e@syFile™ PAYE USER GUIDE





www.sars.gov.za

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1. **Overview**

The first Pay-As-You-Earn (PAYE) interim (biannual) reconciliation took place from 1 September 2010 to 29 October 2010. The interim (biannual) reconciliation is a six-month reconciliation for the period 1 March 2010 to 31 August 2010.

As part of its drive for better service, SARS has been modernising tax processes over the past three years. The changes are a vital part of SARS's long-term vision to have a more accurate reconciliation process. More information means a less cumbersome tax process, as tax returns are increasingly pre-populated.

Employers would have heard about the interim (biannual) reconciliation over the past two years, and again when SARS embarked on an extensive communications campaign during the 2010 Employers Tax Season.

The Employers Tax Season has always marked the climax of the tax year for employers, when employers submit their annual reconciliations for the period 1 March to 28/29 February for PAYE, SDL and UIF. While the annual reconciliation declaration will still be required for the full tax year ending February, going forward the interim (biannual) reconciliation will also be an integral part of the PAYE process.

For further assistance, please visit a SARS branch, call the SARS Contact Centre on 0800 00 SARS (7277), or visit www.sarsefiling.co.za or www.sars.gov.za.

Using e@syFile[™] Employer, you can now finalise and submit your reconciliation in four basic steps:

Step 1

The employer's current payroll system generates electronic tax certificates [IRP5/IT3(a)s] in a CSV file which is imported into e@syFile™ Employer.

Step 2

The employer uses e@syFile™ Employer to capture all manual certificates.

Step 3

e@syFile™ Employer uses information from all the tax certificates to automatically populate certificate totals for the Employer Reconciliation Declaration (EMP501). The employer enters the monthly liabilities and payments, and e@syFile™ Employer calculates the rest.

Step 4

You can make your declaration by generating the CSV tax certificate file from the payroll system, and importing this file into e@syFile™ Employer for submission to SARS. Using e@syFile™ Employer, you can capture additional manual certificates, cancel certificates, and capture EMP501 or EMP701 details. Then submit your reconciliation declaration to SARS:

- Online using e@syFile™ Employer; or
- On a disk, remembering to include signed hard copies of the EMP501, and, if applicable, an EMP601 and EMP701. Please note ٠ that in this instance you would have had to make your declaration using e@syFile™ Employer.

e@syFile™ Employer also automatically generates Adobe PDF versions of all tax certificates ready to be given to employees (either printed or electronically) for Personal Income Tax Filing Season. However, for the interim (biannual) PAYE reconciliation, only finalised certificates may be issued to employees whose employment was terminated prior to the closing of the interim period. In this instance, the certificate number must reflect the full reconciliation period (02).

2. The e@syFile[™] Employer process

2.1 Backing up your existing information

Step 1

You must BACKUP your existing information before installing or updating to the most recent version of e@syFile™ Employer by:

- Clicking on Utilities, and then Database Utilities
- Clicking on Backup, and
- Selecting the **destination folder** for your file backup.

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For a more detailed explanation on backing up your information, please see 3.16 CREATING A BACKUP OF YOUR DATABASE.

2.2 Installing or updating e@syFile[™] Employer

Existing users

2.2.1 Updating to e@syFile™ Employer

Step 1

Log on to the current version of e@syFile™ Employer.

Step 2

If you are online, a pop-up message will appear which allows you to run the update. If the pop-up does not appear, access the update by clicking on the Update option in the left menu pane.

> 1 SEPTEMBER 2010 2

Follow the pop-up messages to complete the installation process. You will be prompted to restart your PC once the update has been successfully installed.

New Users

2.2.2 Installing the latest version of e@syFile™ Employer

<u>Step 1</u>

You will need internet access to download the latest version of e@syFile™ Employer. Go to the e@syFile™ Employer homepage: http://downloads.sarsefiling.co.za/easyfilehome/easyfile.html

Step 2

Click Download for Windows to start the download process.

Step 3

Double-click on the Setup Employer file to unzip it then double click on the extracted file to initiate the installation process. Pop-up messages will guide you through the remainder of the installation process. Once the application is installed, it will automatically open and a registration box will appear. You will also see an e@syFile™ Employer icon on your desktop which allows you quick access to the application.

Step 4

Under user name, the default word ADMIN will appear. Leave this as is.

Welcome to e@syFile - employers	Version 3.1.3.1
Welcome to SARS e@syFile - employe application is being run, you are kind account to access this application. Thi password) will be used to access this be the same username and password data is to be transmitted to SARS, yo login details, and only when this auth be submitted.	ers. As this is the first time that the y asked to create a local login s login account (username and application only, and should not used to access SARS eFiling. When u will be asked for your eFiling entication passes will information
Admin User Name:	ADMIN
Admin Password:	*****
Repeat Admin Password:	*****
Admin Password Hint:	P@ssword1
Would you like to be able to edit information imported from a CSV file?	✔ Allow CSV editing
Please be aware that should you lose or forget your password, SARS eFiling will not be able to retrieve or reset it.	✓ I understand
Cancel	Next

<u>Step 5</u>

Enter your own unique password under user password, using at least eight characters. Your password must include one capital letter, one number and one special character (e.g. a dollar sign or an exclamation mark).

Step 6

Repeat the password under Repeat ADMIN Password.

<u>Step 7</u>

Give yourself a hint to your password under ADMIN Password Hint.

Step 8

If you want to allow editing of imported certificates, you can do so by clicking Allow CSV editing.

Step 9

Click I understand to acknowledge that SARS will not be able to retrieve or reset your password should you lose it.

Step 10

To continue, click Next.

Step 11

You need to create a user account for the person who will be using e@syFile™ Employer.

<u>Step 12</u>

Enter the user's name, as well as a password, using the same criteria as before. Once again, repeat the password and enter a hint.

Step 13

Click Next, and it will take you to a similar page, where you need to enter a second user's details.

Step 14

Click Login to Application.

Step 15

You will see the following: Welcome to e@syFile™ Employer. The person who is about to use e@syFile™ Employer (this may be Admin user1 or user2) must enter their login name and password. Click Login.

Step 16

If you are unsure about your password, click Forgot Password? to see the hint which you entered earlier. If you are an eFiler, click Secure Password and enter your eFiling login name and password.

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2.3 Accessing the e@syFile[™] Employer software

Once you have clicked login, the page will navigate to the homepage. If you are working offline, you will see a red block with the word DISCONNECTED at the bottom of the screen. If you are online, the block will be green and will read CONNECTED. The menu pane to the left of the screen contains the following main menu items:



- 1. HOME Application Home The introductory page.
- 2. REGISTRATION eFiling Registration If you are not yet an eFiler, and you would like to submit your reconciliation to SARS electronically, you must first register for eFiling. You will also need to be online to use this function.
- IMPORT Import Payroll File 3.
 - Allows you to load payroll files onto e@syFile™ Employer.
- 4. EMPLOYEE ADMIN View/Edit Employees

Allows you to view employee details and tax certificates, add new employee records and capture manual certificates.

5.1 MONTHLY PROCESS – PAYE

Using this function you can capture and submit your Monthly Employer Declaration (EMP201) if you are registered for filing your EMP201 on eFiling.

5.2 MONTHLY PROCESS – Payments

You can submit payment for your EMP201 using this function.

- 6.1 RECONCILIATION Cancel Certificate Range e@syFile™ Employer allows you to cancel a range of certificates using this menu.
- 6.2 RECONCILIATION Declaration (EMP501) This is where the reconciliation takes place, matching all tax due with tax paid and the total value of employee tax certificates issued.
- 6.3 RECONCILIATION Adjustments (EMP701)

You can adjust previous declarations here.

- 7. SUBMISSION Submit to SARS This is where you submit your declaration(s) to SARS.
- AGENT APPOINTMENTS 8.

This new functionality was introduced to process ITA88 Agent Appointment Notices issued to employers (please refer to the ITA88 guide which will be issued at a later date in September 2010).

EMPLOYER ADMIN – Add/Edit Employer 9

Enter and edit the employer demographic details here.

10.1 UTILITIES – Utilities

Various functions are available on this menu to manage your database and submissions. The following sub-menus are listed on horizontal tabs under Utilities:

- Database Utilities: Use this menu to create, restore or merge backups
- Status Dashboard: Track your submission status
- Import Payroll File log: This is a log of all import attempts which has been enhanced to include a separate listing of Failures and Warnings relating to discrepancies in the information from your CSV file
- Delete Payroll File: You may delete imported payroll files using this option
- Reset Passwords: The ADMIN user is able to reset passwords for user one and two using this sub-menu
- Payroll File Editing: This option enables you to edit certificates imported with your CSV file
- Reassign Certificate: Allows you to consolidate duplicate employee records
- Generate IRP5/IT3(a) PDFs: Allows you to generate PDFs.
- 10.2 UTILITIES Synchronise Application
 - Allows you to synchronise your local e@syFile™ database with the employer details registered on your eFiling profile.
- 11. Help The help section includes:
 - Application Help: You can click Help in any particular section of the software to see all the available Help topics for that section
 - Update: Compares your software version with the latest version available for download, and enables you to update your version of the software if necessary.
- 12. Log off Click here once you are sure that all work has been completed and saved, and you wish to close the application.

3. Introducing the new menu and enhanced functionality for e@syFile[™] Employer

3.1 Create employer account

- Skip this step if you created an employer account for previous submissions, or if you are going to import a payroll file as the software will automatically create an employer account once your import is completed.
- If you do not use payroll software or do not have a CSV file with certificate details, you need to create an employer before adding employees or capturing manual certificates.

Step 1

Click Add/Edit Employer under EMPLOYER ADMIN (make sure that you select the tab called ADD Employer).

EMPLOYER ADMIN	
Add/Edit Employer	
UTILITIES	
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Synchronise Application	

Complete the employer details and tax reference numbers, including PAYE, SDL and UIF (where applicable). Click Next.

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Please note: If the PAYE, SDL or UIF reference numbers are not completed, you will not be able to enter amounts in the corresponding columns on the Declaration Page.

<u>Step 3</u>

Complete the Employer Address and Phone Information and click Next.

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<u>Step 4</u>

Complete the Employer Bank Information and click Next.

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<u>Step 5</u>

Complete the Employer Contact details – Representative page and click Next.

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<u>Step 7</u>

Where applicable complete the Employer Contact details - Tax Practitioner page and click Save or Add Employer.

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3.2 Edit employer account

Use this option if you need to change or update employer details. You may have to provide additional employer information before submitting your declaration to SARS. To do this click on Add/Edit Employer in the menu pane to the left of the screen, and select the relevant employer from the Company Name list. Then follow steps 2–7 (see 3.1 Create Employer Account).



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- It is only necessary to create an employee account when you need to capture the details for employees or companies not yet on e@syFile™ Employer
- If certificates for an individual or company were submitted from 2008-2010 using e@syFile™ Employer, you need not create the Employee Account again.

Please note: When you import a payroll file, the software will automatically create an employee account.

<u>Step 1</u>

Click on View/Edit Employees, and select an employer from the Company Name list (you need to create the Employer Account prior to creating an Employee Account). To create a new account, click Add Employee.

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Complete all the **required fields** on the Employee Information page, including:

- Nature of Person •
- Surname (or name of entity if not an individual) ٠
- First two names ٠
- Initials •
- Date of Birth •
- ID Number or Passport Number ٠
- Country of Issue (for Passport) •
- Income Tax Reference number (only mandatory from 2011, 10 zeros may be used if no number available) •
- Employee Number (this field is mandatory for pensioners and individuals without an ID number). ٠

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Personal			
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Click Next.

<u>Step 3</u>

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

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

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Branch Code:	122416
Account Holder Name:	JOHN SHITH
Account Burnham	123456769
	Prev Save

3.4 Capture manual certificates

<u>Step 1</u>

Click View/Edit Employees under EMPLOYEE ADMIN in the left menu pane. Select the employer from the Company Name dropdown list to open the list of all available employees or companies. To easily locate a specific employee, use the Search function below the Company Name field. This new option enables you to search for a specific employee record using different search criteria.

	Please complete an	y of the following o	riteria (also partia	l completions):	
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Select the relevant employee and click View next to the employee's name to open the employee record.



Step 3

To capture a new manual certificate, click Add Certificate to the bottom right of the screen. You will see the history of all certificates created, submitted, or cancelled for that particular employee/company displayed in the top right hand corner of the screen.

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<u>Step 4</u>

Complete all the required fields to create the new certificate, including:

- Transaction Year
- Period
- Certificate Number (this is generated automatically) •
- Indicate Certificate Type i.e. IRP5/IT3(a)

- Year of Assessment
- Pay Periods
- Directive Numbers (when applicable)
- Source codes and values (see Step 5 below).

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<u>Step 5</u>

To capture Source Codes and Values, click Manage Source Codes, and select the required Source Code from the drop-down list. Enter the amount under Value, and click Add/Update Source Code. Use Filter SOURCE CODES to search for a specific code, or select the Source Code from the Source Code drop-down list.

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Please note: If the Manage Source Code button is inactive, simply click Save Certificate to the bottom right of the page to activate the button.

Once you are done, click Save Certificate again. A pop-up message will appear which will either indicate that the tax certificate was successfully saved, or list warnings about mandatory fields that must be entered before the certificate can be finalised.

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3.5 Import payroll file

The latest enhancements to the Import Payroll file log include:

- Greatly improved processing speed when importing
- Enhanced messaging to include warnings regarding penalties when omitting mandatory employee demographic details.

Step 1

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



<u>Step 2</u>

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



<u>Step 3</u>

A message will be displayed indicating whether or not the payroll has passed the validation process (i.e. whether the file can be imported or not). If your CSV file has passed the validation process, click OK to begin importing your records.

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Payroll	File pass	ed Validation.	
Please	click OK t	to import records.	
	Ok	Cancel	

Step 4

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.



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To access the Import Payroll File log, click **Utilities** in the left menu pane, and then click **Import Payroll File** Log. To open a specific error report, simply double-click any entry listed in the log.

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<u>Step 5</u>

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

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You can still upload the file if there are items listed under Warnings but must pay attention to any warnings as they relate to the new mandatory information required by SARS. If all mandatory fields are not completed, you may encounter the following error message regarding penalties when you try to import your CSV file.

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Click 'Evolude' t	o avcluda th	e certificates	which may h	ave a nenaltu
Click 'Cancel' to	not import	the CSV file	at all.	ave a periaryr
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If you click Import you will see the following warning message displayed indicating that the employer might be liable for penalties.



You can continue to import and submit certificate details without all mandatory fields completed. However, in order to avoid penalties the missing information should be obtained from the relevant employee(s) and completed. Details of specific certificates without mandatory information will be displayed on the Warnings tab in the Import Payroll File log under Utilities. Click **Yes** to continue.

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3.6 Checking payroll and employee details

The latest enhancements to the EMPLOYEE ADMIN function include:

• The addition of the Single Income Tax registration function to assist employers in obtaining Income Tax reference numbers for new employees.

Follow this process once you've imported the payroll file and you want to ensure that it is on the application.

<u>Step 1</u>

- Click View/Edit Employees under EMPLOYEE ADMIN in the left menu pane.
- Select the employer from the Company Name drop-down list to see a list of all the employees.
- Select a specific employee from the list, and click View.
- To the right of the screen, double-click on the certificate you wish to view.

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

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3.7 Amending certificates within e@syFile™ Employer

Step 1

You will need to activate Payroll File Editing in the System Utilities menu to allow you to amend imported certificates.



<u>Step 2</u>

To change certificate details on e@syFile™ Employer, follow the steps listed in 3.6 CHECKING PAYROLL AND EMPLOYEE DETAILS in order to open a specific tax certificate.

<u>Step 3</u>

Once you have made all your amendments, click Save Certificate.

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3.8 Cancelling certificates within e@syFile™ Employer

e@syFile™ Employer now allows you to cancel a range of certificates.

3.8.1 Cancelling an individual certificate

<u>Step 1</u>

You will need to activate Payroll File Editing in the System Utilities menu to allow you to cancel imported certificates.

Step 2

To cancel a certificate on e@syFile™ Employer, follow the steps listed in 3.6 CHECKING PAYROLL AND EMPLOYEE DETAILS in order to open a specific tax certificate. Click Cancel Certificate at the bottom right of the page.

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<u>Step 3</u>

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

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



Step 5

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



3.8.2 Cancelling a range of certificates

<u>Step 1</u>

Click Cancel Certificate Range under RECONCILIATION in the left menu pane.

<u>Step 2</u>

Select the employer from the Company Name drop-down list.

Step 3

Select the Transaction Year.

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Indicate the starting and ending numbers for the range of certificates you wish to cancel.

<u>Step 5</u>

Click Cancel Certificates.

<u>Step 6</u>

A pop up message will appear to confirm cancellation of all the certificates. Click Yes to continue or No if you do not want to cancel the certificates.

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<u>Step 7</u>

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



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Completing the reconciliation declaration and reconciling annual employee tax 3.9

The latest enhancements to the Reconciliation function include:

- Changes to the EMP501 declaration to include the new periods and changes listed in the Business Requirements Specifications on www.sars.gov.za
- Improved processing time for accessing and processing EMP501 declarations
- A smaller format output file to assist with the processing and submission of EMP501, EMP701 and EMP601 ٠ declarations
- Blocking of multiple submissions pending a status update of the original submission. •

This is the process of matching employer financial declarations with employee financial information and the actual amounts paid to SARS.

Step 1

Click Declaration under Reconciliation.

Step 2

Select a company name from the Company Name drop-down list.



Step 3

Select the transaction year from the Transaction Year drop-down list.

Please note: The PAYE, SDL and UIF reference numbers will only be populated if the employer is activated for PAYE, SDL and UIF on the Employer Admin page within e@syFile™ Employer. To update these particulars edit the employer account by entering the reference number on the Employer Admin page.

Step 4

If all new required fields on the EMPLOYER ADMIN page were not captured, you will receive a warning message directing you to the EMPLOYER ADMIN page to complete the missing information before you can submit your declaration.



<u>Step 5</u>

Enter the monthly Employer Liability for PAYE, SDL and UIF.

<u>Step 6</u>

Capture the Total Payments per month that the employer has made to SARS.



The Total Value of Electronic Tax Certificates is the sum total of the tax value for all imported certificates. e@syFile™ Employer will automatically populate this field.

Step 8

The Total Value of Manual Tax Certificates is the sum total of the tax value for these certificates. e@syFile™ Employer will automatically populate this field.

Step 9

The Total Value of Tax Certificates for PAYE is the sum total of the Total Value of Electronic Tax Certificates and the Total Value of Manual Tax Certificates. e@syFile™ Employer will automatically populate this field.

Step 10

The Total Value of Tax Certificates for SDL is the sum total of the SDL contribution on each tax certificate (where applicable). Although this field will be automatically populated, you will be allowed to edit it if it is incorrect.

<u>Step 11</u>

The Total Value of Tax Certificates for UIF is the sum total of the UIF contribution on each tax certificate (where applicable). Although this field will be automatically populated, you will be allowed to edit it if it is incorrect.

Please note: Do NOT use cents in any of the fields as this will affect the calculation - round off all cents to the nearest rand.



<u>Step 14</u>

Click Yes to provide a reason for the difference, and then click OK.

<u>Step 14</u>

Click **Yes** to provide a reason for the difference, and then click **OK**.

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<u>Step 15</u>

You will see a message displayed indicating that the data can be set as READY TO FILE. Click OK.

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<u>Step 16</u>

Click **OK** to be directed to the submission screen where you can submit your declaration.



<u>Step 17</u>

Click View EMP501 to view the reconciliation in PDF format.

<u>Step 18</u>

To submit your EMP501 declaration to SARS, follow the process described in the Submission chapter below.

3.10 Electronic submission of a reconciliation declaration to SARS

The latest enhancements to the Submission function include:

- A new output file format to ensure an enhanced submission process, and quicker turnaround time for SARS status • updates
- Finalised certificates will be generated in PDF format upon submission
- Bulk Income Tax registration will take place after the submission of the interim (biannual) reconciliation. SARS will • provide the new income tax reference numbers early in the new year
- Enhanced error messages to ensure the accuracy of data submitted to SARS. .

Once you have prepared your Declaration or Adjustment, click Submit to SARS under SUBMISSION in the left menu pane. A screen will appear listing all declarations or adjustments which are ready for submission.

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Step 2

If you wish to view the document before sending it, click View. If you would like to revise the document, click Remove to delete it from the SUBMISSION list.

<u>Step 3</u>

Select the declaration you want to submit in the Submit column, and click Submit.

Step 4

A message will be displayed providing the user with the option to indicate their preferred method of submission.

How	would you	like to submit?	
 Via the I 	Internet (el	Filing Login Re	quired)
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Su	bmit	Close	

<u>Step 5</u>

If you are registered for eFiling, and would like to submit using the internet:

- Select Via the Internet (eFiling login required)
- Select which IRP5/IT3(a)s must be generated for storage on the local hard drive
- Click Submit.

If you want to submit at a SARS branch (electronic medium):

- Select via SARS Branch
- Select which IRP5/IT3(a)s must be generated for storage on the local hard drive •
- Click Submit.

Step 6

Select the destination on the local hard drive where you wish to store the electronic file, and click OK.

Please note: You cannot use a network drive to save the data to - the certificates will only be generated if you select your local drive (usually C:/). Rather copy or move the data to a network folder once you receive the confirmation message.

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Step 7

e@syFile™ Employer will generate the following folders and files in the destination folder specified:

- Subfolder with employer name •
- EMP501 in PDF format ٠
- EMP601 & EMP701 in PDF format (where applicable)
- Subfolder with all the certificates in PDF format, from where they can be printed in bulk •
- An encrypted file with the employer name if "Via a SARS branch" has been selected. The same file will also be generated in a compressed zip file format.

Name 🔺	Size	Туре	
🛅 IRP5IT3a		File Folder	
EMPLOYER NAME_EMP501.pdf	167 KB	Adobe Acrobat Document	
EMPLOYER_NAME_201002.psv	2 KB	PSV File	
EMPLOYER_NAME_201002.zip	1 KB	Compressed (zipped) Folder	

<u>Step 8</u>

 If you selected Via a SARS Branch, a message will appear confirming that all data files required have been successfully generated. It will also remind you to copy the encrypted zip file on an electronic medium, and submit to SARS along with signed copies of the EMP501 (and where applicable EMP601 and/or EMP701).



If you selected **Via the Internet**, you will be asked to provide your **eFiling login** name and **password** before your information can be submitted to SARS. A message will appear confirming that your declaration has been successfully submitted to SARS.

<u>Step 9</u>

If you selected Via the Internet as the submission method, you can monitor the status of your submission using the Status Dashboard (see 3.19 Status Dashboard).

3.11 Resubmission of EMP501 during the season

If you need to resubmit your EMP501 during the filing season, please follow the steps listed below.

Step 1

Make the necessary changes to certificates submitted with your EMP501 (see 3.6-3.8)

<u>Step 2</u>

Click Declaration under Reconciliation in the left menu pane. Select the relevant employer and the current period. If your EMP501 was in a "Submitted" status, you should see a message indicating that your EMP501 was already submitted. Click OK if you wish to proceed.



Step 3

Change the monthly values entered for PAYE, SDL, UIF and Payments if necessary.

Step 4

Click Self Assess.

Step 5

Click Ready to File.

Step 6

Follow Steps 1-6 in of 3.10 Electronic submission of a Reconciliation Declaration to SARS.

Step 7

Once you have indicated your preferred method of submission, you will receive another system message. Indicate here whether you want to resubmit all certificates, or only amended or changed certificates.
Please note: Only resubmit the amended certificates - resubmit all certificates ONLY if required.

If you click Yes, all certificates relating to the EMP501 reference number and period for which you are making the submission will be included in your submission to SARS regardless of the submission status. If you click No, only amended or altered certificates will be included in your submission to SARS and all certificates in a submitted status will be excluded.

Please note: Only finalised certificates will be generated in PDF format in your destination folder. Certificates for employees still employed will only be generated at the end of the financial period with the final reconciliation submission.

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Please note: When submitting an amended EMP501, take care in selecting your destination folder. If you select the same destination folder as that of your first submission, all your data (including IRP5s in PDF format as well as submission files) will be replaced with the new amended data.

3.12 Completing a reconciliation declaration adjustment (EMP701)

Complete an EMP701 if you need to make adjustments to PAYE declarations and payments in respect of prior years. You will need to follow different processes depending on how you submitted the EMP501 that you want to adjust.

Scenario 1

If you submitted the EMP501 using e@syFile™ Employer, and need to change, cancel or replace submitted certificates, adjust it following Scenario 1.

Step 1

Click View Employees.

Step 2

Select the Company Name and Transaction Year for the certificate that you wish to change.

<u>Step 3</u>

Select the employee for whom you want to adjust or cancel a certificate, and then click on the relevant certificate to the top right of the screen.

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 $\label{eq:click} \mbox{Click Cancel Certificate to cancel the certificate you have selected}.$

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To adjust the certificate you have selected, follow the steps listed in **3.7 Amending certificates within e@syFile™ Employer**.

Step 6

To create a new certificate, follow the steps listed in 3.4 Capture manual certificates and 3.5 Import payroll file.

Step 7

Click Adjustments under Reconciliation in the left menu pane. The following screen will appear:



<u>Step 8</u>

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

Step 9

If you made any subsequent payments to SARS since your last EMP501 submission, you need to now add this amount to the previous declaration Payment amount, and enter this new total in the Adjustment Declaration payment field.

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Please note: Do NOT use cents in any of the fields as this will affect the calculation. Please ensure that you round off all cents to the nearest rand.

<u>Step 10</u>

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e@syFile™ Employer will automatically calculate the Difference, Sum of Adjustments and Total Due by/to you fields.

<u>Step 11</u>

Click **Save.** A message will appear informing you that the Adjusted Declaration for that tax year has been successfully saved. Click **OK**.

<u>Step 12</u>

Click **Ready to File** and follow the process described in <u>**3.10 Electronic submission of a reconciliation declaration to SARS**</u> to submit your EMP701 declaration to SARS.

Scenario 2

If you submitted the EMP501 using e@syFile™ Employer and need to add certificates, adjust it following Scenario 2.

<u>Step 1</u>

To create a new certificate, follow the steps listed in <u>3.3 Create employee account</u>, 3.4 Capture manual certificates and 3.5 Import payroll file.

<u>Step 2</u>

Click Adjustments under Reconciliation in the left menu pane. The EMP701 screen will appear.

<u>Step 3</u>

Complete the Previous Declaration and Adjusted Declaration fields.

Click Save. A message will appear informing you that the Adjusted Declaration for that tax year has been successfully saved. Click on OK.

Step 5

Click Ready to File, and follow the same process described in 3.10 Electronic submission of a reconciliation declaration to SARS.

3.13 Printing certificates

You can also print certificates from the IRP5/IT3(a) subfolder (see step 7 of 3.10 Electronic submission of a reconciliation declaration to SARS). Alternatively, you can print certificates one by one following the steps listed below.

Step 1

Click View/Edit Employees in the left menu pane.

Step 2

Select the Company Name and Transaction Year for the certificate that you wish to print.

Step 3

Select the employee from the list.

Step 4

Open the certificate.

Step 5

Click View Certificate.

Step 6

The certificate will appear in PDF format. Click on the **Print icon** in the top left corner of the screen.



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3.14 Registering the employer for eFiling

If the employer wants to register for eFiling, follow this process.

Please note: You must be online to use this function.

Step 1

Click eFiling Registration in the left menu pane.

Step 2

The Register for eFiling screen will be displayed. Click to accept the Terms and Conditions and then click Continue.

Step 3

Capture all the required information, and then click Register.

3.15 Update software

The latest enhancements to the items listed under Utilities include:

- The addition of an Inbox which will list all electronic correspondence from SARS. Once opened, the correspondence will be moved to Notices and Letters on the Employer details page
- Enhanced processing time when using Database Utilities like Merge and Restore ٠
- Enhanced messages on the Status Dashboard ٠
- Enhanced messages on the Import Payroll File Log, including messages regarding possible administrative penalties ٠ when omitting mandatory employee details.

Follow the steps below to check if there's a software update available.

Please note: You must be online to use this function.

Step 1

Click Update. A message will be displayed indicating whether or not an update is available.

Step 2

If an update is available, click Yes. The software update will then be downloaded, and a message displayed to indicate that it has been successfully updated.

Step 3

Click OK.

3.16 Creating a backup of your database

It is important to make frequent backups of your reconciliation information. The backup process on e@syFile™ Employer is quick and simple.

Step 1

Click Utilities.

Click Database Utilities.

<u>Step 3</u>

Click Backup.

Step 4

Select a destination folder and click **OK**.

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<u>Step 5</u>

A message will be displayed indicating that the database backup was successful. Click OK.

Backup files are all named in the following manner to make it easy to locate your most recent backup file: [EasyFile]+[date]+[time of backup].



3.17 Merge multiple databases

Follow this process if you have multiple branches or different employees that complete manual certificates and payroll files, and you want to merge them for your reconciliation. You can also use this option to merge data for different financial periods onto one single database.

Please note: To ensure that no certificates are lost during the merge process, assign different certificate numbers or ranges to the different staff members preparing manual certificates. Please also backup all the data that you want to merge, and transfer these files to a selected folder on the PC where you want to merge the various databases.

Step 1

Click Utilities.

Step 2

Click Database Utilities.

Step 3

Click Merge.

Step 4

Select the relevant backup file from the destination where you saved it, and click Open to begin the merge process.



Step 5

A warning message will appear informing you that EMP501 data must be re-entered. IF YOU DON'T HAVE A BACKUP OF YOUR RECONCILIATION DATA, CLICK CANCEL AND FIRST MAKE A BACKUP. If you have already made a backup of your data, click on Yes.



<u>Step 6</u>

Additional messages will reflect the status of the merging process, and prompt you to restart the application once the merge has been successfully completed.



<u>Step 7</u>

To merge multiple database files, repeat **step 4-6 above**.

3.18 Restore your database from a backup

Step 1

Click Utilities.

Step 2

Click Database Utilities.

<u>Step 3</u>

Click Restore.

Step 4

Select the location from which to restore the database, and then select the backup file you wish to restore.

<u>Step 5</u>

Click Open.

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<u>Step 6</u>

A message will be displayed indicating that the database will be restored. Click Yes.

<u>Step 7</u>

A message is displayed indicating that the database restore is complete. Click OK.

3.19 Status dashboard

The table on this page will list all successful submissions. You can also check the status of your submission using the Status Dashboard. The Status Dashboard in the latest version of e@syFile™ Employer includes two extra columns which reflect the date and time of your submission, as well as the method used for submission. This also serves as your proof of submission for both submission methods.

<u>Step 1</u>

Click Utilities.

<u>Step 2</u>

Click Status Dashboard.

<u>Step 3</u>

Your submissions will be displayed on the screen.

Step 4

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

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Please note: Until your status update reflects as Accepted or Rejected, you will not be able to resubmit your EMP501 (or an EMP701 where applicable).

3.20 Managing payroll file imports in e@syFile™ Employer

e@syFile™ Employer keeps a log of all import attempts, including failures, warnings and successful imports.

<u>Step 1</u>

Click Utilities.

Step 2

Click Import Payroll File Log.

Step 3

To open a specific error report, simply double-click the entry listed in the log.

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3.21 Manage payroll file editing in e@syFile™ Employer

This option must be enabled by the ADMIN user before you can edit certificates imported from a CSV file.

Step 1

Click Utilities.

<u>Step 2</u>

Click Payroll File Editing.

<u>Step 3</u>

Tick to select Enable Editing of Imported Payroll File Data.



<u>Step 4</u>

Click Apply.

3.22 Deleting payroll files

Follow these steps to delete imported payroll files.

<u>Step 1</u>

Click Utilities.

<u>Step 2</u>

Click Delete Payroll File.

<u>Step 3</u>

Double-click the payroll file to be deleted, or click View.

<u>Step 4</u>

Tick the box next to the relevant payroll file(s) to be deleted.

<u>Step 5</u>

Click Delete.

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<u>Step 6</u>

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



<u>Step 7</u>

Click OK. The payroll file is now deleted.



3.23 Reset password

Do this to reset user passwords.

Please note: Only the ADMIN user can access this function.

Click Utilities.

<u>Step 2</u>

Select the Reset Passwords tab.

<u>Step 3</u>

Select the Local Login User Name from the drop-down list.

Step 4

Enter a new Local Login Password.

Step 5

Repeat the captured Local Login Password.

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Please note: A pop-up message will appear prompting you to correct the information you entered (see Step 6 of 2.2.2 Installing the latest version of e@syFile™ Employer).

<u>Step 6</u>

Enter Local Login Password hint.

Step 7

Click Apply Changes. The user password has now been reset.



Reassign certificate 3.24

If duplicate records have been created for an employee under EMPLOYEE ADMIN, you can now reassign the tax certificate(s) to the correct employee record. The duplicate record will then automatically be deleted.

Please note: Only an ADMIN user with CSV editing privileges (see 3.21 Manage payroll file editing in e@syfile™ Employer) can access this function.

<u>Step 1</u>

Click Utilities and then select the Reassign Certificate tab.

Step 2

Select the employer from the Company Name drop-down list.

Step 3

Select the first employee record from the Original Employee drop-down list.

Step 4

Select the second employee record from the New Employee drop-down list.

<u>Step 5</u>

Click Reassign Certificate to consolidate employee records, or to delete the duplicate employee.

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3.25 Generate IRP5/IT3(a) PDFs

Once your file has been submitted to SARS electronically or a file created for manual submission the employer can create IRP5/IT3(a) PDFs as follows.

<u>Step 1</u>

Click Utilities and then select the Generate IRP5/IT3(a) PDFs tab.



<u>Step 2</u>

A list will display all completed submissions for which PDF certificates can be generated.

<u>Step 3</u>

Mark the checkbox for those submissions for which you would like to generate PDF certificates.

<u>Step 4</u>

Click **Generate**. You will be asked which certificates you would like to generate, and where you would like these certificates to be saved on your PC.

Please note: For the PAYE interim reconciliation employers must not issue IRP5/IT3(a) certificates to employees. Therefore no PDF certificates will be generated for this period. A final certificate for an employee can be viewed and printed by selecting "View Certificate" within the View/Edit Employees function.

3.26 eFiling Synchronisation

The latest enhancements to the eFiling synchronisation function include:

- New functionality which allows employers to synchronise the data on their SARS eFiling profile with their local e@syFile™ Employer database
- Once synchronised, EMP201 declarations can be submitted and paid using e@syFile™ Employer.

Use the eFiling Synchronisation option listed on the Employee's Taxpayer Details page to retrieve data for a specific employer.

Step 1

Click PAYE in the left menu pane to open a page listing all employers registered for EMP201 on your profile.

Step 2

Select the relevant employer or use the search function to locate a specific employer, and click View.

<u>Step 3</u>

Select a tax year from the drop-down list and click eFiling Synchronisation to start the process.



3.27 Using the help function

The help function can be easily accessed in any section.

Step 1

Click the **Application Help button** to the left of the screen.



Step 2

The main window will slide towards the left of the screen, and the list of Frequently Asked Questions (FAQ) for that particular page/topic will be displayed to the right of the screen.

Step 3

Select the Index tab to display a list of related topics.

Step 4

To close the Help function, click Close Help to the top right of the help page.

4. The Employer Monthly Declaration using e@syFile[™] Employer

Introduction

This appendix will help you understand how to access the new features for the monthly process so that you are able to submit and pay your Monthly Employer Declaration (EMP201) using e@syFile™ Employer.

You will need the following in order to use e@syFile™ Employer to submit your EMP201 and make payment:

- Internet access
- An existing profile on eFiling (you must be registered and activated for the Monthly Employer Declaration).

To find out how to register your EMP201 on eFiling, please go to http://www.sars.gov.za and click on the 2010 Employers Tax Season banner. Scroll down to Documentation and Info, then click A guide to accessing the new features for the Monthly Employer Declaration (EMP201) on eFiling.

4.1 Overview

You will need to use the latest version of e@syFile™ Employer to access the new functionality that enables you to prepare, submit and pay your EMP201 returns. Before you update to or download and install the new version, please ensure that you make a backup of your existing data.

In order to make use of the new functionality on e@syFile™ Employer, you need to ensure that your EMP201 return(s) is registered and activated on your eFiling profile. You also need to ensure that user rights are set up correctly so that you can submit and pay your monthly return using e@syFile™ Employer.

Once you have downloaded and installed the latest version of e@syFile™ Employer, you will be able to synchronise your local software database with your SARS eFiling profile data. Each time you synchronise with the eFiling website, you will be required to enter your eFiling login name and password. When you synchronise your e@syFile™ Employer database with your eFiling profile the first time, you will retrieve data for all the EMP201 reference numbers activated on your eFiling profile. You will also be able to access the monthly process on e@syFile™ Employer when your application is synchronised with your SARS eFiling profile.

4.2 Synchronising the application

Step 1

Click Synchronise Application in the left menu pane.

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Step 2

Complete the SARS eFiling User Name and Password and click Login. This will align your e@syFile™ Employer database with the data on your SARS eFiling profile.

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<u>Step 3</u>

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Pop-up messages will indicate progress during the synchronisation process, and confirm once the initial synchronisation is complete.

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Note: If you encounter an error message relating to an incorrect eFiling login name and password, please ensure that the login name and password used is correct, and that the necessary user rights were allocated correctly.

Submitting your EMP201 declaration 4.3

<u>Step 1</u>

Click PAYE in the left menu pane to open a page listing of all the employers registered for EMP201 on your profile.



<u>Step 2</u>

Select the relevant employer or use the search function to locate a specific employer, then click View.

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<u>Step 3</u>

View all the particulars for the Declarant to ensure that they are completed and correct. You can edit the details on this page and then click Save Details.

Step 4

To access a specific return, select the relevant tax year and period at the top of the page. You will then see a list of EMP201 Declarations to the right of the screen with the status indicated for that period.

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<u>Step 5</u>

Click View to open a new return, which will open the return in PDF format.

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	View

The new EMP201 return has been enhanced to include additional fields for penalties and interest. If the amounts for penalties and interest are not populated when you open the return, you will be able to edit these fields.

Complete the amounts for PAYE, SDL and UIF (where applicable) in the Payment Details section. You can also complete or edit the penalty and interest amounts if necessary. The Payment Period and Total fields will be automatically populated, and the Payment Reference Number will be generated by SARS on submission of your declaration.

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<u>Step 7</u>

Once you have completed the amounts, you can click Save Online if you need to save your information. Click File if you are ready to file your EMP201 declaration. This will update the status of your return in the EMP201 Declaration listing, and list the return on the Submissions page.

Tax Return Re	ady to File.	
OK		
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iyment Referer PAYE R 10000.00 Total	ce Number RE SDL R 100.00	Status ADY TO FILE UIF R 100.00

<u>Step 8</u>

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

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<u>Step 9</u>

Select your **return** and click **Submit** in the top right hand corner of the page.

<u>Step 10</u>

Click to accept the declaration, and enter your SARS eFiling login name and password to submit.

hereby declare that this re hat all tax required has bee	conciliation is true and correct on deducted and declared and
hat all payments declared h	nave been made. I hereby
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SARS Efiling User Name:	SARS eFiling login name
SARS Efiling Password:	****
	Login Cancel

<u>Step 11</u>

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



4.4 Revising an EMP201 return

4.4.1 Scenario 1: Increasing a previous EMP201 declaration

<u>Step 1</u>

Follow steps 1-4 of 4.3 Submitting your EMP201 declaration to select the relevant Employer and period. The return should be displayed to the right of the screen in the EMP201 Declaration status listing. Click Revise.



Step 2

Complete the Declaration Revision fields with correct amounts and then click OK.

	PAYE	SDL	UIF	Total
ubmitted Declaration	25600.00	2560.00	2500.00	30660.00
ease enter correct amounts for aw declaration	30000.00	3000.00	3000.00	36000.00
mount to be Allocated	4400.00	440.00	500.00	5340.00

Step 3

The revised EMP201 return will automatically be listed on the Submissions page. Follow steps 8-11 of 4.3 Submitting your EMP201 declaration to submit the increased EMP201 Declaration to SARS.

An additional payment will have to be processed. Follow the steps listed below in 4.6 Paying your monthly EMP201 declaration to make the additional payment.

4.4.2 Scenario 2: Decreasing a previous EMP201 declaration.

Step 1

Follow steps 1-4 of 4.3 Submitting your EMP201 declaration to select the relevant Employer and period. The return should be displayed to the right of the screen in the EMP201 Declaration status listing. Click Revise.

Step 2

Complete the Declaration Revision fields and click OK.

	PAYE	SDL	UIF	Total
ubmitted Declaration	25600.00	2560.00	2500.00	30660.00
lease enter correct amounts for ew declaration	20000.00	2000.00	2000.00	24000.00
mount to be Allocated	-5600.00	-560.00	-500.00	-6660.00

Step 3

A pop-up message will appear indicating that the amounts entered have resulted in a credit. If your payment matches the new revised return, click OK. If your payment matches the previous declaration, click Cancel to allocate the resulting credit to another period.



Select a **period** and allocate the **listed credit** on the Payment Reallocation message, then click **Next**.

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<u>Step 5</u>

Once the full credit available has been allocated, you will receive another pop-up message reflecting R0.00 remaining to be allocated. Click **Done**.

You have made a re less than the total a these total to other (evision to your declaration where the total amount in the new declaration i mount in the previous declaration. You can now allocate the difference in periods.
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<u>Step 6</u>

The revised EMP201 return, as well as the credit allocated to another period, will automatically be listed on the Submissions page. Follow **steps 8-11 of <u>4.3 Submitting your EMP201 declaration</u> to submit the decreased EMP201 Declaration to SARS.**

4.4.3 Scenario 3: Incorrect period selected during original EMP201 submission

Step 1

Follow steps 1-11 of 4.3 Submitting your EMP201 declaration, taking care to select the correct period

Step 2

Once you have submitted the return for the correct period, follow steps 1-4 of 4.3 Submitting your EMP201 declaration to locate the return submitted for the incorrect period. Click Revise.

Step 3

Enter zeros in the fields for PAYE, SDL and UIF and click OK. This will ensure that you receive a new unique payment reference number when the return is due and must be revised.

	PAYE	SDL	UIF	Total
Submitted Declaration	25600.00	2560.00	2500.00	30660.00
Please enter correct amounts for new declaration	0.00	0.00	0.00	0.00
Amount to be Allocated	-25600.00	-2560.00	-2500.00	-30660.00

Step 4

You will see a pop-up message indicating that you should reallocate the excess payment. Click Cancel to reallocate the credit.

<u>Step 5</u>

The full amount should be listed as a credit to reallocate. Take care to select the correct period and allocate the full amount to the correct period. Click Next.

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Once the full credit available has been allocated, you will see another pop-up message reflecting R0.00 remaining to be allocated. Click Done.

You have made a r less than the total these total to other	evision to your declaration where the total amount in the new decla amount in the previous declaration. You can now allocate the differ periods.	ration is ence in
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<u>Step 7</u>

The revised return (for the incorrect period) and the credit allocated to the correct period will automatically be listed on the Submissions page. Follow steps 8-11 of 4.3 Submitting your EMP201 declaration to submit the amended EMP201 Declaration to SARS.

4.5 Unallocated Credit

You can reallocate the credit at a later stage following the steps below.

<u>Step 1</u>

In the Payment reallocation window, select Period Zero from the drop-down list next to Period.

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Total:			Cancel	Back	Done

Click Done. A message will be displayed reminding you that the credit is unallocated. Click Yes if you do not want to allocate this credit.



4.6 Paying your monthly EMP201 declaration

Once you have submitted your EMP201 declaration, your return status on eFiling will be updated to Submitted via e@syFile Employer, and a payment will be generated for the relevant EMP201 return.

Please ensure that your banking details are correctly set up on eFiling before you make payment, and that the necessary access rights are allocated to your login name.

Step 1

Click Payments below Monthly Process in the left menu pane.

<u>Step 2</u>

Enter your eFiling login name and password.

Step 3

The remaining steps of the payment process are similar to the process on the SARS eFiling website:

- Select the return for which you want to make payment, and click Make electronic payment.
- Select the account from which you are making the payment, and follow the easy steps to make your payment.

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4.7 Returns history

All returns submitted electronically are available to view under the PAYE tab, including any corrections made to submitted returns. To access a specific return:

<u>Step 1</u>

Click PAYE in the left menu pane to open a page listing all employers registered for EMP201 on your profile.

<u>Step 2</u>

Select the relevant employer or use the search function to locate a specific employer, and click View.

<u>Step 3</u>

Click Returns History and select the year of assessment from the drop-down list.

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<u>Step 4</u>

To open a specific return, simply double-click on the return to view it as a PDF.

<u>Step 5</u>

Click Back to Tax Payer Details to the top right of the screen to return to the Employer menu,

4.8 Status dashboard

Returns submitted using e@syFile™ Employer are listed on the Status Dashboard.

<u>Step 1</u>

Click PAYE in the left menu pane to open a page listing all employers registered for EMP201 on your profile.

<u>Step 2</u>

Select the relevant employer or use the search function to locate a specific employer, and click View.

Click Status dashboard to view a list of all returns submitted using e@syFile™ Employer.

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To verify the status of a specific return, double-click the Update button next to the relevant entry on the list. The status for that return will be retrieved from the SARS database and displayed in a message block. If the return was submitted successfully, the status displayed should read Accepted. Click Close to exit.

4.9 eFiling synchronisation

Use the eFiling Synchronisation option listed on the Employee's Taxpayer Details page to retrieve data for a specific employer.

<u>Step 1</u>

Click PAYE in the left menu pane to open a page listing all employers registered for EMP201 on your profile.

Step 2

Select the relevant employer or use the search function to locate a specific employer, and click View.

Step 3

Select a tax year from the drop-down list and click eFiling Synchronisation to start the process.

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4.10 Making Payment

This menu option will divert you to the same payment link as the option in the left menu pane.

<u>Step 1</u>

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Click Make Payment to view all outstanding payments for EMP201 returns on your profile.

<u>Step 2</u>

See <u>4.6 Paying your monthly EMP201 declaration</u> for more information on sending a payment instruction to SARS.

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4.11 Notices and Letters

All correspondence received from SARS will be listed in the Inbox under Utilities. Once opened, notices and letters will be moved to the Notices and Letters section for the specific employer. To open a notice or letter, simply **double-click** on the entry.

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4.12 Statement of account

You will soon be able to request and view a Statement of Account using e@syFile™ Employer.
5. **Income Tax Registration**

Introduction

It is mandatory for employers to provide employee Income Tax reference numbers for employees who are registered for Income Tax for the interim reconciliation (August 2010). If an employee is not registered and hence does not have an Income Tax reference number, leave the field blank. SARS will automatically register the employee when processing the reconciliation submission.

A new function has been added to e@syFile™ Employer to assist employers to obtain Income Tax reference numbers for individuals employed after the first interim (biannual) reconciliation submission. The Income Tax registration function will enable you to:

- Obtain existing Income Tax reference numbers •
- Verify existing numbers
- Register new employees for Income Tax.

Note: You must be connected to the internet to use this option.

Step 1

You have to create an employee account on e@syFile™ Employer before you will be able to use the Income Tax registration function. Follow steps 1-4 of 3.3 Create employee account to create an employee account.

Step 2

Click Income Tax registration to the bottom right of the Employee details screen.

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Pop-up messages will appear to verify successful submission of the Income Tax registration request.



Should you attempt to register an employee before submission of the interim (biannual) reconciliation, you will receive an error message indicating that your EMP501 has not yet been submitted.

EMP 501 for the 201008 period or later needs to be submitted prior to registering taxpayers
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<u>Step 3</u>

You will receive electronic feedback from SARS after requesting an Income Tax number for an individual

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If the Income Tax registration is unsuccessful, you will receive notification in the Inbox under the Utilities menu.

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If the Income Tax registration is successful, you will receive a pop-up message indicating that the taxpayer details have been verified, and the employee's Income Tax Number will be displayed in the message. The Income Tax Reference field on your Employee Details screen should also be populated.

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If an Income Tax number exists for the relevant employee, you will receive a similar notification in a pop-up message. The Income Tax reference number will be automatically populated and displayed in the relevant field.

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e@syFile™ PAYE User Guide





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