

# e@syFile Employer



# e@syFile Employer

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# Introduction

Using e@syFile™ Employer, you can:

- Submit your interim and annual EMP501 recon
- Generate certificates for employees
- Bulk Income Tax number registration
- Third Party Appointments(AA88)
- Bi-Annual EMP501's cannot be submitted after 28th February.
- Refer to Release Notes for software changes



# Overview

- EMP501 Activation on efiling
- Download and Installation
- Adding Employer
- Adding employee and certificates
- Bulk Income Tax number registration
- Submission
- Technical view and general info



# EMP501 on eFiling

Organisation	Manage Tax Types			
Register New	Tax Type Description	Reference Number	Status	Action
Change Details	EMP201 - PAYE	7 [REDACTED]	Successfully Activated.	<input type="checkbox"/> Deactivate
Tax Types	EMP501 - Submission	75*****	Successfully Activated.	<input type="checkbox"/> Deactivate

# eFiling User Rights

The screenshot displays the SARS eFiling user interface. At the top, the navigation bar includes 'Home', 'User', 'Organisations', 'Returns', 'Customs', 'Duties & Levies', 'Services', and 'Tax Stat'. The 'User' menu item is highlighted with a red box. Below the navigation bar, the 'UPDATE GROUP DETAILS' section is visible, showing various tax types and their associated rights. The 'Rights Groups' section is highlighted with a red box, and the 'Third Party Appointment Employers' option is also highlighted with a red box. A red arrow points from the 'Rights Groups' section to the 'User' menu item.

Portfolio: [redacted] CC Taxpayer: [redacted] Organisation: [redacted]

**UPDATE GROUP DETAILS**

Group Name: System Default

Authorisation Level: Submissions

Access To Payments:

Tax Types:

- Provisional Tax (IRP6)
- Value Added Tax (VAT201)
- Organisation Income Tax (ITR14/IT12E/ITR12T)
- Individual Income Tax (ITR12)
- Employee's Tax (EMP201)
- IT56 - Secondary Tax On Companies (STC)
- EMP501 - Submission
- Customs Agent
- Excise Agent
- VAT Admin Penalty
- PAYE Admin Penalty
- IT Admin Penalty
- Transfer Duty
- Third Party Appointment Banks
- Dividends Withholding Tax (DWT)
- Third Party Appointment Employers**
- Third Party Appointment Other
- Tax Compliance Status
- Tax Compliance Status Verification

**Rights Groups**

- Manage Groups
- Organisation Setup
- Customs Registration

South African Revenue Service

## Welcome to the new 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.

Taxpayers registered for eFiling can engage with SARS online for the submission of returns and declarations and payments in respect of taxes, duties, levies and contributions.

For all updates, and latest news, please refer to the SARS Website.

- What's New
- Forms & Guides
- Payments
- Contact SARS
- Terms and Conditions

### Help-You-eFile

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

[Read more](#)

### 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.

[Read more](#)

### Unsure if you have to submit?

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

[Read more](#)

- Login
- Register Now
- Forgot Username?
- Forgot Password?



### SARS MobiApp

SARS has launched a new MobiApp with many new features including:

- A simplified registration process
- A new streamlined login process
- Added security with OTP and biometric technology
- A quick and easy way to upload supporting documents

2019 TAX SEASON  
LET'S DO RIGHT TOGETHER

Thousands of taxpayers can't be wrong  
Join our MobiApp community

#SARSTaxTips19





- ❗ We help you, the taxpayer to manage your engagement with SARS quickly, easily & conveniently on desktop.
- ❗ Download e@syFile™ Employer onto your desktop to import and validate declarations in offline mode.
- ❗ Only go online to submit returns, reconciliations and tax certificates, or manage agent appointments (AA88).
- ❗ Remember, for time-saving and hassle-free submissions, electronic filing is just a click away.

## 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

# Release notes version 7.2.7

## Release Notes: e@syFile™ Employer version 7.2.7

- Maintenance and general enhancements

## Release Notes: e@syFile™ Employer version 7.2.6

- Adjustment to EMP501 submission files to align validation for Tax Directive numbers with the SARS PAYE BRS

## Release Notes: e@syFile™ Employer version 7.2.5 *(delayed and included in V7.2.6)*

- Adjustment to PDF rendering to allow OS default application

The screenshot displays the 'EMP501 Status Dashboard' within the 'Database Utilities' section. A red box highlights the 'Tax Directives Report' area, which includes a table with columns for 'Reference Number', 'File Name', and 'Date/Time'. A 'Download Report' button is visible to the right of the table. The text 'Please double click on a Company record to view the report.' is displayed above the table.

Reference Number	File Name	Date/Time

e@syFile Employer Setup

### License Agreement

Please review the license terms before installing e@syFile Employer



Press Page Down to see the rest of the agreement.

Terms and Conditions

PLEASE READ THIS AGREEMENT CAREFULLY BEFORE UPGRADING, COPYING, INSTALLING, OR USING SARS e@syFile EMPLOYER FROM THE SOUTH AFRICAN REVENUE SERVICE ("SARS"). USE OF SUCH SOFTWARE BY THE USER IMPLIES ACCEPTANCE OF THE TERMS AND CONDITIONS CONTAINED HEREIN.

WHFRFAS. SARS is the author and proprietor of a software product

If you accept the terms of the agreement, select the first option below. You must accept the agreement to install e@syFile Employer  Click Install to start the installation.

I accept the terms in the License Agreement

I do not accept the terms in the License Agreement

Nullsoft Install System v2.39

< Back Install Cancel





e@syFile Employer 7.1.5 Setup



### Installing

Please wait



e@syFile Employer Setup



**WARNING: INSTALLING THIS VERSION OF e@syFile MAY DELETE ALL INFORMATION STORED ON EARLIER VERSIONS OF e@syFile.**

If you have used the BETA (TEST) version or an earlier version of e@syFile you must first:

1. Backup your e@syFile database to your desktop
2. Install new version of e@syFile

Do you wish to continue with the install?

OK

Cancel

Nullsoft Install System v2.39

< Back

Next >

Cancel



Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
Setup Employer	Application	220 212 KB	No	220 171 KB	0%	2021/08/12 1:56 PM

e@syFile Employer Setup



### Welcome to the e@syFile Employer Setup Wizard

This wizard will guide you through the installation of e@syFile Employer

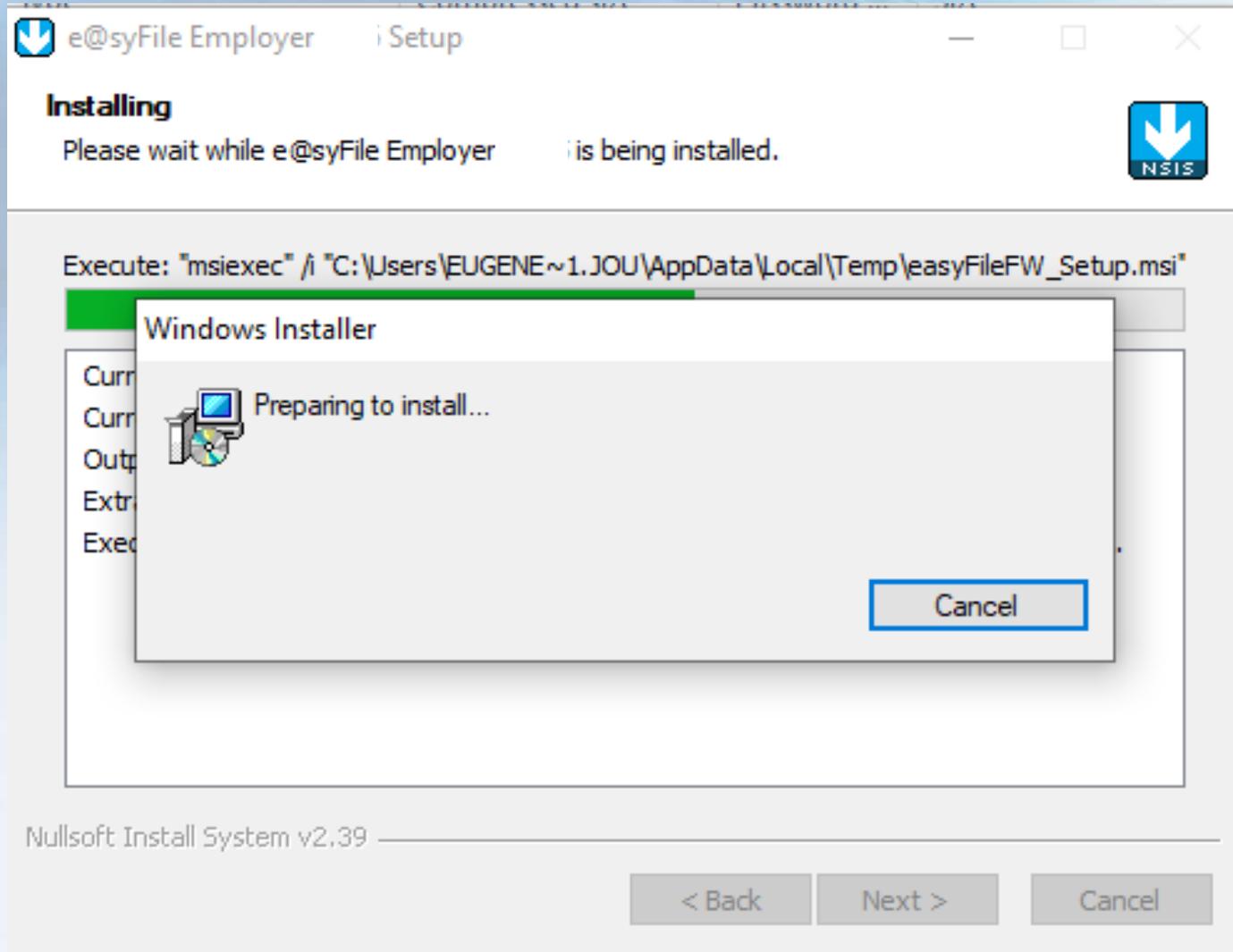
It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.

Click Next to continue.

5 MB



# Windows Form Viewer



# e@syFile & Zulu JRE

- If you see this pop-up during installation, click on YES to ensure you are installing the correct JAVA(AZUL/Zulu JRE)

The image shows a composite of three windows from a Windows operating system. At the top left is the 'e@syFile Employer 7.2.3 Setup' window, which is in the 'Installing' phase and displays the progress of extracting 'zulu8.46.0.19-ca-jre8.0.252-win\_i686.msi... 100%'. Below this is a smaller dialog box with the same title, containing the message: 'Your system does not have the correct version of the Java Runtime Environment. You will need to install it for the application to run correctly. You can choose not to, but the application may not run correctly.' At the bottom of this dialog are 'Yes' and 'No' buttons. To the right is the 'Zulu JRE 8.46.0.19 (8u252), 32-bit Setup' window, which is the 'Welcome to the Zulu JRE 8.46.0.19 (8u252), 32-bit Setup Wizard'. It features the Azul Systems logo and a large blue arrow pointing down to a CD icon. The text in the wizard reads: 'Welcome to the Zulu JRE 8.46.0.19 (8u252), 32-bit Setup Wizard' and 'The Setup Wizard will install Zulu JRE 8.46.0.19 (8u252), 32-bit on your computer. Click Next to continue or Cancel to exit the Setup Wizard.' At the bottom of the wizard are 'Back', 'Next', and 'Cancel' buttons.

- HOME
  - Notification Centre
  - Action Centre
- REGISTRATION
  - eFiling Registration
- IMPORT
  - Import/Export Payroll File
- EMPLOYEE ADMIN
  - View/Edit Employees
- MONTHLY PROCESS
  - PAYS
  - Agreements
- RECONCILIATION
  - PAYS Dashboard
  - Declaration
  - Cancel Certificate Transfer
  - 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



**Welcome to 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 to be transmitted to SARS, you will be asked for your eFiling login details, and only when this authentication passes will information be submitted.

Admin User Name: ADMIN

Admin Password: \*\*\*\*\*

Repeat Admin Password: \*\*\*\*\*

Admin 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 will not be able to retrieve or reset it.  I understand

**Cancel** **Next**

**ADMIN**



- HOME
  - Notification Centre
  - Action Centre
- REGISTRATION
  - eFiling Registration
- IMPORT
  - Import/Export Payroll File
- EMPLOYEE ADMIN
  - View/Edit Employees
- MONTHLY PROCESS
  - TRYS
  - Payments
- RECONCILIATION
  - PKS Desktop
  - Debit/credit
  - Credit Certificate Range
  - Adjustments
  - Summary Report
- SUBMISSION
  - Submit to SARS
- THIRD PARTY APPOINTMENTS
  - Third Party Appointments
- EMPLOYER ADMIN
  - View/Edit/Change
- UTILITIES
  - Utilities
  - Synchronise Application
- HELP
  - Application Help
  - Update
  - Log off



**Welcome to e@syFile - employer**

User Name:

Password:

**Login**      **Close**

**Forgot Password?**      **Secure Reminder**

**Restore Backup**

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



On this screen you are able to create or edit an employer.  
Employer details entered and saved will be used to manage and complete employee tax certificates.

ADD EMPLOYER

Trading or Other name:

Reference Number: PAYE:  SDL:  UIF:

Activity within Major Division:  ...

Employer SIC7: ...

Employer SEZ: ...

ZAR Code Error Older Submissions

...  
...  
COE - COEGA SEZ

Diplomatic Indemnity:  Yes

Business Address

Unit Number:  Complex:

Street Number:  Street/Farm:

Suburb:

City:  Postal Code:

Country Code:

Contact Person

First Name:

Surname:

Business Tel No:  Cell No:  Fax No:

E-Mail Address:

Position at Business:

Practitioner Information

Registration No:

Telephone No:

EDIT EMPLOYER

CHANGE EMPLOYER



- 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
  - Summary Report
- SUBMISSION**
  - Submit to SARS
- THIRD PARTY APPOINTMENTS**
  - Third Party Appointments
- EMPLOYER ADMIN**
  - View/Edit/Change
- UTILITIES**
  - Utilities
  - Synchronise Application
- HELP**
  - Application Help

## Employee Information

### Personal

*indicates required field.* \*

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

Surname: LANGOOR \*

First Two Names: BOELA \*

Initials: B \*

Date Of Birth: 19910528 \* CCYYMMDD

ID Number: 9105280156082 \*

Income Tax Reference: 1234567891 \*

Passport Number: NOTAPASSPORTNO \*

Country of Issue: South Africa \*

Alternate Identification Type: 3 - Asylum Permit Number \*

Alternate Identification Number: 1234567890003 \*

Employee Number: -1 \*

View Status: Active

**Quick Navigation**

Prev Next

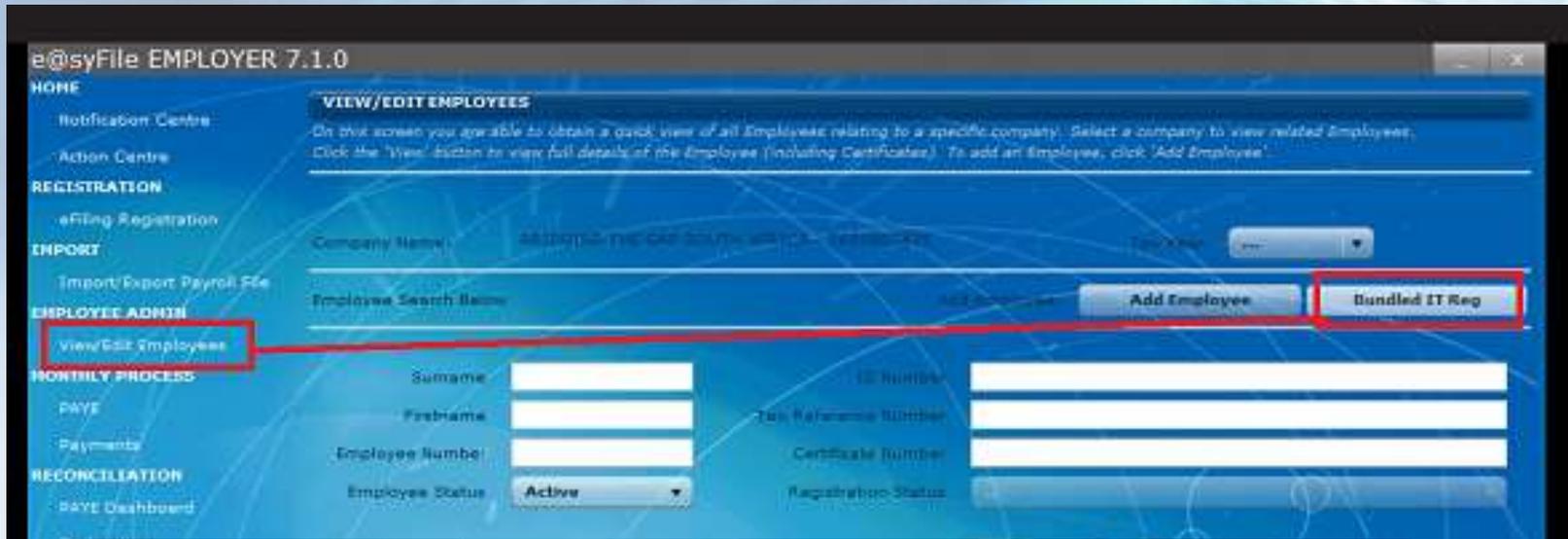
**Employee Contact Details**

**Employee Bank Details**



# Income Tax Number Registration

- Application for TRNs can be done via “Bundled IT Reg” on e@syFile (only on the Bi-annual submission)





### CSV File Import

Payroll File imported successfully.

Please complete Employer Contact information before Submitting a Reconciliation Declaration.

Please note you will have to go to the 'EMPLOYER ADMIN' screen and change to this company.

Ok

**CSV File error**

7945,2081,ZA,9999,  
160,ABD001,3170,20170703,3180,20170801,3200,12,3210,0.97,3213,



- 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

EMP501

Select the Period of Reconciliation for the Declaration:

202202 ▼ Request

EMP501 Declarations for : ALISON COMMUNICATIONS (PTY) LTD - 7150773366

PAYE	SDL	UIF	ETI	States	View

**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.



# Future Recon Period

Deregistration with future-dated EMP501's  
Functionality changed for future-dated EMP501 submissions - a deregistration indicator will be included in the submission that will start the deregistration of the PAYE reference number.

You have selected a reconciliation period in the future.

Do you want to continue with the request?

Yes

No

You have selected a reconciliation period in the future.

Do you want to continue with the request?

Yes

No

Reason:

...

Date you ceased to be an Employer:

Please note that should you continue with the submission of this reconciliation, you will be deregistered as an employer. If the submission date of this reconciliation is after, 14 days of the effective date completed, administrative penalties may be imposed. Should SARS find that you submitted this reconciliation with the intent to defraud SARS, you will be held liable and may face criminal charges.

You have selected a reconciliation period in the future.

Do you want to continue with the request?

Yes

No

Reason:

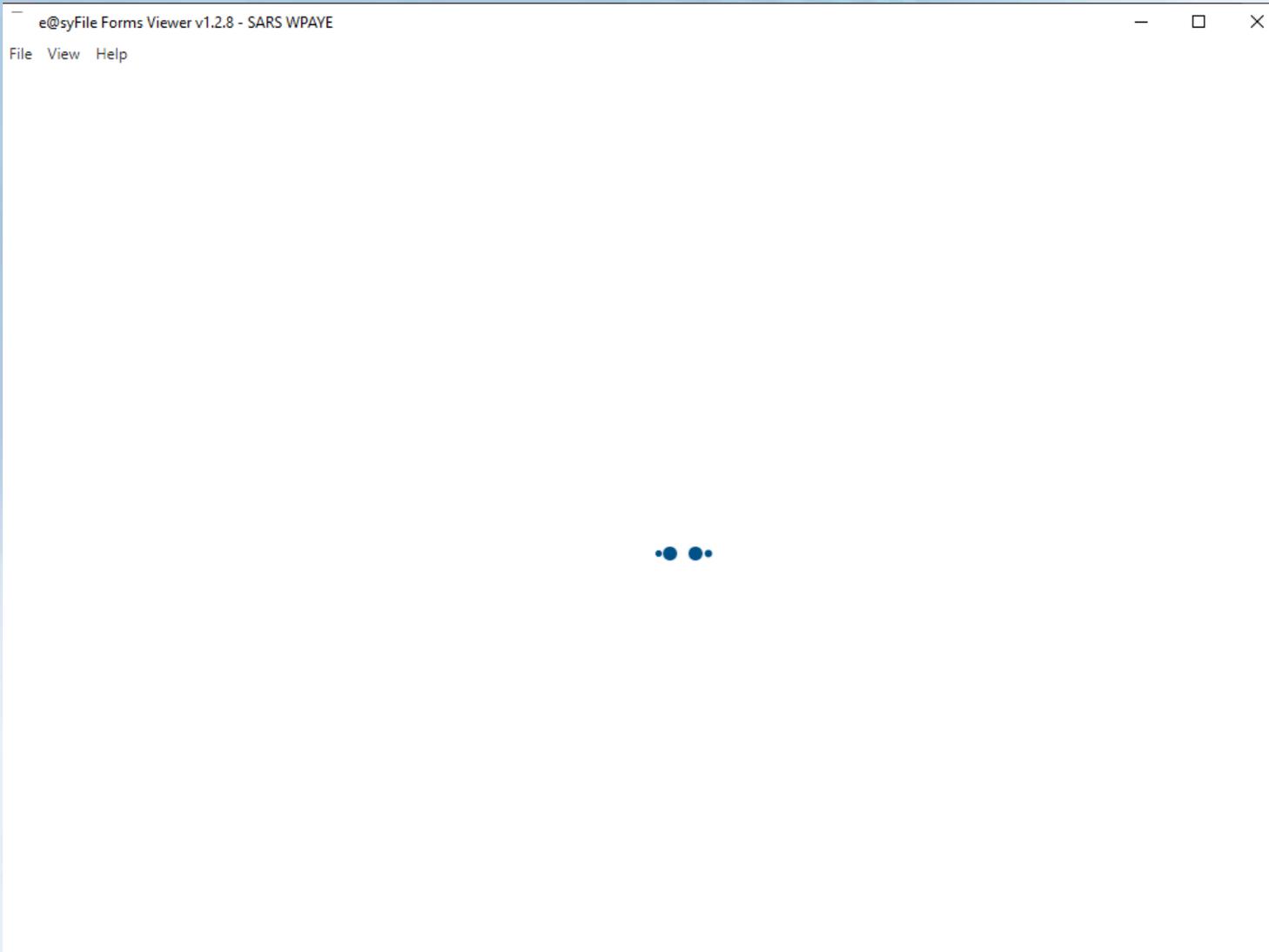
...

Date you

- The employer ceased trading
- Employer ceased to be an employer
- Employer is deceased
- Employer is insolvent
- Employer is liquidated

Please note that should you  
deregistered as an employer  
of the effective date complete  
that you submitted this reconciliation with the intent to defraud SARS, you will be held liable  
and may face criminal charges.

# Forms viewer





Employer Reconciliation  
Declaration EMP501  
Trading Name: BOELA SE VIS WINKEL

Transaction Year: 2022 Period of Reconciliation: 202108

**Employer Information** ^

PAYE REF NO 7950769390	SDL REF NO	UFR REF NO U950769390
---------------------------	------------	--------------------------

TRADING NAME BOELA SE VIS WINKEL
-------------------------------------

Diplomatic Indemnity Indicator?  Y  N

SIC Code	SEZ Code
----------	----------

**Contact Person Details**

FIRST NAME LANGOOR	SURNAME BOELA	POSITION HELD AT BUSINESS BOSS
BUS TEL NO 0214471000	CELL NO	EMAIL INFO@BOELA.CO.ZA

**Payroll Systems Details**

Payroll Software Provider	Payroll Software Package
Other Specify	

**Tax Practitioner Details (if applicable)** v

**Financial Particulars** v

**Declaration** v





Employer Information

Tax Payer/Donor Details (if applicable)

Financial Particulars

PAYE Liability	SDL Liability	UIF Liability	Total Monthly Liability	Payments
R March 0.00	R March 0.00	R March 0.00	R March 0.00	R March
R April 0.00	R April 0.00	R April 0.00	R April 0.00	R April
R May 0.00	R May 0.00	R May 0.00	R May 0.00	R May
R June 0.00	R June 0.00	R June 0.00	R June 0.00	R June
R July 0.00	R July 0.00	R July 0.00	R July 0.00	R July
R August 0.00	R August 0.00	R August 0.00	R August 0.00	R August
R September 0.00	R September 0.00	R September 0.00	R September 0.00	R September
R October 0.00	R October 0.00	R October 0.00	R October 0.00	R October
R November 0.00	R November 0.00	R November 0.00	R November 0.00	R November
R December 0.00	R December 0.00	R December 0.00	R December 0.00	R December
R January 0.00	R January 0.00	R January 0.00	R January 0.00	R January
R February 0.00	R February 0.00	R February 0.00	R February 0.00	R February
R Annual Total 0.00	R Annual Total 0.00	R Annual Total 0.00	R Annual Total 0.00	R Annual Total 0.00
R Difference Total Liability & Annual Total 0.00	R Difference Total Liability & Annual Total 0.00	R Difference Total Liability & Annual Total 0.00	R Difference Total Liability & Annual Total 0.00	R Difference Total Liability & Annual Total 0.00
R Tax Liability 0.00	R Tax Liability 0.00	R Tax Liability 0.00	R Tax Liability 0.00	
R Tax Certificate Total 0.00	R Tax Certificate Total 0.00	R Tax Certificate Total 0.00	R Tax Certificate Total 0.00	
R Audit Result not in Certificates	R Audit Result not in Certificates	R Audit Result not in Certificates		
R Tax Paid on Behalf of Employee				

Declared Liability

Amount: R 0.00

Due By / To You

Amount: R 0.00



# Employment Tax Incentive (ETI) Details

ETIPA01

Transaction Year (CCYY)  Period of Reconciliation (CCYYMM)  PAYE Ref No.  SDL Ref No.  UIF Ref No.  SIC Code

	ETI Brought Forward	ETI Calculated	PAYE Liability	ETI Utilised	PAYE Payable (excl. Penalties, Interest and Add on)
March	0.00	0.00	0.00	0.00	0
April	0.00	0.00	0.00	0.00	0
May	0.00	0.00	0.00	0.00	0
June	0.00	0.00	0.00	0.00	0
July	0.00	0.00	0.00	0.00	0
August	0.00	0.00	0.00	0.00	0
<b>Total (1st ETI Period)</b>	0.00	0.00	0.00	0.00	0.00
<b>ETI not Utilised</b>	0.00				

ETI Calculated per IRP5/IT3(A) Code 4118

Sum total of all certificates captured code 4118 = Sum total Calculated Add ETI = EMP501 ETI Calculated

Month	12 Month Period Indicator	ETI Hours	Remuneration Paid	Minimum Wage	Monthly Calculated ETI	Wage Paid
March	First 12 month period	160.0000	2000.00	2000.00	1000.00	0.00
April	First 12 month period	160.0000	2000.00	2000.00	1000.00	0.00
May	First 12 month period	160.0000	2000.00	2000.00	1000.00	0.00
June	First 12 month period	160.0000	2000.00	2000.00	1000.00	0.00
July	First 12 month period	160.0000	2000.00	2000.00	1000.00	0.00
August	First 12 month period	160.0000	2000.00	2000.00	1000.00	0.00
<b>TOTAL</b>		<b>960.0000</b>	<b>12000.00</b>	<b>12000.00</b>	<b>6000.00</b>	<b>0.00</b>

Add ETI               

Tax Credits and/or Employee / Employee Contributions

Description	Code	Value
PAYE (Pay As You Earn)	4102	3000.00
Total Tax, SDL and UIF	4149	3600.00
Employment Tax Incentive	4118	6000.00
Contributions (employer)	4141	400.00

Transaction Year (CCYY)  Period of Reconciliation (CCYYMM)  PAYE Ref No.  SDL Ref No.  UIF Ref No.

	PAYE Liability	SDL	UIF	Total Monthly Liability	Payments (excl. Penalties, Interest and Add tax)
March	0.00		0.00	0.00	
April	0.00		0.00	0.00	
May	0.00	0.00	0.00	0.00	
June	0.00	0.00	0.00	0.00	
July	0.00	0.00	0.00	0.00	
August	0.00	0.00	0.00	0.00	
September					
October					
November					
December					
January					
February					
<b>Annual Total</b>	0.00	0.00	0.00	0.00	
<b>Difference- Total Liability &amp; Annual Total</b>	0.00	0.00	0.00	0.00	
<b>Total Liability</b>	0.00	0.00	0.00	0.00	
<b>Tax Certificates Total</b>	0.00	0.00	0.00	0.00	
<b>Audit Result Not In Certificates</b>					
<b>Tax Paid on Behalf of Employee</b>					

**If it does not balance  
You need to check your  
work. Fix before submitting  
Rounding = R6 Allowed**

<b>Declared Liability</b>	<b>Annual ETI Utilised</b>	<b>Due By / To You (excl. Penalties, Interest and Add tax)</b>
0.00	0.00	0.00

IMP501 L SV 2020.04.01 SV 2001 CF EASY... NO 7950769390 P 202008 Y 2021 003/004



Reason

STATE YOUR REASON FOR DIFFERENCES

BMPS01 1 IV 2020.04.01 BV 2001 CT EASY... NO 7950769390  
P 202008  
Y 2021  
004/004



Annual Total R 0.00	Annual Total R 0.00	Annual Total R 0.00	Annual Total R 0.00	Annual Total R 0.00
Difference Total Liability & Annual Total R 0.00	Difference Total Liability & Annual Total R 0.00	Difference Total Liability & Annual Total R 0.00	Difference Total Liability & Annual Total R 0.00	Difference Total Liability & Annual Total R 0.00
Total Liability R 0.00	Total Liability R 0.00	Total Liability R 0.00	Total Liability R 0.00	Total Liability R 0.00
Tax Certificates Total R 0.00	Tax Certificates Total R 0.00	Tax Certificates Total R 0.00	Tax Certificates Total R 0.00	Tax Certificates Total R 0.00

R Audit Result not in Certificates	R Audit Result not in Certificates	R Audit Result not in Certificates
R Tax Paid on Behalf of Employee		

**If you fill in the block you will owe SARS the full amount entered**

**Declared Liability**

Amount  
R 0.00

**Due By / To You**

Amount  
R 0.00



Financial Particulars

BRDF301

Transaction Year (CCYY)	Period of Reconciliation (CCYYMM)	PAYE Ref No.	SDL Ref No.	UIF Ref No.	
2021	202008	7950769390			U950769390
	PAYE Liability	SOL	UIF	Total Monthly Liability	Payments (incl Penalties, Interest and Add tax)
March	0.00		0.00	0.00	
April	0.00		0.00	0.00	
May	0.00	0.00	0.00	0.00	
June	0.00	0.00	0.00	0.00	
July	0.00	0.00	0.00	0.00	
August	10000	0.00	0.00	10000.00	
September					
October					
November					
December					
January					
February					
<b>Annual Total</b>	10000			10000.00	
<b>Difference-Total Liability &amp; Annual Total</b>	-10000			10000.00	
<b>Total Liability</b>	0.00	0.00	0.00		
<b>Tax Certificates Total</b>	0.00	0.00	0.00		
<b>Audit Result Not in Certificates</b>					
<b>Tax Paid on Behalf of Employee</b>					

**Error**



The total liability for PAYE cannot be zero if annual total for PAYE is greater than zero.

**Ok**

If an amount is populated for PAYE, an error message will alert the user if no certificates are present (Total Liability is zero)

BRDF301 L PV 2020.04.01 DV 2021 CY 8ADY... NO 7950769390  
 # 202008  
 # 2021  
 002/003



**Due By / To You**  
 Penalties, Interest and Add tax

0.00



	PAYE Liability Rands only, no cents	SDL Rands only, no cents	UIF Rands only, no cents	Total Monthly Liability Rands only, no cents	Payments (incl. Penalties, Interest and Add tax) Rands only, no cents
March		4 0 0	4 0 0	8 0 0	4 8 0 0
April		4 0 0	4 0 0	8 0 0	4 8 0 0
May		4 0 0	4 0 0	8 0 0	4 8 0 0
June		4 0 0	4 0 0	8 0 0	4 8 0 0
July		4 0 0	4 0 0	8 0 0	4 8 0 0
August		4 0 0	4 0 0	8 0 0	3 8 0 0
September		4 0 0	4 0 0	8 0 0	3 8 0 0
October				0 0 0	3 8 0 0
November				0 0 0	3 8 0 0
December				0 0 0	3 8 0 0
January				0 0 0	3 8 0 0
February				0 0 0	3 8 0 0
Annual Total				0 0 0	5 0 6 0 0
Difference- Total Liability & Annual Total	5 0 0 0 0			0 0	
Total Liability	5 0 0 0 0	3 0 0 0 0	3 0 0 0 0		
Tax Certificates Total	5 0 0 0 0	3 0 0 0 0	3 0 0 0 0		
Audit Result Not In Certificate					
Tax Paid on Behalf of Employee					

**Error**

 The annual total for PAYE cannot be zero if total liability for PAYE is greater than zero.

Declared Liability  
Rands only, no cents

5 6 0 0 0

Due By / To You  
(excl. Penalties, Interest and Add tax)  
Rands only, no cents

5 4 0 0

If certificates are present (Total Liability) the user will get an error message if no PAYE is captured/populated



## Ready to File

Employer Declaration Ready to File.  
Please go to the 'Submission' screen to submit  
this declaration.

OK

# Declaration

**HOME**

- Notification Centre
- Action Centre

**REGISTRATION**

- eFiling Registration

**IMPORT**

- Import/Export Payroll File

**EMPLOYEE ADMIN**

- View/Edit Employees

**MONTHLY PROCESS**

- PAYE

**SUBMISSION**

*On this screen you are able to submit documents to SARS*  
*Please select the documents you wish to submit by clicking on the Submit check box*

Print Submit

Type	Reference	Company	Year	Status	Submit		
EMP501				ONLINE VALIDATION RE	<input type="checkbox"/>	View	Remove

**SARS Secure Login**

Login in to eFiling to verify your credentials.

SARS eFiling User Name:

SARS eFiling Password:

Login Cancel



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

Summary Report

SUBMISSION

Submit to SARS

THIRD PARTY APPOINTMENTS

Third Party Appointments

EMPLOYER ADMIN

View/Edit/Change

UTILITIES

Utilities

Synchronise Application

HELP

Application Help

Update

Log off

SYSTEM UTILITIES

On this screen you are able to run the system utilities.

Database Utilities

Here you are able to create a backup of your local Database or restore your local Database from a backup

Backup DB Directory

Merge EasyFile DB

Restore EasyFile DB

Disc submission will not work once you have selected the Submission in the submit to SARS tab and had the eFiling log in Pop up

EMP501 Status Dashboard

AA88 Payment Allocation Dashboard

Pre-Submission Validation Report

Import Payroll File Log

Delete Payroll File

Reset Passwords

Payroll File Editing

Reassign Certificate

Generate IRP5 / IT3(a) PDF's

Full Resubmission Request

Disk Submission

System Configuration



Database Utilities

EMP501 Status Dashboard

Please double click on a Company record to view detailed status.

Company Name	Reference N...	Form	Year	Channel	Date/Time	Update
[REDACTED]	[REDACTED]	EMP501	201608	Online	2016/09/16 14:29:4	<input type="button" value="Update"/>
[REDACTED]	[REDACTED]	EMP501	201502	Online	2017/08/30 13:27:3	<input type="button" value="Update"/>
[REDACTED]	[REDACTED]	EMP501	201602	Online	2017/08/30 13:44:1	<input type="button" value="Update"/>
[REDACTED]	[REDACTED]	EMP501	201708	Online	2017/09/01 10:33:5	<input type="button" value="Update"/>
[REDACTED]	[REDACTED]	EMP501	201702	Online	2017/09/01 11:23:5	<input type="button" value="Update"/>
[REDACTED]	[REDACTED]	EMP501	201602	Online	2017/09/01 11:43:4	<input type="button" value="Update"/>
[REDACTED]	[REDACTED]	EMP501	201602	Online	2017/09/01 14:27:4	<input type="button" value="Update"/>

**Status Update**

Updates Recieved! Click 'Ok' to view.

AASS Payment Allocation Dashboard

Pre-Submission Validation Report

Import Payroll File Log

Delete Payroll File

Reset Passwords

Payroll File Editing

Reassign Certificate

Generate IRP5 / IT3(a) PDF's

Full Resubmission Request



Status Update			EMP501	201502	Online	2017/08/30 13
Cert Number	Form Type	Response				
7010718437	EMP501	Please note that your return has been successfully submitted				
7010718437	EMP501	Declaration Processed				
7010718437	EMP501	[PAYE] Please note that your reconciliation has been finalised.				

[Close](#)

Status Update			EMP501	201502	Online	2017/08/30 13
Cert Number	Form Type	Response				
7390758466	EMP501	EMP501 reconciliation processed. Please check your compliance status				
7390758466	EMP501	Recon Failed Compliance				

[Close](#)



# Resubmissions

Cert Number	Form Type	Response
7350772853	EMP501	The EMP501 reconciliation that you have submitted contained excessive liability updates and was routed for manual assessment
7350772853	EMP501	Manual Assessment



# e@syFile Employer introducing ETV

## Step 1

Ensure that you retrieved the submissions status update under Utilities, on the EMP501 Dashboard in e@syFile Employer.

- Click on Update next to the relevant submission to retrieve an Accepted or Rejected status.

- Please note: ETV feedback will not be available for rejected EMP501



The screenshot shows a 'Status Update' window with a table of submission statuses. The table has three columns: 'Cert Number', 'Form Type', and 'Response'. The first row is highlighted in light blue. The second row is highlighted in light blue. The third row is highlighted in light blue. A 'Close' button is located at the bottom center of the window.

Cert Number	Form Type	Response
██████████	EMP501	Please note that your return has been successfully submitted
██████████	EMP501	Declaration Processed
██████████	EMP501	[PAYE] Please note that your reconciliation has been finalised.

Close

## Step 2

- Click on Download Employment Taxes Validation to retrieve ETV feedback.

**SYSTEM UTILITIES**  
*On this screen you are able to run the system utilities.*

**Database Utilities**  
**EMP501 Status Dashboard**

*Please double click on a Company record to view detailed status.*

[Download Employment Taxes Validation](#)

Company N...	Reference ...	Form	Year	Channel	Date/Time	Update	ETV
		EMP501		Online	2014/09/15 15:29	<input type="button" value="Update"/>	

## Step 3

- Complete your eFiling credentials for authentication and click on login.

**SARS Secure Login**

Login in to eFiling to verify your credentials.

SARS eFiling User Name:

SARS eFiling Password:



## Step 4

Click on the View button in the right hand column to view the ETV Report for an EMP501 Submission.

### SYSTEM UTILITIES

On this screen you are able to run the system utilities.

#### Database Utilities

#### EMP501 Status Dashboard

Please double click on a Company record to view detailed status.

Download Employment Taxes Validation

Company N...	Reference ...	Form	Year	Channel	Date/Time	Update	ETV
		EMP501	201408	Online	2014/09/15 15:29	<input type="button" value="Update"/>	
		EMP501	201502	Online	2015/04/16 12:16	<input type="button" value="Update"/>	
		EMP501	201508	Online	2015/10/14 16:04	<input type="button" value="Update"/>	
		EMP501	201602	Online	2016/05/03 08:35	<input type="button" value="Update"/>	
		EMP501	201608	Online	2016/09/28 08:58	<input type="button" value="Update"/>	
		EMP501	201702	Online	2017/04/14 12:07	<input type="button" value="Update"/>	
		EMP501	201708	Online	2017/09/18 10:34	<input type="button" value="Update"/>	
		EMP501	201802	Online	2018/04/05 12:34	<input type="button" value="Update"/>	
		EMP501	201808	Online	2018/09/18 10:43	<input type="button" value="Update"/>	
		EMP501	201902	Online	2019/04/18 12:11	<input type="button" value="Update"/>	
		EMP501	201908	Online	2019/09/25 07:20	<input type="button" value="Update"/>	
		EMP501	202002	Online	2020/04/02 11:37	<input type="button" value="Update"/>	<input type="button" value="View"/>

## Step 5

The details of certificates with errors will be displayed. You can also save the report to a text file format by clicking on the Save button

2020~202002~  
CERTIFICATENO~TYPEOFCERTIFICATE~SURNAME~IDNUMBER~PASSPORTNO~ALTERNATEIDNO~NAME~TOTALPERIODSINYEAROFASSESSMENT~TOTALPERIODSWORKED~GROSSEMPLOYMENTINCOME~TOTALDEDUCTIONS~INCOMETAXREFERENCENO~PAYEAMNT~UIFCONTRIBUTION~SDLCONTRIBUTION~MEDICALSCHEMETAXCREDIT~ADDITIONALMEDICALEXPENSESTAXCREDIT~REASONFORNONDEDUCTION~PAYEVALIDATIONOUTCOME~PAYECALCULATEDAMOUNT~SDLVALIDATIONOUTCOME~SDLCALCULATEDAMOUNT~UIFVALIDATIONOUTCOME~UIFCALCULATEDAMOUNT  
~IRP5~HERHOLDT~5708210148089~DEBORAH  
12.0000~12.0000~33044.0~0.0~1442319149~22.91~594.88~330.44~0.0~0.0~0.00~FAIL~0.0~330.44~660.88

Save Close

e@syFile™  
Employer

- HOME
  - Application Home
- 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
  - Recon Assistant
- SUBMISSION
  - Submit to SARS
- AGENT APPOINTMENTS
  - Agent Appointments
- EMPLOYER ADMIN
  - Add/Edit Employer
- UTILITIES
  - Utilities
  - Synchronise Application
  - Mismatch
- HELP
  - Application Help
  - Update
  - Log off

**Welcome to the e@syFile Employer PAYE Status Dashboard**

The PAYE dashboard provides a consolidated view of the Employer's PAYE tax affairs.

Select Company : **A COMPANY PTY LTD.** Select Period : **201102** **Show** **PAYE Recon Assistant**

**EMP201 Returns and Payments allocated**

Item	Amount
EMP201 Liabilities	R3,066,170.22
Payments Allocated	R5,446,106.36
Difference	-R2,379,936.14

**Certificates**

Item	Amount
EMP501 Certificate Value	R7,841,073.00
Certificates received by SARS	R7,841,073.40
Difference	R0.40

**EMP201 and EMP501 liabilities**

Item	Amount
EMP201 Liabilities	R3,066,170.22
EMP501 Liabilities	R7,841,073.00
Difference	-R4,774,902.77

**Certificates received and payments allocated**

Item	Amount
Certificates received by SARS	R7,841,073.40
Payments Allocated	R5,446,106.36
Difference	R2,394,967.03

**Comparison**

	This Period	Previous Period	Change
Active Certificates received by SARS	280	69	211
Active Certificate Values	R7,841,073.40	R2,141,673.21	R5,699,400.18

**Account summary for Period of reconciliation**

Item	Amount
Total EMP201 Liabilities	R3,066,170.22
Additional EMP501 Liabilities	R4,774,902.77
Certificate Adjustment	R0.00
Add.Penalties, Interest & Add.Tax	R412,273.39
Total Liabilities	R8,253,346.40
less Payments Allocated to taxes	R5,446,106.36
less Payments Allocated to other	R408,299.87
Total Amount Due	R2,398,940.15
Unallocated Payments	R1,467,604.79

**IT88 Information**

Item	Amount
ITA88 Notices Issued	4
ITA88 Notices Cancelled	0
ITA88 Notices Active	4
ITA88 Appointment Amount	R12,000.00
ITA88 Cancelled Amount	R0.00
Active ITA88 Appointments	R12,000.00
ITA88 Amount Received	R0.00
ITA88 Amount Due	R12,000.00

# ETI Reinstatement

## 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

Re-instate ETI

## ETI Re-instatement Request

If an employer incorrectly submits an incorrect EMP501 (future dated or without claiming ETI), they will now be able to request a Reinstatement of ETI without going through the Debt Management process or manual intervention.

A new option was added on the Declaration page when you click on Request: This will be a real-time request that will return pre-populated values as per the original EMP201's submitted where ETI was stated.

All the standard checks will still be performed (compliance and any assessments raised etc) and the Request may also be declined. A pop-up message will provide a reason if the Re-instate request was unsuccessful.



# General Info

## CERTIFICATE DETAILS

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

Transaction Year:    
Period of Reconciliation:    
Certificate Number: 0000000000000000

Final Certificate Submission

Certificate Type:

Year of Assessment:

Pay Periods Worked:

Pay Periods in Tax Year:

Employment Date:

Cert. Tax Period Start:

Cert. Tax Period End:

Voluntary Over Deduction

Fixed Rate Taxation

### Directive Numbers:

Directive Number 1:

Directive Number 2:

Directive Number 3:

### Employment Tax Incentive

ETI

Employee SIC7 Code:

Certificate Status:

Certificate Source:

Date Created:

Date Submitted:

### Income Received

Description	Code	Value

### Total Income Received

Description	Code	Value

### Deductions/Contributions

Description	Code	Value

### Total Deductions/Contributions

Description	Code	Value

### Tax Credits and/or Employer / Employee Contributions

Description	Code	Value

Manage Source

Back to Employee

Cancel Certificate

View Certificate



# Certificate Directive Table

Please note change to directives table on manual capture screen, additional fields (source codes) were added for Tax Year 2022 and moving forward. If Tax Year 2021 and older is selected, only a Directive number is required (and Directives table were revert to the single column table).

**CERTIFICATE DETAILS**  
*On this screen you are able to view and edit Certificate Data.*

**JANSEN**

Transaction Year: ...  
 Period of Reconciliation: ...  
 Certificate Number: 000000000000000000  
 Final Certificate Submission  
 Certificate Type: ...  
 Year of Assessment: ...  
 Pay Periods Worked:   
 Pay Periods in Tax Year:   
 Employment Date:    
 Cert. Tax Period Start:    
 Cert. Tax Period End:    
 Voluntary Over Deduction   
 Fixed Rate Taxation

**Directive Information:**

Directive Number	Issue Date	Code	Value

**Income Received**

Description	Code	Value

**Total Income Received**

Description	Code	Value

**Deductions/Contributions**

Description	Code	Value

**Total Deductions/Contributions**

Description	Code	Value

**Tax Credits and/or Employer / Employee Contributions**

Description	Code	Value

ETI   
 Employee SIC7 Code: ...  
 Certificate Status: Certificate Source:  
 Date Created: Date Submitted:

Manage Source Codes

Not all directives are entered on the certificate. Ref BRS





# Error Messages

## FIELD VALIDATION

The following highlighted field(s) are incomplete or invalid  
 Source Code 3696, 3697 or 3698 is a mandatory field if an amount is specified under the income source codes.

Click OK to continue, or CANCEL to correct.

OK

Cancel

## ACTION CONFIRMATION

Are you sure you want to CANCEL this certificate?  
 Click 'YES' if you wish to continue, or click 'NO' to stop this action.

Yes

No

## CSV File Import

Payroll File failed validation.  
 Please consult the Import Payroll log to see where failures occurred.

Ok

## FIELD VALIDATION

The following field(s) are incomplete or invalid  
 Invalid code 'C.P.'; Source Codes should be exactly 4 digits. Record Structure invalid.

Click OK to continue, or CANCEL to correct.

OK

Cancel

Action: **Cancel Certificates** | Period of Recon: **201008**

### CANCEL CERTIFICATE RANGE

On this screen you are able to cancel a range of IRP5/IT3(a) Certificates for a company and transaction year.  
 Individual Certificate can be cancelled on the certificate details screen.

Range Start:  Range End:

Start Range Certificate Number	End Range Certificate Number	Count for Captured Certificates	Value for Captured Certificates	Certificate Range Count	Action
7950769390201108000000S00000003	7950769390201108000000S00000005	3	797.48	3	Remove

Action: **Revive Certificates** | Period:

### REVIVE CANCELLED CERTIFICATE RANGE

On this screen you are able to revive a cancelled range of IRP5/IT3(a) Certificates for a company and trans  
 Individual Certificate can be revived on the certificate details screen?????

Selec... | S...

LIBER | Complex: AAN-DE-WAGENWEG

STELL | Street/Farm: AAN-DE-WAGENWEG

STELL EN BOSCH

THE ADDERLEY, FLOOR C

ADDERLEY STREET



FAILED WARNINGS

Line	Status
2	[REDACTED] 20170200000050000016 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
3	[REDACTED] 20170200000050000033 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
4	[REDACTED] 201702000000500000510 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
7	[REDACTED] 20170200000050001201 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
9	[REDACTED] 20170200000050001542 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
13	[REDACTED] 20170200000050002728 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
14	[REDACTED] 20170200000050002943 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
15	[REDACTED] 20170200000050002993 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
16	[REDACTED] 20170200000050003083 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
18	[REDACTED] 20170200000050003450 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294
23	[REDACTED] 20170200000050004076 [REDACTED] : Employee Address Details - Postal: Country Code mandatory - code 3294

80.1%

- If field "Employee Postal Address Details Country Code" (Code 3294) is ZA and Nature of Person is N, then this field is mandatory and:
  - Must consist of 4 numeric characters (e.g. "0040" written to the import file as "0040" and not as "40");
  - Must not be "0000"
  - In case there is no postal code for the postal address, use the nearest postal code
- If field "Employee Postal Address Details Country Code" (Code 3294) is not ZA, then this field is optional
- If Nature of Person is N, then this field is optional

**Find** ✕

3294 ▼

Previous Next

Save Report Close



- Installation error Remove - previous Version
- Disable Virus Program to Install

**e@syFile Employer 6.8.3 Setup**

**Installing**

Please wait while e@syFile Employer 6.8.3 is being installed.

Execute: easyfile-employer.exe

Current JRE Version 1.7  
Current AIR Version 28.0.0.127  
Output folder: C:\Users\TarynP\AppData\Local\Temp  
Extract: AdobeAIRInstaller\_26.exe... 100%  
Execute: C:\Users\TarynP\AppData\Local\Temp\AdobeAIRInstaller\_26.exe  
Installed Air Runtime Environment...  
Extract: easyFile-employer.exe... 100%  
Execute: easyfile-employer.exe

**Application Install**

**e@syFile-employer**

**Sorry, an error has occurred.**

The application could not be installed. Try installing it again. If the problem persists, contact the application author.

Error# 0

Close



e@syFile Employer

Your version is out of date please click update or download the full version from the SARS website [www.sarsefiling.co.za](http://www.sarsefiling.co.za)

OK

Update

Its Best to Select OK and download the new version. Windows 10 users have a 90% chance that the data will get removed

# Adobe reader DC Current issue

Notification Centre

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.

Search using PAYE Reference Number or Company Name

7310789377-101 MEADE STREET

Letter ID	Tax Payer Name	Tax Year	Message Type	Status
12780	101 MEADE STREET	2021	EMP222	READ
11742	101 MEADE STREET	2021/02/28	EMPSA	READ
11749	101 MEADE STREET		ITRECOVER	READ
11942	101 MEADE STREET	202102	LEPAYE-DM0001	READ
12561	101 MEADE STREET		LEPAYE-DM0001	IN AUDIT
12782	101 MEADE STREET		LEPAYE-DM0002	IN AUDIT
11943	101 MEADE STREET		LEPAYE-DM0001_VAL	READ

Reader Error

PDF cannot be displayed. Error code: Adobe Reader is detected, but the version is too old.

OK

7310789377-101 MEADE STREET

7500746871-A.L. & F CONTRACTOR

7510792220-ABOVE BAR PAINTING

7190755678-ABS Production CC

760083276-ADVANCE CONSTRUCT

7760786451-ALLOREEN BODELLET

7940780906-A.L. & F CONTRACTOR

CONNECTION STATUS : CONNECTED

# PDF Viewing/Certificate Generation - Java Related

- Check Java installed via Control Panel – Programs and features
- Uninstall all Java
- To correct run the e@syFile installer and install Zulu Java
- Restart computer and check if problem was resolved

The screenshot shows the 'System Configuration' window of the e@syFile Forms Viewer Application. The window is divided into a left sidebar and a main content area. The sidebar contains several sections: 'SUBMISSION' (Cancel Certificate Range, Adjustments, Summary Report), 'THIRD PARTY APPOINTMENTS' (Third Party Appointments), 'EMPLOYER ADMIN' (View/Edit/Change), 'UTILITIES' (Utilities, Synchronise Application), and 'HELP' (Application Help, Update, Log off). The 'UTILITIES' section is highlighted with a red box. The main content area is titled 'Disk Submission' and 'System Configuration'. It contains the following sections: 'PDF Rendering:' with a checked checkbox 'Render PDF with default application.'; 'Java JRE:' with a text box containing the path 'C:\Program Files (x86)\Zulu\zulu-8-jre\bin\java.exe' and a 'Change Java Path' button; and 'e@syFile Forms Viewer Application:' with a text box containing the path 'C:\Users\Akhona.Tengwa\AppData\Local\Programs\easyfileformsviewer' and 'Change Path' and 'Install' buttons. At the bottom right, there is a blue bar with the text 'Employer'.

# Back up structure/ Local Store

Name	Date modified	Type	Size
DoNotDelete	2021/08/19 1:18 PM	File folder	
748.....dbz	2021/08/19 1:18 PM	DBZ File	479 KB
EasyFile.dbz	2021/08/19 1:18 PM	DBZ File	249 KB
key	2021/08/18 1:23 PM	Text Document	1 KB
LI	2021/08/19 1:18 PM	Text Document	1 KB

## Do Not Delete

C:\Desktop > Training DB > Training db > 2017 > Blank DB > EasyFile20140622\_17h02\_Backup.zip > DoNotDelete

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
key.txt	Text Document	1 KB	No	1 KB	0%	2014/06/22 5:02 PM
LI.txt	Text Document	1 KB	No	1 KB	49%	2014/06/22 5:02 PM



# Basic Rules!

- Please **READ** the Manual and Release notes!
- Add your Local Store Folder to the Exceptions File!
- Add Forms viewer App to Windows Firewall! **Allowed Apps!**
- Computer up to date! **Correct Java /Adobe**
- **Correct EMP201** before submitting the EMP501
- **Download** the new e@syFile software! **Don't Update!**
- **Backup** your work before you close! **Important!**
- Utilities 501 Dashboard Update - **Click To View**
- Log in as ADMIN User! **ALWAYS!!**
- **Ensure your ETI is submitted correctly on the EMP201**
- **Resubmission –Why? 08 No Drop down 28 Feb**
- **Read & Understand the message**



# Thank You

Ayanda Takela  
Akhona Tengwa  
Nokuthula Mbatha  
Ntebogiseng Bojosi

Important Contact details:

Technical e@syFile Queries & eFiling setup problems.

- [Support@sarsefiling.co.za](mailto:Support@sarsefiling.co.za)

Tax issues via Call Centre

- Call Centre 0800007277

SARS Queries

- [contactus@sars.gov.za](mailto:contactus@sars.gov.za)



# Q & A