



ubuntu
(n.) "I am what I am because of who we all are"
compassion, kindness and humanity that connect
us together by sharing ourselves with others
and caring for those around us

e@syFile Reconciliation Process



Overview.

1. Download and installation process.

- Installation.
- Data base information.

2. Database registration and User creation.

3. Dashboard.

4. Side menu application.

- Employer Admin.
- Employee Admin.
- Reconciliations.
- Synchronisation.
- Notification Centre.
- Utilities.

Minimum System Requirements.

Windows 10 (64 bit)

8 GB RAM

2 GB hard drive space (for download and installation to C:/ drive; additional space will be required as employer data increases)

Downloading e@syFile Version 8.

Go to www.sarsefiling.co.za, then click on the e@syFile Employer icon in the bottom right of the webpage.

← → ↻ 🏠 <https://secure.sarsefiling.co.za/landing> 🔍 🗨️ ⚙️ | ⭐ 🔄 Update ... Chat

SARS
South African Revenue Service

WHAT'S NEW | FORMS AND GUIDES | PAYMENTS | CONTACT SARS | TERMS AND CONDITIONS

e FILING

LOGIN

Register Update Contact Details Forgot Password Forgot Username Manage Access Requests File My ITR12 Return Two-pot Calculator Notice of Registration IT Statement of Account Directives Correspondence Profile Management Book An Appointment

Employers submit your Employer Reconciliation Declaration (EMP501) with ease!

Use the new e@syFile™ Employer v8.0, it's smart, sleek and e@sy. Download the **NEW** e@syFile™ on sars.gov.za

e@syFile
Employer

e@syFile
Dividends Tax

SARS
At Your Service


SARS
South African Revenue Service


Welcome to the SARS eFiling Landing Page.

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

Downloading e@syFile Version 8.

Welcome to e@syFile™ Employer - Software designed by

Proudly brought to you by 



- Download the new look e@syFile™ Employer onto your desktop to import and validate declarations.
- Employers already using old e@syFile™ Employer should:
 - Not uninstall the old look e@syFile™ Employer application.
 - Please be aware that backups created in old e@syFile™ Flex cannot be restored in the new e@syFile™ TC application.
 - Make a backup and retain the backups in a safe and secure location.
 - Import the certificate history into the new look e@syFile™ Employer application

Windows Download

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

[Download](#)

Other Downloads

[Adobe Reader](#)

[ZipUTILITY](#)

User Docs

Get the User Manual:

[Download](#)

Minimum System Requirements:

- Windows 10 (64 bit)
- 8 GB RAM
- 2 GB hard drive space (for download and installation to C:/ drive; additional space will be required as employer data increases)

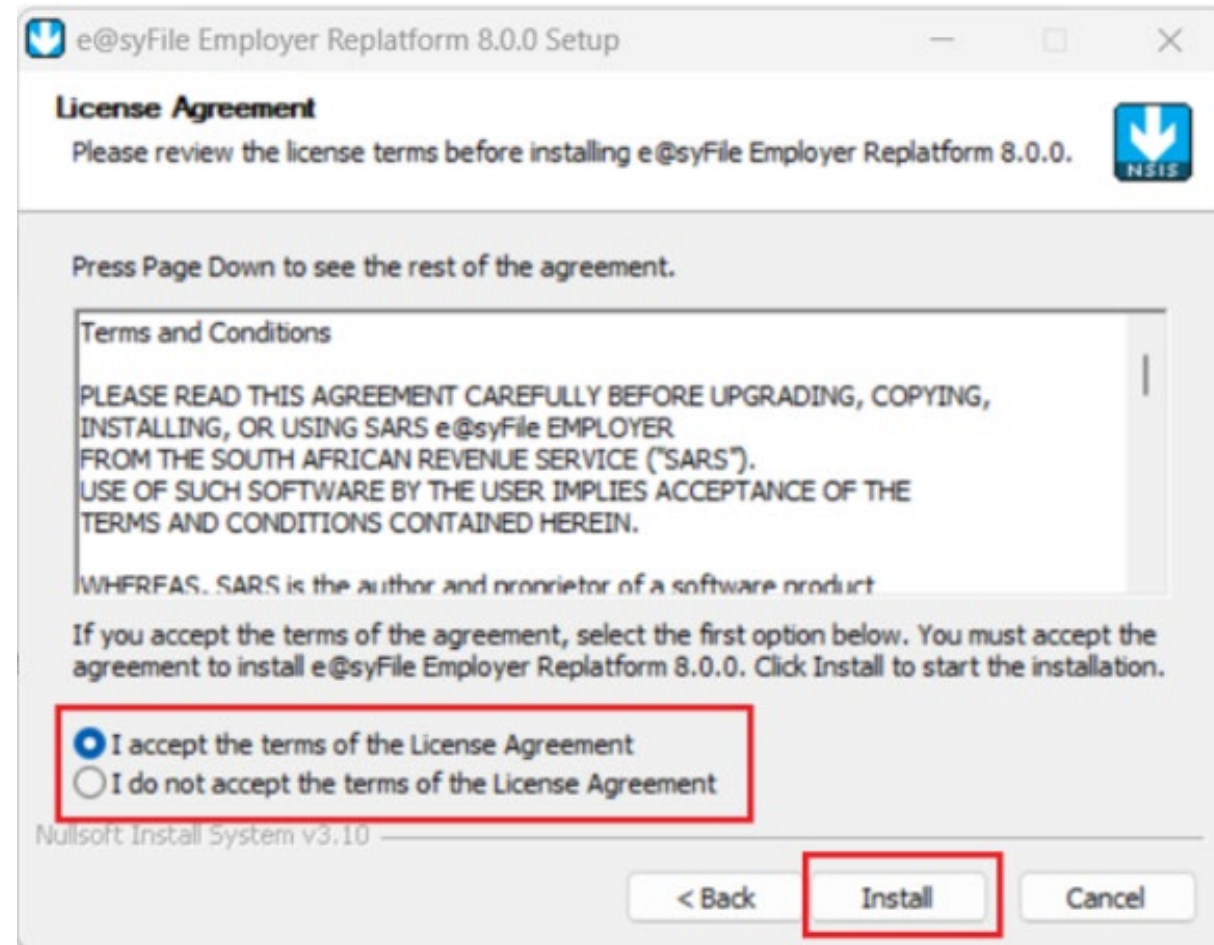
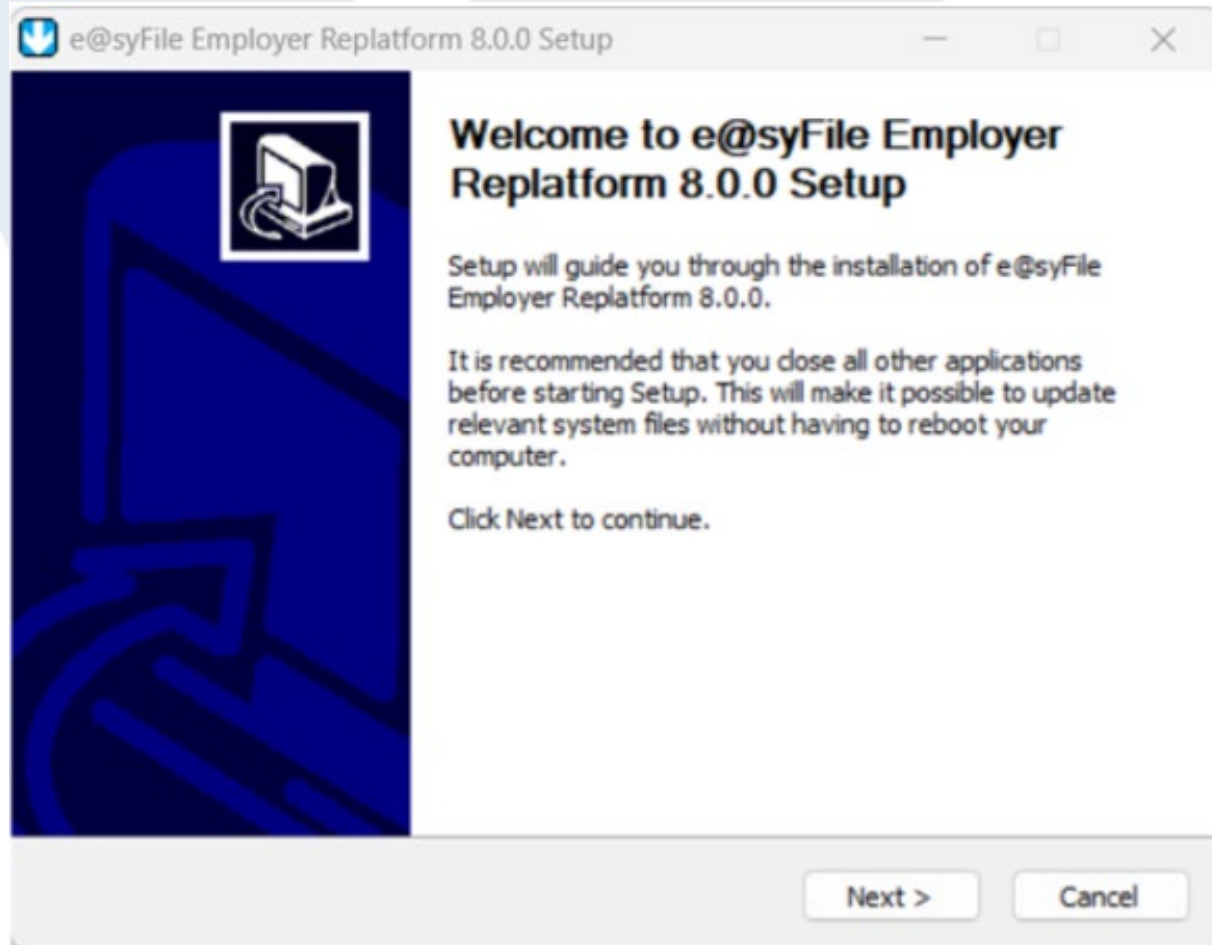
e@syFile™ Employer · The quick, easy and accurate way to complete your declaration

After clicking on the download link, you will be routed to the download webpage, which contains the link to download the installation file, in the “Windows Download” section of the webpage.

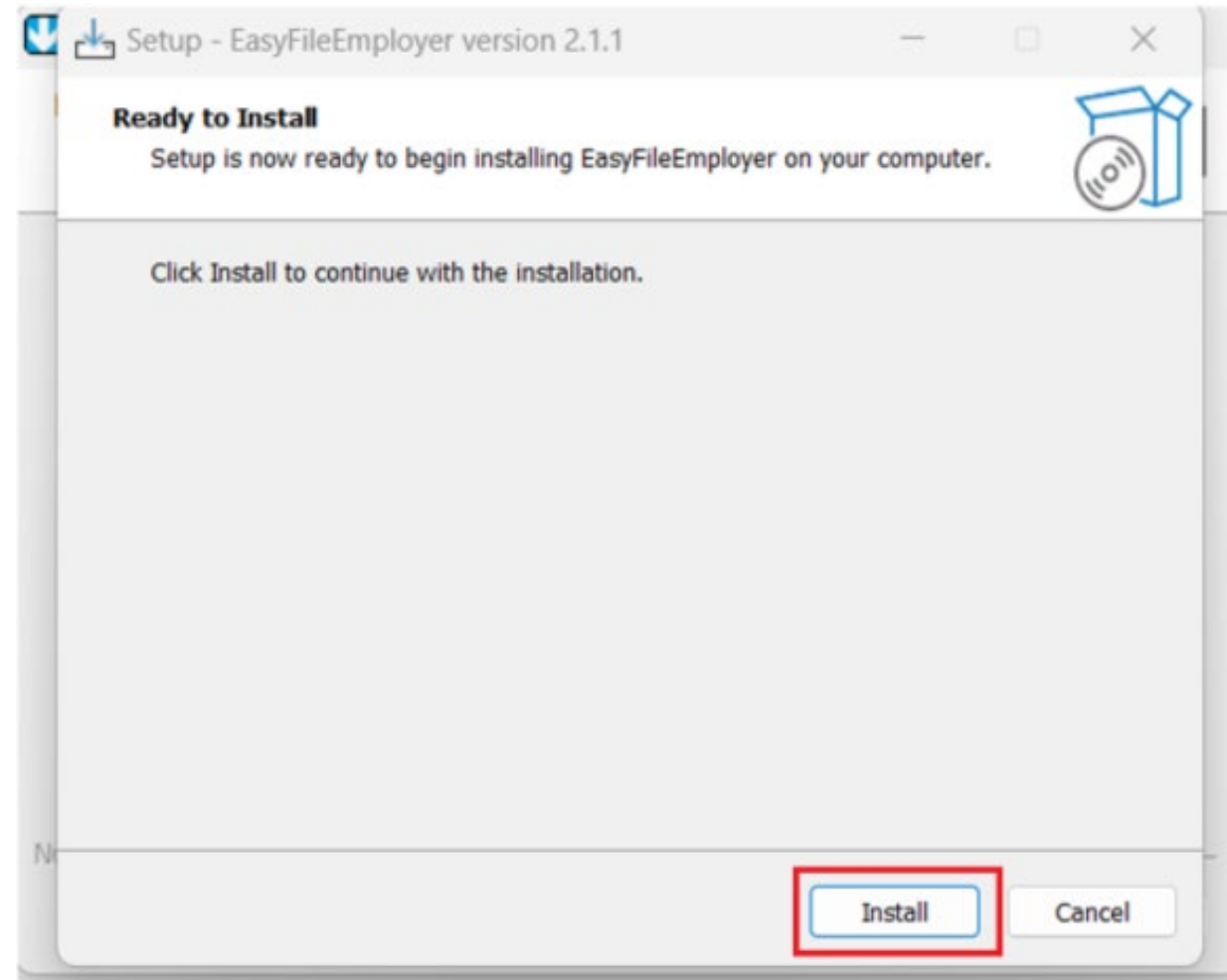
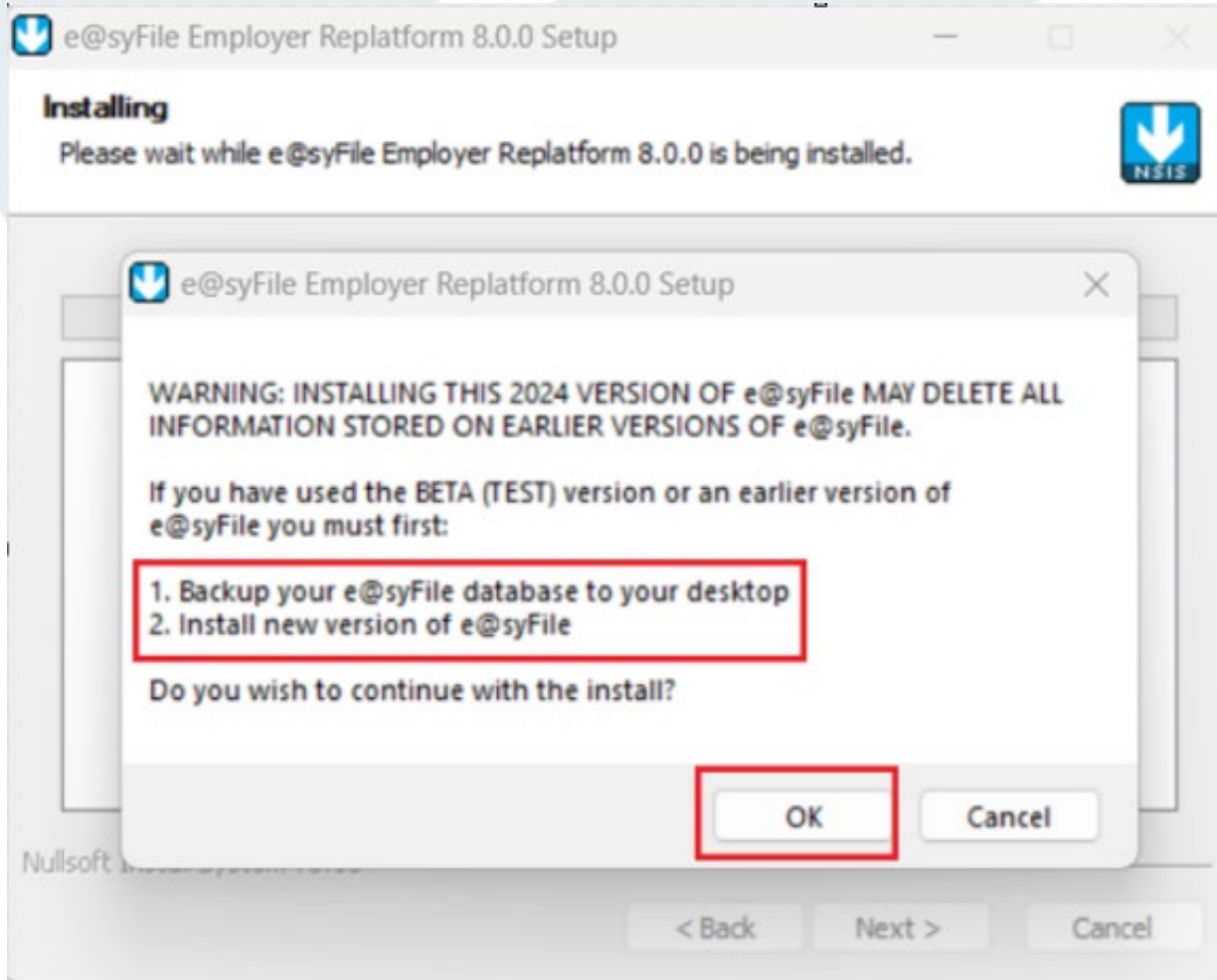
There is note that advise that you do NOT uninstall the old e@syFile application, also another that details the minimum system requirements.

Installation.

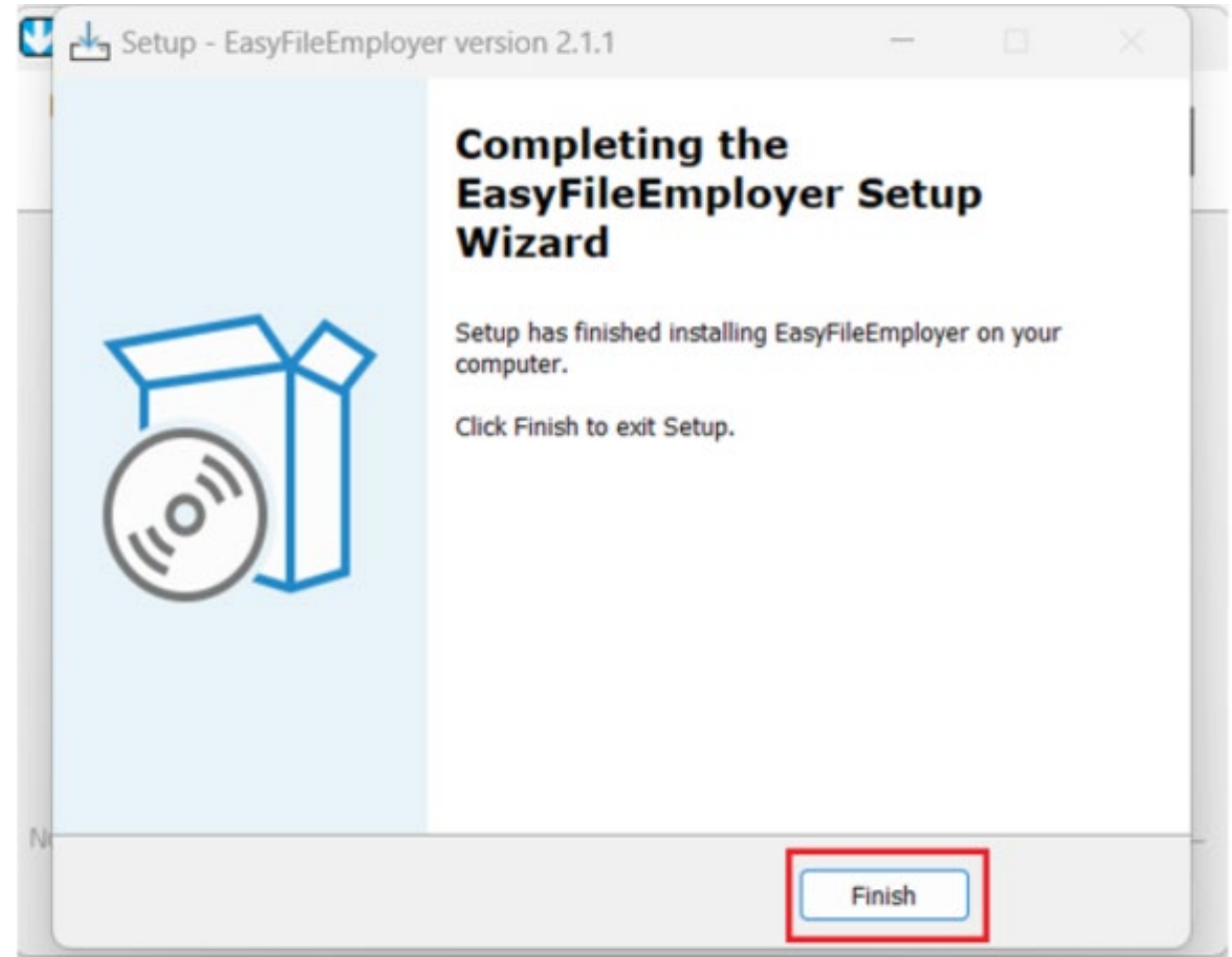
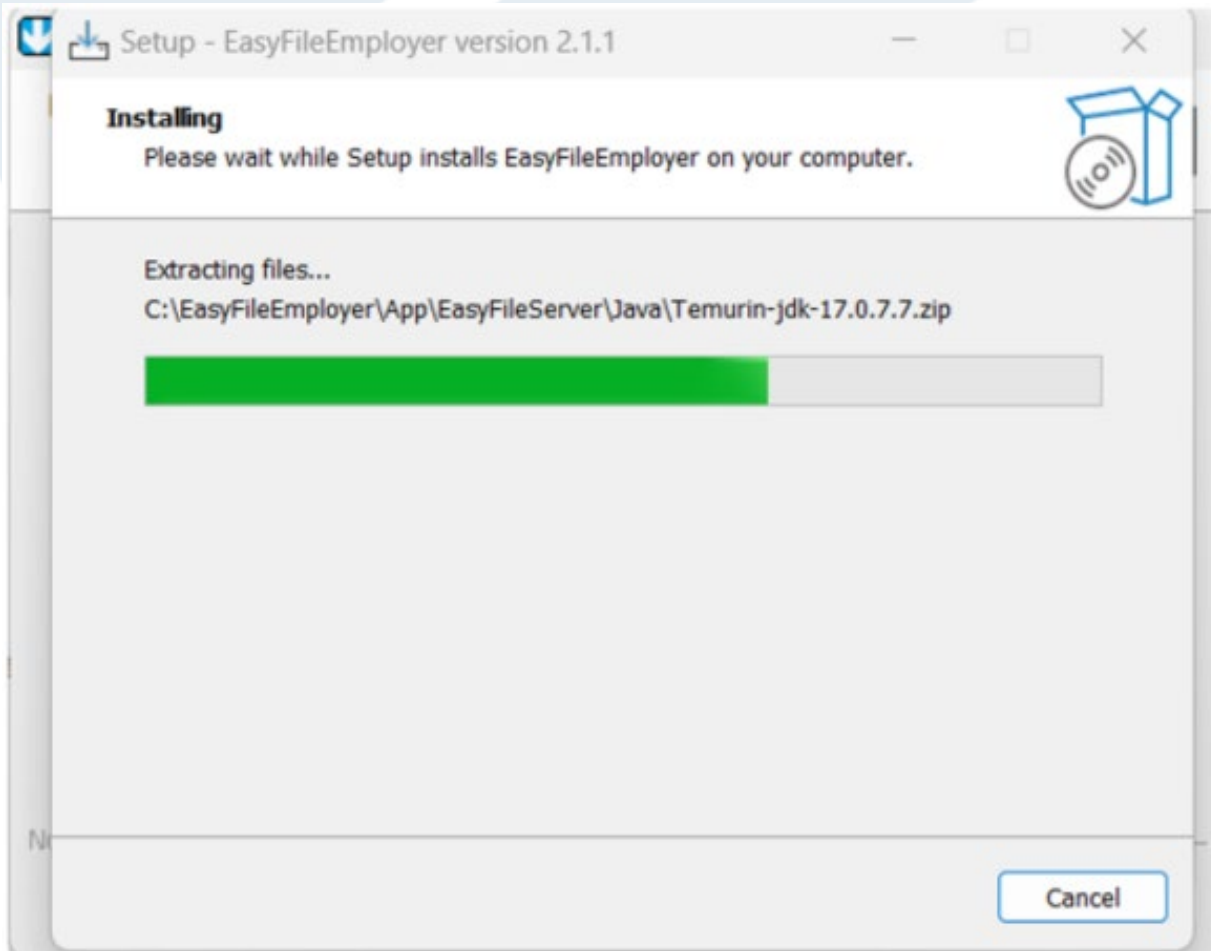
After downloading the installation file, double click on it to start the installation of the applications. Follow the prompts to complete the installation.



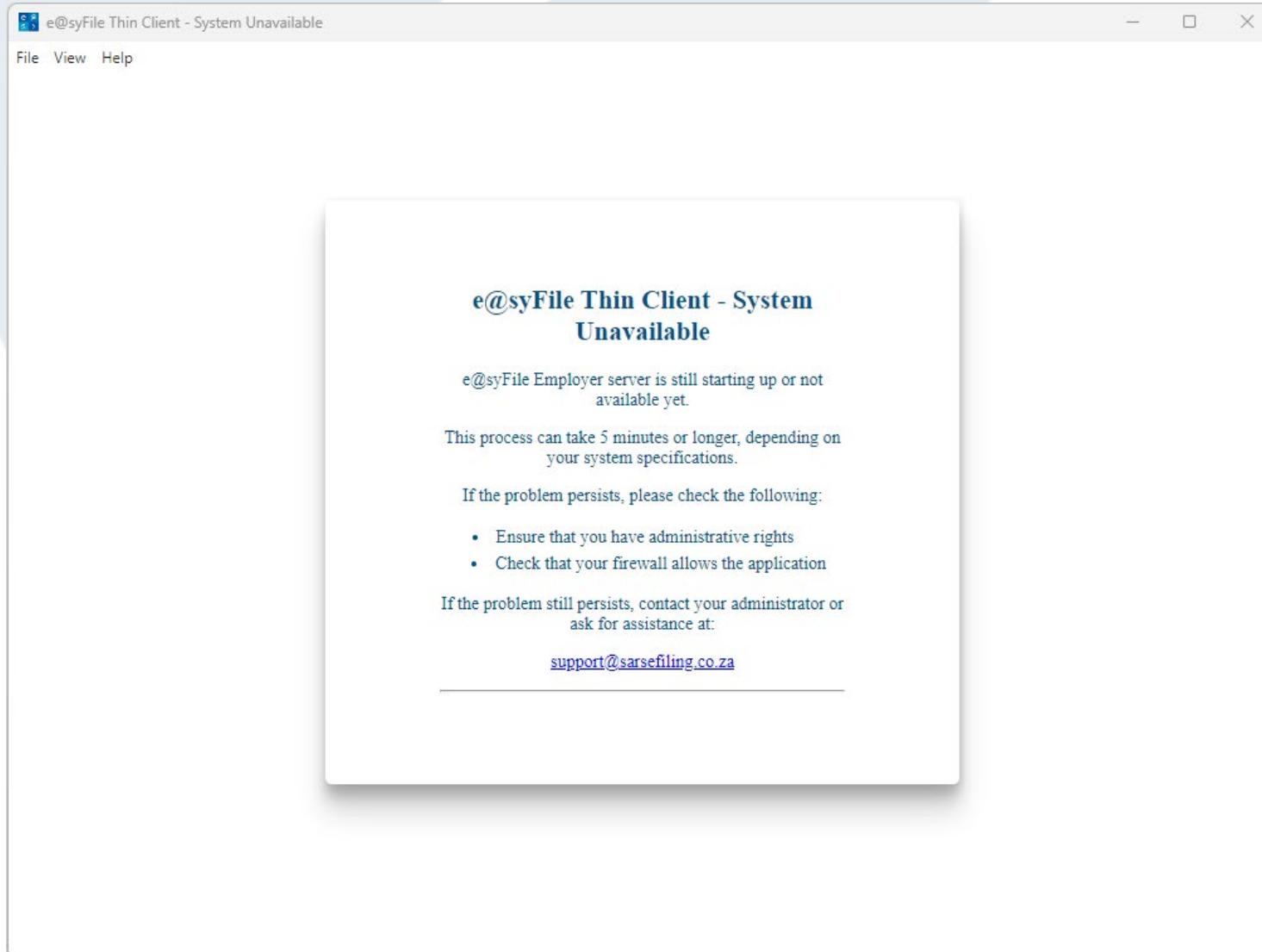
Installation.



Installation.



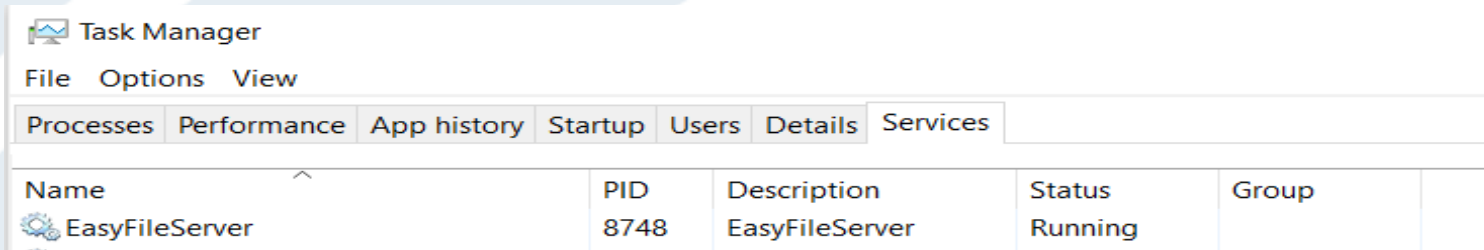
Installation.



When you open the application immediately after installation, a message will appear that says that e@syFile Thin Client is not available.

This message appears by default, as the application is still connecting to the local server and the database. This process usually takes approximately 5 minutes.

Installation.



If the “System Unavailable” message persists after approximately 10 minutes, you need restart the EasyFileServer via the steps below.

- Open the Task Manager.
- Click on Services (or the puzzle icon).
- Search for EasyFileServer, right click on it and select “Restart”.

If the issue persists after you have restarted the server, follow the steps in the installation trouble shooting guide, which can be requested from support@sarsefiling.co.za.

Data base Registration.

e@syFile Employer
File View Help

e@syFile
Employer

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

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SARS

Welcome to e@syFile

PAYE Reference Number

SARS eFiling username SARS eFiling password

VERIFY


First time use – This is the first screen when Thin Client browser opens for a secure DB registration.

- Enter PAYE ref number relevant to your eFiling profile with the user and password
- Where a PAYE registration is not applicable, the company Income Tax can be used
- Any number on your eFiling profile will suffice the multi profiles – Function is to secure the data and allow the ADMIN user to gain access should the password be lost

Data base Registration.


e@syFile Employer

File View Help



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

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Welcome to e@syFile

Username
ADMIN

Password

Confirm Password

Password Hint
P@ssw0rd

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

Allow csv editing

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

I understand

REGISTER

Once verified you may create the ADMIN user

Enter the password, password hint, select both boxes and click on Register

Database password hint.

e@syFile Employer

File View Help

e@syFile™
Employer

8 May 2024 11:30 am

Welcome to e@syFile

ADMIN

Password

Password Hint Admin Forgot Password

LOGIN TO E@SYFILE

P@ssw0rd

This software has been developed to help you, the employer, to do your PAYE reconciliations correctly, efficiently and in a more user-friendly way. With this software you can do all your PAYE reconciliations offline and then upload your information when you are fully reconciled and ready to submit.

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

Proudly brought to you by

SARS
South African Revenue Service

If you have forgotten your password, you can click on “Password Hint”, which will display the hint that was captured when the login credentials were created, which should help you remember the password.

If the password hint does not help you to remember your password, you will need to reset the password by clicking on “Admin Forgot Password”.

Please note that you will need to use the PAYE or Income Tax reference number that was used when the database was registered to reset the password.

Employer Selection.

The screenshot displays the e@syFile Employer application interface. The main window has a dark blue header with the e@syFile logo, a 'Proudly' badge, and several dropdown menus: 'Select an employer', 'Select a period', 'Environment' (set to 'QA'), 'Connected' status, 'Version: 800.00.209', and 'Logged in as: ADMIN'. A 'Logout' button is in the top right. A sidebar on the left contains navigation items: 'Dashboard', 'Employer Admin', 'Employee Admin', 'Reconciliations', 'Synchronisation', 'Notification Centre', 'Third Party Appointments', and 'Utilities'. The 'Employer' tab is selected. A modal dialog titled 'Select Employer' is centered on the screen. It contains the text 'Please select Employer you want to work with below:' followed by a 'SEARCH' button and a search input field labeled 'Search by PAYE Ref / Employer Name'. Below this is a table with three columns: 'Employer Name ↑', 'PAYE Ref No', and 'Select'. The table is currently empty, and the text 'No employer found' is displayed below it. At the bottom of the dialog are 'CANCEL' and 'CONTINUE' buttons. The bottom left of the application window features the text 'Proudly brought to you by' above the SARS logo.

After logging into the new application, you will be presented with a window, containing a list of all employers that have been imported or created in your database which you can select.

In the initial installation of the application, the list will be empty, because a new database is created.

Employer information will need to be created, imported, or certificates transferred from a database backed up from the old e@syFile application.

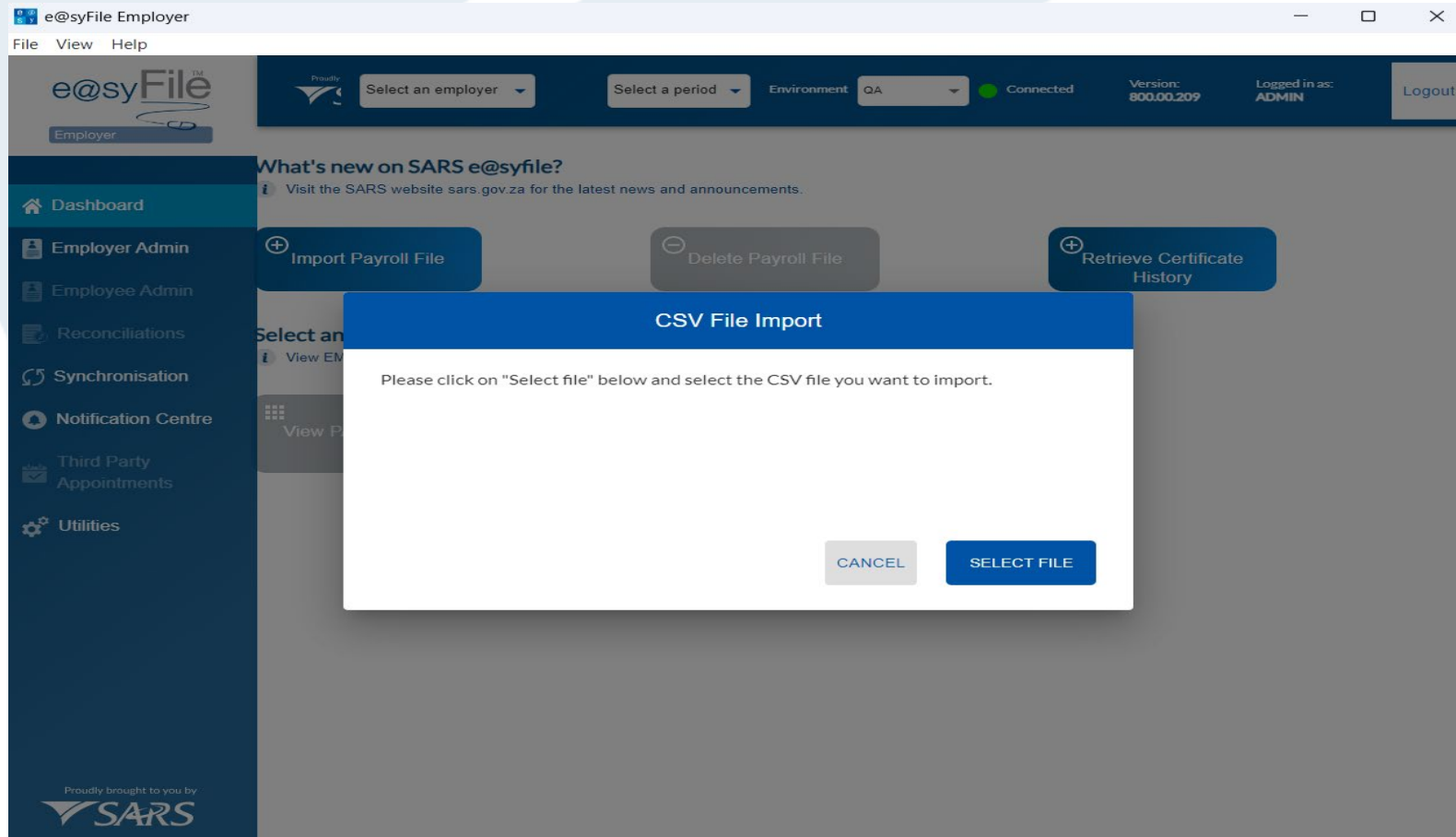
Employer Admin.

The screenshot shows the SARS e@syFile Employer Admin interface. The browser window title is "e@syFile Employer". The top navigation bar includes "File", "View", and "Help". The main header features the SARS logo, a "Select an employer" dropdown, a "Select a period" dropdown, a "Connected" status indicator, the version number "801.00.336", the user "ADMIN", and a "Logout" button. A sidebar on the left contains navigation options: Dashboard, Employer Admin (selected), Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area displays "What's new on SARS e@syFile?" with a link to the SARS website. Below this are six buttons: "Import Payroll File", "Delete Payroll File", "Retrieve Certificate History", "View PAYE Dashboard", "View Correspondence", and "Request Statement of Account". The "View PAYE Dashboard" and "Request Statement of Account" buttons are greyed out, while the others are blue.

After selecting the employer and the Period of Reconciliation, click on continue and you will now see the Dashboard.

Some options are greyed out and will only become available once an employer has been created or a CSV file imported or a Sync performed

Import Payroll File.



Import payroll file –

This will create the employer, employees and certificate information as well as the database for the period on the import file.

Import Payroll File.

The screenshot displays the SARS e@syFile Employer web application. The browser window title is "e@syFile Employer". The top navigation bar includes a menu (File, View, Help), the e@syFile logo, and several controls: "Select an employer", "Select a period", "Environment: QA", "Connected" status, "Version: 800.00.209", "Logged in as: ADMIN", and a "Logout" button. A left-hand sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area features a "What's new on SARS e@syfile?" section with a link to the SARS website. Below this are three buttons: "Import Payroll File" (highlighted with a plus icon), "Delete Payroll File" (with a minus icon), and "Retrieve Certificate History" (with a plus icon). A modal dialog box titled "CSV File Import" is open in the foreground, containing the following text: "202302 CSV file containing ETI.txt", "Payroll File ready for import", "Please click OK to initiate the process.", and "Please be patient while the process runs. Another message will alert you once the file import is successful." At the bottom of the dialog are "CANCEL" and "OK" buttons. The SARS logo is visible in the bottom left corner of the application interface.

Import Payroll File.

The screenshot displays the SARS e@syFile Employer web application. The interface includes a top navigation bar with the SARS logo, a search bar, and various status indicators like 'Connected' and 'Version: 800.00.209'. A left-hand sidebar contains navigation options such as 'Dashboard', 'Employer Admin', 'Employee Admin', 'Reconciliations', 'Synchronisation', 'Notification Cent', 'Third Party Appointments', and 'Utilities'. The main content area shows a 'Payroll File Validation' dialog box. The dialog box has a blue header and contains the following text: '202302 CSV file containing ETI.txt', 'Payroll File failed validation. Please consult the Import Payroll log to see where failures occurred.', and 'Please select an option below to proceed'. Below the text are five buttons: 'CANCEL', 'IMPORT ANOTHER FILE', 'VIEW ERRORS', 'GO TO IMPORT PAYROLL FILE LOGS', and 'EXPORT ERROR LOGS'. The 'Payroll File failed validation' text is highlighted with a red box.

The payroll file is validated against the latest Business Requirements Specifications document first before it is imported.

If the CSV payroll import file fails validation, a pop-up window will appear advising that the file failed validation and will display options to import another file, view the validation errors, or export the failed validation report.

Import Payroll File.

The screenshot shows the e@syFile Employer application interface. The top navigation bar includes the e@syFile logo, a dropdown menu, a 'Select a period' dropdown, 'Environment QA', 'Connected' status, 'Version: 800.00.209', 'Logged in as: ADMIN', and a 'Logout' button. The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Utilities' and contains a dropdown menu with 'Database Utilities', 'User Management', and 'Validation Logs **'. Below this is the 'Import Payroll File Log' section, which has a 'Log Category' dropdown set to 'Payroll Imports'. A table displays the log entries:

FILENAME	DATE IMPORTED	STATUS	ACTIONS
202302 CSV file containing ET1.txt	2024/05/08 11:48:10	FAILED	VIEW SAVE TO FILE

Total Rows: 1

Payroll import validation results can also be viewed in Utilities under “Validation Logs”.

From the dropdown select Payroll Imports. The Failed import file can be viewed or saved to open outside the application.

Payroll Import Validation Report.

202302 CSV file containing ETI.txt

FAILED Warnings

Line	Status
7	/ASHE 2094 : Incorrect number of values for code (7006) expecting 12 got 6
9	TTHEWS 2098 : Incorrect number of values for code (7006) expecting 12 got 6
10	.DATI 3115 : Incorrect number of values for code (7006) expecting 12 got 6
12	PHA 4002 : Incorrect number of values for code (7006) expecting 12 got 6
13	BA 5117 : Incorrect number of values for code (7006) expecting 12 got 6
14	>KETT 5118 : Incorrect number of values for code (7006) expecting 12 got 6
15	\NGA 5128 : Incorrect number of values for code (7006) expecting 12 got 6
16	HALER 5129 : Incorrect number of values for code (7006) expecting 12 got 6
17	\AHAMS 5130 : Incorrect number of values for code (7006) expecting 12 got 6

Total Rows: 15

CLOSE

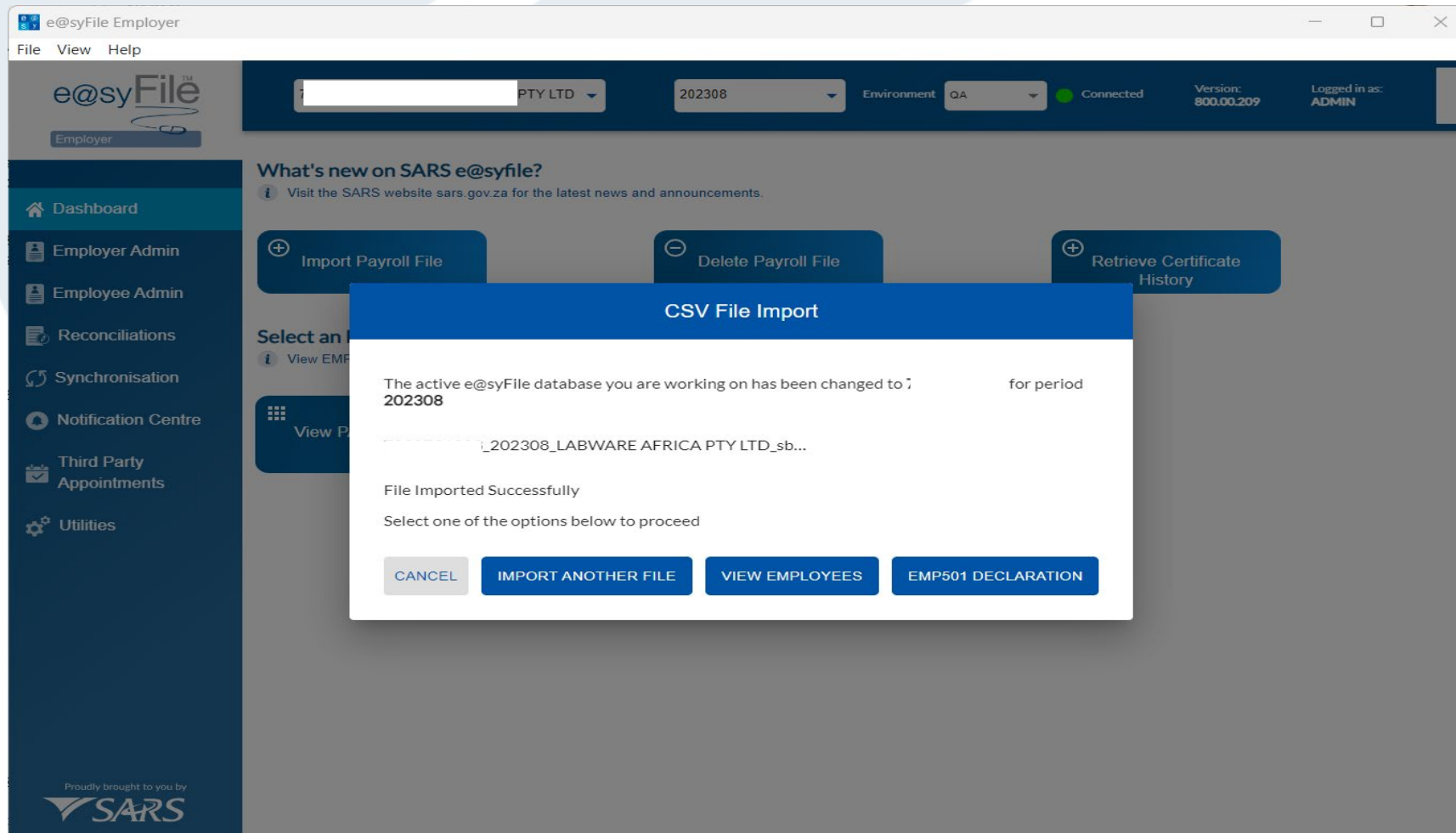
If CSV payroll import file fails validation, you can use the BRS to correct validation errors manually, but if there are a lot of validation errors, you will need to either update your payroll software application and run the payroll file again, or contact your payroll service provider to assist with correcting the file.

Import Payroll File

The screenshot displays the SARS e@syFile Employer web application. The interface includes a top navigation bar with the SARS logo, a menu (File, View, Help), and a status bar showing the user is logged in as ADMIN. A sidebar on the left lists various functions: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area features a 'What's new on SARS e@syfile?' section and three primary action buttons: 'Import Payroll File', 'Delete Payroll File', and 'Retrieve Certificate History'. A modal dialog box titled 'File Import Validation Results' is open in the foreground, displaying the text: 'PTY LTD_sb...', 'Payroll File passed Validation', and 'Please click OK to initiate import records'. The dialog box has 'CANCEL' and 'OK' buttons at the bottom right.

If the payroll import file passes validation, a notification will appear notifying you of the successful validation, and you will need to click on “OK” to initiate the import of the payroll file.

Import Payroll File



The screenshot displays the e@syFile Employer web application interface. The top navigation bar includes the e@syFile logo, a menu (File, View, Help), and user information (Environment: QA, Connected, Version: 800.00.209, Logged in as: ADMIN). The main content area features a sidebar with navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. A central panel shows 'What's new on SARS e@syfile?' with a link to the SARS website. Below this are three buttons: 'Import Payroll File', 'Delete Payroll File', and 'Retrieve Certificate History'. A modal dialog titled 'CSV File Import' is open, displaying the following text: 'The active e@syFile database you are working on has been changed to 202308 for period'. Below this, a file path is shown: '..._202308_LABWARE AFRICA PTY LTD_sb...'. The dialog also states 'File Imported Successfully' and 'Select one of the options below to proceed'. At the bottom of the dialog are four buttons: 'CANCEL', 'IMPORT ANOTHER FILE', 'VIEW EMPLOYEES', and 'EMP501 DECLARATION'. The SARS logo is visible in the bottom left corner of the interface.

After importing the payroll file successfully, options will be presented to import another file, to view employees, or to go directly to the EMP501 declaration.

It is always advised to check the employer details and update before preparing and submitting the declaration to SARS

Employer Selection

The screenshot shows the e@syFile Employer selection interface. A dropdown menu is open, displaying a list of periods. The period 202308 is selected, indicated by a green tick and the word 'Closed'. Other periods listed include 202502, 202408, 202402, 202302, 202208, 202202, 202108, 202102, 202008, 202002, 201908, 201902, 201808, 201802, 201708, 201702, 201608, 201602, 201508, 201502, and 201408, all of which are also labeled 'Closed'. The background shows the 'Employer' selection page with a search bar and a 'SEARCH' button.

The employer selection page when you log in or select at the top of the page will now have the imported/Created employer to select with a period of recon. Note the green tick showing the year that has active data in it. To create a recon, you will have to select the actual year you want to create and only then add the employees and certificates as the DB creates a separate DB for each period of recon.

Employer Selection.

The screenshot displays the SARS e@syFile Employer web application interface. At the top, there is a header bar with the e@syFile logo, a menu (File, View, Help), and a navigation area containing dropdown menus for company name (PTY LTD), ID number (202308), and environment (QA). It also shows a 'Connected' status, version (800.00.209), and the user is logged in as ADMIN.

The main content area is titled 'What's new on SARS e@syfile?' and includes a notification to visit the SARS website. Below this, there are three blue buttons: 'Import Payroll File', 'Delete Payroll File', and 'Retrieve Certificate History'. A section titled 'Select an Employer and Period of Recon to view the following:' contains two more blue buttons: 'View PAYE Dashboard' and 'View Correspondence'.

A sidebar menu on the left lists the following options: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. At the bottom of the sidebar, it says 'Proudly brought to you by SARS' with the SARS logo.

After an employer and a period of reconciliation is selected, all the items in the menu on the left will become interactive.

Retrieve Certificate History.

The screenshot shows a web browser window titled "e@syFile Employer". The top navigation bar includes the e@syFile logo, a menu (File, View, Help), and a dark blue header with dropdown menus for "PTY LTD" and "202308", an "Environment" dropdown set to "QA", a "Connected" status indicator, "Version: 800.00.209", and "Logged in as: ADMIN".

The left sidebar contains a navigation menu with the following items: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. At the bottom of the sidebar, it says "Proudly brought to you by SARS" with the SARS logo.

The main content area is titled "Retrieve Certificate History" and contains the following text: "You can retrieve historical certificate data from old format e@syFile backup files. Please complete all fields below to proceed."

The form includes the following fields and buttons:

- "Select a backup file" section with a "Select File" button.
- "Provide a username and password for the selected backup file." section with a "Login name" field containing "ADMIN" and a "Password" field.
- "PAYE Ref No" field.
- A dropdown menu with "202302" selected.
- "BACK" and "REQUEST CERTIFICATE DATA" buttons at the bottom.

Retrieve certificate History –

This functionality enables you to retrieve certificates on a period of recon basis from the old e@syFile application. You will require the old e@syFile username (ADMIN) and password to be able to retrieve the data from the database backed up from the old e@syFile application, containing the certificates you want to transfer.

PAYE Dashboard.

The screenshot displays the e@syFile Employer interface. The top navigation bar includes the e@syFile logo, a search field with the value '7590734689', a dropdown menu with '202402', and status indicators for 'Environment: QA', 'Connected', 'Version: 800.00.211', and 'Logged in as: ADMIN'. A 'Logout' button is located in the top right corner.

The left sidebar contains the following menu items: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The bottom of the sidebar features the SARS logo with the text 'Proudly brought to you by SARS'.

The main content area is titled 'BACK' and contains six reconciliation tables:

- EMP201 Returns and Payments allocated**

Item	Amount
EMP201 Liabilities	R 99 815.00
Payments Allocated	R 60 701.08
Difference	R 39 113.92
- Certificates**

Item	Amount
EMP501 Certificate Value	R 99 815.00
Certificates received by SARS	R 50 000.00
Difference	R -49 815.00
- EMP201 and EMP501 Liabilities**

Item	Amount
EMP201 Liabilities	R 99 815.00
EMP501 Liabilities	R 99 815.00
Difference	R 0.00
- Certificates received and payments allocated**

Item	Amount
Certificates received by SARS	R 50 000.00
Payments Allocated	R 60 701.08
Difference	R -10 701.08
- Account Summary for the Period of Reconciliation**

Item	Amount
Less Payments Allocated to taxes	R 60 701.08
Less Payments Allocated to other Liabilities	R 0.00
Total Amount Due	R -5 923.25
Unallocated Payments	R 0.00
- Certificates received**

Item	Amount
Active Certificates received by SARS	2
Active Certificate Values	R 50 000.00

The PAYE dashboard is used to view declaration information that SARS has received for a particular period of reconciliation. It is advisable to view the PAYE dashboard after submitting the EMP501.

Employer Admin.

The screenshot displays the e@syFile Employer Admin interface. The top navigation bar includes the e@syFile logo, a menu (File, View, Help), and a status bar with a dropdown menu, the number 202308, Environment QA, a Connected status indicator, Version 800.00.209, and Logged in as ADMIN. The left sidebar contains navigation options: Dashboard, Employer Admin (highlighted), Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is divided into two sections: 'Add Employer' and 'Edit Employer'. The 'Edit Employer' section is active and shows the 'Employer : Information' form with fields for Trading or Other name, PAYE No, SDL No, UIF No, Employer SIC7 (80300 - Investigation a...), Employer SEZ, and a checkbox for Diplomatic Indemnity. Below this is the 'Business : Address' section with fields for Unit Number, Complex, Street No (193), Street / Farm (SPRINGBOK STREET), Suburb, City/Town (CENTURION), Postal Code (0149), and Country Code (SOUTH AFRICA). The bottom section is partially visible, labeled 'Contact : Person'.

The Employer Admin page is where you will be able to view and edit the employer record that has been created.

This is also where you will be able to add the employer manually if you do not use an import payroll file.

Employee Admin.

The screenshot shows the 'Employee Admin' page in the e@syFile Employer application. The interface includes a top navigation bar with a search field, a period selector (202308), environment (QA), and connection status (Connected). A left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin (selected), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area features four action buttons: 'Add Employee', 'Reassign Certificates', 'Merge Employee', and 'Certificate Ranges'. Below these is a search form with fields for Surname, First Name, Employee Number, ID Number, Tax reference, and Certificate Number, along with dropdowns for Employee Status (ACTIVE) and Registration Status (ALL). Search buttons include 'CLEAR SEARCH', 'SEARCH OTHER PERIODS', and 'SEARCH SELECTED PERIOD'. The search results section shows a table for the period 202308 with one entry: JANNETHA ENGELBRECHT (Employee Number: TRADOROTHNAME 2010 ...).

Employee : Search

Surname First Name Employee Number Employee Status
ID Number Tax reference Certificate Number Registration Status

CLEAR SEARCH SEARCH OTHER PERIODS SEARCH SELECTED PERIOD

Employee : Search result

Employee Selection

Period: 202308

Status	Surname	First Name	Employee Number	View
ACTIVE	ENGELBRECHT	JANNETHA	TRADOROTHNAME 2010 ...	VIEW

The Employee Admin page allows you to view and edit employee information as well as adding employees to the database for a period of reconciliation manually.

To add an employee, click on the “Add Employee” button, in the top left of the page.

Employee Admin.

The screenshot displays the e@syFile Employer web application interface. At the top, there is a navigation bar with the e@syFile logo and the word "Employer". Below this is a dark blue header containing a search bar, a dropdown menu with the value "202308", an "Environment" dropdown set to "QA", a "Connected" status indicator, the version number "800.00.209", and the user "Logged in as: ADMIN".

On the left side, there is a vertical navigation menu with the following items: Dashboard, Employer Admin, Employee Admin (highlighted in blue), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. At the bottom of this menu, it says "Proudly brought to you by SARS" with the SARS logo.

The main content area features two buttons: "Add Certificate" (greyed out) and "View Employee Certificates". Below these is a form titled "Employee: Information" with the following fields:

Nature of Person (dropdown)	Surname	First Two Names	Initials
Date Of Birth (yyyy/mm/dd)	ID Number	Income Tax Reference	Passport Number
Country of Issue (dropdown)	Employee Number	Status (ACTIVE)	

Below the form are three expandable sections: "Employee: Contact Details", "Employee: Banking Details", and "Employee: Banking Details". At the bottom of the form area, there are three buttons: "BACK TO EMPLOYEES", "IT REGISTER", and "SAVE".

After the “Add Employee” button is clicked, a blank form will be presented where you will be required to complete using the employee’s information.

The “Add Certificate” button will not be available and greyed out until the form is completed and saved.

Employee Admin.

The screenshot displays the e@syFile Employer Employee Admin interface. The top navigation bar includes the e@syFile logo, a menu (File, View, Help), and system information such as the company name (PTY LTD), period (202308), environment (QA), and user status (Connected, Version: 800.00.209, Logged in as: ADMIN). A sidebar on the left lists navigation options: Dashboard, Employer Admin, Employee Admin (highlighted), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area features a search section titled "Employee : Search" with input fields for Surname, First Name, Employee Number, ID Number, Tax reference, and Certificate Number. It also includes dropdown menus for Employee Status (ACTIVE) and Registration Status (ALL). Below the search fields are three buttons: CLEAR SEARCH, SEARCH OTHER PERIODS, and SEARCH SELECTED PERIOD. The search results section, titled "Employee : Search result", shows a toggle for "Employee Selection" and a "Period: 202308". A table displays the search results with columns for Status, Surname, First Name, Employee Number, and View. The first row shows an ACTIVE employee with a "VIEW" button.

Status	Surname	First Name	Employee Number	View
ACTIVE			2010 ...	VIEW

An employee can be searched for using the various filters available, you can also search for the employee in the selected period of reconciliation, or in other periods.

Employee Admin.

The screenshot displays the e@syFile Employer interface. At the top, there is a navigation bar with the e@syFile logo and the text "Employer". Below this, a sidebar on the left contains navigation options: Dashboard, Employer Admin, Employee Admin (highlighted), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area shows a search form for employees. The form includes fields for Surname, First Name, Employee Number, ID Number, Tax reference, and Certificate Number. There are also dropdown menus for Employee Status (set to ACTIVE) and Registration Status (set to ALL). Below the search form are three buttons: CLEAR SEARCH, SEARCH OTHER PERIODS, and SEARCH SELECTED PERIOD. A section titled "Employee : Search result" contains a toggle for "Employee Selection" (which is turned on) and two buttons: BUNDLED IT REGISTRATION and DUPLICATE EMPLOYEES. Below this, a table shows search results for the period 202308. The table has columns for Registration Status, Status, Surname, First Name, Employee Number, and View. The first row is highlighted, and a checkbox is visible in the first column.

<input type="checkbox"/>	Registration Status	Status	Surname	First Name	Employee Number	View
<input type="checkbox"/>	NOT VERIFIED	ACTIVE				VIEW
<input type="checkbox"/>	NOT VERIFIED	ACTIVE				VIEW
<input type="checkbox"/>	NOT VERIFIED	ACTIVE				VIEW
<input type="checkbox"/>	NOT VERIFIED	ACTIVE				VIEW
<input type="checkbox"/>	NOT VERIFIED	ACTIVE				VIEW
<input type="checkbox"/>	NOT VERIFIED	ACTIVE				VIEW

When the “Employee Selection” slider is clicked on and opened, the “Bundled IT Registration” and “Duplicate Employees” buttons become available.

Bundled Income Tax Registration.

The screenshot shows the e@syFile Employer web application. A modal window titled "SARS Secure Login" is open, prompting the user to "Log in to eFiling to verify your credentials". The modal contains two input fields: "SARS eFiling username" and "SARS eFiling Password", along with "CANCEL" and "LOGIN" buttons. In the background, the main interface is visible, featuring a sidebar with navigation options like "Dashboard", "Employer Admin", and "Employee Admin". A toggle for "Employee Selection" is active, and a "BUNDLED IT REGISTRATION" button is highlighted. Below this, a table lists employees with columns for "Registration Status", "Status", "Surname", "First Name", "Employee Number", and "View". The table shows seven rows, all with "NOT VERIFIED" registration status and "ACTIVE" status. The period is set to "202308".

Registration Status	Status	Surname	First Name	Employee Number	View
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW

Bundled IT registration, is a functionality that enables you to request income tax numbers from SARS for multiple employees in a single request.

After you have clicked on and opened the “Employee Selection” slider, select employees you would like to add to the list then click on “Bundled IT Registration”. Enter your eFiling login credentials, then submit.

After 24 hours, synchronise to retrieve the income tax numbers.

Duplicate Employees.

The screenshot shows the e@syFile Employer web application interface. The top navigation bar includes the e@syFile logo, a menu (File, View, Help), and user information (Company: PTY LTD, Period: 202308, Environment: QA, Version: 800.00.209, Logged in as: ADMIN). The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin (highlighted), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area displays a search form with fields for Surname, First Name, Employee Number, ID Number, Tax reference, and Certificate Number. Below the search form are buttons for CLEAR SEARCH, SEARCH OTHER PERIODS, and SEARCH SELECTED PERIOD. A modal dialog is open in the center, showing a dropdown menu with the value 202402 and buttons for CANCEL and OK. Below the dialog, a table lists search results for employees. The table has columns for Registration Status, Status, Surname, First Name, Employee Number, and View. The results show seven employees, all with a status of ACTIVE and a registration status of NOT VERIFIED. Each row has a blue VIEW button.

Registration Status	Status	Surname	First Name	Employee Number	View
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW
NOT VERIFIED	ACTIVE				VIEW

When manually creating certificates for employees who are already captured under a period of reconciliation that differs from the recon period of the certificate you want to create, employees need to be duplicated for that recon period first.

Click on the “Employee Selection” slider to open it, select the employees, click on “Duplicate Employees” then select the recon period you want to create the manual certificates for.

Duplicate Employees.

The screenshot shows the e@syFile Employer interface. A dropdown menu is open, displaying a list of reconciliation periods. The period 202402 is selected and has a green checkmark. Other periods are marked as 'Closed'. A red arrow points to the 202402 option.

Period	Status
202502	
202408	
202402	Selected (Green Tick)
202308	Closed
202302	
202208	Closed
202202	
202108	Closed
202102	
202008	Closed
202002	
201908	Closed
201902	
201808	Closed
201802	
201708	Closed
201702	
201608	Closed
201602	
201508	Closed
201502	
201408	Closed

After the employees are duplicated, you will notice that the period of reconciliation that the employees were duplicated for, will have a green tick in the drop down box when selecting a reconciliation period.

Adding a certificate manually.

The screenshot displays the SARS e@syFile Employer Admin interface. At the top, there is a navigation bar with the SARS logo, a dropdown menu, the year 202408, a 'Not Connected' status indicator, the version number 800.00.258, and the user 'ADMIN' logged in. A 'Logout' button is also present. Below the navigation bar, there are three main action buttons: 'Add Certificate' (blue), 'View Employee Certificates' (blue), and a green confirmation box showing 'Certificate Number: 08VIPC0033300155', 'Recon Period: 202408', and 'Year Of Assessment: 2025' with a 'CREATED' status. On the left, a sidebar menu includes 'Dashboard', 'Employer Admin', 'Employee Admin', 'Reconciliations', 'Synchronisation', 'Notification Centre', 'Third Party Appointments', and 'Utilities'. The main content area is titled 'Employee: Information' and contains a form with the following fields: 'Nature of Person' (A - Individual with an identit...), 'Surname' (empty), 'First Two Names' (Thulisile), 'Initials' (TA), 'Date Of Birth' (empty with a calendar icon), 'ID Number' (empty), 'Income Tax Reference' (004), 'Passport Number' (empty), 'Country of Issue' (empty with a dropdown arrow), 'Employee Number' (8371), and 'Status' (ACTIVE).

After you have clicked on “Add Employee” and completed the form or after you have duplicated the employee, click on the “Add Certificate” button to complete a blank certificate form.

Adding a certificate manually.

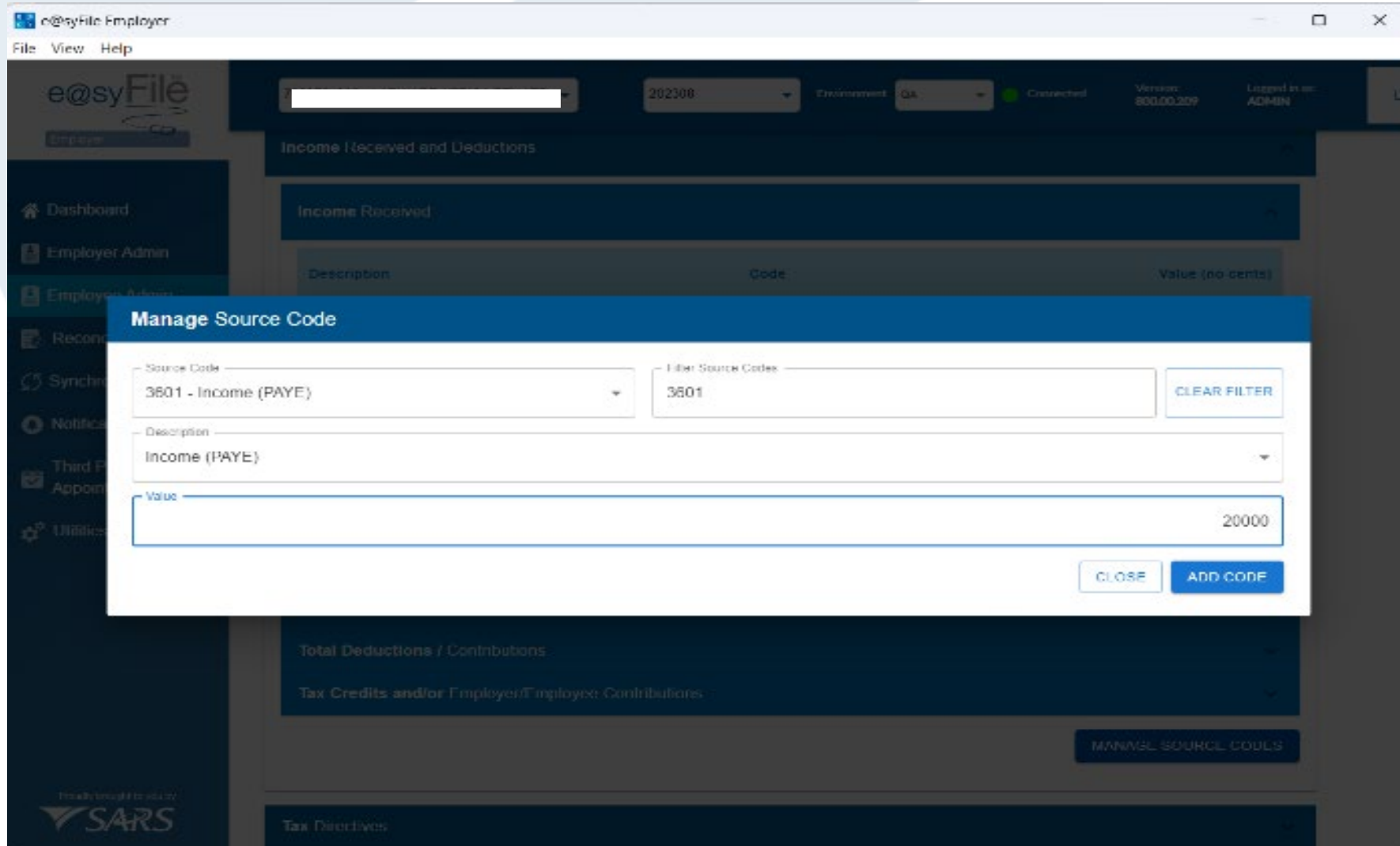
The screenshot displays the e@syFile Employer web application interface. The top navigation bar includes a search field, the year 202308, the environment QA, a 'Connected' status indicator, the version 800.00.209, and the user 'ADMIN'. The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin (highlighted), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Income Received and Deductions' and contains three expandable sections: 'Income Received', 'Deductions / Contributions', and 'Tax Credits and/or Employer/Employee Contributions'. The 'Tax Credits and/or Employer/Employee Contributions' section is expanded to show a table with the following data:

Description	Code	Value (with cents)
Reason code for IT3(a)	4150	02
UIF contribution (employer and employee contributions)	4141	2000.00
SDL contribution	4142	1000.00
Total Tax, SDL & UIF	4149	3000.00

At the bottom right of the main content area, a blue button labeled 'MANAGE SOURCE CODES' is highlighted with a red rectangular border.

Click on the “Manage Source Codes” button in the “Income Received and Deductions” section of the certificate.

Adding a certificate manually.



The screenshot shows the e@syFile Employer web application interface. A modal dialog titled "Manage Source Code" is open in the foreground. The dialog contains the following fields and controls:

- Source Code:** A dropdown menu with "3601 - Income (PAYE)" selected.
- Filter Source Codes:** A text input field containing "3601" and a "CLEAR FILTER" button.
- Description:** A dropdown menu with "Income (PAYE)" selected.
- Value:** A text input field containing "20000".
- Buttons:** "CLOSE" and "ADD CODE" buttons.

The background interface shows a dashboard with a sidebar on the left containing navigation items like "Dashboard", "Employer Admin", and "Reconcile". The main content area displays "Income Received and Deductions" with a table header for "Description", "Code", and "Value (no cents)". A "MANAGE SOURCE CODES" button is visible at the bottom right of the main content area.

The “Manage Source Code” window will appear, where you will be able to capture the source code and its corresponding value.

Adding a certificate manually.

The screenshot shows the e@syFile Employer interface. The top navigation bar includes fields for '71', 'TD', '202308', 'Environment: QA', 'Connected', 'Version: 800.00.209', and 'Logged in as: ADMIN'. The left sidebar contains menu items: Dashboard, Employer Admin, Employee Admin (highlighted), Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Certificates' and displays employee details: Surname/Trading Name: surname, First Names: first, Employee Number: 2, Tax Reference Number: , ID Number: . Below this are sections for 'Certificate details', 'Income Received and Deductions', and 'Tax Directives'. The 'Tax Directives' section contains a table with the following data:

Type	Directive Number	Issued Date	Code	Value	Action
L	1234567891		9905	20000	ADD REMOVE

Below the table is an 'ADD TAX DIRECTIVE' button. A blue arrow points from the text 'Directive options' to the 'ADD' and 'REMOVE' buttons in the table.

Adding a certificate manually.

The screenshot shows the e@syFile Employer interface. The top header displays the company name 'RICA PTY LTD', the year '202402', and the user 'ADMIN'. The main content area features two certificate cards: a blue one on the left and a green one on the right. The blue card is selected and highlighted. Below the cards is a form for adding an employee, with fields for Surname, First Names, Employee Number, Tax Reference Number, and ID Number. The form is titled 'Employee: Information' and includes sections for 'Employee: Contact Details' and 'Employee: Banking Details'. At the bottom, there are buttons for 'BACK TO EMPLOYEES', 'IT REGISTER', and 'SAVE'.

Navigation Menu:

- Dashboard
- Employer Admin
- Employee Admin
- Reconciliations
- Synchronisation
- Notification Centre
- Third Party Appointments
- Utilities

Header:

e@syFile Employer
File View Help
RICA PTY LTD | 202402 | Environment | Connected | Version: | Logged in as: ADMIN | Logout

Certificate Cards:

- Selected Certificate (Blue):** Certificate Number: [REDACTED]230MAND000016, Recon Period: 202402, Year Of Assessment: 2024, CREATED
- Other Certificate (Green):** Certificate Number: 703073180820240200000050000002, Recon Period: 202402, Year Of Assessment: 2024, CREATED

Employee Information Form:

Surname/Trading Name: | First Names: | Employee Number: | Tax Reference Number: | ID Number:

Employee: Information

Nature of Person: A - Individual with an ident...	Surname: surname	First Two Names: first	Initials: fs
Date Of Birth: 2000/09/28	ID Number: L.....	Income Tax Reference:	Passport Number:
Country of Issue:	Employee Number: 2	Status: ACTIVE	

Employee: Contact Details

Employee: Banking Details

Buttons: BACK TO EMPLOYEES | IT REGISTER | SAVE

The selected certificate will default to the left and appear in blue

Adding a certificate manually.

The screenshot displays the e@syFile Employer web application interface. The main navigation menu on the left includes: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The top header shows the user is logged in as ADMIN, with system information like Environment (QA) and Version (800.00.209). A central popup window titled 'Employee Certificates' is open, showing a table with the following data:

Certificate Number	Period Of Recon	Status	Certificate Type	Year Of Assessment		
71	10002	202402	CREATED	IT3(a)	2024	VIEW

Below the table, the pagination indicates 'Rows per page: 5' and '1-1 of 1'. A 'Close' button is located at the bottom right of the popup. In the background, there are buttons for 'Add Certificate', 'View Employee', 'BACK TO EMPLOYEES', 'IT REGISTER', and 'SAVE'. The bottom left corner features the SARS logo with the text 'Proudly brought to you by SARS South African Revenue Service'.

If more than three certificates are created for an employee, select the “View Employee Certificates” tab for this popup to appear to select and view the certificate

Reconciliation.

The screenshot shows the e@syFile Employer web application. The top navigation bar includes the company name 'e@syFile', a dropdown menu for '7030731808 - LABWARE AFRICA PTY LTD', a dropdown for '202402', and status indicators for 'Environment: DA', 'Connected', 'Version: 800.00.209', and 'Logged in as: ADMIN'. The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations (highlighted), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Reconciliations' and features a message: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' Below this message are four buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History'. The 'Accept Data', 'Reinstate ETI', and 'Own Values' buttons are enclosed in a red rectangular box. Below the buttons are two expandable sections: 'EMP501 Reconciliation Work Page' and 'EMP501 Reconciliation Status Dashboard'. The 'EMP501 Reconciliation Work Page' section contains a table with columns: PAYE, SDL, UIF, ETI, Type, Status, and Action. The 'EMP501 Reconciliation Status Dashboard' section contains a table with columns: Channel, Date & Time, Status, and Actions. The bottom of the sidebar features the SARS logo with the text 'Proudly brought to you by SARS South African Revenue Service'.

In Reconciliations, you will be provided with three submission options to select.

“Accept Data”, which requests and pre-populates the EMP501 with submitted EMP201 data.

“Own Values”, which presents a blank EMP501 form.

Reinstate ETI, for when you need to include ETI values in a resubmission, where ETI was submitted in EMP201s within the prescribed period.

Reconciliation.

The screenshot displays the e@syFile SARS Reconciliations interface. The top navigation bar includes the e@syFile logo, a SARS logo, a dropdown menu, the number 202502, a 'Connected' status indicator, the version number 801.00.336, and the user 'ADMIN' with a 'Logout' button. The main content area is titled 'Reconciliations' and contains a message: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' Below this message are four buttons: 'Accept Data' (highlighted with a red border), 'Reinstate ETI', 'Own Values', and 'EMP501 History'. A modal window titled 'SARS Secure Login' is open in the foreground, prompting the user to 'Log in to eFiling to verify your credentials'. The modal contains two input fields: 'SARS eFiling username' and 'SARS eFiling Password', along with 'CANCEL' and 'LOGIN' buttons. The background interface shows a table with columns for PAYE, SDL, UIF, ETI, Type, Status, and Action, and a table with columns for EMP501 and Channel.

If you opt to accept SARS data, your eFiling login credentials will be required for verification.

Enter your eFiling login credentials, then click on “Login”.

Reconciliation.

The screenshot shows the e@syFile Employer interface. The top navigation bar includes the e@syFile logo, a dropdown menu for the company name (LABWARE AFRICA PTY LTD), a dropdown for the transaction year (202402), and the environment (QA). The main content area is titled "Employer Reconciliation Return EMP501" and includes fields for PAYE Ref No. (703), SDL Ref No. (L03), and UIF Ref No. (U0). The trading or other name is LABWARE AFRICA PTY LTD. The SIC Code is 80300 - Investigation activities. The contact person details are: First Name (TH), Surname (VAI), Position held at Business (PUBLIC OFFICER), Bus Tel No. (012), Cell No. (0729162403), and Email (IENGELBRECHT@SARS.GOV.ZA). A red box highlights the "FILE" menu in the top left corner, which contains the options: Save, Exit, File and Close, and Download.

The “File” button, situated in the top left of the EMP501 form has the following options.

Save – To save the return if you are not ready to submit yet.

File and Close – If you are ready to submit the declaration to SARS.

Download - If you want to download the EMP501 in PDF before submitting to SARS.

Reconciliation.

The screenshot displays the e@syFile Employer interface. The top header shows the user is logged in as ADMIN, with system details like 'Version: 800.00.209' and 'Environment: QA'. The left navigation menu includes options like Dashboard, Employer Admin, and Reconciliations. The main content area is titled 'Reconciliations' and contains a message about SARS data and four action buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History'. Below this are two tables. The first table, 'EMP501 Reconciliation Work Page', has columns for PAYE, SDL, UIF, ETI, Type, Status, and Action. The second table, 'EMP501 Reconciliation Status Dashboard', has columns for Channel, Date & Time, Status, and Action. A context menu is open over the 'Action' column of the first table, listing options: 'Open Return', 'Refresh', 'Summary Report', and 'Download EMP501 PDF'.

If you opt to save the declaration, the action items will be to open the return, to refresh the return, to export the summary report and to download the EMP501 PDF.

Reconciliation

The screenshot shows the e@syFile Employer interface. The top navigation bar includes the e@syFile logo, a search bar, and user information: 202402, Environment: QA, Connected, Version: 800.00.209, and Logged in as: ADMIN. The left sidebar contains menu items: Dashboard, Employer Admin, Employee Admin, Reconciliations (highlighted), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Reconciliations' and contains a message: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' Below this are four buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History'. The 'EMP501 Reconciliation Work Page' is expanded to show a table with columns: PAYE, SDL, UIF, ETI, Type, Status, and Action. The table contains one row with values: R 0.00, R 2,000.00, R 4,000.00, R 2,000.00, and Status: Ready To File. A context menu is open over the 'Ready To File' status, listing actions: Open Return, Refresh, Summary Report, Submit to SARS, Download EMP501 PDF, and Full Resubmission Request. Below the table is the 'EMP501 Reconciliation Status Dashboard' with columns: Channel, Date & Time, and Status. The bottom of the page features the SARS logo and the text 'Proudly brought to you by SARS South African Revenue Service'.

If you opt to submit the declaration by clicking on File > File and Close, “Submit to SARS” and “Full Resubmission Request” will be added to the action menu.

Reconciliation.

The screenshot displays the e@syFile Employer interface. The top header shows the user is logged in as ADMIN. The main content area is titled 'Reconciliations' and includes a message: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' Below this message are three buttons: 'Accept Data', 'Reinstate ETI', and 'Own Values', all of which are greyed out. To the right of these buttons is a blue button labeled 'EMP501 History'. Below the buttons are two tables. The first table is titled 'EMP501 Reconciliation Work Page' and has columns for PAYE, SDL, UIF, ETI, Type, Status, and Action. The second table is titled 'EMP501 Reconciliation Status Dashboard' and has columns for Channel, Date & Time, Status, and Actions. The 'Status' column in the second table is highlighted with a red box, showing 'SUBMITTED TO SARS' and an 'UPDATE' button.

Once submitted to SARS, the Status Dashboard will be available to Update the reconciliation. The options to resubmit(Accept Date, Reinstate ETI and Own Values) will be greyed out until updated with a SARS response.

It is always important to click on the "Update" button to see the SARS response or the status of the submission, to see if SARS has accepted the submission, or if it has been rejected. Reasons for rejection will be displayed if rejected.

Reconciliation.

The screenshot shows the e@syFile Employer web application. A 'Status Update' modal window is open, displaying a table with the following data:

Ref Number	Form Type	Response
EMP501	0305 [SDL]	Please note that your reconciliation has been finalised.
EMP501	0305 [UIF]	Please note that your reconciliation has been finalised.
EMP501	0505 [PAYE]	Please note that your reconciliation has been finalised.
EMP501	0305 [PAYE]	Please note that your reconciliation has been finalised.
EMP501	Category Description	Declaration Processed
EMP501	User Description	Please note that your return has been successfully submitted
EMP501	9415 [PAYE]	Please note that your EMP501 reconciliation submission did not balance. SARS did not receive your IRP5/IT3(a) certificates. Please submit your IRP5/IT3(a)

Total Rows: 9

The interface also shows a sidebar with navigation options like Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The top navigation bar includes the e@syFile logo, a search bar, and user information (202402, Environment: QA, Connected, Version: 800.00.209, Logged in as: ADMIN).

This is an example of a rejected submission, detailing the reasons for the rejection.

In this example, the response is that SARS did not receive some or all certificates that were intended to be submitted, so a full resubmission request is required.

You will also see the number of certificates SARS received in the PAYE dashboard.

Reconciliation.

The screenshot shows the e@syFile Employer interface. The top navigation bar includes the e@syFile logo, user ID (7010705236 - WA Theron), environment (QA), and version (800.00.209). The left sidebar contains menu items: Dashboard, Employer Admin, Employee Admin, Reconciliations (highlighted), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Reconciliations' and contains a message: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' Below this message are four buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History'. The 'EMP501 Reconciliation Work Page' table has columns: PAYE, SDL, UIF, ETI, Type, Status, and Action. The 'EMP501 Reconciliation Status Dashboard' table has columns: Channel, Date & Time, Status, and Actions. The status dashboard table shows a record with 'ONLINE' channel, '2024-05-09 13:00' date, and 'ACCEPTED' status. The 'ETV Reports' section is also visible. A red box highlights a dropdown menu with options: 'Generate IRP5/IT3(a) PDF's', 'PAYE Dashboard', 'Summary Report', 'ETV Report', and 'View EMP501 PDF'.

After submitting the EMP501 declaration, the action tab has the options to generate certificates in PDF, to view the PAYE dashboard, to export the summary report, to download the ETV report and to download the EMP501 in PDF.

ETV Report.

The screenshot displays the e@syFile Employer web application interface. At the top, there is a navigation bar with the e@syFile logo, a menu (File, View, Help), and a status bar showing the user is logged in as ADMIN. Below the navigation bar, there are four main action buttons: "Accept Data", "Reinstate ETI", "Own Values", and "EMP501 History".

The main content area is divided into several sections:

- EMP501 Reconciliation Work Page:** A table with columns: PAYE, SDL, UIF, ETI, Type, Status, and Action.
- EMP501 Reconciliation Status Dashboard:** A table with columns: Channel, Date & Time, Status, and Actions. It shows a record for "ONLINE" on "2024-05-09 13:00" with a status of "ACCEPTED" and an "UPDATE" button.
- ETV Reports:** A section with a "DOWNLOAD REPORTS" button (highlighted with a red box) and a table of reports. The table has columns: File Name, Date & Time, and Actions. It shows a report named "ETVRepoi" with a file extension "xt" and a date of "2024-05-09 13:10:23". A "VIEW" button (highlighted with a red box) is located in the Actions column for this report.

At the bottom left, there is a logo for SARS (South African Revenue Service) with the text "Proudly brought to you by SARS".

If you receive SARS correspondence stating that one or more certificates in the EMP501 submission have failed validation, you need to click on the “ETV Report” option in the action tab menu to download the report.

An ETV reports section will appear containing the button to download the report.

After the report has been downloaded, you need to click on the “View” button to view it on the screen.

ETV Report.

The screenshot shows the e@syFile Employer interface with an ETV Report modal window open. The modal displays a list of employee records in PSV (Pipe Separated Values) format. The records include fields such as CERTIFICATENO, TYPEOFCERTIFICATE, SURNAME/TRADINGNAME, IDNUMBER, PASSPORT NO, ALTERNATEIDNO, ITREFNUMBER, NAME, TOTALPERIODSINYEAROFASSESSMENT, TOTALPERIODSWORKED, ASSESSEDSTATUS, ITREFDUPSTATUS, DIRECTIVENO1, DIRECTIVESTATUS1, DIRECTIVEFAILREASON1, DIRECTIVENO2, DIRECTIVESTATUS2, DIRECTIVEFAILREASON2, DIRECTIVENO3, DIRECTIVESTATUS3, DIRECTIVEFAILREASON3, DIRECTIVENO4, DIRECTIVESTATUS4, DIRECTIVEFAILREASON4, DIRECTIVENO5, DIRECTIVESTATUS5, DIRECTIVEFAILREASON5, GROSSEMPLOYMENTINCOME, TOTALDEDUCTIONS, INCOMETAXREFERENCENO, PAYEAMNT, UIFCONTRIBUTION, SDLCONTRIBUTION, MEDICALSCHEMETAXCREDIT, ADDITIONALMEDICALEXPENSESTAXCREDIT, REASONFORNONDEDUCTION, PAYEVALIDATIONOUTCOME, SDLVALIDATIONOUTCOME, and UIFVALIDATIONOUTCOME. The modal also shows a date filter for 2024-03-15 and a 'Save Report' button.

After you have clicked on “View”, the report will be displayed on the screen within e@syFile.

The ETV report will be displayed in PSV (Pipe Separated Values) format, which is the format that it will exported in when you click on the “Save Report” button to save to your computer.

If you are not able to interpret the report in it’s current format, you can request for steps on how to format it in excel from support@sarsefiling.co.za.

Generating Certificates.

The screenshot shows the e@syFile Employer web application interface. At the top, there is a navigation bar with the e@syFile logo, a search bar, and user information including the year 202402, Environment QA, and a 'Logout' button. Below this, a message states: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' There are four buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History'. A blue banner reads 'GENERATE IRP5/IT3(a) PDF's'. Below this, a message says 'You selected to generate IRP5/IT3(a) Tax Certificates for this EMP501 submission'. A note asks the user to 'Please select the documents you wish to generate by clicking on the Export' button. There are two bullet points: 'Destination folder can only be created on local disk' and 'Only final tax certificates (end of year) will be generated in PDF format and saved to your PC.' Below these are four radio button options: 'All' (selected), 'Manual Only', 'Import Only', and 'Amended'. There are 'EXPORT' and 'CLOSE' buttons. At the bottom, there is a 'DOWNLOAD REPORTS' button and a table with columns 'File Name', 'Date & Time', and 'Actions'. The table contains one row: 'ETVReport_ [redacted]' with date '2024-05-09 13:10:23' and a 'VIEW' button. The SARS logo is in the bottom left corner.

When the option to generate IRP5/IT3(a) certificates is clicked, in the action tab menu, various options for generating certificates in PDF will appear.

You need to select an option first before you click on the “Export” button to export and save the certificate PDFs to your computer.

PAYE Dashboard.

The screenshot displays the e@syFile Employer dashboard. The top navigation bar includes the e@syFile logo, a dropdown menu, the year 202402, the environment QA, a 'Connected' status indicator, the version 800.00.209, and the user 'ADMIN' with a 'Logout' button. A 'BACK' button is located below the navigation bar. The left sidebar contains a menu with options: Dashboard, Employer Admin, Employee Admin, Reconciliations (highlighted), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is divided into four panels:

- EMP201 Returns and Payments allocated:** A table with columns 'Item' and 'Amount'.

Item	Amount
EMP201 Liabilities	R 75 789.82
Payments Allocated	R 75 789.82
Difference	R 0.00
- Certificates:** A table with columns 'Item' and 'Amount', highlighted with a red border.

Item	Amount
EMP501 Certificate Value	R 75 789.82
Certificates received by SARS	R 0.00
Difference	R -75 789.82
- EMP201 and EMP501 Liabilities:** A table with columns 'Item' and 'Amount'.

Item	Amount
EMP201 Liabilities	R 75 789.82
EMP501 Liabilities	R 75 789.82
Difference	R 0.00
- Certificates received and payments allocated:** A table with columns 'Item' and 'Amount'.

Item	Amount
Certificates received by SARS	R 0.00
Payments Allocated	R 75 789.82
Difference	R -75 789.82

The bottom left corner features the SARS logo with the text 'Proudly brought to you by SARS South African Revenue Service'.

The “PAYE Dashboard” option in the action tab menu, will display information received by SARS for the EMP501 submission.

EMP501 History.

The screenshot displays the e@syFile Employer web application interface. The top navigation bar includes a menu (File, View, Help), the e@syFile logo, and user information (Environment: QA, Connected, Version: 800.00.209, Logged in as: ADMIN, Logout). Below the navigation bar are four main action buttons: "Accept Data", "Reinstate ETI", "Own Values", and "EMP501 History", with the latter highlighted by a red box. The left sidebar contains a navigation menu with options: Dashboard, Employer Admin, Employee Admin, Reconciliations (highlighted), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is divided into three sections: "EMP501 Reconciliation Work Page" (a table with columns: PAYE, SDL, UIF, ETI, Type, Status, Action), "EMP501 Reconciliation Status Dashboard" (a table with columns: Channel, Date & Time, Status, Actions), and "EMP501 Submissions History" (a table with columns: Channel, Date & Time, Tax Year, Status). The "EMP501 Submissions History" table is highlighted with a red border and contains three rows of submission data. At the bottom left, it says "Proudly brought to you by SARS" with the SARS logo. At the bottom right, it says "Total Rows: 3".

PAYE	SDL	UIF	ETI	Type	Status	Action

Channel	Date & Time	Status	Actions
ONLINE	2024-05-09 13:00	ACCEPTED	UPDATE ...

Channel	Date & Time	Tax Year	Status
ONLINE	2024-05-09 13:00	2024	UPDATE
ONLINE	2024-04-17 15:09	2024	UPDATE
ONLINE	2024-04-17 15:08	2024	UPDATE

The “PAYE Dashboard” option in the action tab menu, will display information received by SARS for the EMP501 submission.

EMP501 History.

The screenshot displays the e@syFile Employer web application interface. The top navigation bar includes the e@syFile logo, a menu (File, View, Help), and user information (202402, Environment: QA, Connected, Version: 800.00.209, Logged in as: ADMIN, Logout). Below the navigation bar are four main action buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History' (highlighted with a red box). The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations (highlighted), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area shows the 'EMP501 Reconciliation Work Page' with a table of reconciliation data. Below this is the 'EMP501 Reconciliation Status Dashboard' with a table showing the status of reconciliations. At the bottom, the 'EMP501 Submissions History' section is highlighted with a red box, displaying a table of submission records.

Channel	Date & Time	Tax Year	Status
ONLINE	2024-05-09 13:00	2024	UPDATE
ONLINE	2024-04-17 15:09	2024	UPDATE
ONLINE	2024-04-17 15:08	2024	UPDATE

Total Rows: 3

EMP501 History allows a sync and opens a grid at the bottom with the history.

It shows history of previous submissions, even if submission were not done on the current database.

Please note that only the SARS response or status of the submission will be presented, and not the EMP501.

PAYE Dashboard.

The screenshot shows the e@syFile Employer interface. At the top, there's a navigation bar with 'File', 'View', and 'Help' menus. Below this, the e@syFile logo and 'Employer' role are visible. A status bar shows '202402', 'Environment: QA', 'Connected', 'Version: 800.00.209', and 'Logged in as: ADMIN' with a 'Logout' button.

Reconciliations

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

Buttons: **Accept Data**, **Reinstate ETI**, **Own Values**, **EMP501 History**

EMP501 Reconciliation Work Page

PAYE	SDL	UIF	ETI	Type	Status	Action
R 36,605.28	R 13,375.74	R 25,808.80	R 0.00		Ready To File	...

EMP501 Reconciliation Status Dashboard

Channel	Date & Time	Status
ONLINE	2024-05-09 13:00	ACCEPTED UPDATE

EMP501 Submissions History

Channel	Date & Time	Tax Year	Status
---------	-------------	----------	--------

Context menu for the 'Ready To File' row:

- Open Return
- Refresh
- Summary Report
- Submit to SARS
- Download EMP501 PDF
- Full Resubmission Request**

Full resubmission option in the recon screen under Actions once the EMP501 has been set to Ready to file


Disc Submission.

The screenshot shows the e@syFile Employer web application interface. The top navigation bar includes a menu, a dropdown menu, the number 202402, Environment QA, a Connected status indicator, Version: 800.00.209, Logged in as: ADMIN, and a Logout button. The left sidebar contains a navigation menu with the following items: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities (highlighted). The main content area is titled 'Utilities' and contains a list of options: Database Utilities, User Management, Validation Logs **, and Disc Submission (expanded). Below the Disc Submission option, there is a table with the following data:

On this screen you are able to submit your EMP501 and IRP5/IT3(a) certificates via disk. Select the items to save to disk.

PAYE	SDL	UIF	ETI	Type	Status	Action
R 36,605.28	R 13,375.74	R 25,808.80	R 0.00	EMP501	Ready To File	...

A dropdown menu is open from the 'Action' column, showing two options: 'Disc Submission' and 'Full Disc Resubmission'.

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Disc submission option is in the Utilities menu. Note the options in the Disc submission drop down menu, Once selected it will process and give an option to save the file to your PC. The zipped file and signed EMP501 must be delivered to the requesting SARS official for manual upload.

Disc Submission.

The screenshot shows the e@syFile Employer interface. The top navigation bar includes the e@syFile logo, a search bar, and user information: 202402, Environment: QA, Connected, Version: 800.00.209, Logged in as: ADMIN, and a Logout button. The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations (selected), Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is titled 'Reconciliations' and includes a message: 'SARS might have financial values for the EMP501. Select "Accept Data" in order to populate the return with the SARS data OR select "Own Values" in order to capture your own values on the return.' Below this are four buttons: 'Accept Data', 'Reinstate ETI', 'Own Values', and 'EMP501 History'. The 'EMP501 Reconciliation Status Dashboard' is expanded, showing a table with the following data:

Channel	Date & Time	Status	Actions
ONLINE	2024-05-09 13:00	ACCEPTED	UPDATE ...
DISC	2024-05-09 13:28	SARS Branch	...

The 'DISC' row is highlighted with a red border. A dropdown menu is open for this row, listing the following actions:

- Generate IRP5/IT3(a) PDF's
- PAYE Dashboard
- Summary Report
- ETV Report
- View EMP501 PDF

As soon as the disc submission file is created, the channel in the EMP501 Reconciliation Status Dashboard will reflect as Disc, and its status will reflect as SARS Branch.

Synchronisation.

The screenshot displays the SARS e@syFile web application interface. At the top, there is a header with the SARS logo, a dropdown menu for 'Select an employer' (currently showing '202502'), a 'Connected' status indicator, the version number '801.00.336', and the user 'ADMIN' with a 'Logout' button. The main dashboard area features a 'What's new on SARS e@syFile?' section with a link to the SARS website. Below this are three buttons: 'Import Payroll File', 'Delete Payroll File', and 'Retrieve Certificate History'. A section titled 'Select an Employer and Period of Recon to view the following:' provides instructions to view EMP501 PAYE Status Dashboards. A modal dialog box titled 'SARS Secure Login' is overlaid on the dashboard, containing the text 'Log in to eFiling to verify your credentials', two input fields for 'SARS eFiling username' and 'SARS eFiling Password', and 'CANCEL' and 'LOGIN' buttons. The 'Synchronisation' menu item in the left sidebar is highlighted with a red box.

PAYE correspondence can be requested from SARS via the synchronisation function.

PAYE Dashboard.

The screenshot shows the e@syFile Employer web application interface. A modal dialog box titled "e@syFile Synchronisation Service" is open in the center. The dialog contains the following text and options:

Here you can select which item you wish to sync

- eFiling Profile and Employer Information
- Letters and Correspondence
- AA88 notices
- 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

At the bottom of the dialog are two buttons: "SYNC" and "CANCEL".

The background dashboard shows a navigation menu on the left with options like Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities. The main content area is partially obscured by the dialog box but shows sections for Reconciliations, EMP501 History, and EMP501 Submissions History.

The “PAYE Dashboard” option in the action tab menu, will display information received by SARS for the EMP501 submission.

You will only be able to synchronise for “All” if it is the first time your database is being synchronised.

Synchronisation.

The screenshot displays the SARS e@syfile Employer web application. The interface includes a top navigation bar with the SARS logo, a dropdown for 'Select an employer', a dropdown for 'Select a period', a status indicator 'Connected: PREPROD', the version '800.00.236', and the user 'ADMIN' with a 'Logout' button. A left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation (highlighted with a red box), Notification Centre, Third Party Appointments, and Utilities. The main content area shows a 'What's new on SARS e@syfile?' section with a link to the SARS website. Below this are buttons for 'Import Payroll File', 'Delete Payroll File', and 'Retrieve Certificate'. A modal dialog box titled 'Success' is overlaid on the screen, containing the text: 'New Correspondence from SARS. Please go to the NOTIFICATION CENTRE to view the correspondence.' The dialog has a 'View Correspondence' button (highlighted with a red box) and an 'OK' button.

After you have clicked on the “Sync” button, and passed verification, a link to the notification centre will be presented.

Synchronisation.

The screenshot shows the e@syFile Employer interface. The top navigation bar includes the e@syFile logo, a search bar, and user information (202502, Connected, Version: 801.00.336, Logged in as: ADMIN, Logout). The left sidebar contains navigation options: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre (selected), Third Party Appointments, and Utilities. The main content area is titled "Notification Centre" and contains instructions: "Here you are able to view any correspondence from SARS. To view any of the letters, please click on the applicable employer to expand the list of letters." It also notes "(New = available via synchronisation)" and "0 = Unread count". A search bar is present with the text "Search by PAYE Reference Number or Employer Name". Below this is a table with columns: PAYE Reference Number, Employer Name ↑, Items to Sync, Available Letters, and Letter Types. The table shows one row for "Sasol" with 0 new items, 4 available letters, and 4 letter types. Below the table, it says "1 row selected" and "Total Rows: 1". A section titled "7940714134 - Sasol (Display expanded details for selected Employer)" contains a "Show Read Only" checkbox, a "Select Form Type" dropdown (set to "-- ALL --"), and "ARCHIVE" and "RESTORE" buttons. A table below this section lists letters with columns: Letter Id, Tax year, Message Type, Audit Case Number, Status, and Date Issued ↓. The table contains five rows of letter data.

PAYE Reference Number	Employer Name ↑	Items to Sync	Available Letters	Letter Types
	Sasol	0 new	Letters 4	Letter Types 4

Letter Id	Tax year	Message Type	Audit Case Number	Status	Date Issued ↓
<input type="checkbox"/>	101247011	2025	EMPSA	READ	2025-10-13
<input type="checkbox"/>	44344529	2025	DEBT_WD_OF_TPA	READ	2025-06-02
<input type="checkbox"/>	44341346	2025	NOTICE_OF_TPA	READ	2025-06-02
<input type="checkbox"/>	1780340624884	2025	AAB8 Notification	READ	2020-06-04

Select the employer to view the letter.

Utilities.

The screenshot displays the e@syFile Employer web application interface. At the top, there is a navigation bar with the e@syFile logo and the role 'Employer'. The main navigation menu on the left includes: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities (which is currently selected). The Utilities menu is expanded, showing the following options: Database Utilities, User Management, Validation Logs **, and Disc Submission. The top right of the interface shows system information: a search bar, the number '202402', the environment 'QA', a 'Connected' status indicator, the version '800.00.209', and the user 'ADMIN'.

The Utilities section contains the following functionalities.

- Database Utilities.
- User Management.
- Validation logs.
- Disc Submission.

Database Utilities.

The screenshot shows the 'Utilities' section of the SARS Employer Admin interface. On the left is a navigation menu with the following items: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities (which is highlighted). The main content area is titled 'Utilities' and contains a sub-section 'Database Utilities' with an upward arrow. Below this sub-section is a descriptive text: 'Here you are able to create a backup of your database, restore your database from a backup, extract a PAYE data or import an extracted PAYE data.' Underneath the text are four buttons: 'BACKUP DB', 'RESTORE E@SYFILE DB', 'PAYE DATA EXTRACT', and 'IMPORT PAYE DATA EXTRACT'. Below the buttons are four expandable menu items: 'User Management', 'Validation Logs **', 'Disc Submission', and 'Update', each with a downward arrow.

In Database Utilities, you are able to backup the database, restore an e@syFile database, Extract PAYE data, and import extracted PAYE data.

Validation Logs.

The screenshot shows the e@syFile Employer application interface. The top navigation bar includes the e@syFile logo, a search bar, and status information: "Connected : PREPROD", "Version: 800.00.235", and "Logged in as: ADMIN". The left sidebar contains a menu with items: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities (highlighted). The main content area is titled "Utilities" and contains several expandable sections: "Database Utilities", "User Management", and "Validation Logs **" (expanded). Under "Validation Logs **", there is a sub-section "Import Payroll File Log". A "Log Category" dropdown menu is open, showing options: "Payroll Imports", "AA88 Imports", "Payroll Imports", and "Pre-Submission". Below the dropdown is a table with columns: "FILENAME", "DATE IMPOR...", "STATUS", and "ACTIONS". The table is currently empty, displaying "No rows". At the bottom of the sidebar, it says "Proudly brought to you by SARS" with the SARS logo.

All validations logs will appear on this tab from the dropdown. AA88 Imports, Payroll Imports and Pre-Submission Validation logs

Utilities Menu

In Utilities, select Update

The screenshot shows the e@syFile Employer application interface. At the top, there is a header bar with the e@syFile logo on the left and navigation elements on the right: "Proudly brought by SARS", "Select an employer" (dropdown), "Select a period" (dropdown), "Connected: PREPROD" (status), "Version: 800.00.241", "Logged in as: ADMIN", and a "Logout" button.

On the left side, there is a vertical navigation menu with the following items: Dashboard, Employer Admin, Employee Admin, Reconciliations, Synchronisation, Notification Centre, Third Party Appointments, and Utilities (highlighted in blue). Below the menu is the SARS logo with the text "Proudly brought to you by".

The main content area is titled "Utilities" and contains a list of utility options, each with a dropdown arrow: Database Utilities, User Management, Validation Logs **, and Disc Submission. Below this list is the "Update" utility, which is expanded to show the following information: "Current Version: 800.00.241", "Server Version: 800.00.240", and "No updates available!".

A small tooltip at the bottom right of the screen reads: "Press the 'Prnt Scrn' on your keyboard to take a screenshot".

Remember our Digital Channels

Manage tax matters on the go with SARS digital channels

Use these digital channels:

*# USSD *134*7277#

SMS Service 47277

WhatsApp 0800 11 7277
Send "Hi or Hello"



SARS Online Query System (SOQS) at www.sars.gov.za



SARS MobiApp



AI Assistant on www.sars.gov.za

Say goodbye to queues. Go to sars.gov.za



**MAKE
TAX MATTERS
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Tax matters, so does your time.

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Thank you

Siyabulela

Siyabonga

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Dankie

Re a leboga

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Ha khensa