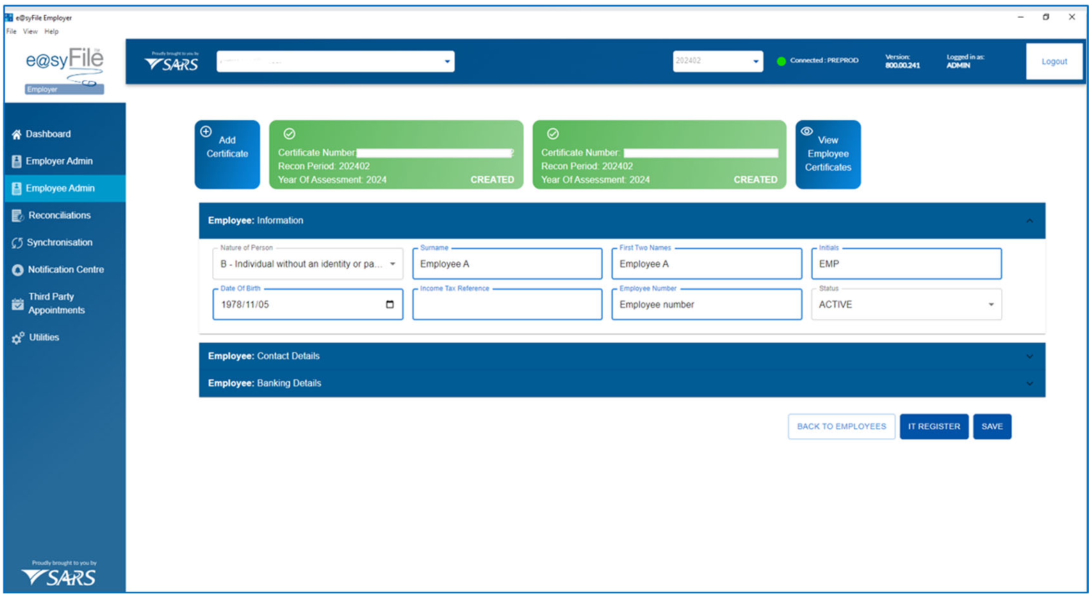
b) Below is the employee information screen showing that two certificates have been created for the individual:

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

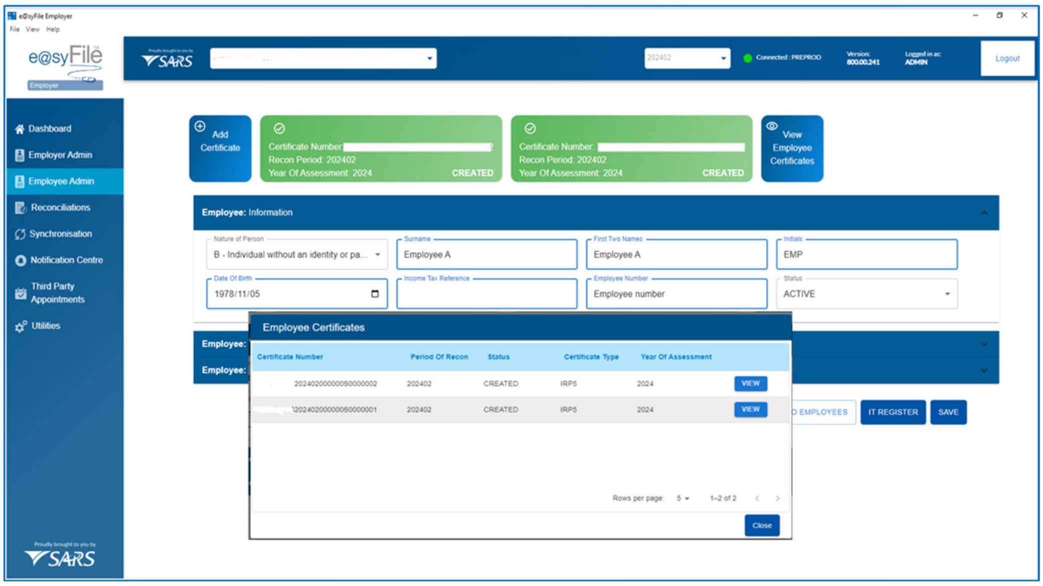


ii) This screen will show the two certificates in green on the employee info screen. A maximum of 3 certificates can be displayed on the screen. If there are more than 3 certificates created.

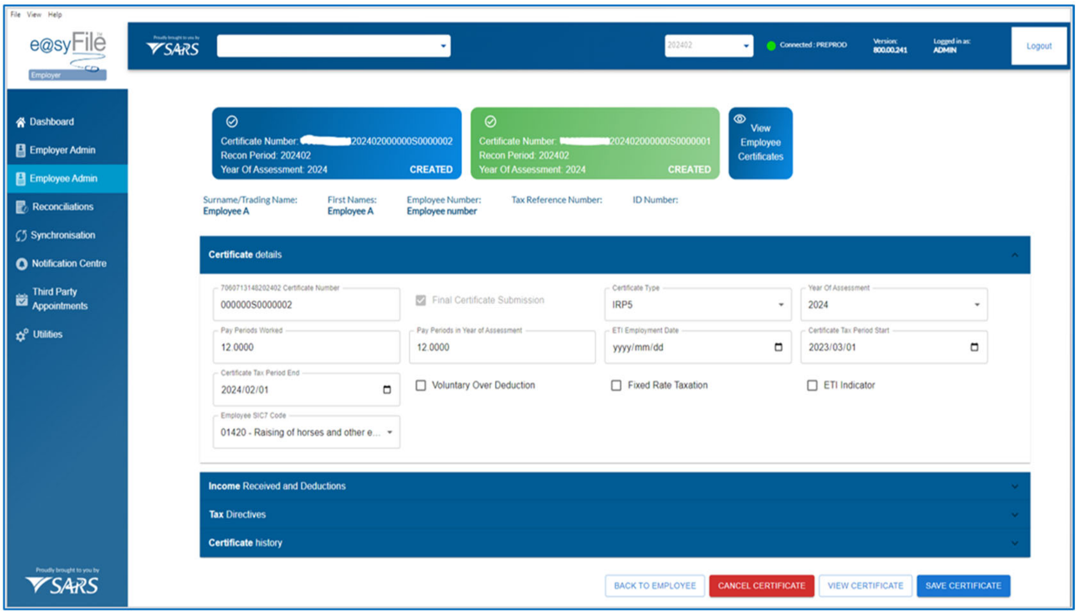
iii) Click the "**View Employee Certificates**" button to access all the certificates. If there are 3 or fewer certificates, you can still use the "**View Employee Certificates**" button,



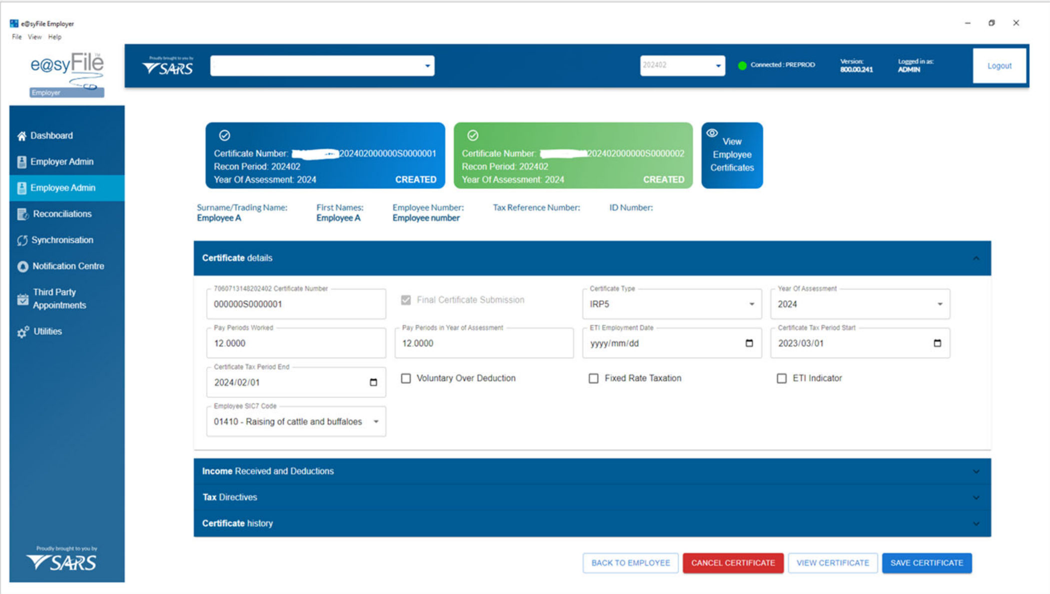
iv) This screen will display when **View Employee Certificate** button is selected.



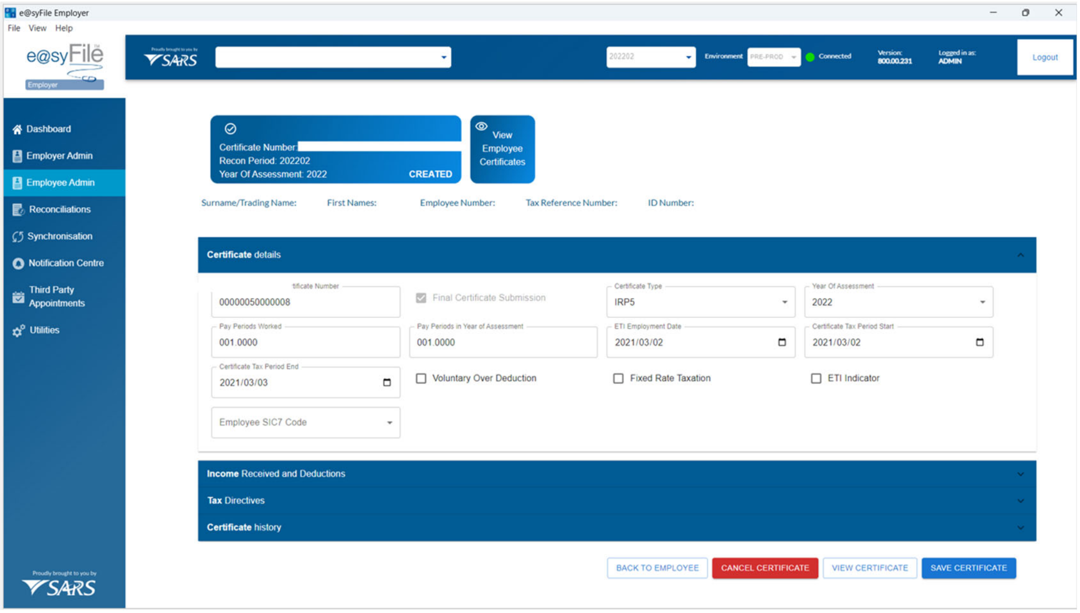
v) There are two options available to view the certificate, either by selecting from the certificates displayed in green or from the popup. The following screen will display once selection is made and the selected certificate will appear in blue, while the unselected one remains green.



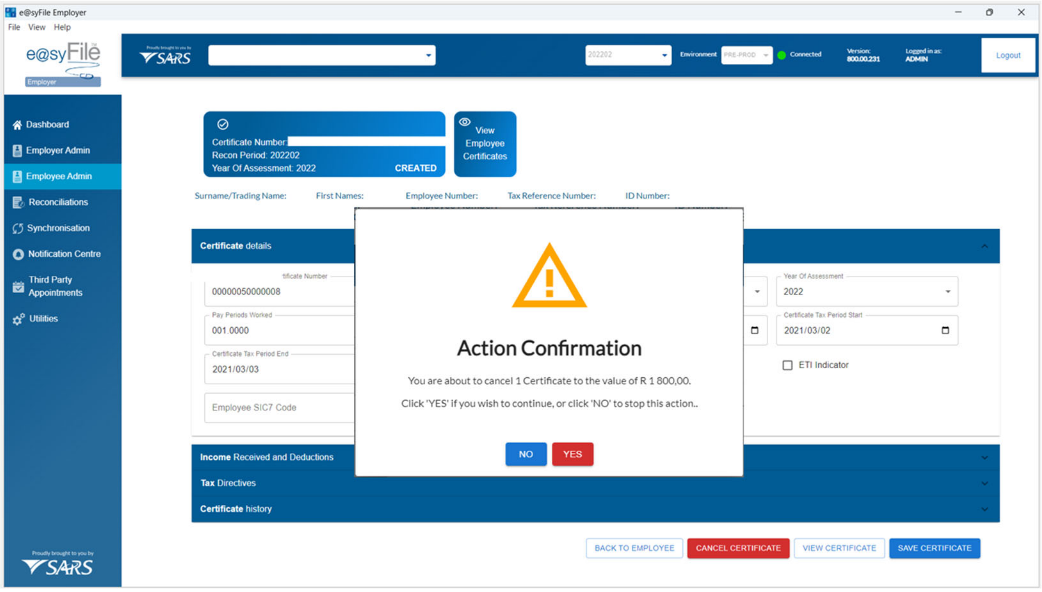
vi) When a certificate is selected, it shifts to the first position. The screen below shows a certificate, originally in the second position, which has moved to the first position and is now highlighted in green. This movement does not alter the certificate number.



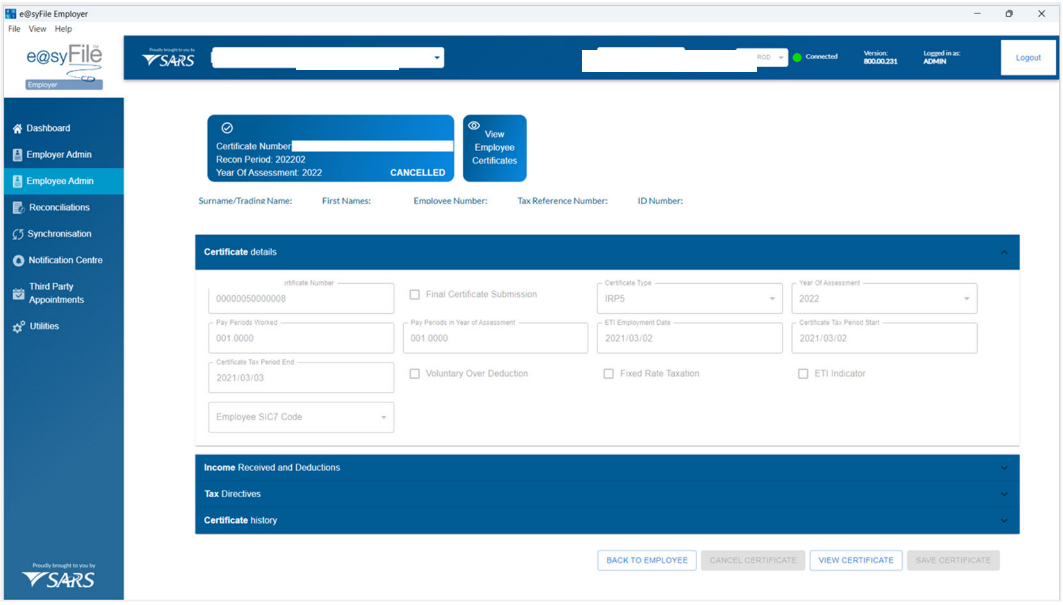
vii) Click **Cancel Certificate** at the bottom of the page. Note that an Individual certificate that has been cancelled cannot be revived.



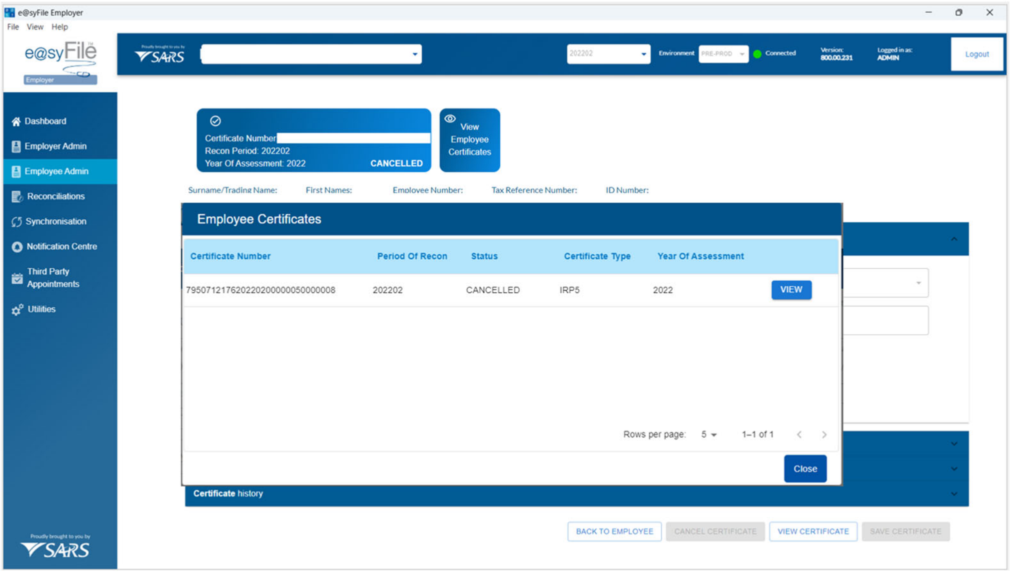
viii) A pop-up message will appear to confirm cancellation. Click **Yes** to continue or **No** if you do not want to cancel the certificate.



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



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.

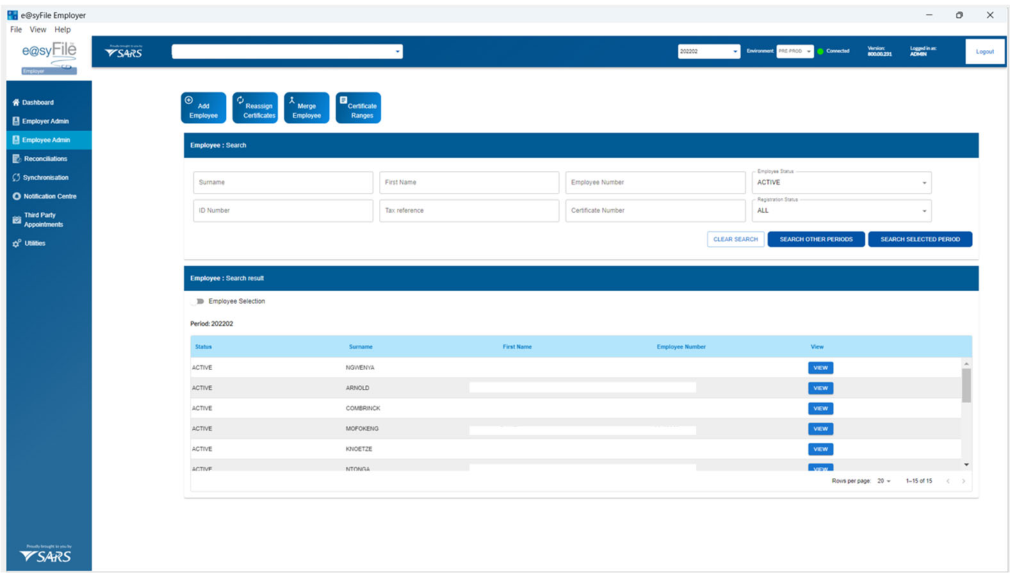


6.5.2 Cancelling a range of certificates

a) Select Employer and Period of Reconciliation.

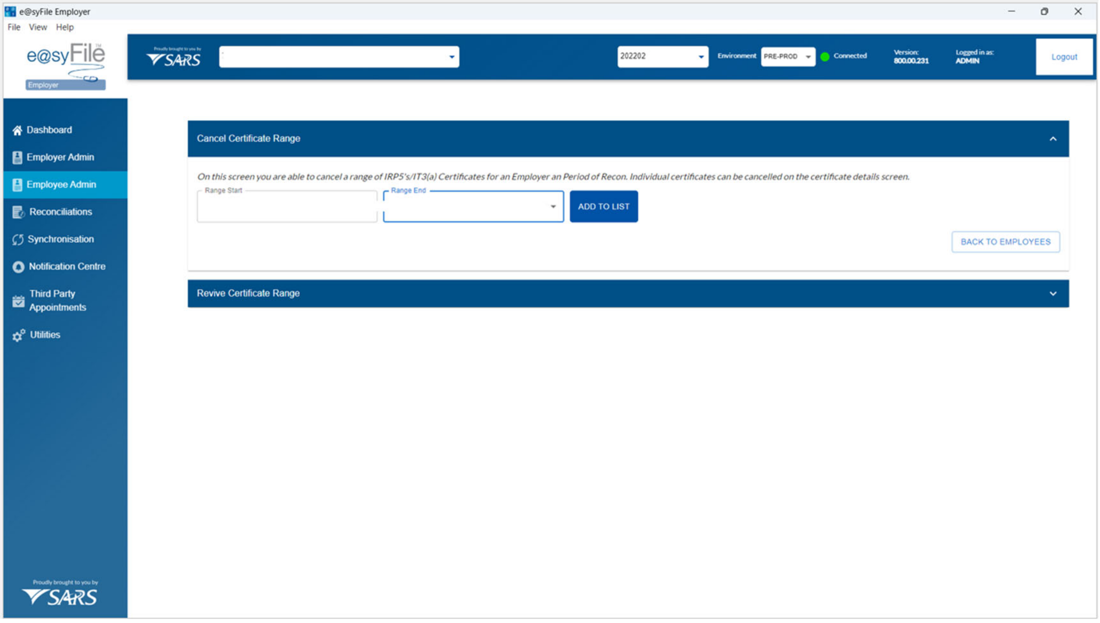
b) Select "**Employee"** from the left-hand navigational pane.

c) Select Certificate Ranges from the Employee Admin screen.

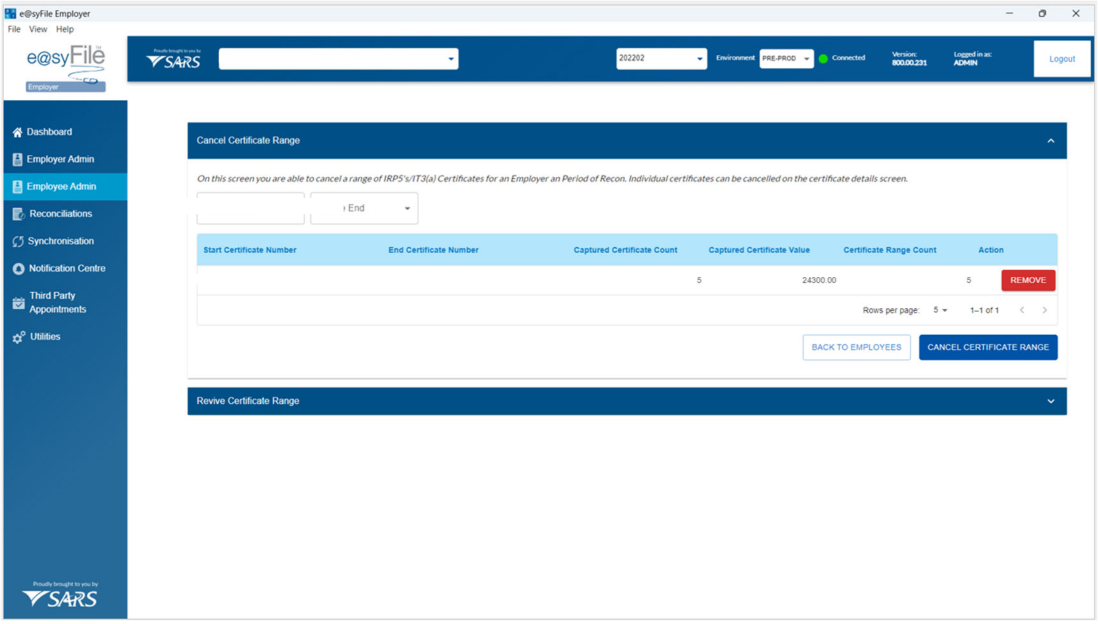


d) From the Cancel Certificate Range panel indicate the starting and ending numbers for the range of certificates you wish to cancel. More than one range of certificates can be selected and added.

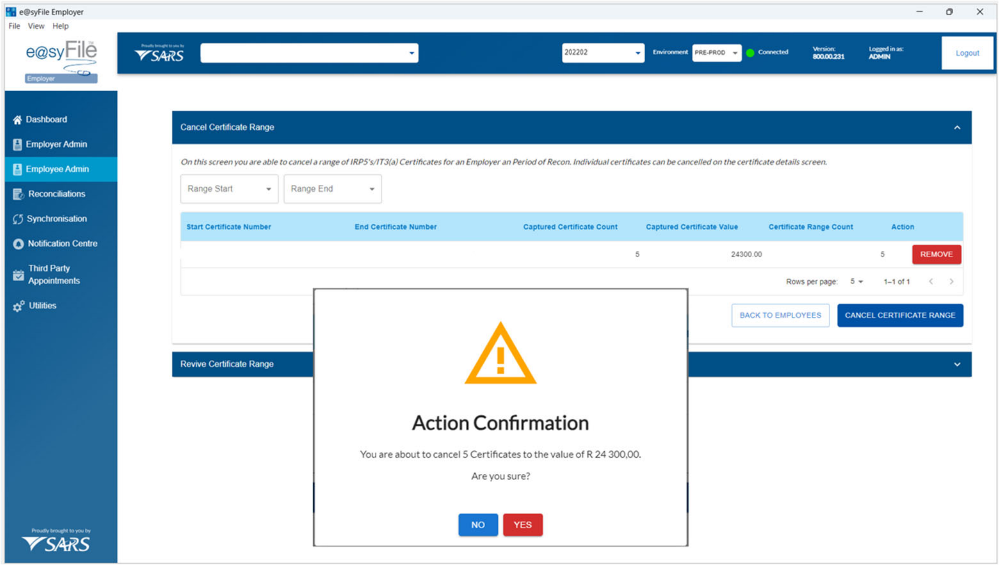
i) Range Start - A list of all certificates found on the database will be displayed.
ii) Range End - Only certificates which fall within the range selected will be displayed.
iii) **Note**: A range is any certificate number that follows consecutively from the previous number. Alpha characters will sort between numeric characters.
iv) Click on Add to list.



e) Click **Cancel Certificates Ranges** once satisfied with the list of ranges.

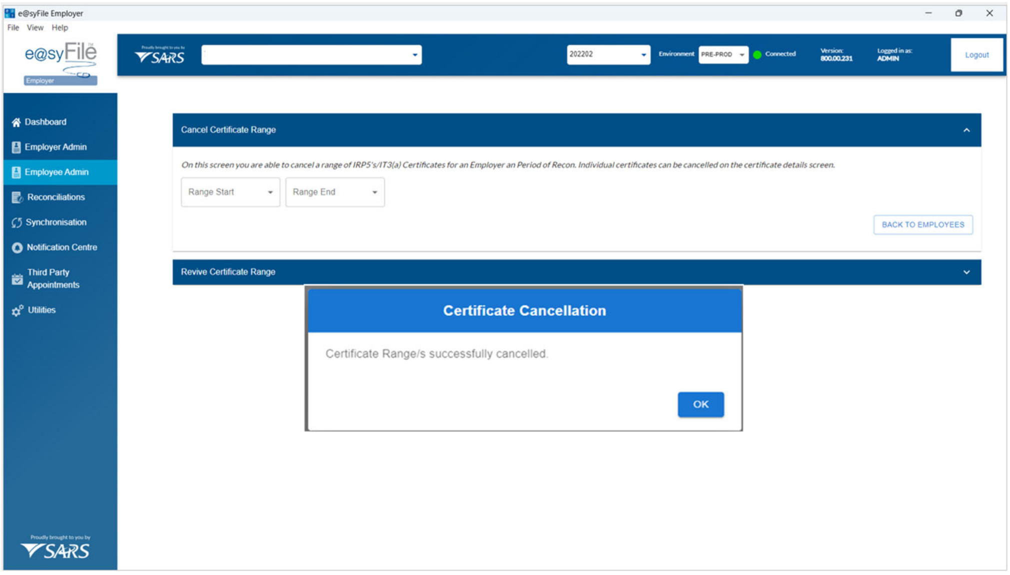


f) A pop-up message will appear to confirm cancellation of all the certificates falling within the selected range. Click **Yes** to continue or **No** if you do not want to cancel the certificates.



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**.



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.

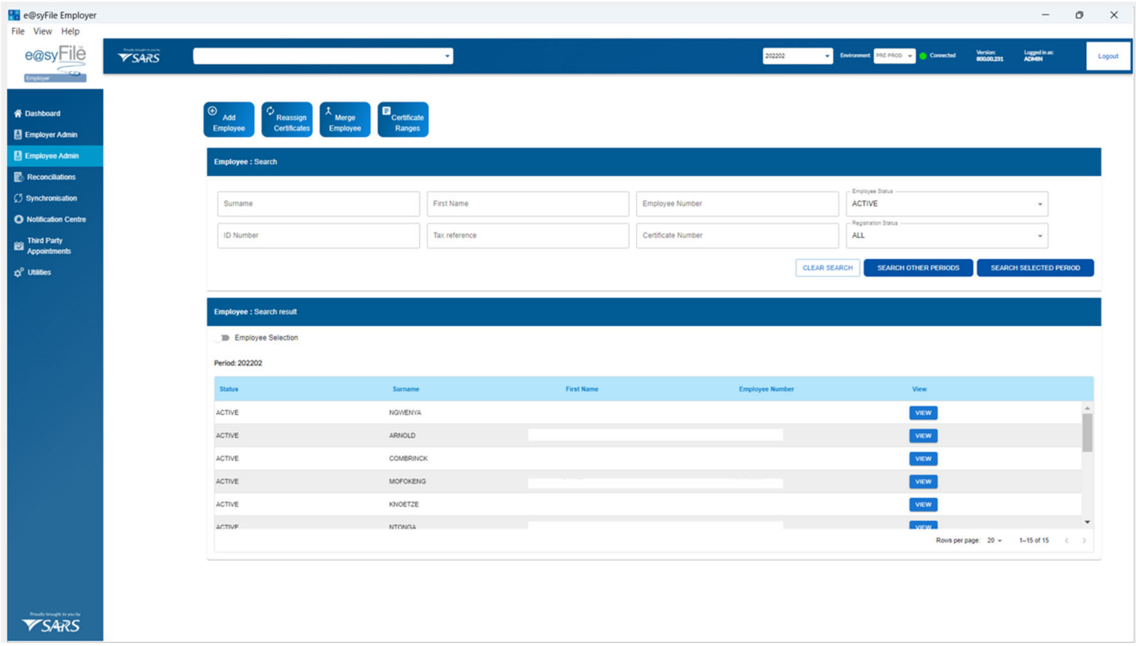
6.5.3 Reviving a cancelled range of certificates

a) You can select one or more cancelled certificate ranges and request that these be revived.

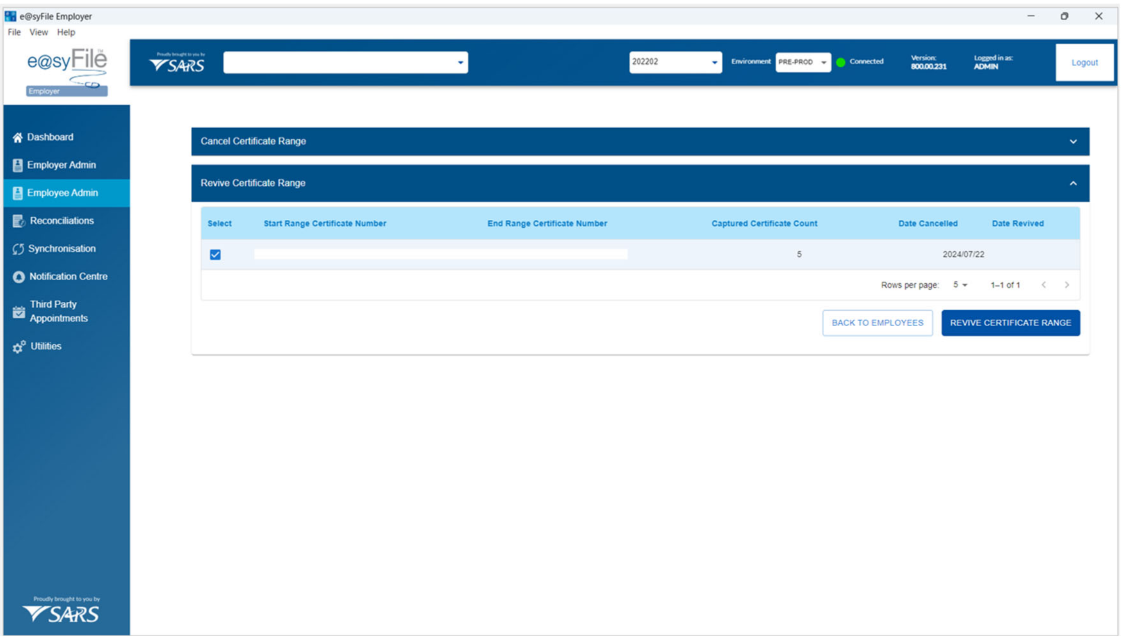
b) When you click "Revive Certificate Range", the system will:

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.

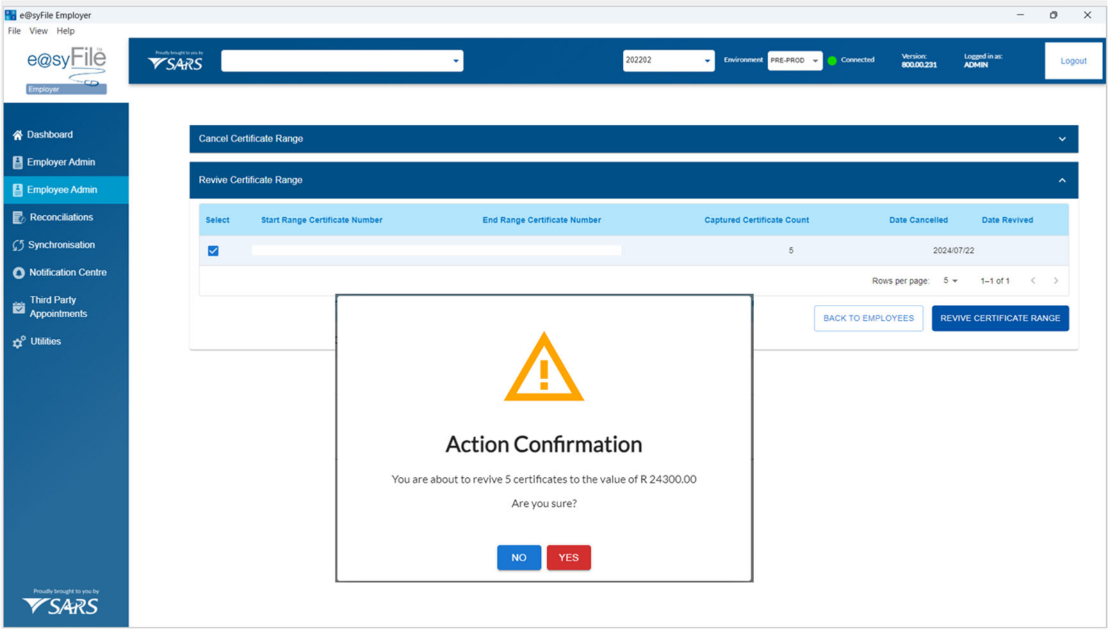
c) Under Employee Admin, select Certificate Ranges.



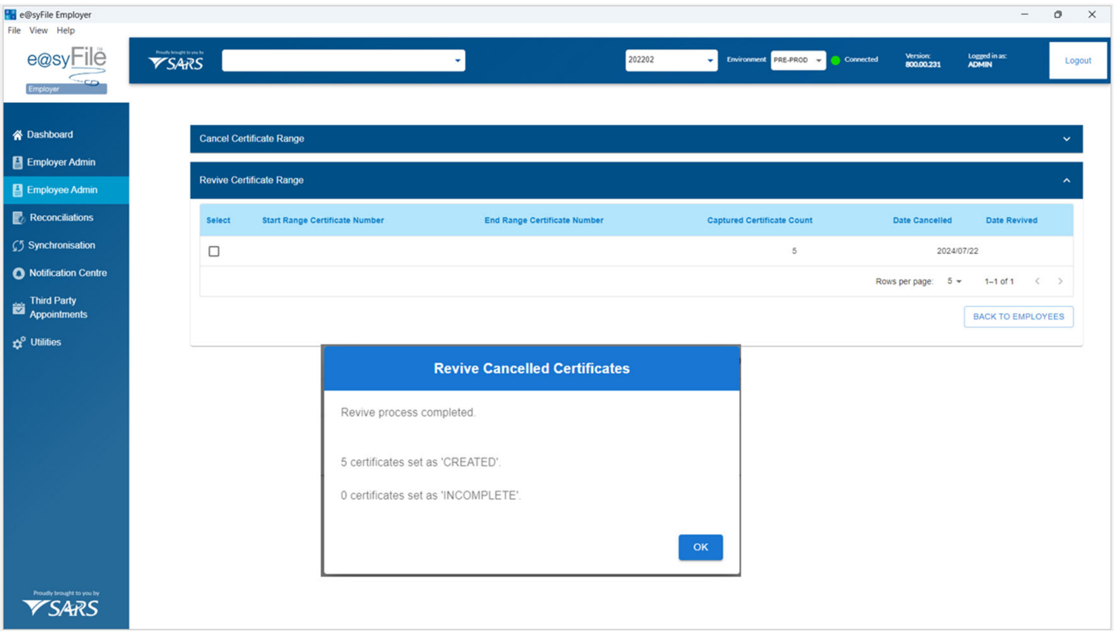
d) From the "Revive Cancelled Certificate Range" panel select the certificate range to revive. After making the selection, the "Revive Certificate Range" button will become enabled.



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



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

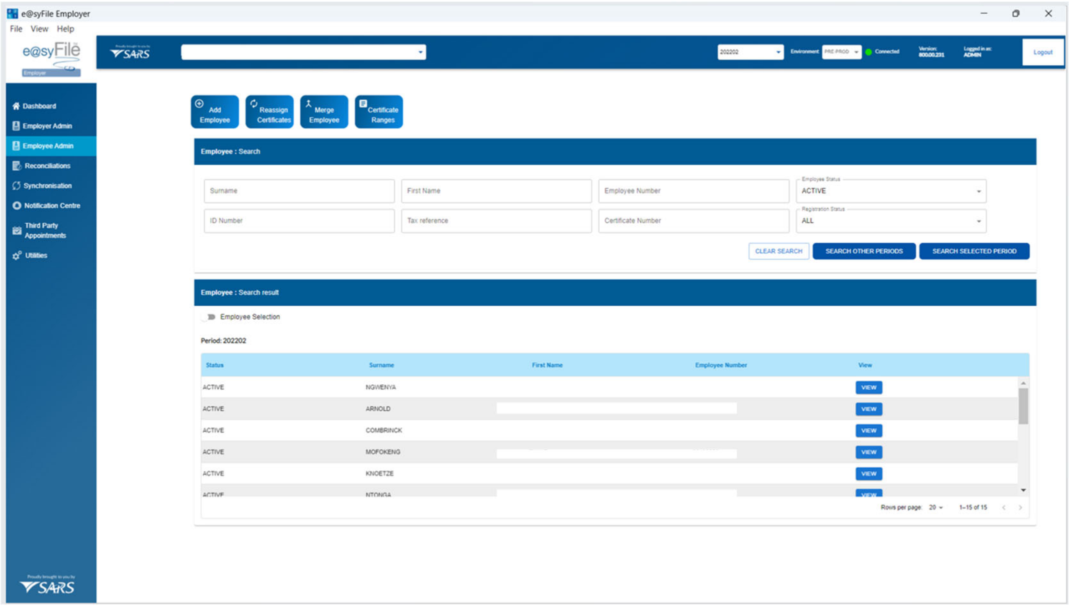


6.5.4 Reassign Certificates

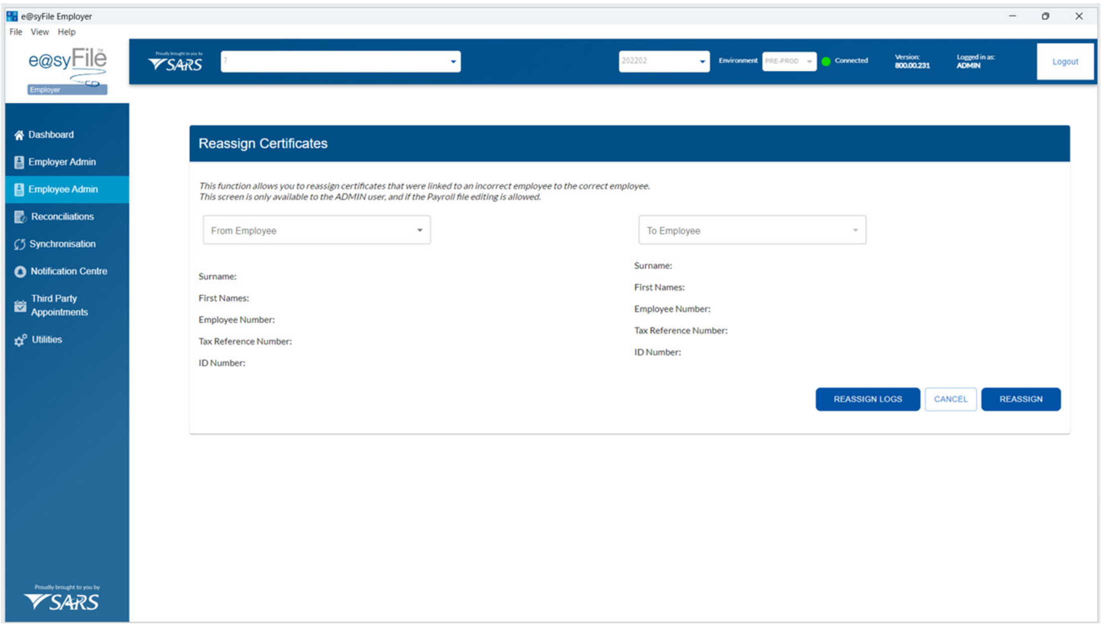
a) The e@syFile application allows a user to move (reassign) a certificate from one employee to another employee in cases where the certificate was incorrectly allocated to the wrong person.

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.

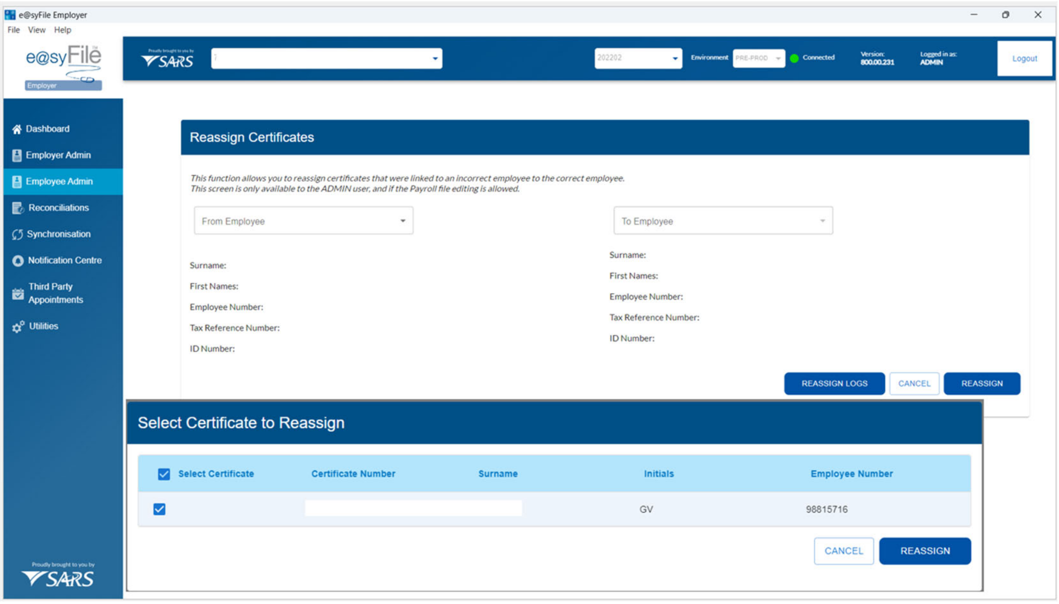


iv) Select the "From Employee" and "To Employee" from drop down lists which show all employees in the currently selected Employer and Period of Recon.

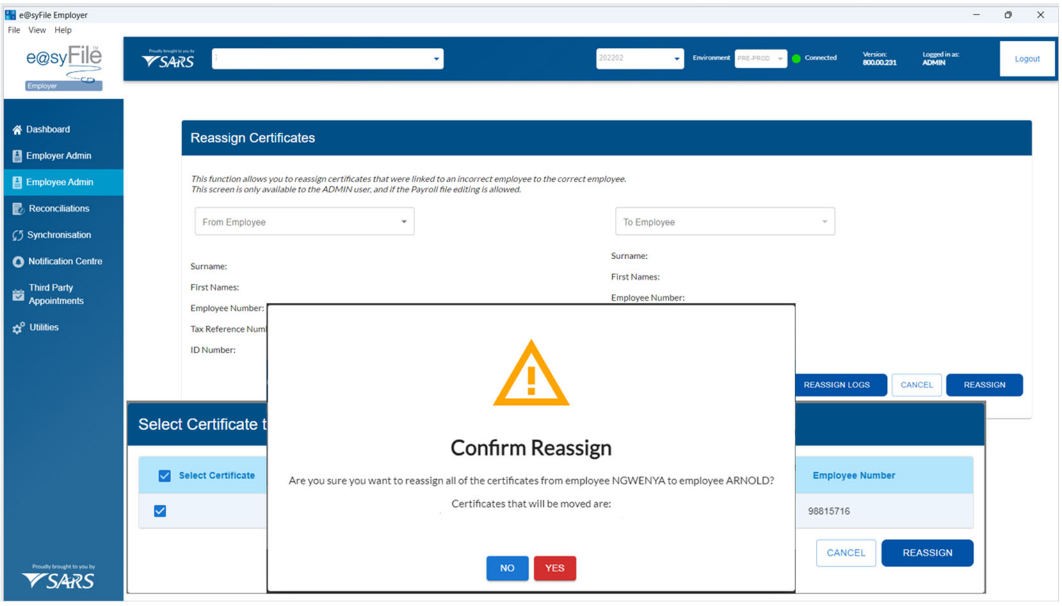


v) Click **Reassign**, the system will display a list of the certificates linked to the "From" employee for the period of recon.

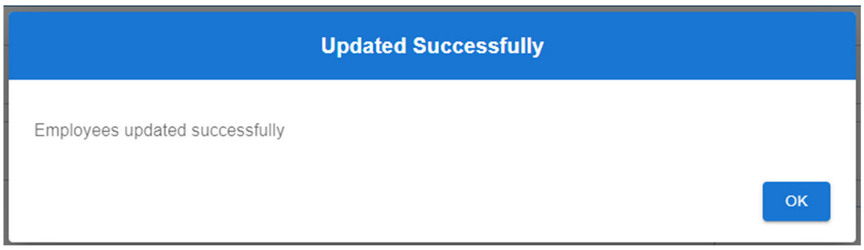
vi) Select certificate to reassign and click **Reassign**.



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



viii) Click OK on the confirmation mesaage



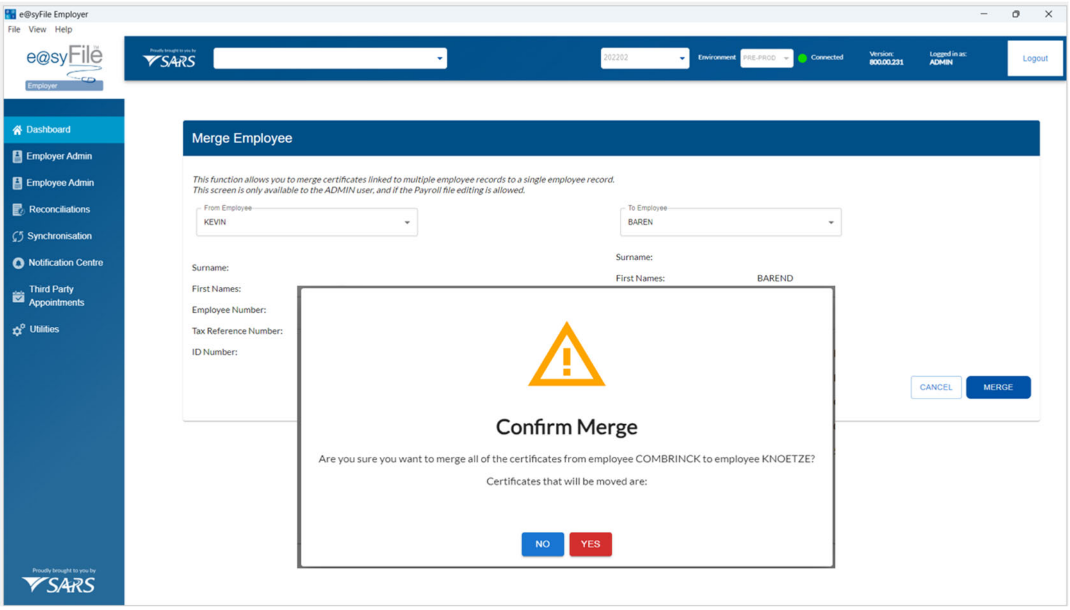
6.5.5 Merge employee

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.

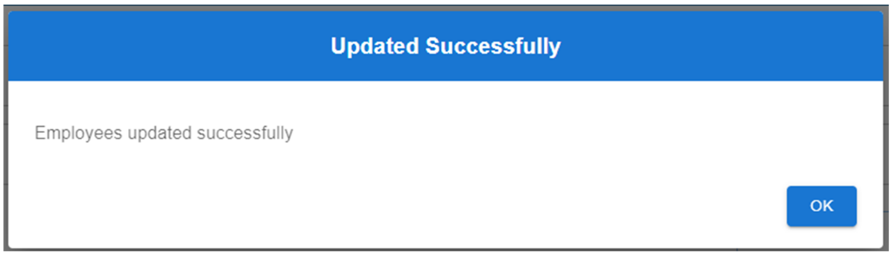
b) This funtion allows you to merge certificates linked to multiple employee records to a single employee record.

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



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.



7 RECONCILIATION

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:

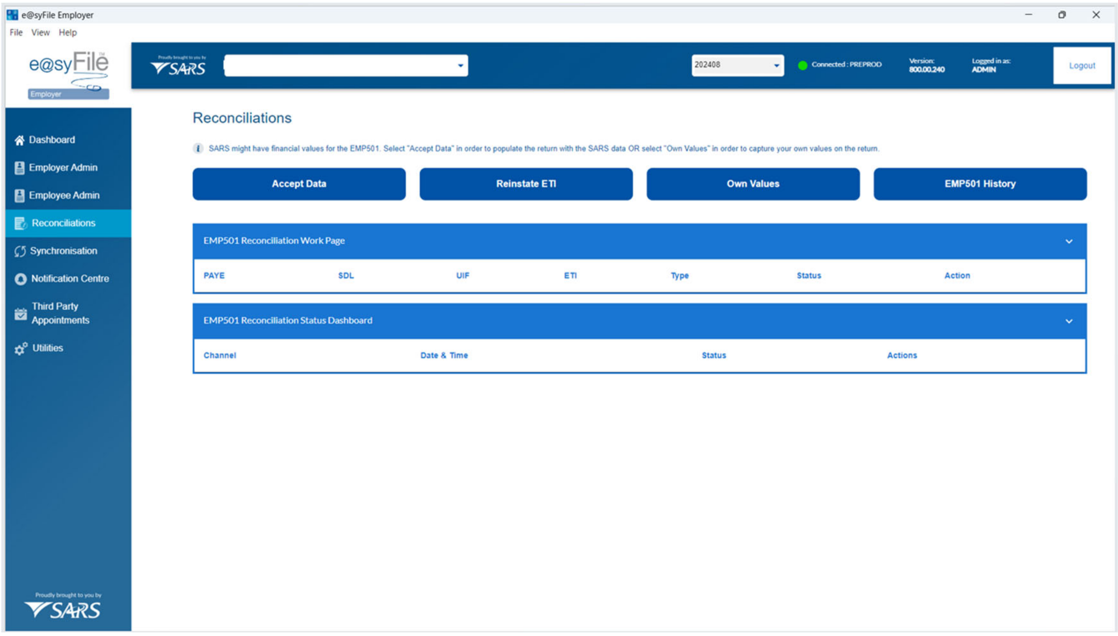
   i) Request a pre-populated return from SARS ("Accept SARS Data").
      A) This is the preferred option.
      B) This option is an online service requiring a synchronised eFiling profile.
   ii) Request a blank form ("Own Values") where financial data needs to be entered manually.
      A) ETI employers 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 it also populates the ETI values as originally submitted/declared to SARS.

Note: Full resubmission is not available when ETI reinstatement is selected. The submission for the ETI re-instatement will have to be submitted before requesting full resubmission.

7.1 Request EMP501 Return

a) The EMP501 return can be requested using either SARS values, own values, or ETI Reinstate

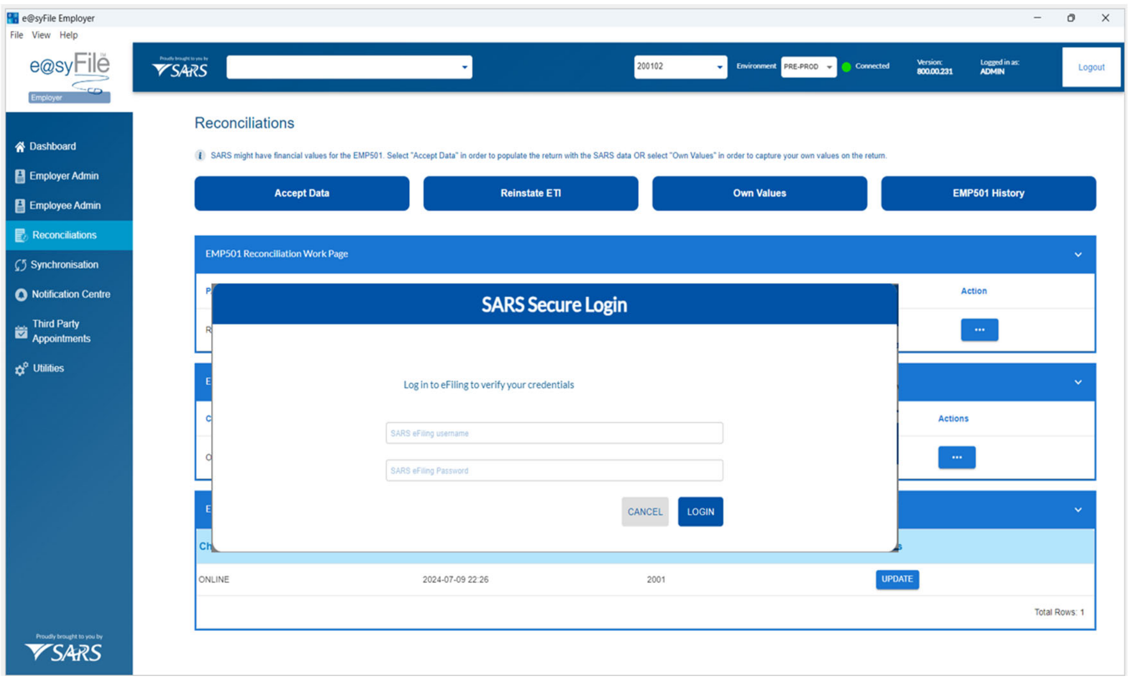
b) Select "Reconciliation" from the left-hand navigational pane and the either "**Accept Data**", "**Own Values"** or "**Reinstate ETI**".



7.2 Request EMP501 with SARS Values

a) Select **Accept Data -** will require eFiling credentials and populate the return with the SARS data:

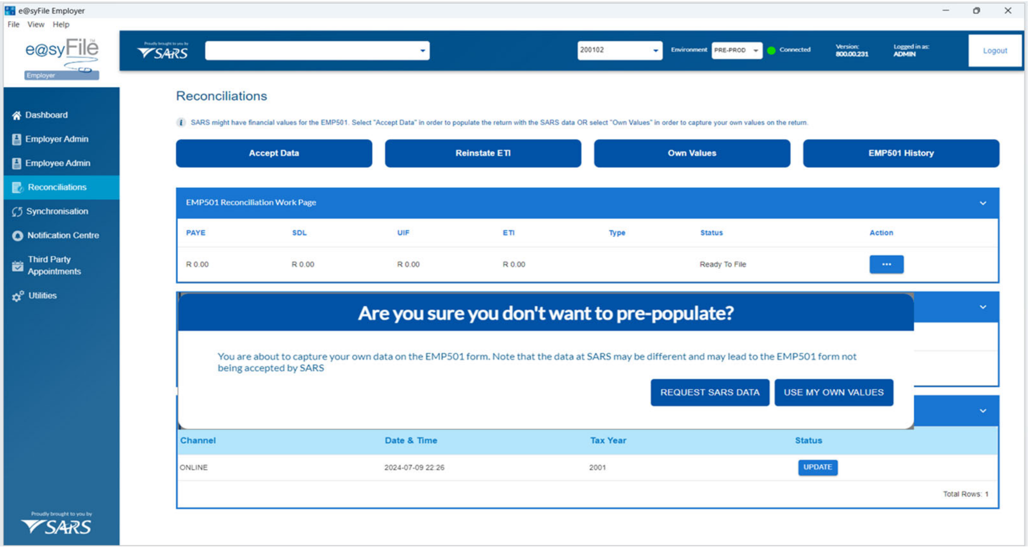
i) Enter your eFiling credentials.
ii) Once authenticated, an EMP501 return will be created, populated with employer demographic information as well as liabilities and payments for each month.



7.3 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.

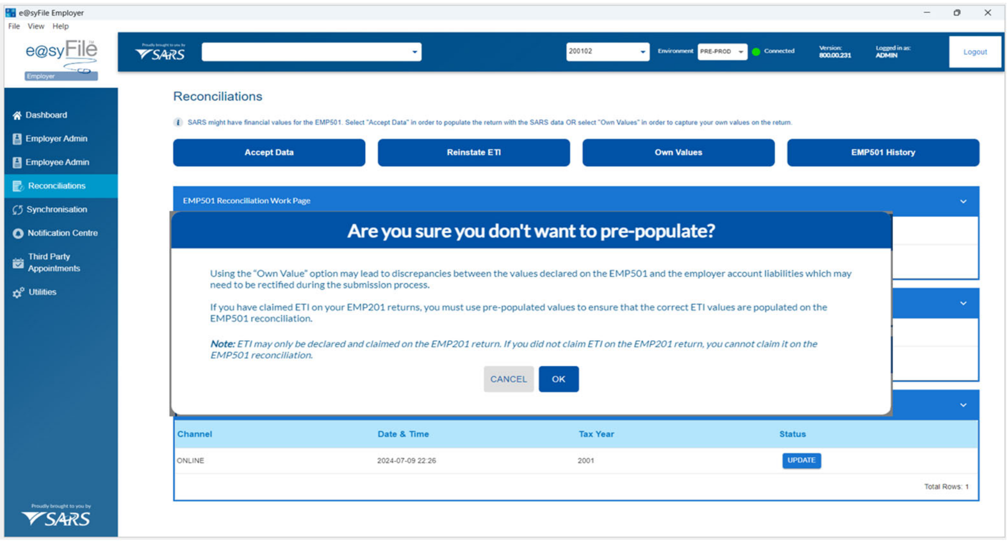
b) After selecting this option, a warning message will display with two options: request SARS data or use my own values.



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.



7.4 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.

7.5 Request EMP501 period in the future

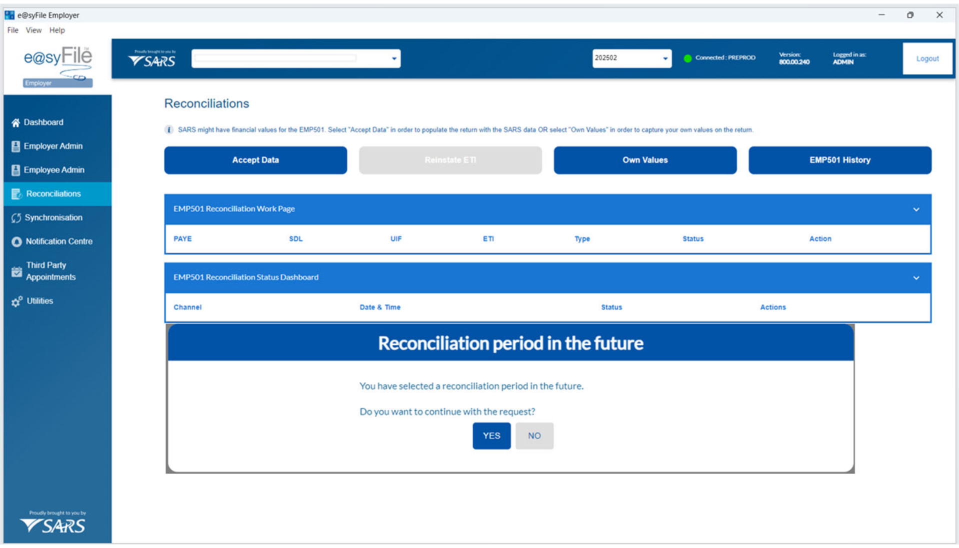
a) Employers who seize trading or no longer employ employees are required to submit reconciliation following such an event and must submit a reconciliation during the full year/annual reconciliation before the end of the transaction year. In this instance the system will request verification that a future dated reconciliation is indeed required.

b) Select "Reconciliation" from the left-hand navigational pane.

c) Select an employer and future period of recon.

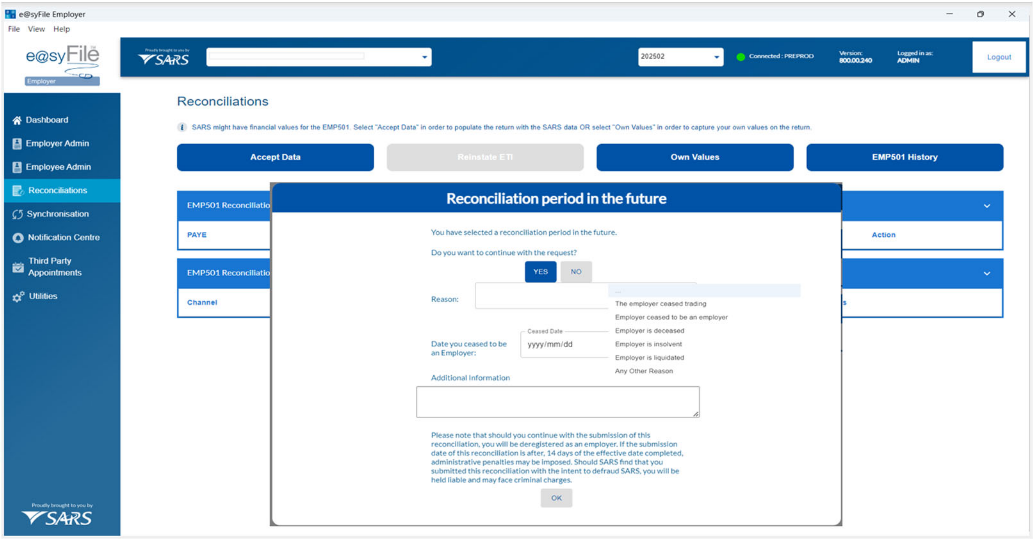
d) Select one of the following options: **Accept Data** or **Own values**. Note that the **Reinstate ETI** option is greyed out because it is not available for future dated submissions.

e) Click **Yes** to continue from the displayed message.

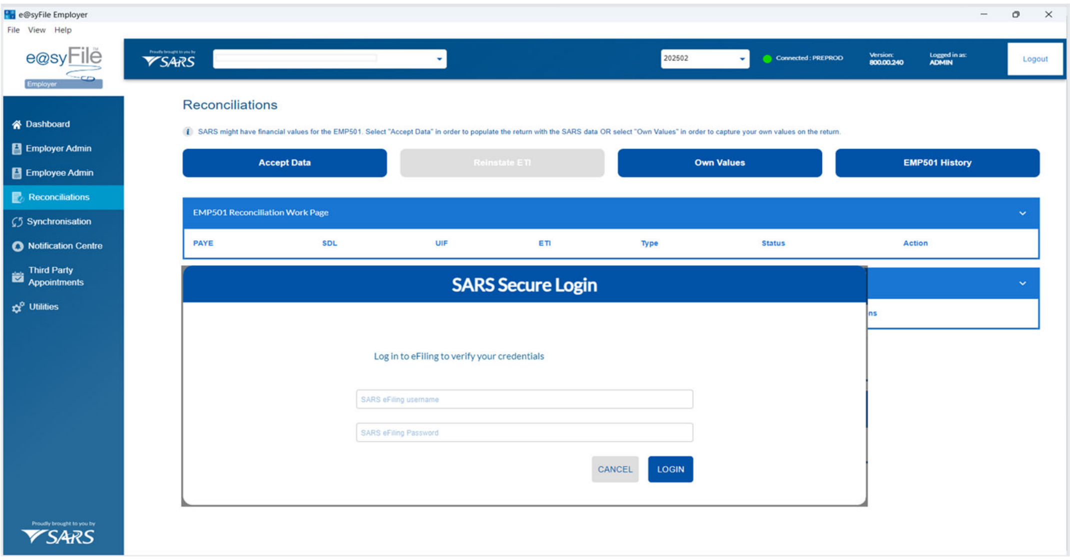


f) Complete the following information:

- 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.



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.



h) Continue to Edit the EMP501.

7.6 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 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 contain values for certificates in cancelled, cancelled-submitted as well as

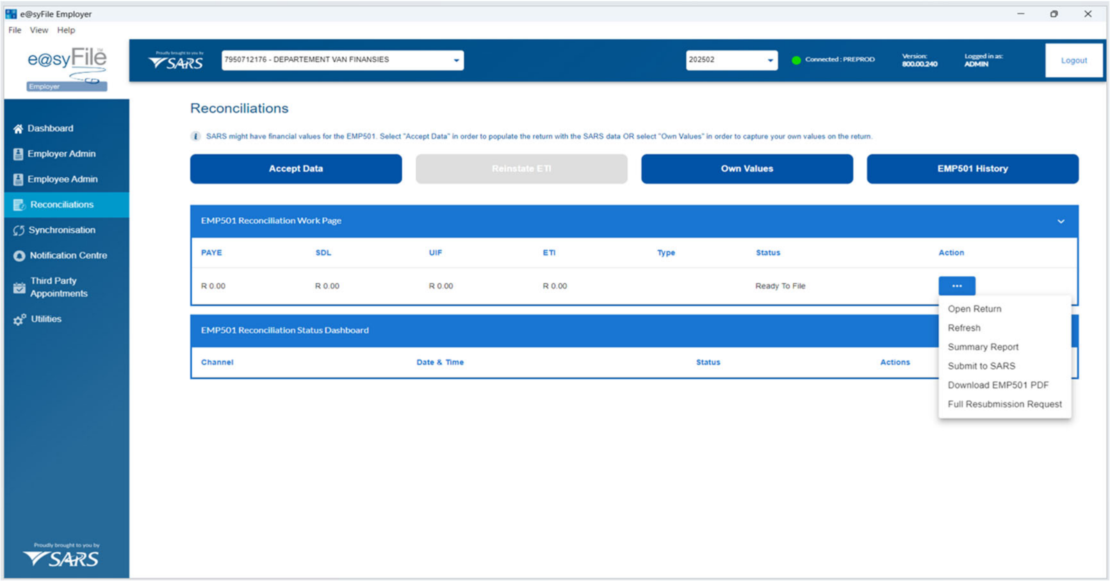
cancel certificate ranges to SARS (excluding certificates in a Submitted or Incomplete status)

v) Download EMP501 PDF – View EMP501 PDF (Render the EMP501 Read Only PDF for user to view, save or print).

vi) Full Resubmission Request: Note: do not use this option for amended submission.

A) Selecting this option 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 are 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.



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:

i) Generate IRP5/IT3(a) PDF's – This option is only available once the submission has been submitted and EMP501 status is available, should you require a certificate before submission you will need to obtain from the employee individual record.

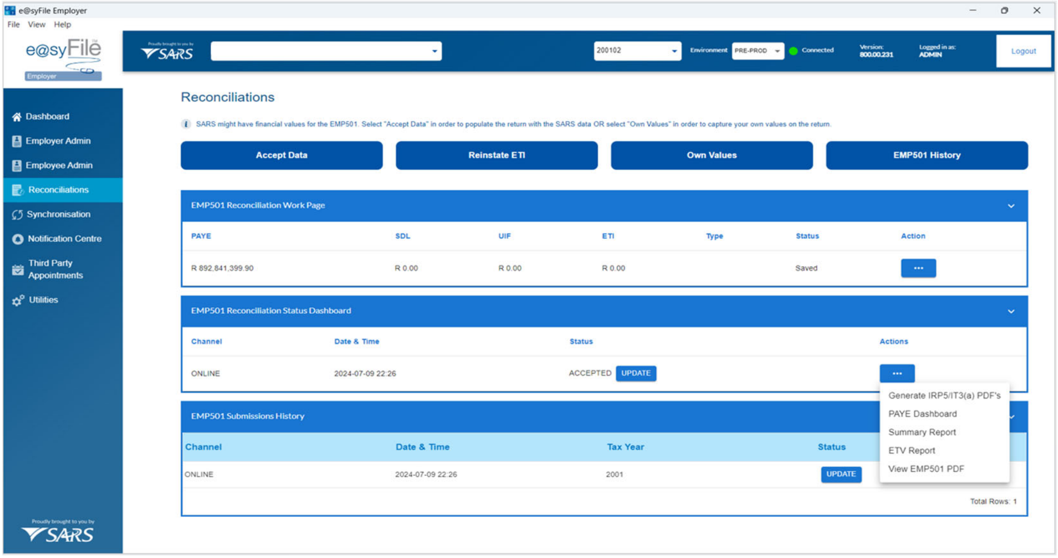
ii) PAYE Dashboard

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

v) View EMP501 PDF. Note that the EMP501 status and related data will determine which action items should be available.

c) Once submission is 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 SYNCHRONISATION

a) The e@syFile application includes an online functionality that requires 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 on 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) eFiling profile and Employer information: This will synchronise all employer information linked to the SARS eFiling profile.
- ii) Letters and Correspondence
- iii) AA88 notices: AA88 correspondence, EMPSA and other letters.
- iv) Taxpayer Income Tax Registrations: `
- v) All: 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™ 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):

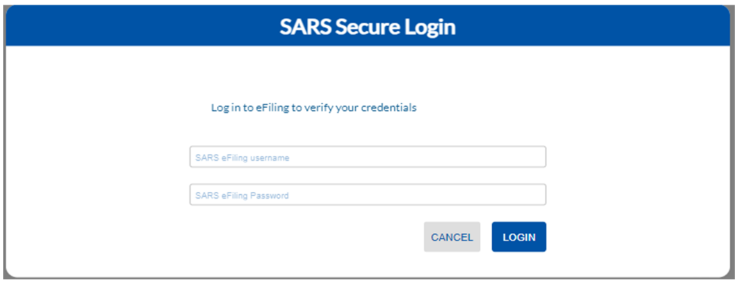
- i) Where multiple PAYE reference numbers are registered on a eFiling profile, it is important to ensure that all the final reconciliations for these PAYE reference numbers were submitted using the same e@syFile™ Employer database used for synchronisation. This will ensure correct distribution of the contents of the Income Tax letters 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™ Employer database when synchronising.

8.1 Profile, employer information, letter, correspondence

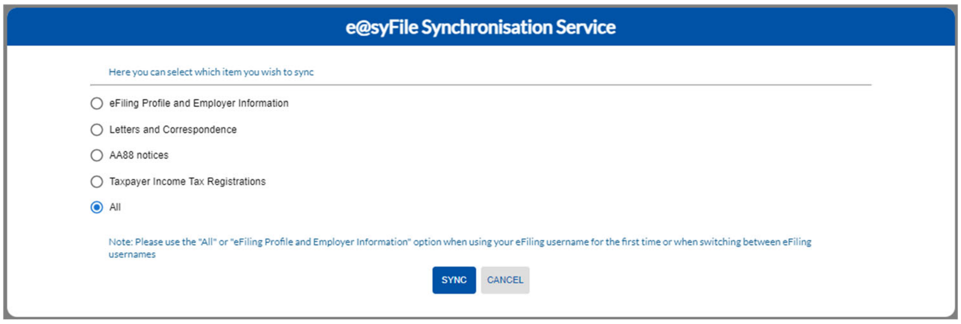
a) Click SYNCHRONISE APPLICATION on the left-hand menu pane.

b) Enter your eFiling login name and password and click LOGIN.



c) Select which items must be synchronised:

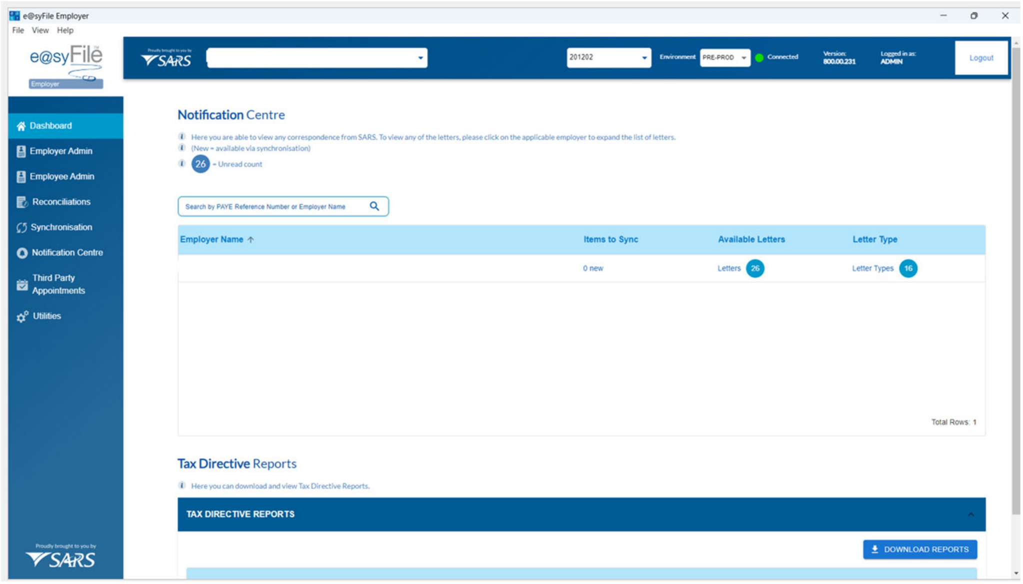
i) eFiling profile and Employer information
ii) Letter and Correspondence
iii) AA88 notices
iv) Taxpayer Income Tax Registrations
v) All



d) Click SYNC for the synchronisation process to start.

i) A pop-up message will be displayed confirming the synchronisation has been completed. Click OK.

9 NOTIFICATION CENTRE



a) The notification centre serves as central place where a user can view and manage all correspondence (messages) sent by SARS.

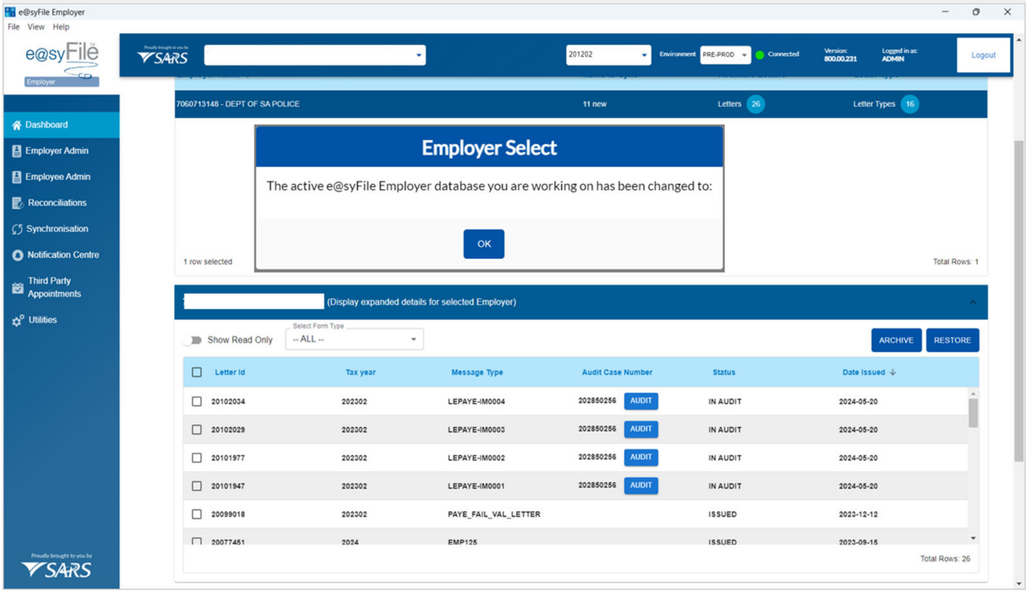
b) There are two types of messages:

   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.
   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.



10 UTILITIES

a) The Utilities function provides tools for backing up and restoring the various e@syFile databases.

b) Various functions are available on this menu. The following sub-menus are listed on the horizontal tab:
   i) Database Utilities – Use this menu to back up the database, restore it from a backup, extract PAYE data and Import PAYE data extract.
   ii) User Management – Use this menu to create and edit and change user passwords.
   iii) Validations Logs – Use this menu to review AA88 import logs, Payroll import logs, Pre-Submission validation logs.
   iv) Disc 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.
   v) Update – Use this menu if the e@syFile™ application is out of date.

10.1 Database Utilities

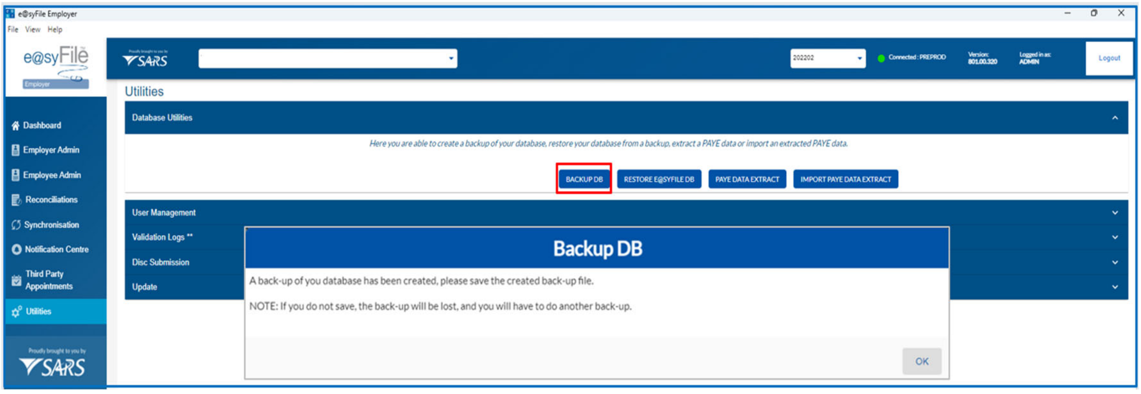
a) This functionality allows you to back up the database, restore it from a backup, extract PAYE data, or import previously extracted PAYE data.

10.1.1 Backup database

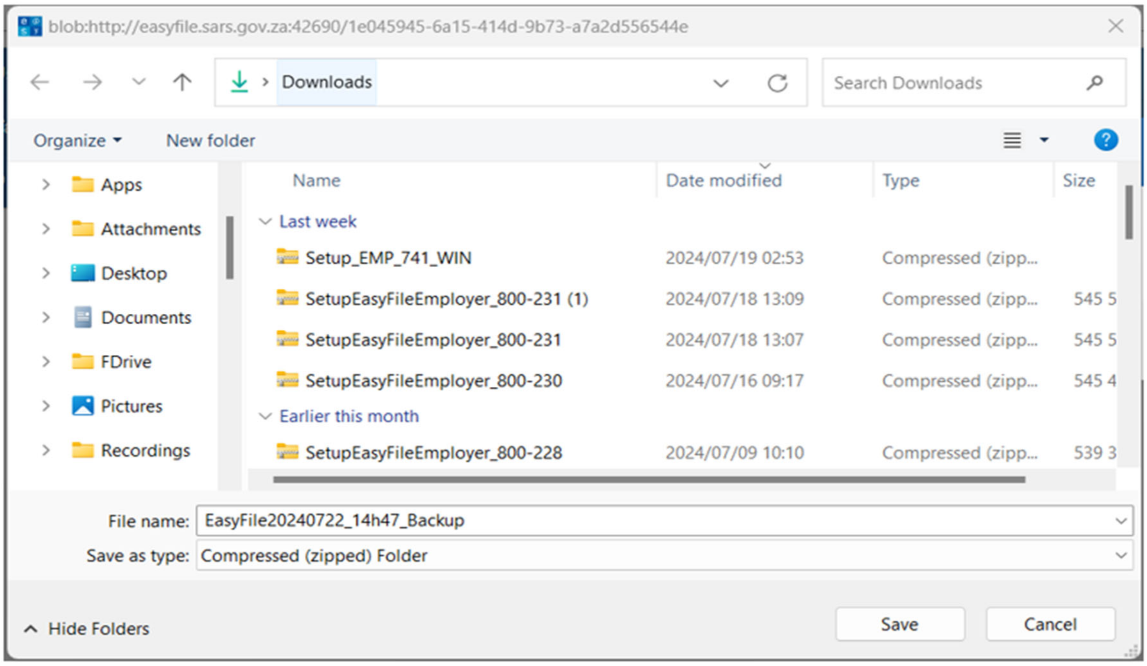
a) When performing a backup, the system will prompt you to select a target folder. A full backup of all e@syFile databases will then be created and stored in a single zipped file. This file can be archived and later used to restore data into e@syFile. Only a system administrator can perform database backups.

b) It is recommended to make frequent backups of your reconciliation information. The backup process in e@syFile™ Employer is quick and simple.

c) Steps to back up the database:
   - i) Click Utilities.
   - ii) Click Database Utilities.
   - iii) Select BACKUP DB.
   - iv) Select OK on the pop-up message.



   - v) Select a destination folder and click OK.



   - 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™ Employer login details, which created the back-up, are saved with back-up files.

e) The e@syFile™ Employer login details, which created the back-up file, will be needed when restoring the back-up. The encrypted data contained in the back-up will not be accessible unless the e@syFile™ Employer login details which created the back-up are used.

10.1.2 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.

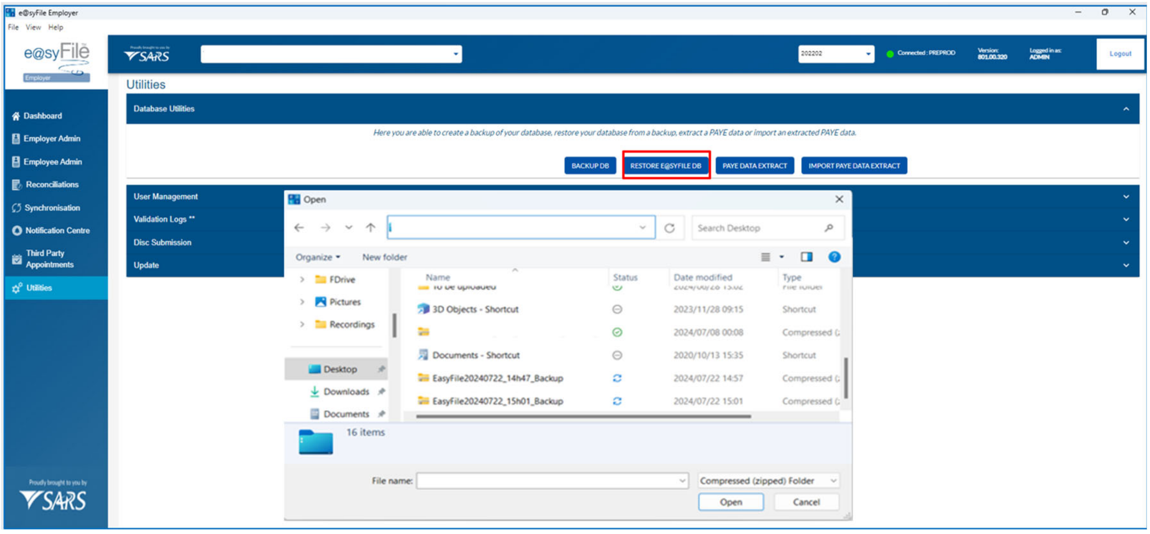
b) All current data is overwritten.

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) Steps to 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.



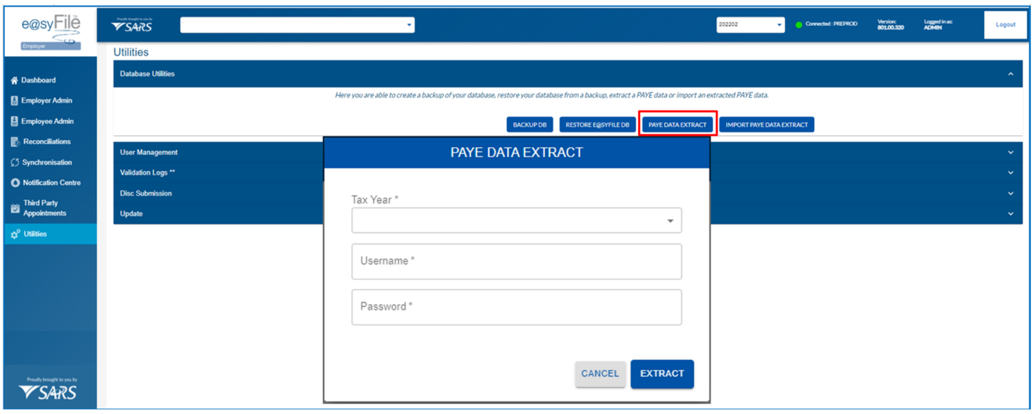
10.1.3 PAYE Data Extract

a) PAYE Data Extract allow users to securely extract and share data for a single Employer/PAYE reference via an encrypted data extract file.

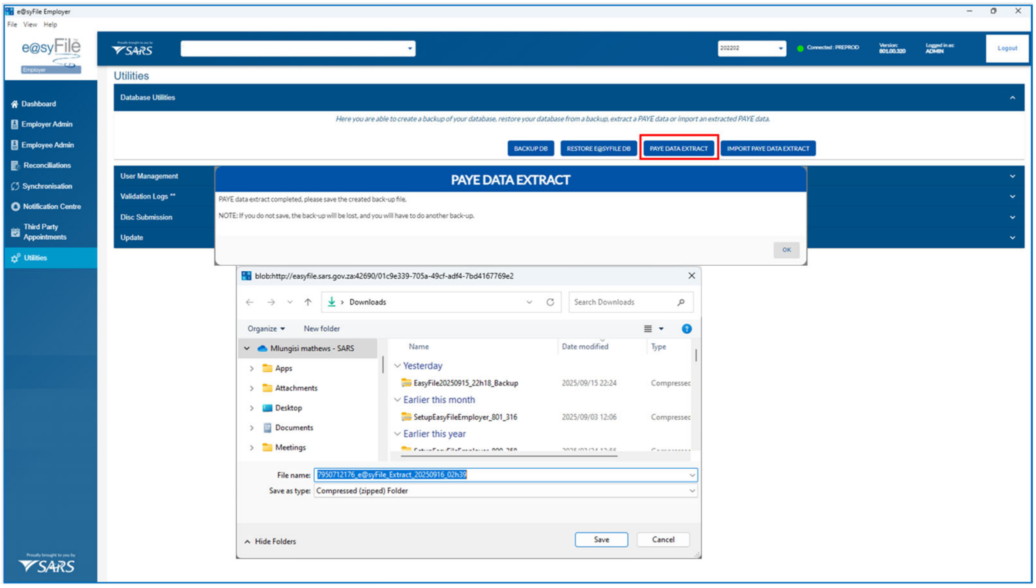
b) Steps to extract a single Employer/PAYE

   i) Selects "PAYE Data Extract" from the Database Utilities screen.

ii) Selects an Employer/PAYE reference and a Tax Year (or "All").
iii) Provides import credentials (username/password).



iv) Selects a save location (local or network).

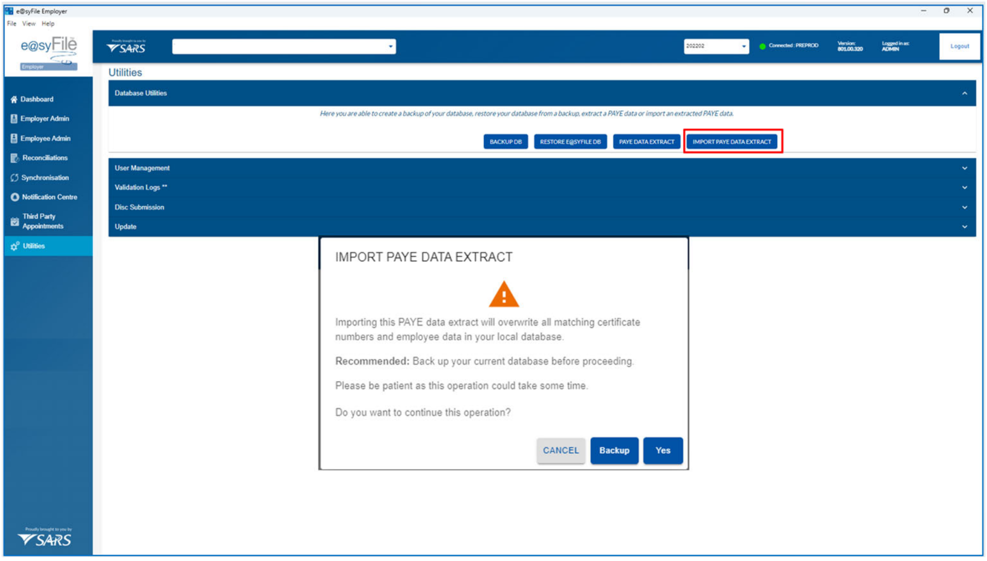


10.1.4Import PAYE data extract

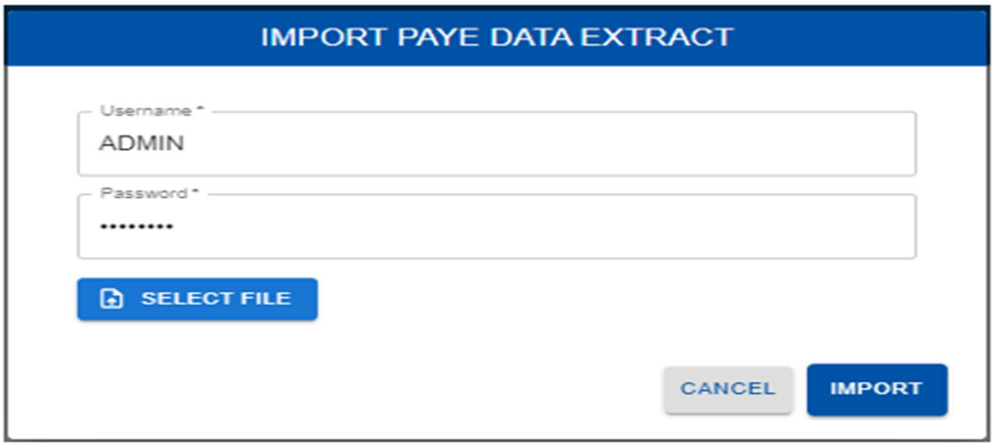
a) Importing a PAYE data extract allows System Administrators to merge the extract into an existing database. During this process, conflicting records are overwritten while maintaining data security.

b) Steps to import PAYE data extract

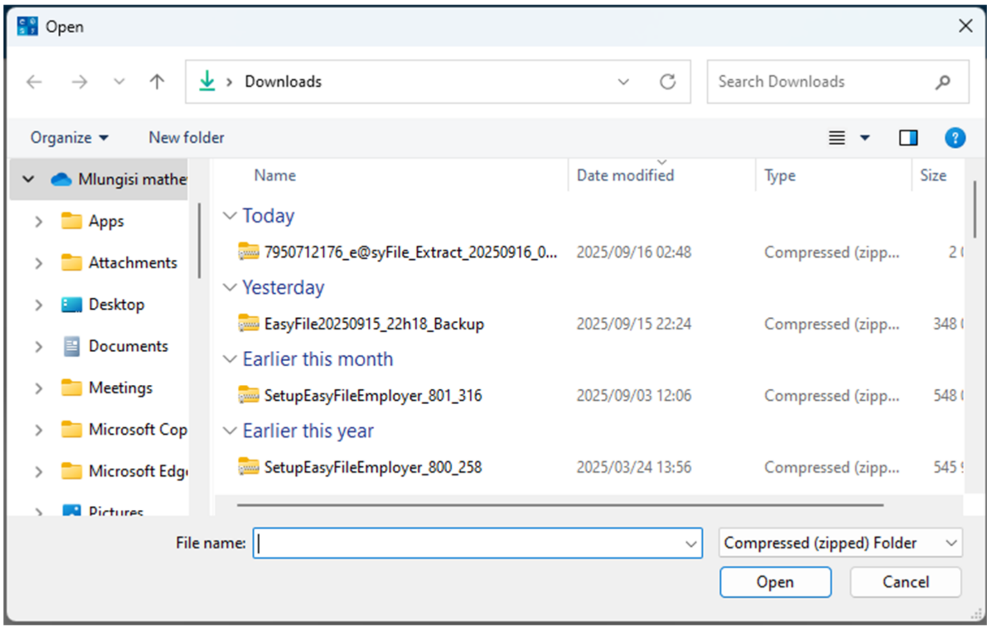
i) Accesses the Database Utilities screen
ii) Selects"Import PAYE Data Extract".
iii) Select the supplied Single Database extract to Import.



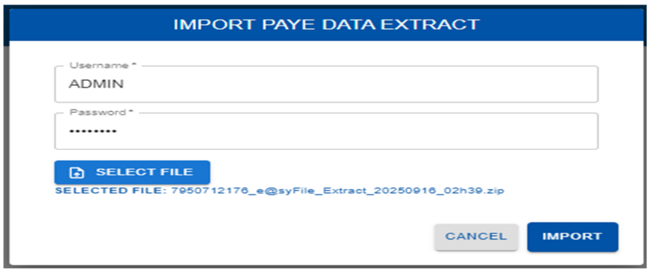
iv) Select “Yes “to proceed with import.
v) Enter the credentials (login/password).



vi) Select the file and click open.



vii) Click **Import**



10.2 User Management

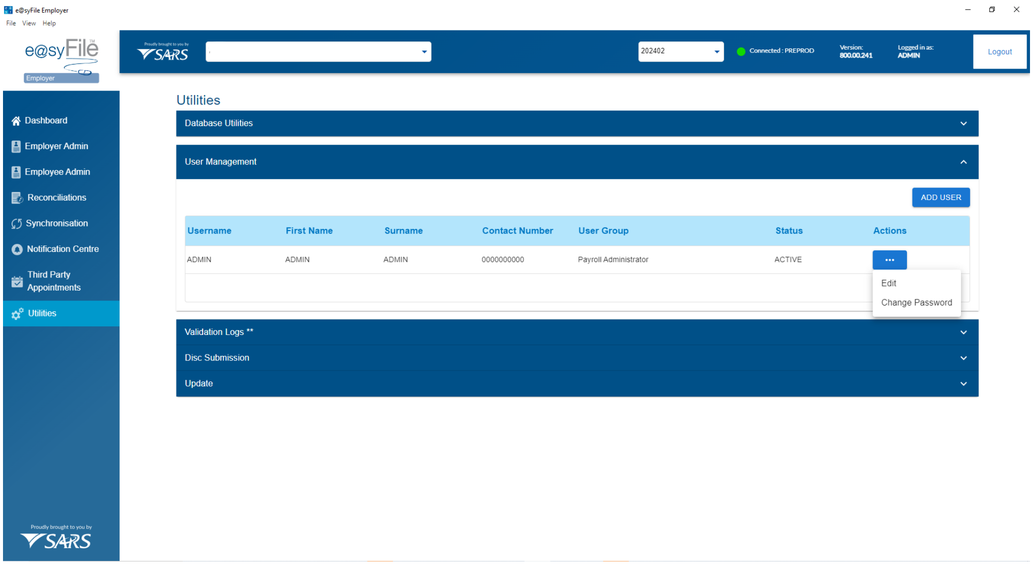
a) After initial installation, e@syFile will have a system administrator user setup with username ADMIN as configured during installation. This default user can then login and is able to create and manage the other required users.

b) There are 2 (two) 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.

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



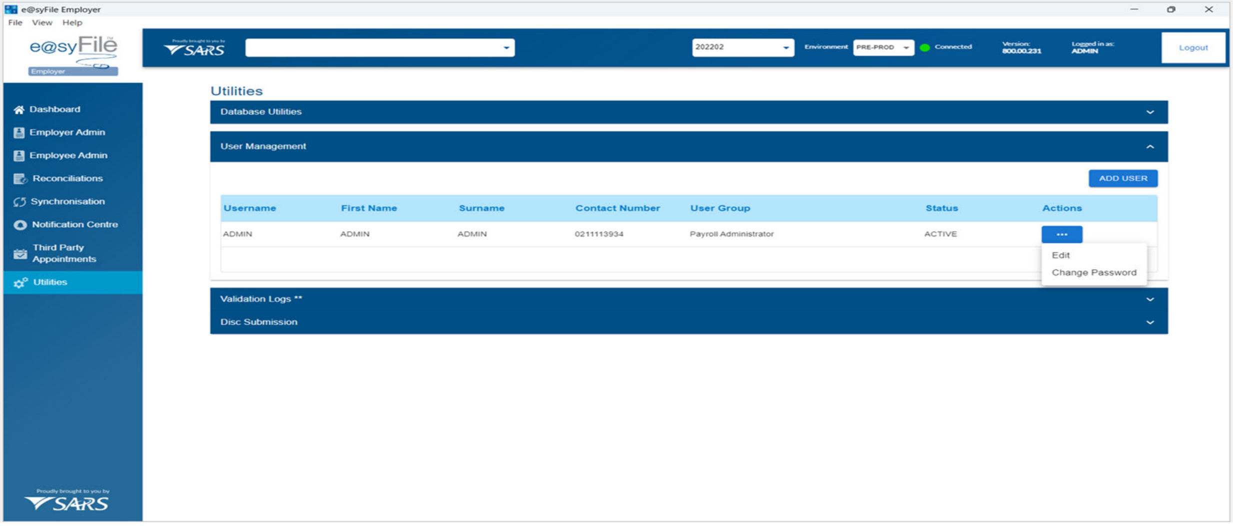
10.2.1 Create and Edit Users on e@syFile

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.

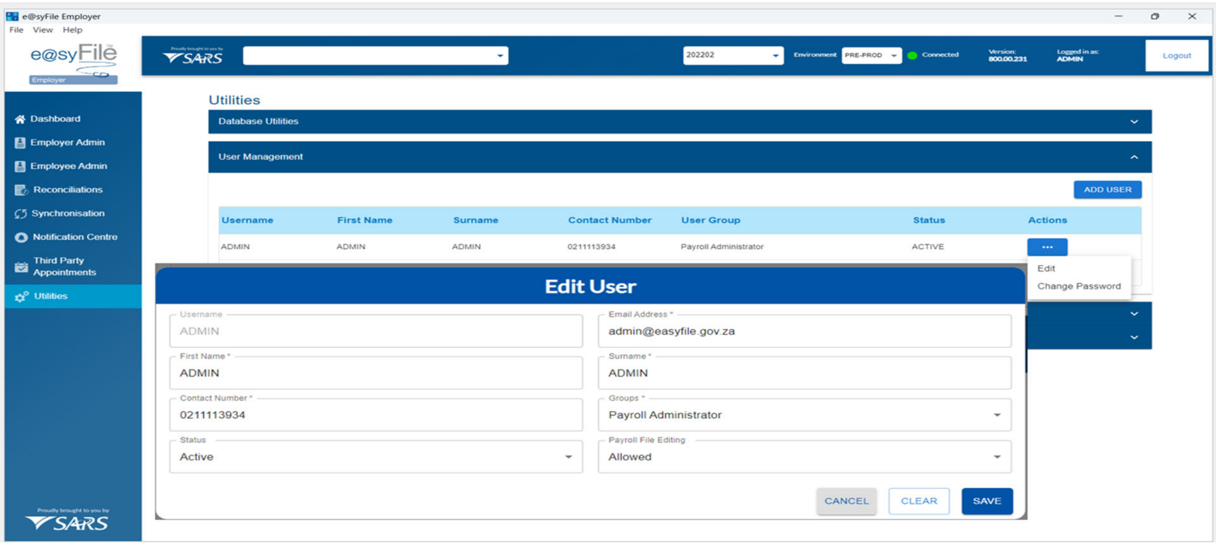
b) Step to create and edit users:

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.



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



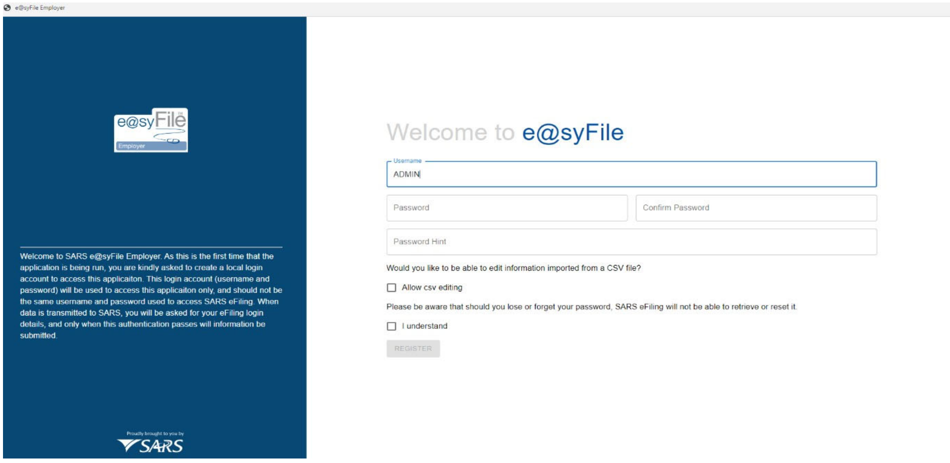
10.2.2 Create e@syFile Password

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.

c) Creating first password and password hint on registration:

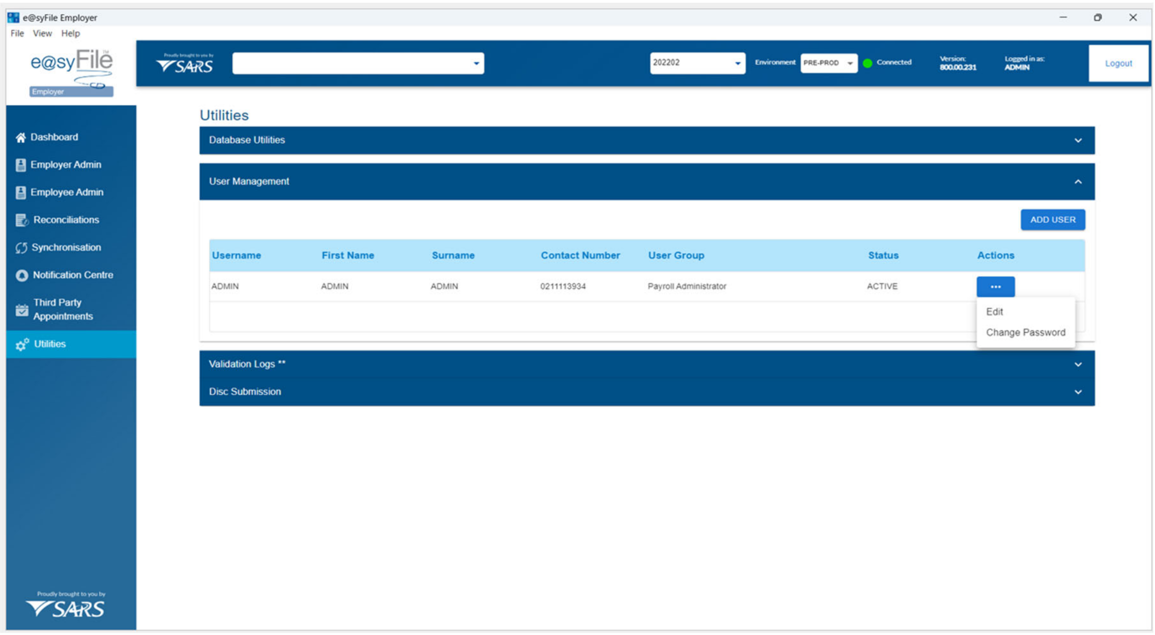
i) Capture password and password hint.



10.2.3 Reset Password

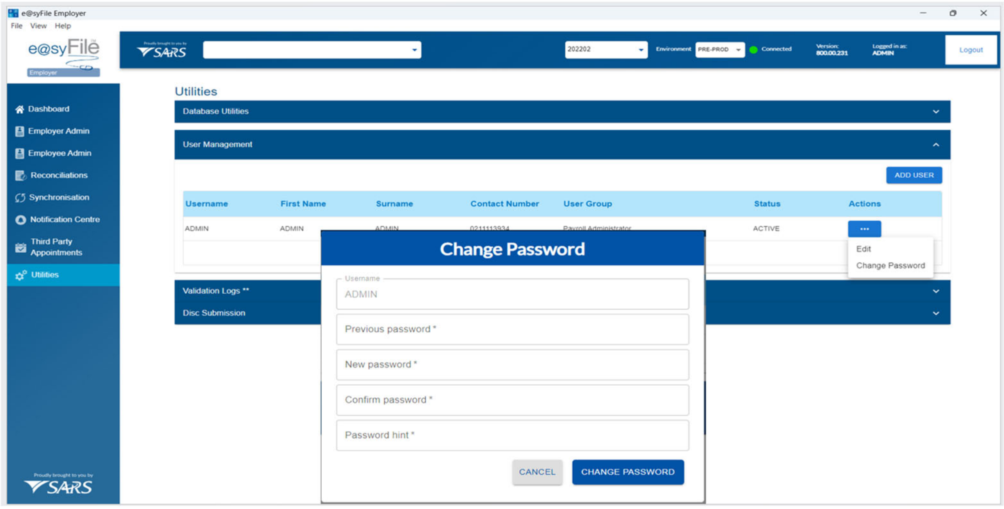
a) Only the ADMIN user can access this function.

i) Navigates to the User management screen under the Utilities Menu.
ii) Select the Change Passwords.



iii) Supply new password and password hint.

iv) Click **CHANGE PASSWORD**



10.3 Validation logs

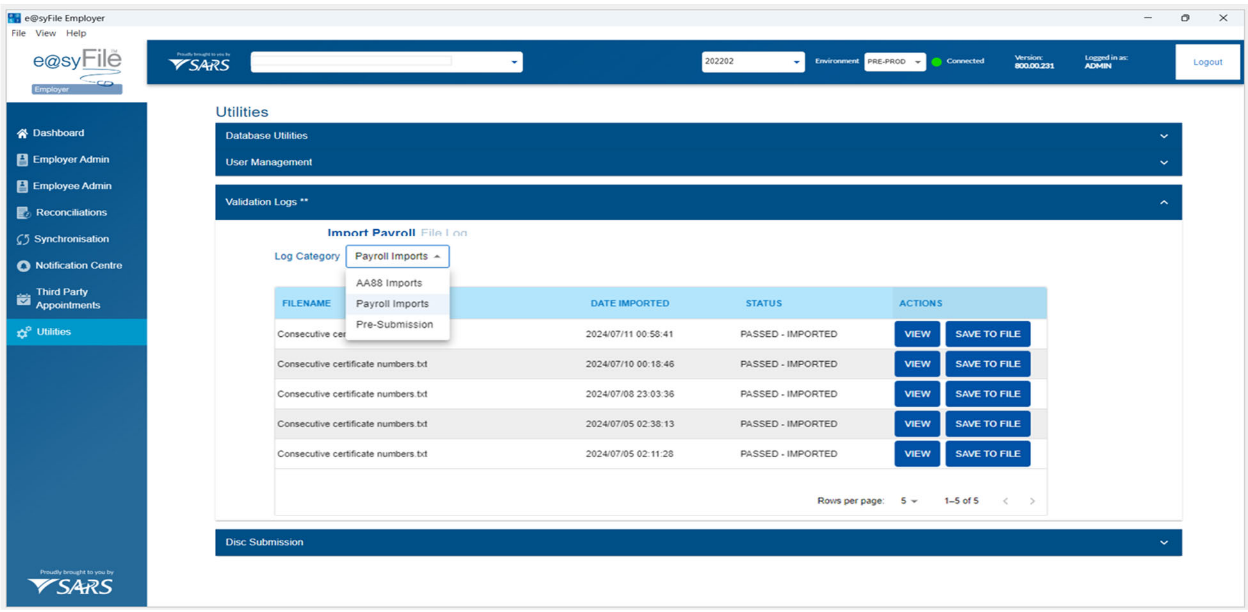
a) The purpose of the validation logs is to provide feedback to the user on the result of the validation, and most importantly list the errors found, so that the user may then correct these errors.

b) Each time a validation of a Payroll File import or a PAYE Reconciliation is performed a validation log entry must be created.

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.



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

10.4 Disc Submission

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.

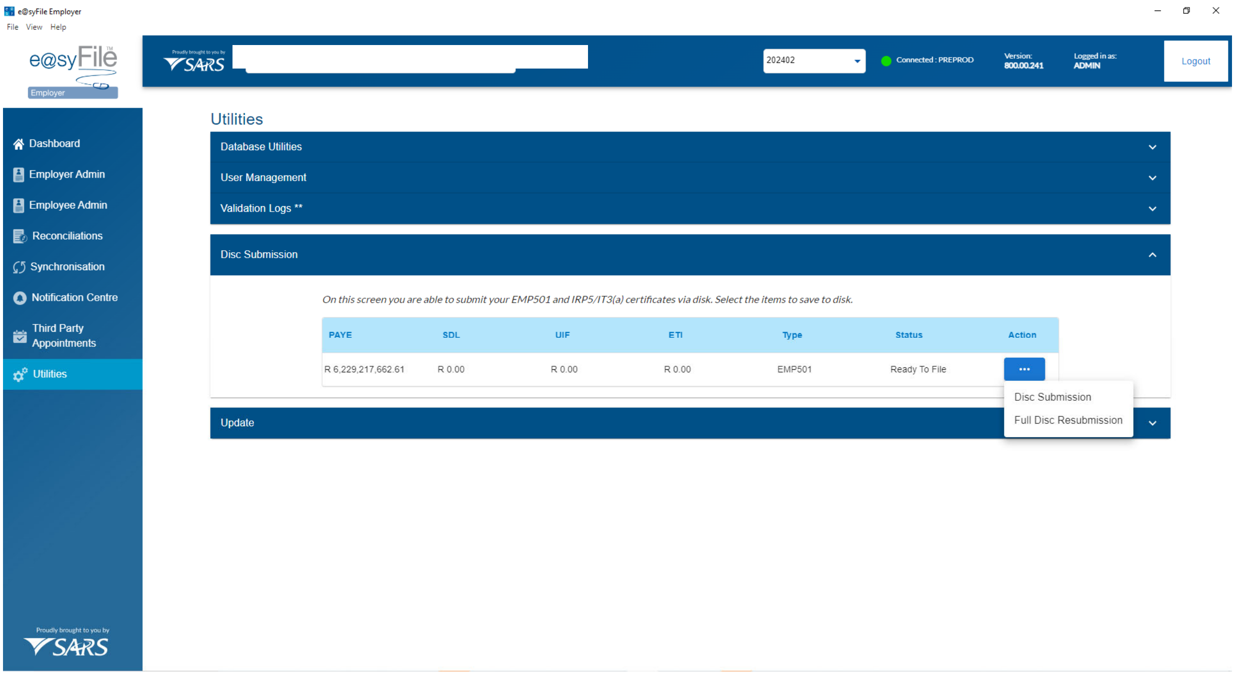
c) In the case of disk submission, a PSV (Pipe Delimited File) is created together with PDF versions of the EMP501 and EMP601 are also created and placed in the same destination folder selected by the user, with the aim that the user has to print and sign them and bring them to the branch together with 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.

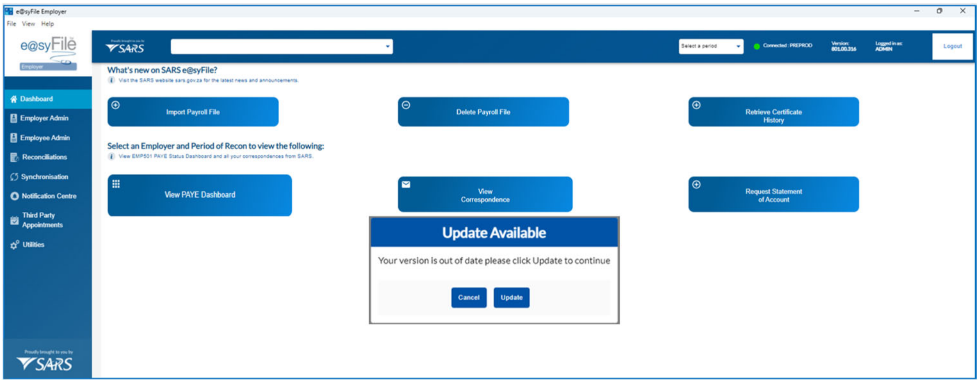
e) Disk submission process:

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 Pre-submission 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.

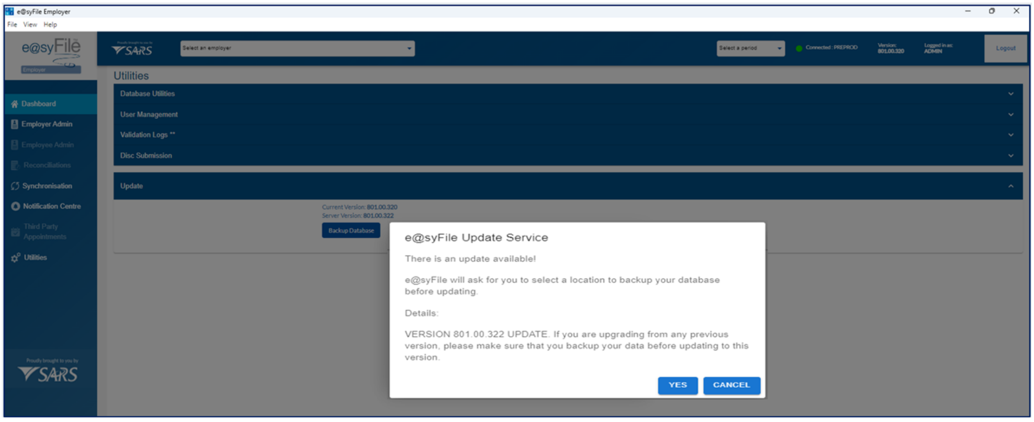


10.5 Update

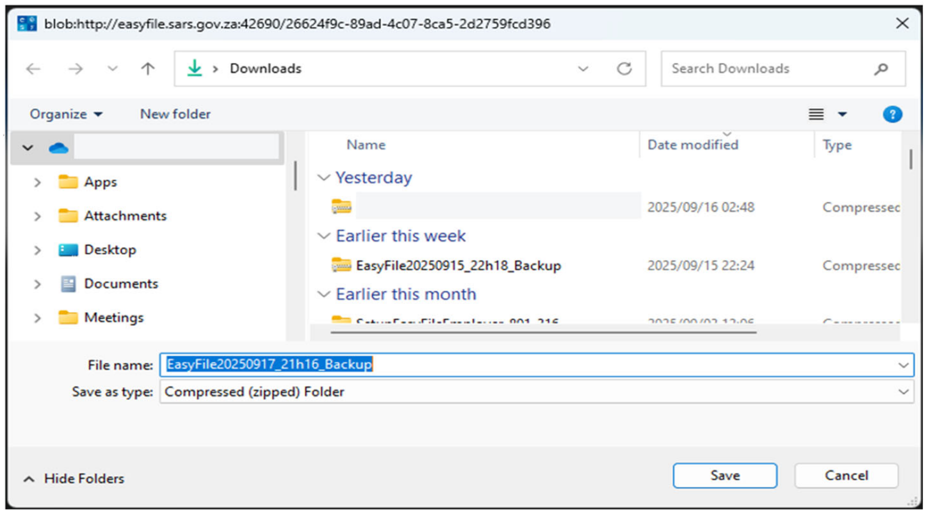
a) The following message will display when e@syFile™ application is out of date.



b) Select Update, then the following message will display.



c) Select YES to back up your database.



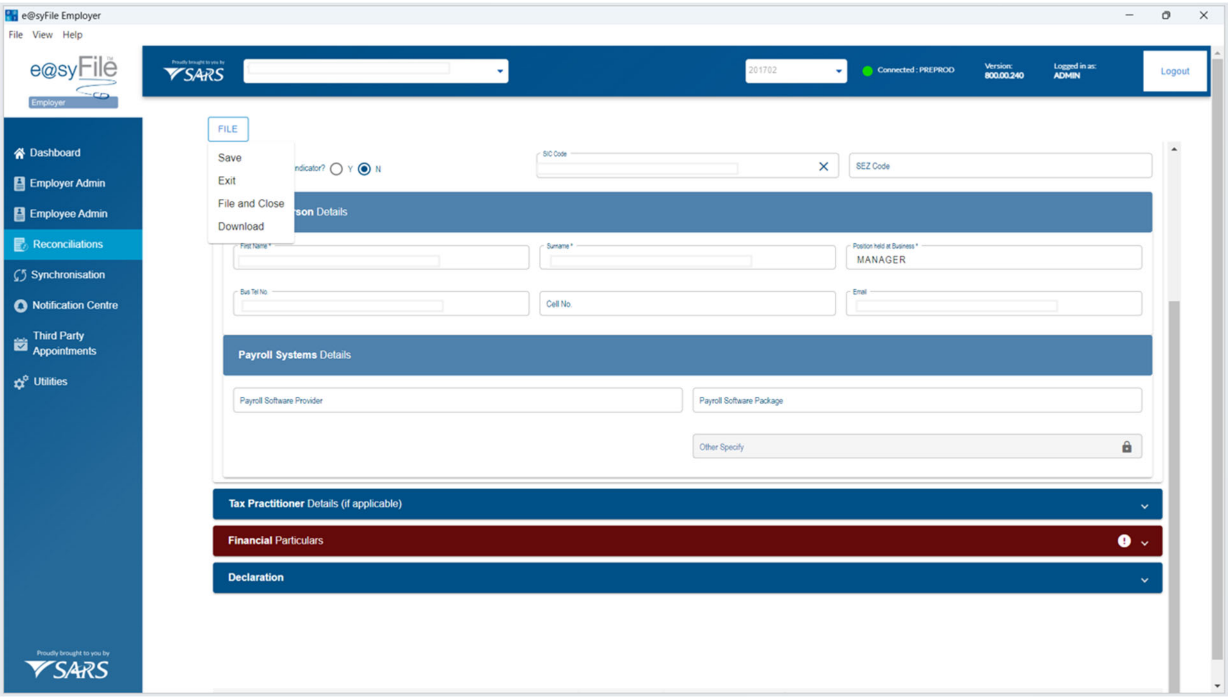
d) Select a location on your local C drive to save the and click save.

e) Select a Location on your Local C drive or Desktop to save and then click to save.

11 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 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.

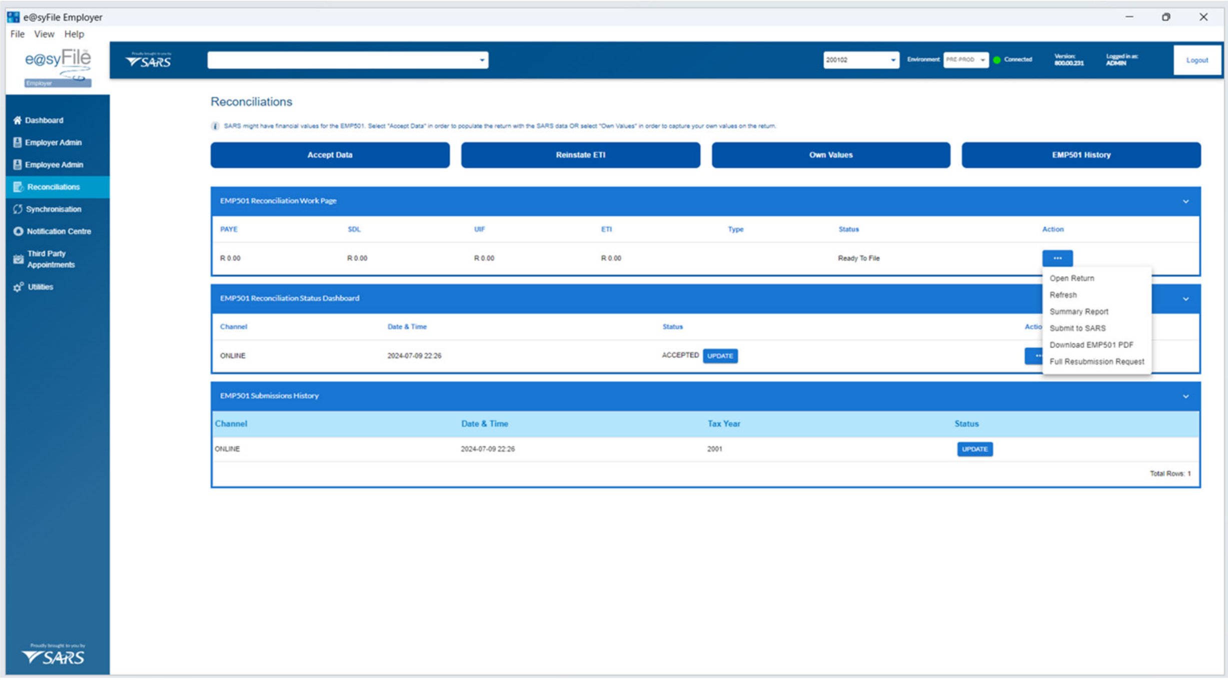


11.1 PAYE Reconciliation return Submission to SARS

11.1.1 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.



iv) The system will perform pre- submission validation and if validation 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."

11.2 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

11.2.1 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.

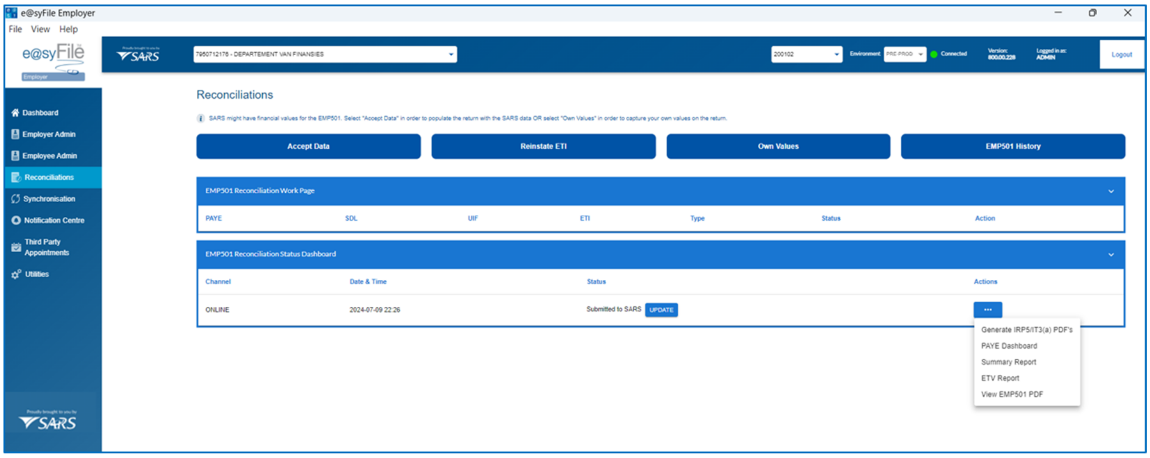
11.2.2 ETV report

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.



11.2.3 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.

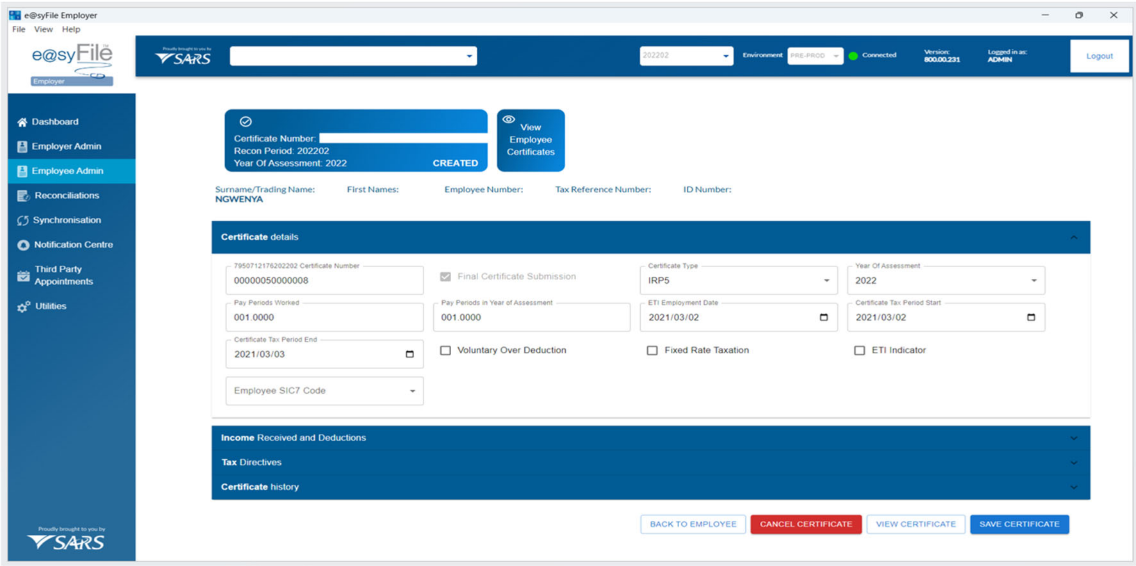
d) Steps to view and download a Tax Directive Report:

- 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.

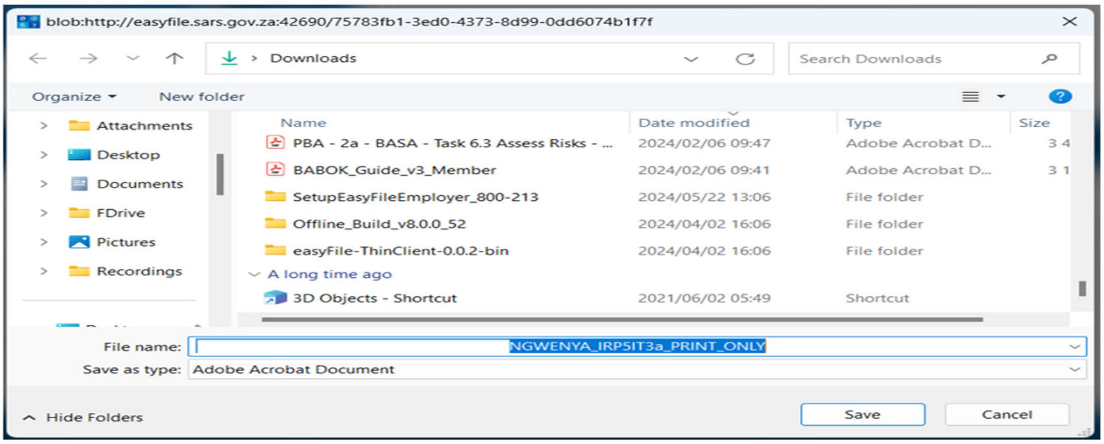
11.3 Printing certificates

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**



vi) Download and save the certificate.



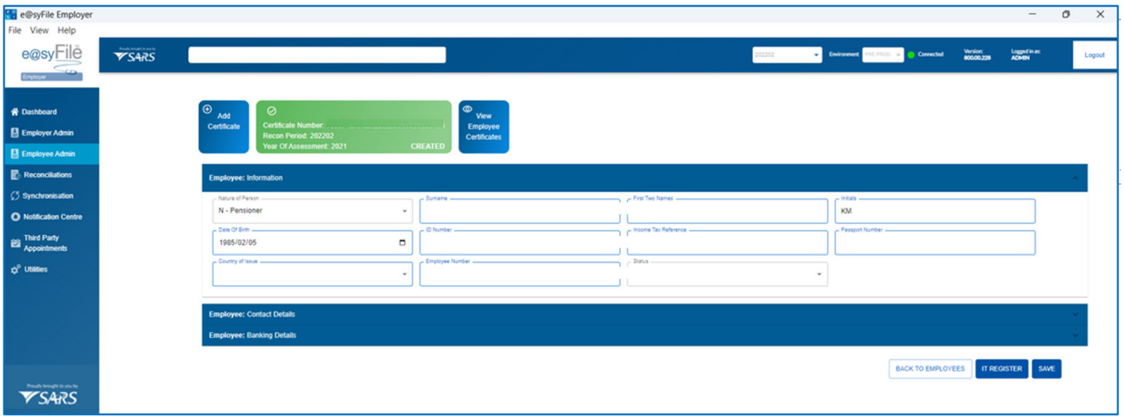
11.4 Taxpayer Income tax registrations

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.

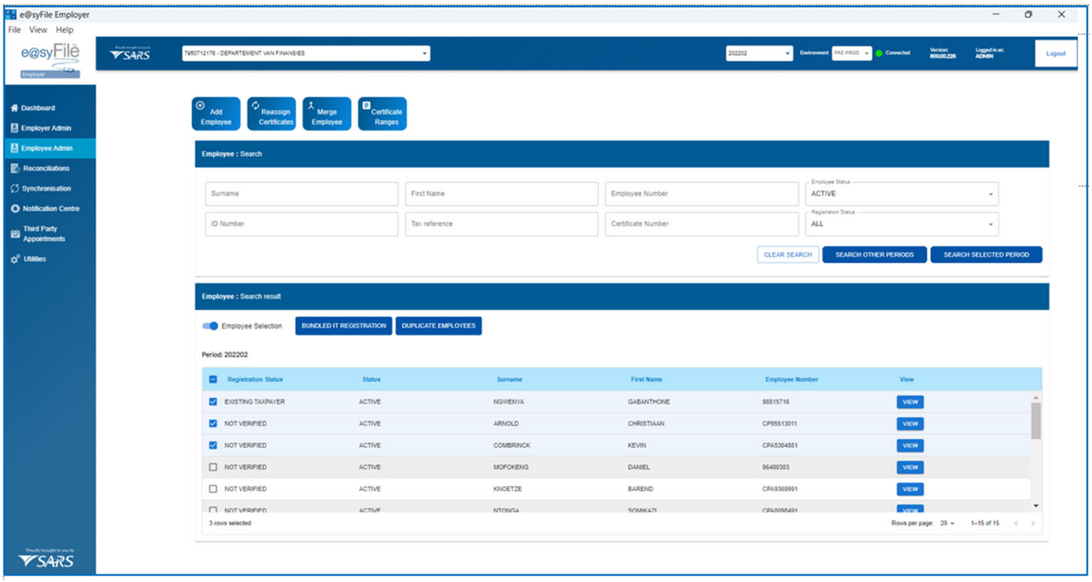
c) IT Registration process for Single requests:

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.

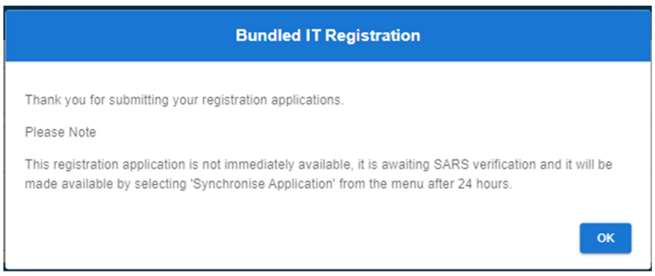


d) IT Registration process for Bundled requests:

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.



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.



12 DEFINITIONS AND ACRONYMS

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

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).