<table>
<thead>
<tr>
<th>ACTION</th>
<th>DONE</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SAGE CITY</strong></td>
<td></td>
<td></td>
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<tr>
<td>What is Sage City:</td>
<td></td>
<td>It is important to join the relevant Sage City group to ensure you have access to important information that is shared on a regular basis with clients.</td>
</tr>
<tr>
<td>It is an online community offering forums to discuss both Sage solutions as well as current topics and industry challenges.</td>
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<tr>
<td>To Join Sage City form for Sage VIP and Sage 200c VIP:</td>
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<tr>
<td>• Go to: <a href="https://sagecity.na.sage.com/za/sage-vip-payroll-hr-south-africa/">https://sagecity.na.sage.com/za/sage-vip-payroll-hr-south-africa/</a></td>
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<tr>
<td>• Click on Join and register user on Sage City</td>
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<tr>
<td>• Change “E-mail Digest Options” to “Daily” on the forum</td>
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<td>Self Help templates:</td>
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<td>• How to join Sage City: <a href="https://customerzone.sagevip.co.za/doclib/General/Sage%20200c%20VIP%20How%20to%20Join%20Sage%20City.pdf">https://customerzone.sagevip.co.za/doclib/General/Sage%20200c%20VIP%20How%20to%20Join%20Sage%20City.pdf</a></td>
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<td>• How to find a solution: <a href="https://customerzone.sagevip.co.za/doclib/General/Sage%20200c%20VIP%20How%20to%20Find%20a%20Solution%20in%20Sage%20City.pdf">https://customerzone.sagevip.co.za/doclib/General/Sage%20200c%20VIP%20How%20to%20Find%20a%20Solution%20in%20Sage%20City.pdf</a></td>
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<td>• How to ask a question / start discussion: <a href="https://customerzone.sagevip.co.za/doclib/General/Sage%20200c%20VIP%20How%20to%20Ask%20a%20Question%20in%20Sage%20City.pdf">https://customerzone.sagevip.co.za/doclib/General/Sage%20200c%20VIP%20How%20to%20Ask%20a%20Question%20in%20Sage%20City.pdf</a></td>
<td></td>
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<tr>
<td><strong>PREPARATION</strong></td>
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<tr>
<td>Ensure you are on the correct release of VIP.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>ETI COMPANY SETUP</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Setup ETI System Description Codes for the following:</td>
<td></td>
<td>Take Note: If an employer (one entity/one PAYE number) has more than one SEZ (i.e. branches in more than one of the six SEZ’s) - For the 2019 year of assessment (August 2018 submissions and February 2019 submissions), the following rules must be applied in the systems for a multiple SEZ scenario:</td>
</tr>
<tr>
<td>• Minimum Wage Rate as per the Bargaining Council/Sectoral Determination or Collective agreements specific to each company for where there is a wage regulating measure. The hourly rate must also be included.</td>
<td></td>
<td>• Employer SEZ code – link the employer to any one of the employer’s SEZ code, but a code must be specified.</td>
</tr>
<tr>
<td>• Monthly Hours is calculated as follows: Minimum Wage Value ÷ Minimum Rate per Hour. The Monthly Hours field is used to calculate IRP5 Code 7003 per month in the IRP5/IT3(a) file.</td>
<td></td>
<td>• Employee SEZ code – link the employee to any one of the employer’s SEZ codes in which the employee ‘mainly’ worked during any month in the six-month period of the tax certificate cycle.</td>
</tr>
<tr>
<td>If the Monthly Hours change in the future, we suggest that you add a new Minimum Wage Code and the relevant employees must then be linked to that code. (If the Minimum Wage Value and Minimum Rate per Hour changes, the employees can remain linked to the same Minimum Wage Code.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• A standard Minimum Wage Code for R2000 per month already exists and has been updated with an hourly rate of R12.50. This should be used if there is no wage regulating measure.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
- Special Economic Zone (SEZ)

**Take Note:**
The Minister of Finance has designated the following 6 Special Economic Zones in GG 41759 effective 1 August 2018:

- Coega Special Economic Zone
- Dube Tradeport Special Economic Zone
- East London Special Economic Zone
- Maluti-a-Phofung Special Economic Zone
- Richards Bay Special Economic Zone
- Saldanha Bay Special Economic Zone

***Please note that the SEZ rules must be applied per month per employee in order to determine if an employee qualifies for ETI in that month.***

2. A Menu option is available to give you access to amend the ETI setup:
   - Main Menu > Company > ETI Setup > Select ETI Company Setup or Check Employee Wage Regulating Measure
   - You can also click on the Guidelines button for more information on doing the Company Setup for ETI for the 2018/2019 tax year.

   Access Control to this screen is determined by:
   - Company > Access Control > Advanced Access Control
   - Advanced Page 1 > Basic Company Information

3. Complete the following fields on the **ETI Company Setup screen**:
   - Exclude Company
   - Company Eligible
   - SIC Code
   - Special Economic Zone (SEZ)

4. Also complete the rest of the ETI Company Setup by using this **Step by Step Guide**.

   **Step 1: Only for Wage Regulating Measure Employees**
   Indicate where the actual Wage Rate per Hour is stored for Employees with a wage regulating measure:
   - Increase Screen
   - Calculation Screen Fields

   This rate will be compared with the prescribed minimum rate per hour linked on the employee IS screen to determine if the employee passes the wage qualifying test or not.

   The Wage Regulating Measure Tick on the employee IS screen must be ticked for this step to work. Details on activating this will be discussed later in the checklist.

   **Step 2: For all Employees**
   Define the Wage Components for all employees whether there is a wage regulating measure or not:
   - Earnings table: select Yes or No in the "Incl Wage" column
   - Calculation Screen table: select the applicable option for the Selection Options Lookup in the "Incl Wage" column

   'Wage' refers to the cash amount paid for ordinary hours of work. This is typically basic salary or basic wage of the employee and excludes elements such as overtime, commission, bonus etc. and includes any leave pay (such as pay for annual leave, sick leave, family leave etc.).

   - Include lines like, Public Holiday Not Worked and Unpaid Leave
   - Always exclude Backpay Normal and Notice Pay
   - Leave Pay earning line for Annual Shut Down purposes must be looked at in December each year as the weeks included for leave pay will determine if the line should be

**Take note:** From March 2018, 'employed and remunerated' hours in terms of wage, for employees without a wage regulating measure, refers to ordinary/employed hours only and additional hours more than ordinary hours (such as overtime) should not be considered when determining the 'employed and remunerated' hours for wage.
Employment Tax Incentive 2018

Take Note: It is the user's responsibility to indicate the correct earning lines for wage and to capture the correct amounts on the correct lines to ensure the wage calculation is done correctly.

Step 3: For all Employees
Indicate where the employed and remunerated hours for ETI employees are stored in this company:

**Option 1:** Use the Increase Screen Working Hours per Month/Period
This option will typically be used in a Salary Company where no actual normal working days/hours are processed
If you select this option, you will still have to define unpaid and additional hours in the Calculation Screen and/or Hours Table
If for any reason you want to reduce salary / contractual hours, then make sure to do that on the unpaid leave line.

*Examples:*
* If the company has employees in 1 company who are paid Fixed Salary and some who are paid hourly (Processing hours).
* If salary is prorated (work half a month because on maternity), excluding termination or new employee.

**OR**

**Option 2:** Define Hours on the Hours and/or Calculation Screen table
This option will typically be used in a Weekly/Biweekly company where the client processes Normal Hours Worked and all other hours.
If you have a company where there are hourly paid employees and fixed paid employees, you cannot use option 1 and therefore need to show the system where the fixed salary employee’s normal hours are.
You can do this by setting up a XS line where normal hours and Pro Rata Days/Hours will be stored.

You can setup a method on the XS line that looks like this example below. Remember to convert the days to hours if client enters days and you are going to use this method

```
Hours 01  MethodCalc 2  Hours 01  MethodCalc 3  Hours per Month
```

This XS line must then be flagged on the Basic Co Info Screen

**OR**

**Option 3:** Import Hours to the Employee ETI Screen
This option will typically be used if client does not process any hours in the payroll, but they still need it for the system to calculate ETI.
• ‘Employed and remunerated’ hours are all actual hours the employee was ‘employed and remunerated’ for. In other words, it should be the ordinary hours less any unpaid hours (such as unpaid leave hours, no work-no pay hours, strikes etc.) plus any additional hours (such as overtime hours, public holiday worked hours, hours worked on a Sunday etc.).

• Always exclude all back-pay lines

• If client has two Pro Rata methods on Salary line one for Days and one for Hours but both go to HR01 one of the methods will have to change to send it to a different hours line

Take Note: Temporary Employees – employees are typically ticked for ‘Employee Works Irregular Hours’. The calculated hours entered here will be Ordinary Hours plus Additional Hours of work with Unpaid Hours excluded. However, you can also simply use the Define or Import options in this section for these employees.

If you have never used the Irregular Hours tick on the employee IS screen then the setup done on the Basic Company Information will be sufficient for all types of employees

If you have used the Irregular Hours tick on the employee IS screen:

1. Globally untick the Irregular Hour Tick from the employee IS screen and only use the Basic Company Information Screen – This is the advised option

OR

2. Leave the tick on the IS screen but remember to go and adjust their XS method to include all Unpaid and Additional Hours or setup the XS line to add this method – Not recommended

5. Check Employee Wage Regulating Measure
When you click on this button you will be taken to a list of all the employees in the company, indicating all the employees currently flagged for Wage Regulating Measure on the Employee ETI Screen. This is so that you can check that the conversion did the allocation correctly.

You can print this list or export it to simplify sorting. If there are any errors, you can use the Global Activation to correct it:
Payroll > Global Activation > ETI > Wage Regulating Measure

Did you know? Wage regulating measure refers to a Collective Agreement, Bargaining Council or Sectoral Determination.

Take Note: If the current Wage Code linking is not done correctly for each employee, then VIP is not able to flag employees correctly. You can print or export the list of employees and change Wage Code linking if required.

Remember: You can globally link employees to a wage regulating measure. You can select to link/unlink
• All Employees
• Wage Code (a group of employees linked to a specific wage code)

Verify the Employment Tax Incentive Remuneration Components
(Payroll > Definitions > ETI Definitions). Modify fields if and where required.

Take Note:
The ETI definitions determine the remuneration on which tax incentive is calculated. Inclusion flags will default based on SDL flags.
### ETI EMPLOYEE SETUP

1. For an employee to be a qualifying employee for ETI in a specific month, all the following requirements must be met. The employee must –
   - be employed by the employer (or associated institution) on or after 1 October 2013,
   - be in possession of an RSA ID, an asylum seeker permit or a refugee ID,
   - not be a connected person in relation to the employer,
   - not be a domestic worker,
   - be aged from 18 to 29 years old on the last day of the calendar month, or
   - be employed by an employer operating through a fixed place of business located within a special economic zone (SEZ) designated by the Minister of Finance in the Gazette and that employee renders services to that employer mainly within that special economic zone (SEZ) from August 2018, is
     - receive at least the minimum wage, and
     - receive monthly remuneration of less than R6 000.
   Each employee employed at the employer (or associated institution in relation to the employer) can qualify for ETI for 24 months only. Please ensure that the ETI periods are correct. The ETI amount must be pro-rated if the qualifying employee was not employed and remunerated for a full month.

The system does not cater for late terminations and manual adjustments are required (if applicable).

Example, you have already closed off your payroll and rolled forward the new month. You now get notification that an employee’s record must be terminated for the previous month.

If the employee worked a full month and the termination date is the end of the previous month, that will be fine, if the employee’s termination date is prior to the end of the month, the ETI calculation would have been done incorrectly and will require an adjustment.

Due to a late termination being processed, it is important to ensure that NO ETI calculates for the current period, even if there are earnings due to the employee. The employee is no longer employed and therefore ETI cannot be claimed in the current period.

| The system does not cater for late terminations and manual adjustments are required (if applicable). |
| Example, you have already closed off your payroll and rolled forward the new month. You now get notification that an employee’s record must be terminated for the previous month. |
| If the employee worked a full month and the termination date is the end of the previous month, that will be fine, if the employee’s termination date is prior to the end of the month, the ETI calculation would have been done incorrectly and will require an adjustment. |
| Due to a late termination being processed, it is important to ensure that NO ETI calculates for the current period, even if there are earnings due to the employee. The employee is no longer employed and therefore ETI cannot be claimed in the current period. |

2. Globally link employees to the ETI System Codes:
   - SIC Codes (Mandatory)
   - Minimum Wage Codes
     All employees must be linked to a minimum wage code. If an employee has no wage regulating measure, link #001 for the Standard minimum wage. If an employee has a wage regulating measure, link the appropriate minimum wage applicable to the Bargaining Council Agreement, Collective Agreement or Sectoral Determination.
   - Special Economic Zone Codes (SEZ)

Take Note:
The Minister of Finance has designated the following 6 Special Economic Zones in GG 41759 effective 1 August 2018:

- Coega Special Economic Zone
- Dube Tradeport Special Economic Zone
- East London Special Economic Zone
- Maluti-a-Phofung Special Economic Zone
- Richards Bay Special Economic Zone
- Saldanha Bay Special Economic Zone

From August 2018, the age requirement does not apply if the following two requirements are met:
1. the employer operates through a fixed place of business located within a SEZ, and
2. the employee renders services to that employer mainly within that SEZ

Create a flexi layout to pick up all the fields as mentioned here. Also include the ID number and valid ID tick fields to the layout. Export the layout with header and data to give to the client and let them sign it off to confirm that all the information is correct. Ensure that you have actual copies of the ID documents of each employee with an ID number on the system.

Also check that no valid ID tick is on for employees who do not have an ID number in the system.

3. Tick the correct option for the following employees:
   - Asylum Seeker (Enter Permit Number)
   - Refugee (Enter Refugee Number)
   - Related to Employer (Connected Person)
   - Domestic Worker
   - Irregular Hours tick and linking
     This is only applicable if an employee is a temporary employee for ETI purposes

If you have never used the Irregular Hours tick on the employee IS screen then the setup done on the Basic Company Information will be sufficient for all types of employees.

If you have used the Irregular Hours tick on the employee IS screen;
1. Globally untick the Irregular Hour Tick from the employee IS screen and only use the Basic Company Information Screen – This is the advised option

OR

2. Leave the tick on the IS screen but remember to go and adjust their XS method to include all Unpaid Hours or setup the XS line to add this method – Not recommended

**Take Note:**
A connected person is for example a relative of the employer.

3. **Employee Tax Incentive Tab (Basic Employee Information Screen)**
   A few new fields have been added to the Employee Tax Incentive Tab to cater for the amendments.

   - **ETI Engagement Date**
     Make sure that the ETI engagement date is entered correctly on the ETI screen for each employee.

     **Please Note:** If an employee is employed by an associated institution (company managed or controlled directly or indirectly by the same persons), it will be employment at one employer and must be considered for determining the 24 ETI months. If the employee is employed at a new employer (that is not an associated institution) the 24 ETI month period will start again as it is employment at a new employer.

     It is important to note that if the employee started working for the associated institution prior to 1 October 2013 you need to make sure the Date Engaged in the new company reflects this correct date. The system will not look at the ETI Engagement Date to do the first validation of employment date of 1 October 2013.

   - **Wage Regulating Measure**
     If this option is ticked, it indicates that the employee works in an industry or is doing a job that is regulated by Wage Measures.

     The system will use the selection made in Step 1 on the Basic Company Information and this tick on the Employee’s Employment Tax Incentive Tab to do the comparison.

   - **Employed and Remunerated Hours (Rem)**
     If the Import Hours option has been selected on the ETI Setup Tab, then this field will be enabled.

     The Actual Remunerated Hours, as defined on the ETI Setup Tab, will display in this field.

     Remuneration Hours will be used for the Gross-up Calculation of Remuneration for ETI calculation purposes.

     If the Employee is ticked for Irregular Hours, the Employed and Remunerated Hours (Rem) field will not be displayed, and the Irregular Hours Setup will be used for Remuneration Hours.

     If the Employee is New or Terminated and is not employed for the full month, then you can enter the Days Worked in this Month at the bottom left hand side of the screen. If Days are entered, then the Hours as setup on ETI Setup Screen will be ignored for the current month.

   - **Employed and Remunerated Hours (Wage)**
     If the Import Hours option has been selected on the ETI Setup Tab, then this field will be enabled.

     The Actual Wage Hours, as defined on the ETI Setup Tab, will display in this field.

     Wage Hours will be used in the Gross-up Calculation for the Wage Qualifying Test.

     If the Employee is ticked for Irregular Hours, the Employed and Remunerated Hours (Wage) field will not be displayed, and the Irregular Hours Setup will be used for Wage Hours.
If the Employee is New or Terminated and is not employed for the full month, then you can enter the Days Worked in this Month at the bottom left hand side of the screen. If Days are entered, then the Hours as setup on ETI Setup Screen will be ignored for the current month.

- **‘Number of days worked in this Month’ Message**
  A message will remind you to enter the pro-rata days for Employees who have not worked a full month, due to being a New or Terminated Employee.

  **Please Note:** This field can also be imported via the Flexi Fixed Information Utility.

If you add an Employee with a Date Engaged that starts after the Month Start Date, when you are on the Employee ETI Tab, the following message will be displayed:

- **Rebate Adjustment**
  When an employee is transferred in the middle of a Pay Period, from one payroll company to another, and the companies are related to one another, the employer may not claim more than the maximum for ETI between both companies in the same month.

  This field will only be enabled for input if the employee is engaged after the 1st day of the month or if the employee is terminated before the last day of the month.

Days worked must only be entered where the company does not process hours on the salary or wage line and the ETI setup links employees to their standard hours worked on the Increase Screen.

You need to review your ETI setup to determine if you will be required to enter the days worked or not.
To check for and to correct this scenario:
Print the ETI Transfer Validation Report from Reports > Audit Reports
The report will include all employees:

- with the same South African ID Number / Refugee Number / Asylum Seeker Permit Number,
- employed in a company with the same PAYE Reference Number,
- in the same calendar month (and year)
- AND who qualify for ETI in either one or both companies.

Where necessary, you must enter the Rebate Adjustment for each employee in both companies so that the total of the two Incentives, with their rebates, total the correct value for the month.

---

**ETI HISTORY SCREEN**

The Employee ETI History Screen is accessed from the Payslip Screen by clicking on the <ETI> button on the top ribbon.

**Summary Tab**
The Monthly Incentive Table has been adjusted by a cent in all three the brackets.

**Detail Tab**
The new fields added to the Employee ETI Screen have also been added to the History Screen:

- **Wage Factor:** This is a new field and differs from the Remuneration Factor because it excludes Additional Hours. Wage Hours (Ordinary Hours – Unpaid Hours) / Standard Hours
- **Tax Incentive Revised Calculation:** This is a new display to cater for adjustments that have been entered on the Employee ETI Screen, as displayed in the last field on the right-hand side of the screen. It sets out the revised ETI Calculation for this employee for this month.
- **Hours Worked for Remuneration:** Replaced ‘Hours Worked per Month’.
- **Hours Worked for Wage Test:** Displays the new Wage Hours.
- **Wage Hours:** This is not a new field but will now display the new Wage Hours for Employees without a Wage Regulating Measure.
- **New/Term Days Worked:** Replaced ‘New or Termination Days Worked’.
- **New/Term Additional Hours:** This is a new field for Additional Hours worked by new or terminated employees who have not worked a full month.
- **Rebate Adjustment:** This is a new field for adjustments that have been entered on the Employee ETI Screen. It is also displayed as part of the revised calculation in the Incentive Components block.

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**ETI HISTORY EXPORT**

To simplify the process of importing ETI History for take-on purposes, VIP has created an ETI History Utility Export.

**Export**
You can access the ETI History Export in two ways:

- Main Menu > Interfaces > Import Data > Utility Imports > ETI Take-On
- Main Menu > Interfaces > Export Data > ETI History
You can modify the data, as required, save it as a CSV file and import the amended data into the payroll system.

**Please Note:** If you create an import file, from the export, you can save the CSV file with headings. The import will ignore the headings and counts the position of the data instead.

The Import cater for the fields that are displayed on the ETI History Screen:
- ETI Engagement Date
- Wage Regulating Measure
- Employed and Remunerated Hours (Remuneration Hours)
- Employed and Remunerated Hours (Wage Hours)

THEORY - WAGE QUALIFYING TEST

**Employees with a Wage Regulating Measure:**

**Rate per hour comparison**

The system will check if the employee’s actual wage rate per hour is equal to or more than the required minimum rate per hour and if the employee has Monthly Wage for that month.

**Take Note:** Employees must be linked to the correct Minimum Wage Code.

**Employees without a Wage Regulating Measure:**

**Wage test of R2000**

- If ‘employed and remunerated’ hours are less than 160 hours a gross-up calculation will be done using the actual monthly wage to apply the wage qualifying test.
  - Actual monthly wage (Step 2) / ‘employed and remunerated’ hours (Step 3) x 160
- If the ‘employed and remunerated’ hours are 160 or more the actual monthly wage will be used to apply the wage qualifying test.
  - If the actual monthly wage or grossed-up monthly wage for a full month (at least 160 hours) is R2000 or more, the employee will pass the wage qualifying test.

**Take note:** From March 2018, ‘employed and remunerated’ hours in terms of wage, for employees without a wage regulating measure, refers to ordinary/employed hours only and additional hours more than ordinary hours (such as overtime) should not be considered when determining the ‘employed and remunerated’ hours for wage.
## Employed and Paid Remuneration Hours (in terms of Wage)

- **Permanent employees** – contractual/ordinary hours (average working hours per month according to the BCEA, calculated on a 4.3333 week or according to the employment contract) less any unpaid hours (such as unpaid leave hours, no work-no pay hours).
- **Temporary employees** – actual number of hours worked in the month (the calculation of hours will include ordinary, unpaid hours will automatically not be counted).
- **New and terminated employees** – actual number of hours worked if employed after the first day of the month or terminated before the last day of the month (the calculation of hours will include ordinary hours less unpaid hours).

### THEORY - REMUNERATION - employees WITH and WITHOUT a wage regulating measure

- **Remuneration**
  Monthly remuneration (taxable earnings, taxable perks and taxable company contributions) is used to calculate the employment tax incentive amount.
  - If the ‘employed and remunerated’ hours are less than 160, the system will do a gross-up calculation of the remuneration:
    ➢ `Actual remuneration / ‘employed and remunerated’ hours x 160`
  - If the ‘employed and remunerated hours’ are 160 or more, the system will use actual remuneration.
  - The actual/grossed-up remuneration for the full month has to be less than R6000 for the employee to qualify. If the remuneration for the full month is R6000 or more, the employee will not qualify and no ETI amount will calculate.

The value for ETI Remuneration is still determined according to the ETI Definitions Set-up Screen (Main Menu > Payroll > Definitions > ETI Definitions).
- Calculate the Total ETI Remuneration
- Apply the Factor used in the Wage Qualifying Test to calculate the ETI Remuneration
- If the ETI Remuneration is R6000 or more, no ETI is calculated
- If the ETI Remuneration is less than R6000, refer to the ETI Monthly table to calculate the ETI Tax Incentive value

**Please Note:** If an Employee has no Actual Wage but receives Remuneration (Other Taxable Earnings + Taxable Company Contributions + Fringe Benefits) for the month (e.g. Employees on Maternity Leave, or Commission only earners), then the Employee fails the Wage Qualifying Test and no ETI Tax Incentive will be calculated.

## Employed and Remunerated Hours (Remuneration)

### 3 groups of employees:

- **Permanent employees** – contractual/ordinary hours (average working hours per month according to the BCEA, calculated on a 4.3333 week or according to the employment contract) less any unpaid hours (such as unpaid leave hours, no work-no pay hours) plus any additional hours (such as overtime hours, public holiday worked hours, hours worked on a Sunday etc.).
- **Temporary employees** – actual number of hours worked in the month (the calculation of hours will include ordinary hours plus additional hours of work, unpaid hours will automatically not be counted).
- **New and terminated employees** – actual number of hours worked if employed after the first day of the month or terminated before the last day of the month (the calculation of hours will include ordinary hours plus additional hours less unpaid hours).
### Pro-Rata Incentive Amount

The ETI amount will be grossed down (prorated) if the ‘employed and remunerated’ hours (previously referred to as ‘employed’ hours) are less than 160 hours:

- Full monthly ETI amount / 160 x ‘employed and remunerated’ hours.

If the ‘employed and remunerated’ hours are 160 hours or more the full monthly ETI amount will calculate.

**Take Note:** The VIP system does this calculation. It is however required that the correct hours are entered and flagged/defined.

### ETI take-one

The ETI Take-on allows you to correct incorrect history ETI data

1. Refer to the link below to see which template to use for the take-on
   
   [https://customerzone.sagevip.co.za/doclib/General/ETI%20Amen
dments_How%20to%20do%20an%20ETI%20Take-on.pdf](https://customerzone.sagevip.co.za/doclib/General/ETI%20Amen
dments_How%20to%20do%20an%20ETI%20Take-on.pdf)

   Should you require assistance with an ETI Take-on you can book a consultation

### REPORTS

2. The EMP201 report shows the ETI value for each employee and the total Incentive Value. The report must be printed landscape for the ETI value per employee to show.

3. ETI Submission file from the IRP5 Report can be printed

4. ETI History Report from the History Tab will provide the ETI history per month, per employee

5. ETI Validation Report (Real Number 767)

   The ETI Validation Report will print employees who have an ETI Comment on their ETI History Screen, due to them having no ETI Incentive calculated for the month.

   You can print the report for a specific Range of Analysis Codes or Employee Codes.

   The types of Employees without ETI that can be printed are:

   - Print ALL Employees (without ETI)
   - Print ACTIVE Employees (without ETI)
   - Print TERMINATED Employees (without ETI)
   - Print NEW / TERMINATED in the Current Period Employees (without ETI)

### TRANSFER EMPLOYEES WITHOUT YTD VALUES

Check ETI values to ensure that you do not over claim in the following scenario:

- You have more than one company in your directory with the same PAYE Number;
- You have the same employee in more than one company; and
- You claim ETI for that employee in both companies for a specific month.

**This might happen in cases where you transfer employees without YTD values in the middle of a month.**

### REMINDER

It is your responsibility for maintaining the Minimum Wage Codes.