# ETI amendments
## How to do an ETI Take-on

ETI values cannot be changed by accessing the history data as you would do with the payslip values on the History Screen. The current period's ETI can only be changed by changing the setup accordingly and if the Period Set and count is incorrect for the current period, that can be changed by accessing the system with VIPSD.

Should there be a reason for **history** ETI values to be changed due to incorrect setup or incorrect calculations, and ETI Take-on must be done.

Identify the employees for whom changes need to be made. If an employee is terminated, you will have to make their record active first before importing the data. Terminate them again after the import was successful

From the main screen of the company go to Interfaces>Import Data>Utility Imports>ETI Take-on.

A screen will pop up asking you if you if you want to Import or Export. Click on Export.

The following selections need to be made: Pay attention to what each field represents

**Export Year:** This is calendar year and not Tax year.

> January 2018 – December 2018 = 2018

> January 2019 – December 2019 = 2019

**Destination for Export file:** This will default to either your system folder (the system you are working) or an alternative predefined export location under Miscellaneous 5. Make a note of where the file is going to be stored.

**Export file**: This is the name you need to give the file

**Range of Employees**: Leave on all employees. If only one employee, you can click on the drop-down list and then select range of employees and complete their employee number in the from and to block.

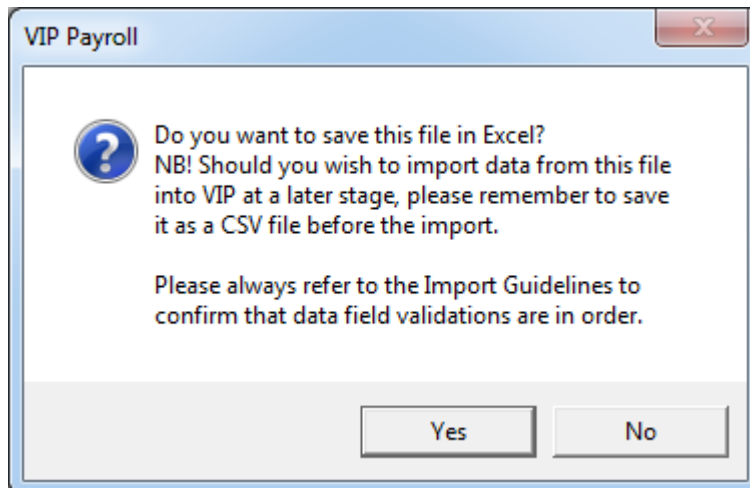**Export Employees:** Leave this on all employees

Click on Export.

A message will pop up saying how many records have been exported
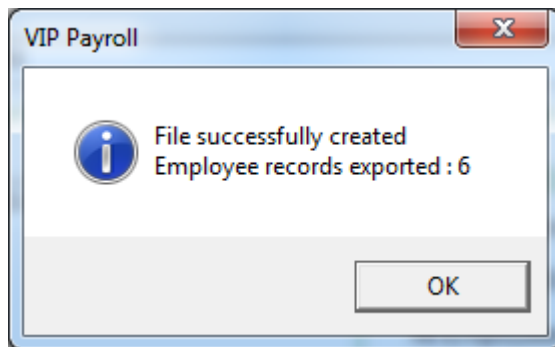


Click on Ok.

A message will then pop up asking you if you want to save this file to Excel. Select Yes



It should then open your Excel and then open your Windows Browser as you now need to browse to the folder that was indicated on the Destination folder.

When you have located the folder, click on it and select open.

Browse in the folder and look for the file (this would be the file name you gave it when doing the export initially). When you found the file, click on it then click on select.

It will then populate the ETI data for the selected employees in Excel

| | Company | Employee | Year | Month | Start date | Age | Valid ID | SEZ Code | Filler | SIC Code | Tax Status | UIF | Wage Code | Min Wage | Actual Wage | Period Set | Period Count | ETI Remuneration | Tax Incentive | Related | Domestic | AsylU |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2 | 014 | 001 | 2019 | 1 | 20151001 | 28 | No | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2500 | 2 | 3 | 2819 | 500 | No | No | Yes |
| 3 | 014 | 001 | 2019 | 2 | 20151001 | 28 | No | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2500 | 2 | 4 | 2819 | 500 | No | No | Yes |
| 4 | 014 | 001 | 2019 | 3 | 20151001 | 28 | No | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2500 | 2 | 4 | 2819 | 500 | No | No | Yes |
| 5 | 014 | 002 | 2019 | 1 | 20140601 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 4080 | 2 | 9 | 4080 | 0 | No | No | No |
| 6 | 014 | 002 | 2019 | 2 | 20140601 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 4080 | 2 | 9 | 4080 | 0 | No | No | No |
| 7 | 014 | 002 | 2019 | 3 | 20140601 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 4080 | 2 | 9 | 4080 | 0 | No | No | No |
| 8 | 014 | 003 | 2019 | 1 | 20160310 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2535 | 1 | 7 | 2535 | 0 | No | No | No |
| 9 | 014 | 003 | 2019 | 2 | 20160310 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2535 | 1 | 7 | 2535 | 0 | No | No | No |
| 10 | 014 | 003 | 2019 | 3 | 20160310 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2535 | 1 | 7 | 2535 | 0 | No | No | No |
| 11 | 014 | 004 | 2019 | 1 | 20131001 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2500 | 2 | 10 | 2819 | 0 | No | No | No |
| 12 | 014 | 004 | 2019 | 2 | 20131001 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2500 | 2 | 10 | 2819 | 0 | No | No | No |
| 13 | 014 | 004 | 2019 | 3 | 20131001 | 30 | Yes | | | 1120 | N.Statutory Tables | R.UIF | #001 | 2000.00 | 2500 | 2 | 10 | 2819 | 0 | No | No | No |

Each column contains information applicable to the ETI. Some fields are mandatory and have specific data layout requirements.

| Fields | Allow Import for Current Period | Valid Options | Example/Comments |
|---|---|---|---|
| *Company Number | Y | 3 Numeric | 033 |
| *Employee Code | Y | 8 Alphanumeric | EMP004 |
| *Year | Y | 4 Numeric | ETI Valid from 2014 |
| *Month | Y | 2 Numeric | Month number in Year; 01-12 |
| Date Engaged | N | 8 Numeric | CCYYMMDD<br><br>*(Cannot be prior to 01 October 2013)* |
| Employee Age | N | 2 Numeric | 26 |
| Valid ID Document | Y | 15 Alphanumeric | Y/N Default to No<br><br>*If there is no valid ID defined for the period, and Y is imported, the field will be ignored.* |
| Special Economic Zone Code (SEZ) | Y | 3 Alphanumeric | User can import a # to unlink/clear the SEZ field.<br><br>Error report will reflect a Warning Message if an invalid code is entered, this field will then NOT be imported. |
| Filler (For future use) | N | Blank | Space |
| *SIC Code | Y | 5 Numeric | 01120 |
| Tax Status | N | 1 Alphanumeric | **<br><br>*(If not supplied, the import will default to the Tax Status as on the STA Screen)* |
| UIF Status | N | 1 Alphanumeric | ***<br><br>*(If not supplied, the import will default to the UIF Status as on the STA Screen)* |
| Minimum Wage Code | N | 4 Alphanumeric | #001<br><br>**Validation Error(s):**<br>*Wage Regulating Measure requires a valid Minimum Wage Code*<br><br>*Wage Regulating Measure requires Minimum Wage Code other than #001* |
| Minimum Wage | N | 9.2 Numeric | *WRM: Supply Hourly Rate*<br>*Non-WRM: Gross Up Wage Value* |
| ETI Actual Wage | N | 9.2 Numeric | *WRM: Supply Hourly Rate*<br>*Non-WRM: Gross Up Wage Value* |
| *Period Set | Y | 1 Numeric | 1 or 2:<br><br>Indicate if it is 1 for the first 12 months or a 2 if the Employee is in the second 12 months ETI cycle. |
| *Period Count | Y | 1 Numeric | 0-12:<br><br>Indicate the number of months that the Employee was eligible for the ETI<br><br>It accrues during a Start of Period.<br><br>(See the Case Study for more detail on this field.) |

| | | | |
|---|---|---|---|
| *ETI Remuneration | N | 9.2 Numeric | *WRM: Supply Hourly Rate* <br> *Non-WRM: Gross Up Wage Value* |
| * Tax Incentive Amount | N | 9.2 Numeric | Theoretical value that was calculated on another system <br><br> *"Rebate Adjustments done for a specific Import month will be cleared when importing a Tax Incentive Value.* |
| Related to Employer | N | 1 Alpha | Y/N <br><br> Default to No |
| Domestic Worker | N | 1 Alpha | Y/N <br><br> Default to No |
| Asylum Seeker | N | 1 Alpha | Y/N <br><br> Default to No |
| Refugee | N | 1 Alpha | Y/N <br><br> Default to No |
| | | | *Validation Error(s):* <br> *Employee can be either an Asylum Seeker or Refugee. Not both.* |
| Asy/Ref Number | N | 15 Alphanumeric | Must contain at least 6 characters. |
| Remuneration Factor | N | 1.4 Numeric | Cannot be less than 0 and not more than 1. <br><br> *(If there is no Factor on the specific month's ETI screen, and no factor supplied in the Import file, but there is ETI Remuneration, then the factor is forced as "1".* <br><br> *A zero / blank field in the Factor column, is ignored. One cannot force a factor field to zero with the Import file).* |
| ETI Engagement Date | N | 8 Numeric | CCYYMMDD <br><br> *Validation Error(s):* <br> *Cannot be prior to 01 October 2013;* <br> *Cannot be > than Date Engaged;* <br> *Cannot be < Termination Date.* <br><br> *For all date errors, the existing ETI Engagement Date will be retained.* |
| Wage Regulating Measure | N | 1 Alpha | Y/N <br><br> *To import values:* <br> *WRM: Use the Rate per Hour* <br> *Non-WRM: Use the Wage Value* <br><br> *Validation Error(s):* <br> *Wage Regulating Measure requires Minimum Wage Code other than #001.* |
| Remuneration Hours | N | 9.2 Numeric | Hours will overwrite, and not accumulate. (Sum of ordinary hours worked less unpaid hours plus any additional hours worked) |
| Wage Hours | N | 9.2 Numeric | Hours will overwrite, and not accumulate. (Sum of ordinary hours worked less unpaid hours) |
| Wage Factor | N | 1.4 Numeric | Cannot be less than 0 and not more than 1. <br><br> *(If the employee is not working under a WRM and there is no Factor on the specific month's ETI screen, and no factor supplied in the Import file, but there is a Wage Value then the factor is forced as "1".* <br><br> *A zero / blank field in the Factor column, is ignored. One cannot force a factor field to zero with the Import file).* <br><br> *Applicable from March 2018* |
| *F | Y | 1 Character | F - End of record indicator. |

Each file layout has mandatory fields which must be completed (indicated with an *).
Without them, the records will be rejected.

Once you have made the changes you would like to, delete the following 8 columns:

New/Term Days  New/Term Add Hrs  Rebate Adj.  Irregular  Hrs Worked Remun  Hrs Worked Wage  Std Hrs  Comment

Save your file in the system folder (system you are working in)

File>Save As>

Give the file a unique name and make sure the file is saved as a file type CSV (comma delimited). Make a backup of this company before importing the file.
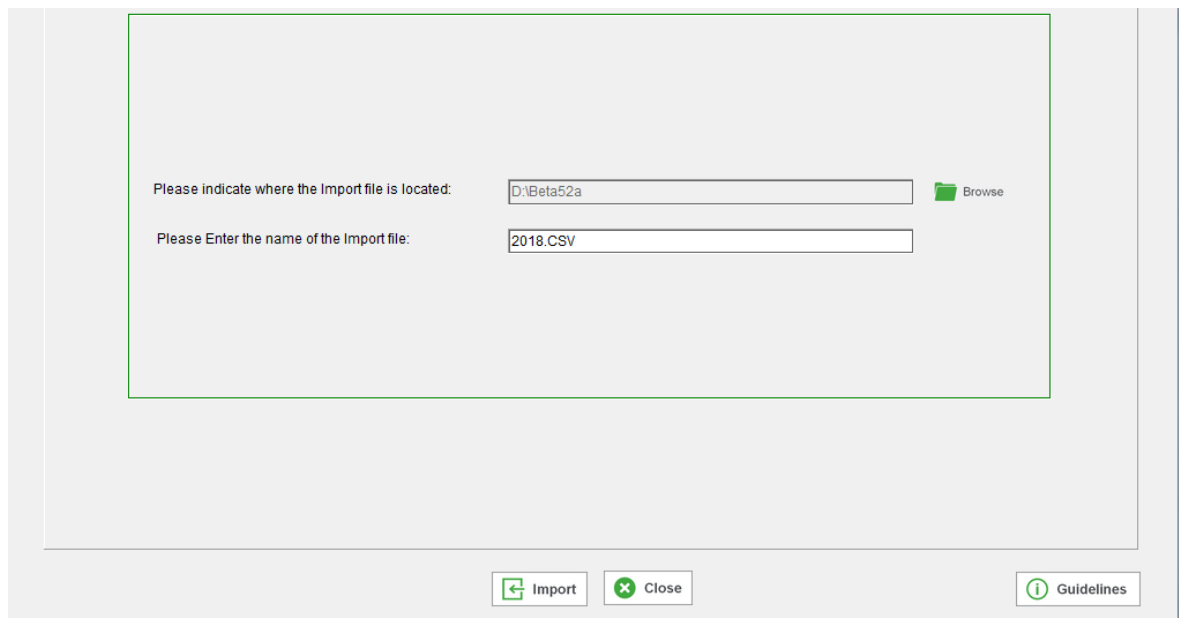
From the main screen of the company go to Interfaces>Import Data>Utility Imports>ETI Take-on.

A screen will pop up asking you if you if you want to Import or Export. Click on Import.

A message will prompt you to make a backup, click Ok.

Double check the location and make sure it points to where you saved the import file. If not browse and select the correct folder.
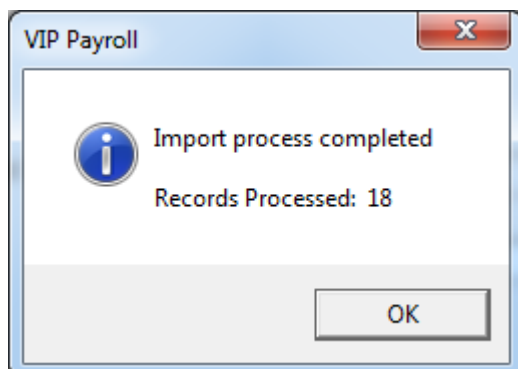
Enter the file name you gave it: example 2018.csv



Click on Import.

A message will pop up to indicate if the import was successful



If there are any issues with the data a validation report will print. Correct and retry.

If you require assistance with the process, [book a consultant](#).