

e@syFile Employer V6.7.3

(2017/02 Recon Period)



Ayanda Takela

**SARS eFiling and e@syfile
Specialist
(Gauteng, Free State & Northern
Cape Region)**



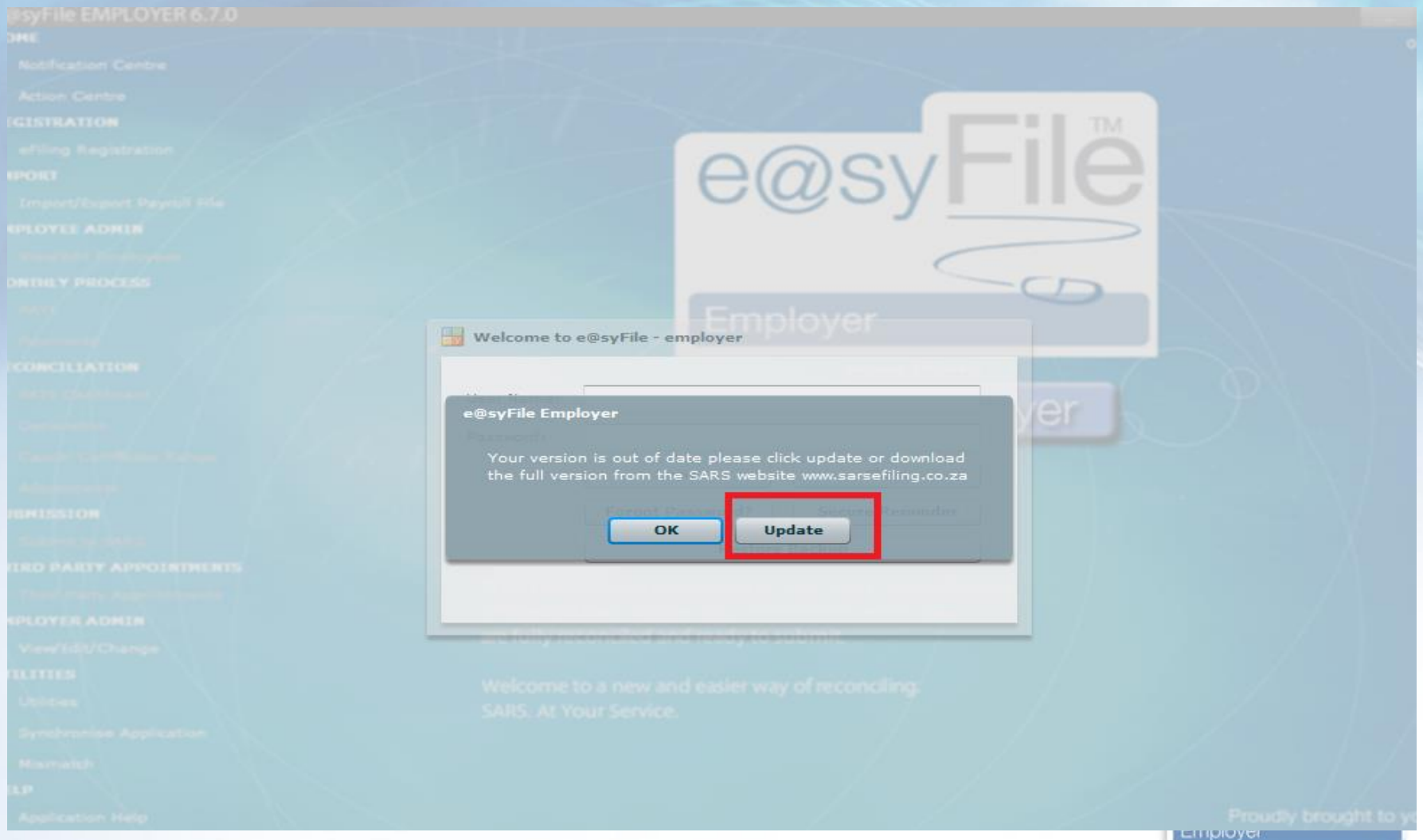
Overview

- **2016/08**-Introducing a new EMP501 form as well as pre-population of the EMP201 return and payment data on record at SARS.
- New Audit functionality was added to receive and manage Audit letters and requests for EMP201's and EMP501's – letters received in Notification centre and Action Centre
- A new Action Centre was added to enable users to manage Audit cases (EMP201's and EMP501's)
- Enhancements and corrections to manual capture and manual validation.
- Introduction of a new status field on Employee demographic screen where user can indicate "Active/Inactive" status for employees
- Correction to Employee Postal address fields, as well as new, optional structured and unstructured postal address fields.
- Please visit the SARS website www.sars.gov.za for additional documentation and guides.



Always accept e@syfile updates-

Latest version 6.7.3



E@syfile set up file can be downloaded from eFiling

**ACTIVITY**

www.sarsefiling.mobi to submit via the mobisite. It's that easy, [read more.](#)

Tax Season 2016 is open!

2016 Tax Season for Individuals is open on 1 July 2016. Be ready. We're ready, South Africa, [read more.](#)



2016 TAX SEASON
OPENS 1 JULY



At Your Service

Help-You-eFile

Help-You-eFile will make completing your Individual Income Tax Return (ITR12) easier.



Call me Back

Instead of waiting in the queue, you can now get a SARS consultant to phone you back! Read and accept T&C's for call back option.



Unsure if you have to submit?

Not sure whether you must submit an Income Tax Return (ITR12)? Answer these simple questions and find out.



Select “Download for Windows “ Option

Welcome to e@syFile™ Employer, a software package designed by SARS to help taxpayers manage their engagements with SARS quickly, easily and conveniently on their desktop.

e@syFile™ Employer can be downloaded onto your desktop and all work can be done offline. You only go online when you are ready to submit returns or reconciliations and tax certificates to SARS or manage agent appointments (AA88) via eFiling. Alternatively use the software to prepare a disc, and submit your reconciliation declaration manually to a SARS branch (include manual signed copies of the EMP501, and, where

Please note that you must backup your current PAYE information on your PC prior to installing this version as the installation may delete your current information. Any beta test version downloaded must be uninstalled prior to installing this version of e@syFile™ Employer.

Included are step-by-step guides to help you complete your PAYE reconciliation declaration (EMP501) and Monthly Employer Declaration (EMP201), as well as manage Agent Appointments (AA88) and get to grips with e@syFile™ Employer.

Remember, for time-saving and hassle-free submissions, electronic filing is just a click away.

e@syFile Documentation



Download for Windows

Please note that you must backup your current PAYE information on your PC prior to installing this version as the installation may delete your current information. Any 2010/2011 beta test version downloaded must be uninstalled prior to installing this version of e@syFile™ Employer.

Minimum system requirements for e@syFile Employer:

Windows 7 / XP / Vista OS (both 32 bit and 64 bit)

Adobe Reader 9

Adobe AIR 3.1

Hard drive space 76MB's for the application, additional for database

Must be installed to C:/ drive

e@syFile™ Employer - a quick, easy and accurate way to complete your declaration.

Employer

EMP201 can be completed on e@syfile

Employers Taxpayer Details
Select the appropriate tax year for the period return you wish to complete: 2016
Select the appropriate tax month for the tax year you wish to complete: 03
[Returns History](#) [Status Dashboard](#) [Make Payment](#)
[Statement of Account](#)

Employer Details
Trading as:
PAYE Reference Number: SDL Reference Number: UIF Reference Number:

Particulars of Declarant
Surname:
First Name:
Initials:
Position:
ID Number:
Date of Birth:
Contact Email:
Bus Tel No: Fax No:
Cell No:

Payment Reference Number	Status
LC2016038	EMP501 Submitted
PAYE	SDL
UIF	
Total	

[View](#)

NB!!!EMP201 Amendments not possible after submitting the EMP501

Error RAM-0001

The EMP201 cannot be amended - an EMP501 that has been reconciled has been received.

OK

Message displayed on eFiling if attempt is made to submit EMP201

[USER](#)[ORGANISATIONS](#)[RETURNS](#)[DUTIES & LEVIES](#)[SERVICES](#)[TAX STATUS](#)[CONTACT](#)[LOGOUT](#)[CARDINAL FL](#)[Inbox](#)[Returns Issued](#)[Employee's Tax
\(EMP201\)](#)[Employee s Tax
\(EMP501\)](#)[Income Tax
\(ITR14/ITR12T/IT12EI\)](#)[Provisional Tax \(IRP6\)](#)[Value Added Tax
\(VAT201\)](#)[Returns History](#)[Returns Search](#)[Third Party Data](#)[Non-Core Taxes](#)[Payments](#)

The EMP201 cannot be amended - an EMP501 that has been reconciled has been received.

EMP501 Changes-

History can also be viewed once period selected

EMP501

Select the tax year for the Declaration : 201608 ▼

Request

EMP501 Declarations for : ~~XXXXXXXXXXXXXXXXXXXX~~

PAYE	SDL	UIF	ETI	Status	View

Online Pre-Population Screen Appears When EMP501 Is Requested

Online pre-populate?

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.

Accept Data

Own Values

e@syFile EMPLOYER

File Save Print Close

HOME

1 / 3 74%

SARS

Employer Reconciliation Declaration

EMP501

Does the Reconciliation include ETI? Y ☒ N ☐

Business Information

Transaction Year (CCYY) **2017** Period of Reconciliation (CCYYMM) **201608** PAYE Ref No. [] SDL Ref No. [] SIF Ref No. []

Trading or Other Name []

Tax Practitioner Details (if applicable)

Registration No. [] Tel No. []

Contact Details

First Name **J O H N**

Surname **S M I T H**

Position held at Business []

Bus Tel No. **0112002000** Fax No. [] Cell No. []

Email []

Reason for Over / Understatement of Declaration

Reason []

Employment Tax Incentive (ETI)

Do you declare that the legal entity claiming the Employment Tax Incentive on this declaration does not have any outstanding declarations, and/or debt with SARS?

SIC Code [] SEZ Code **Z A R**

Declaration

I hereby declare that:
- This reconciliation is true and correct and that all tax, levies and contributions required to be deducted has been declared and all payments declared have been made. I hereby accept liability for any differences due.

Date (CCYYMMDD) []

Please ensure you sign over the 2 lines of "X"s above

For enquiries go to www.sars.gov.za or call 0800 00 SARS (7277)

EMP501 L PV 2016.12.00 SV 1501 CZ NO 7790728312 P 201508 Y 2017 081/603

ETI Calculated field can be completed

e@syFile EMPLOYER

File Save Print Close


2 / 3 74%

Employment Tax Incentive (ETI) Details

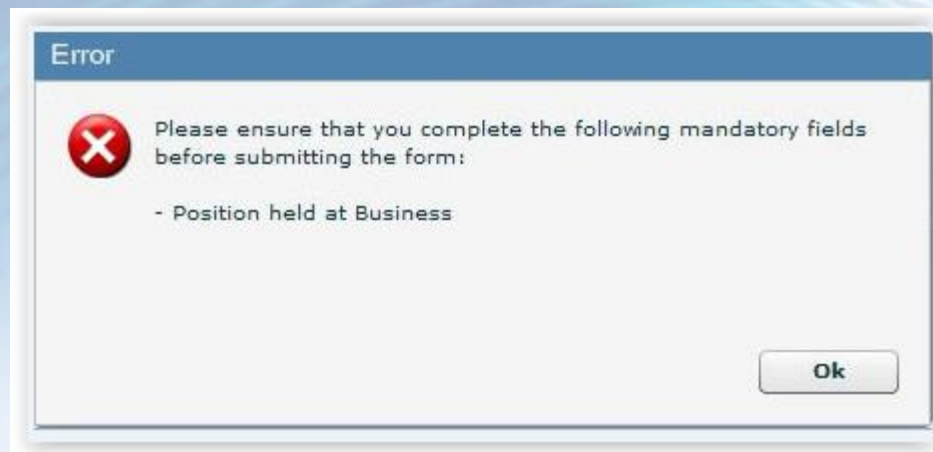
Transaction Year (CCYY): 2017 Period of Reconciliation (CCYYMM): 201608 PAYE Ref No. SCL Ref No. LIP Ref No. ETIPA01

	ETI Brought Forward Rands only, no cents	ETI Calculated Rands only, no cents	PAYE Liability Rands only, no cents	ETI Utilised Rands only, no cents	PAYE Payable (incl. Penalties, Interest and Add'l tax) Rands only, no cents
March	0		0		0
April	0		0		0
May	0		0		0
June	0		0		0
July	0		0		0
August	0		0		0
Total (Ytd Six Months)	0		0		0
ETI not Utilised	0				

880501 1. 1PV 2016.13.00 8V 1501 CTF 882 201608 2017 082/003



Employer Demographics Error



View/Edit/Change employer

ADD EMPLOYER

Employer Information

Employer Address and Phone Information

Employer Bank Information

Employer Contact Details - Representative

Employer Contact Details - Contact Person

First Name:

Surname:

Initials:

ID Number:

Passport Number:

Country of Issue:

Business Tel No:

Cell No:

Fax No:

E-Mail address:

Business Position:

Prev

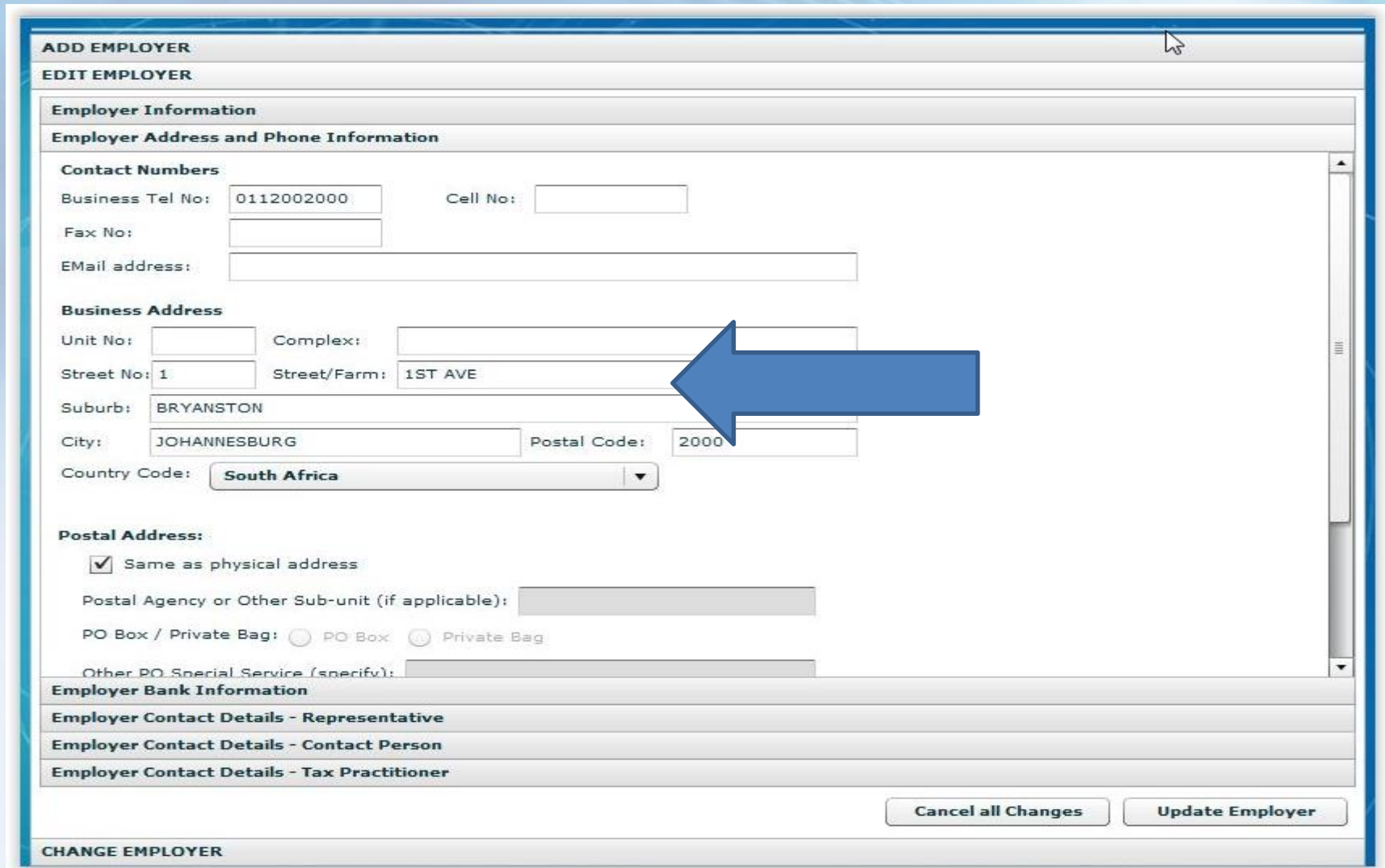
Next

Employer Contact Details - Tax Practitioner

Cancel all Changes

Add Employer

Country code must also be completed



The screenshot shows a web form titled 'ADD EMPLOYER' with a sub-header 'EDIT EMPLOYER'. The form is divided into several sections: 'Employer Information', 'Employer Address and Phone Information', 'Postal Address', and 'Employer Bank Information'. A large blue arrow points to the 'Country Code' dropdown menu in the 'Business Address' section, which is currently set to 'South Africa'.

ADD EMPLOYER

EDIT EMPLOYER

Employer Information

Employer Address and Phone Information

Contact Numbers

Business Tel No: 0112002000 Cell No:

Fax No:

Email address:

Business Address

Unit No: Complex:

Street No: 1 Street/Farm: 1ST AVE

Suburb: BRYANSTON

City: JOHANNESBURG Postal Code: 2000

Country Code: **South Africa** ▼

Postal Address:

☒ Same as physical address

Postal Agency or Other Sub-unit (if applicable):

PO Box / Private Bag: ☐ PO Box ☒ Private Bag

Other PO Special Service (specify):

Employer Bank Information

Employer Contact Details - Representative

Employer Contact Details - Contact Person

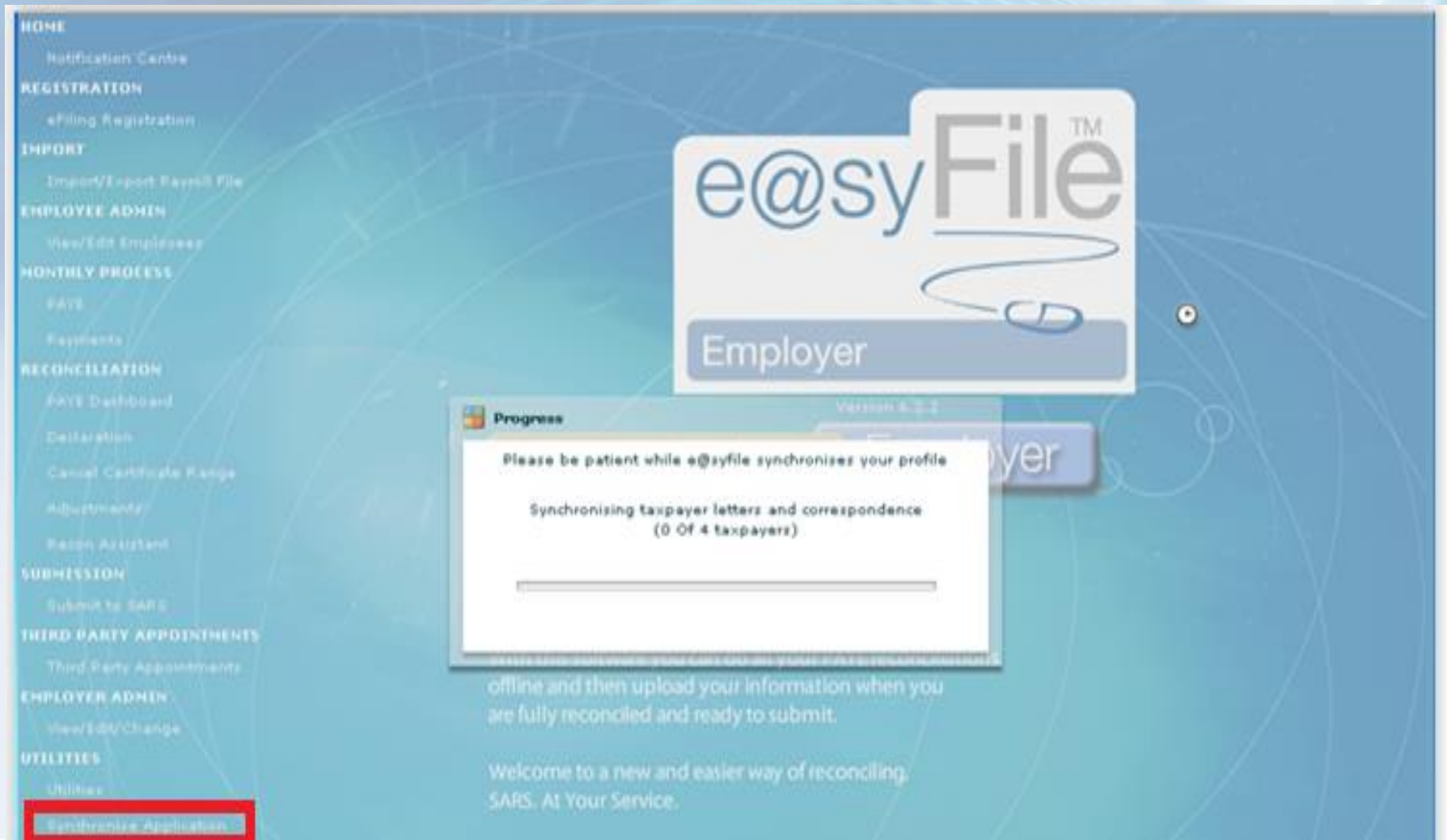
Employer Contact Details - Tax Practitioner

Cancel all Changes **Update Employer**

CHANGE EMPLOYER

Risk and Audit function-

Synchronise e@syfile to retrieve letters



Introducing the new Action Centre-Actions required where Audit letters have been issued

HOME

- Notification Centre
- Action Centre**

REGISTRATION

- eFiling Registration

IMPORT

- Import/Export Payroll File

EMPLOYEE ADMIN

- View/Edit Employees

MONTHLY PROCESS

- PAYE
- Payments

RECONCILIATION

- PAYE Dashboard
- Declaration
- Cancel Certificate Range
- Adjustments

SUBMISSION

- Submit to SARS

THIRD PARTY APPOINTMENTS

- Third Party Appointments

EMPLOYER ADMIN

- View/Edit/Change

UTILITIES

- Utilities
- Synchronise Application
- Mismatch

HELP

- Application Help
- Update
- Log off

e@syFileTM

Employer

Version 670.44.0

Welcome to e@syFile Employer

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** At Your Service

Audit letters-LEPAYE 21 working days to action once first letter has been issued

Action Centre

Search using keyword(s)

Audit Type Compliance Audit **Status** New Action Update Status

Case # 100463078

Period	Letter Type	Return Type	Status	Date	Additional Info
201304	LEPAYE-IM0001	EMP201	Verification of Declaration	2016-08-16 13:37:24	

Action Centre

Search using keyword(s)

Audit Type Compliance Audit **Status** New Action Update Status

Case # 100463078

Period	Letter Type	Return Type	Status	Date	Additional Info
201304	LEPAYE-IM0002	EMP201	Verification of Declaration Final Request	2016-08-16 14:12:34	
201304	LEPAYE-IM0001	EMP201	Verification of Declaration	2016-08-16 13:37:24	

Action Centre

Search using keyword(s)

Audit Type: Compliance Audit

Status: New

Action

Update Status

Case #: 100463078

Period	Letter Type	Return Type	Status	Date	Additional Info
201304	LEPAYE-IM0002	EMP201	Verification of Declaration Final Request	2016-08-16 14:12:34	
201304	LEPAYE-IM0001	EMP201	Verification of Declaration	2016-08-16 13:37:24	

Action Case



Supporting documents

Supporting Documents

Add Document

Remove Document

Submit Documents

Request For Correction

Submit revised EMP201 for 201304

Submit RFC

Supporting documents

Supporting Documents
C:\Users\talita.geyser\Desktop\Guide contents\Toets EMP201.docx

Request For Correction

Submit revised EMP201 for 201304

Message displayed after submitting supporting documents to SARS- All audit letters will have case numbers for follow up

The screenshot displays the SARS e@syFile PAYE Employer interface. At the top, there is a header bar with tabs for 'Action Case', 'Return Type', 'Status', 'Data', and 'Submission X'. The main content area is divided into two sections. The upper section, titled 'Supporting documents', contains a list of files under the heading 'Supporting Documents':

- C:\Users\talita.geyser\Desktop\Guide contents\Toets EMP201.docx
- C:\Users\talita.geyser\Desktop\Guide contents\Toets EMP201.pdf

Below this list are buttons for 'Add', 'OK', and 'Submit Documents'. A modal dialog box titled 'Supporting document submission' is overlaid on the interface, displaying the message 'Document submitted successfully' and an 'OK' button. The lower section, titled 'Request For Correction', contains a text field with the value 'Submit revised EMP201 for 201304' and a 'Submit RFC' button.

SARS documentation

- Use the information available to you on www.sars.gov.za – select Tax Types – Pay As You Earn
- Business Requirement Specification (BRS) updated before every reconciliation period. Understanding CSV files, format and content
- Release Notes – available with each update of the application, listing changes included in new version



The screenshot displays the e@syFile Employer software interface. On the left side, there is a vertical list of ten buttons, each containing a link to a specific document:

- e@syFile PAYE Manual
- e@syFile Quick PAYE Reconciliation Guide
- e@syFile ITA88 User Manual
- e@syFile 6 Release Notes
- e@syFile ITA88 Progress Guide
- e@syFile IT Registration Guide
- e@syFile 6 Update Guide
- e@syFile 6 User Guide
- Get ADOBE® READER®
- 7ZIP

On the right side, the e@syFile™ Employer logo is prominently displayed. The logo features the text "e@syFile™" in a large, stylized font, with "Employer" written in a smaller font below it. A graphic of a computer mouse cord is integrated into the design. Below the logo, a tagline reads: "e@syFile™ Employer - a quick, easy and accurate way to complete your declaration."



Release Notes: e@syFile™ Employer version 6.7.3

- Correction to allow user to view EMP201 returns on e@syFile, regardless of EMP501 submission status
- Correction to import validation that previously resulted in a pending status under specific circumstances to display errors in the import payroll file log as expected
- Enhancement to employee search function to accurately display employee records on the View/Edit employee screens
- Correction to the View/Edit employee screens when the “All” function is used to ensure the “All” option remains available without logging out and in again
- Correction to EMP501 status update functionality for 2014/02 and older periods that blocked access to the relevant EMP501 declaration
- Correction to validation for employee postal address fields when the “Other” option is selected
- Enhancement to the submission process to allow resubmissions on larger database files that previously resulted in an incomplete submissions (application hanged)

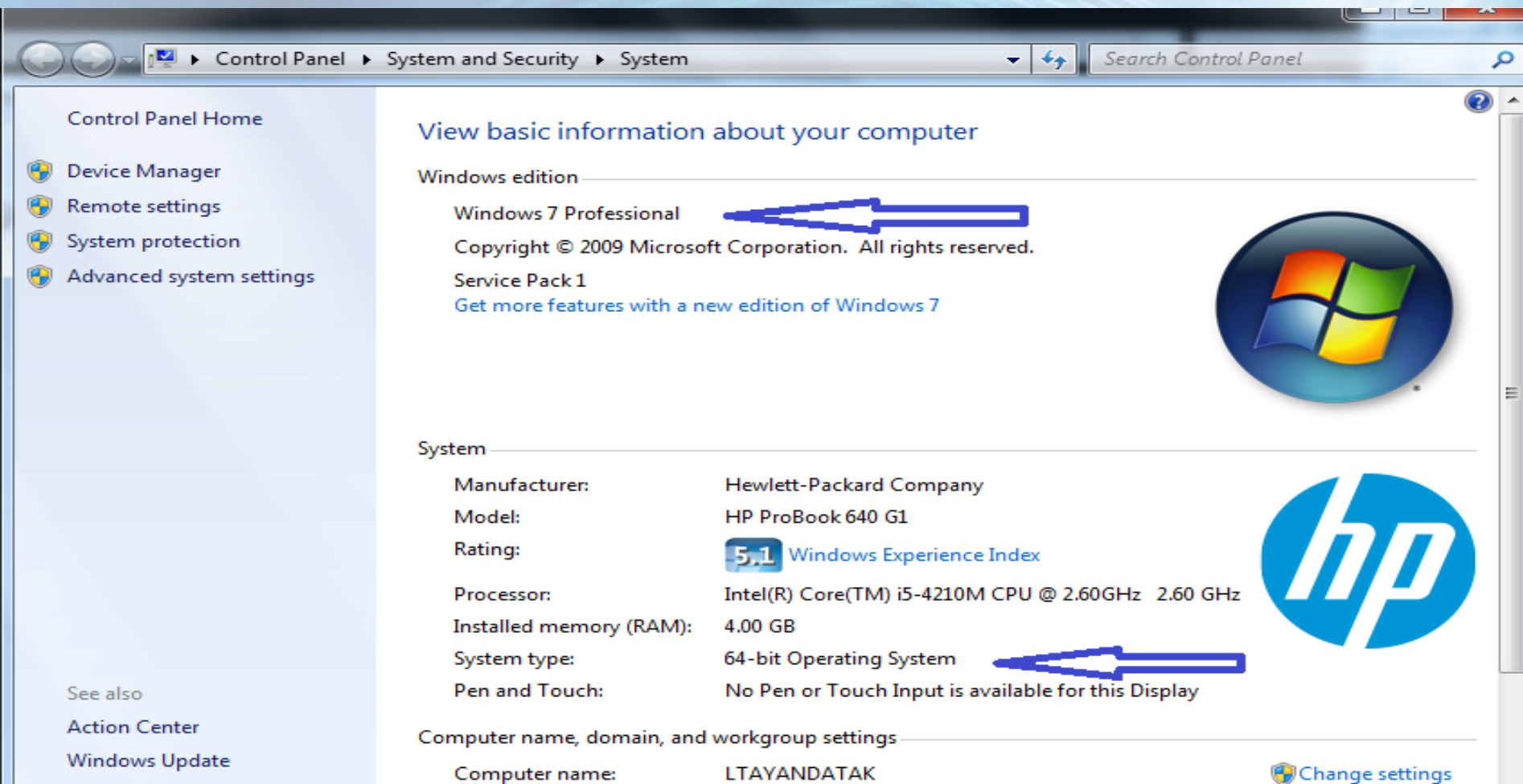


FAQS

- **Resubmission of older years**-always use SARS current validation rules so that recon passes pre-submission validation
- **SIC and SEZ codes** (industry and employment zone) compulsory on certificates and employer details
- **Making e@syFile back-ups** -The importance (Utilities-database utilities-back up DB directory)



Java version to use-Java 7 64 or 32 bit (Windows 10), Java 8 (64 or 32 bit) Windows 8 (My Computer-right-click-Properties)



The screenshot shows the Windows 7 Control Panel window, specifically the 'System' page under 'System and Security'. The window title bar reads 'Control Panel > System and Security > System'. The left sidebar contains links to 'Control Panel Home', 'Device Manager', 'Remote settings', 'System protection', and 'Advanced system settings'. The main content area is titled 'View basic information about your computer'. It displays the 'Windows edition' as 'Windows 7 Professional' with a blue arrow pointing to the text. Below this, it shows 'Copyright © 2009 Microsoft Corporation. All rights reserved.', 'Service Pack 1', and a link to 'Get more features with a new edition of Windows 7'. To the right is the Windows logo. The 'System' section lists hardware details: 'Manufacturer: Hewlett-Packard Company', 'Model: HP ProBook 640 G1', 'Rating: 5.1 Windows Experience Index' (with a blue arrow pointing to the rating), 'Processor: Intel(R) Core(TM) i5-4210M CPU @ 2.60GHz 2.60 GHz', 'Installed memory (RAM): 4.00 GB', 'System type: 64-bit Operating System' (with a blue arrow pointing to the text), and 'Pen and Touch: No Pen or Touch Input is available for this Display'. To the right of this section is the HP logo. At the bottom, it shows 'Computer name, domain, and workgroup settings' with 'Computer name: LTAYANDATAK' and a 'Change settings' link.

Control Panel > System and Security > System

Control Panel Home

- Device Manager
- Remote settings
- System protection
- Advanced system settings

View basic information about your computer

Windows edition

Windows 7 Professional

Copyright © 2009 Microsoft Corporation. All rights reserved.

Service Pack 1

[Get more features with a new edition of Windows 7](#)

System

Manufacturer: Hewlett-Packard Company

Model: HP ProBook 640 G1

Rating: 5.1 Windows Experience Index

Processor: Intel(R) Core(TM) i5-4210M CPU @ 2.60GHz 2.60 GHz

Installed memory (RAM): 4.00 GB

System type: 64-bit Operating System

Pen and Touch: No Pen or Touch Input is available for this Display

Computer name, domain, and workgroup settings

Computer name: LTAYANDATAK

[Change settings](#)

Please note that on employee admin only
previously submitted recon years will appear
on drop-down

This screen you are able to obtain a quick view of all Employees relating to a specific company. Select a company to view related Employees. Click the 'View' button to view full details of the Employee (including Certificates). To add an Employee, click 'Add Employee'.

Company Name: ROBISPEC PTY LTD - 7020779114 Tax Year: ... ▼

Employee Search Below Add Employee: Add Employee

Surname: ID Number:

Firstname: Tax Reference Number:

Employee Number: Certificate Number:

Employee Status: Active ▼ Registration Status: ...

Clear Search Search

Bug Identified when attempting to capture manual IRP5/IT3A

On this screen you are able to obtain a quick view of all Employees relating to a specific Company. Select a Company to view related Employees. Use the 'View' button to view full details of the Employee (including Certificates). To add an Employee, click 'Add Employee'.

Company Name: ROBISPEC PTY LTD - 7020779114

Tax Year: 201602 ▼

Employee Search Below



Add Employee

Add Employee

Bundled IT

Surname

ID Number

Firstname

Tax Reference Number

Employee Number

Certificate Number

Employee Status

Active ▼

Registration Status

Clear Search

Search

Users advised to select “Clear Search” option to activate “ADD Employee” Field

Click the 'View' button to view full details of the Employee (including Certificates). To add an Employee, click 'Add Employee'.

Company Name:

ROBISPEC PTY LTD - 7020779114

Tax Year:

201602

Employee Search Below

Add Employee

Add Employee

Surname

ID Number

Firstname

Tax Reference Number

Employee Number

Certificate Number

Employee Status

Active ▼

Registration Status

...

Clear Search

Search

Declaration page-Only final year recons can be completed for 2016 and older years

1

Select the tax year for the Declaration :

Declarations for : TRAINING PTY LTD - 7020779114

PAYE	SDL	UIF	ETI	Status	View

201602
201502
201402
201302
201202

How to complete ID/Passport field on employee certificate-

Common mistake made in selecting a country of issue for Individual with ID

e@syFile EMPLOYER 6.7.2

HOME

- Notification Centre
- Action Centre

REGISTRATION

- eFiling Registration

IMPORT

- Import/Export Payroll File

EMPLOYEE ADMIN

- View/Edit Employees

MONTHLY PROCESS

- PAYE
- Payments

RECONCILIATION

- PAYE Dashboard
- Declaration
- Cancel Certificate Range
- Adjustments

SUBMISSION

- Submit to SARS

THIRD PARTY APPOINTMENTS

- Third Party Appointments

EMPLOYER ADMIN

- View/Edit/Change

EMPLOYEE DETAILS

On this screen you are able to view and edit Employee Demographic Data.
To view this Employee's Certificates, couble click the Certificate number in the Certificate List.

Employee Information

indicates required field.

Personal

Nature of Person: **A - Individual with ID or Passport Num** *

Surname: *

First Two Names: GI' TOR *

Initials: GV *

Date Of Birth: 19820202 * CCYYMMDD

ID Number: 8200 24089 *

Income Tax Reference: 100 63 *

Passport Number: *

Country of Issue: **South Africa** *

Alternate Identification Type: ... *

Alternate Identification Number: *

Employee Number: 4 *

View Status: **Active**

Quick Navigation

Certificate Number
7070743119201602000000S00000002

Recon Period
201602

Status
CREATED

To view this Employee's Certificates, double click the Certificate number in the Certificate List.

Employee Information

Personal

indicates required field.

Nature of Person:

A - Individual with ID or Passport Numb

Surname:

CHAUKE

First Two Names:

GIVEN VICTOR

Initials:

GV

Date Of Birth:

19820202

CCYYMMDD

ID Number:

Income Tax Reference:

Passport Number:

Country of Issue:

Alternate Identification Type:

Alternate Identification Number:

FIELD VALIDATION

The following RED highlighted field(s) are invalid and need to be corrected.

Country Of Issue 3075 may not be ZAF.

OK

Cert
70
Rec
20

EMPLOYEE DETAILS

On this screen you are able to view and edit Employee Demographic Data.

To view this Employee's Certificates, couple click the Certificate number in the Certificate List.

Employee Information

Personal

indicates required field. *

Nature of Person:

A - Individual with ID or Passport Num ▼ *

Surname:

CHAUKE *

First Two Names:

GIV . *

Initials:

GV *

Date Of Birth:

19820202  *

CCYYMMDD

ID Number:

8202 *

Income Tax Reference:

100E ▼ *

Passport Number:

Country of Issue:

... ▼ *

Alternate Identification Type:

... ▼ *

Alternate Identification Number:

Employee Number:

4 *

View Status

Active ▼

Quick Navigation

Prev

Next

Certificate Number

7070743119201602000000S0000

Recon Period

201602

Stat

CREA

Lost e@syfile password

- Type in “ADMIN” as username and use the “Secure reminder” and
- “Forgot password option on login screen



Welcome to e@syFile - employer

User Name:

Password:

Lion

Welcome to e@syFile - employer

User Name:

Password:

Secure Password Reminder

ADMIN Password:

Lion

ETI Rejection errors

- Letters will be issued on e@syfile to provide reason and/or list of error.
Synchronise e@syFile to retrieve letters in Notification Center
- SARS Contact center can also be contacted to find out of errors

EMP501 submitted for 2017/02 by mistake/accidentally

- Users advised to wait for 2017/02 recon period to open on the 1st April 2017 to correct
- SARS was assisting by providing PRN numbers for payments to be made for September 2016 to February 2017
- Submitting the 2017/02 recon will rectify the monthly figures submitted



General eFiling and E@syfile Questions ?



Ayanda Takela

**SARS -eFiling and e@syfile
Specialist
(Gauteng, Free State & Northern
Cape Region)**

