# Sage 300 People

Release Notes
19.3.1.0

# Table of Contents

# 1.0  Bank Files

## 1.1    Nedbank CPS Bank File

We added the Nedbank CPS Bank file to our list of available bank files.  There are two types of files which can be exported:

- Transaction Instruction File

    o  A 'transaction instruction' file contains all EFT transactions that will be sent to Nedbank for processing

    o  The 'transaction instruction' file will have to adhere to the following naming convention:

       PNGG00.CDPACK. ****I000.D0.SQ320

    o  Nedbank will assign a unique Client Identifier code to each of the CPS corporate clients.  This code can be up to a maximum of 4 digits long.  The **** represents the client identifier (user input field), AAAA, AAA1, etc. This unique code will be incorporated into the file name, as displayed above.

    o  The three digits, represented by 000, is a sequential number (user input field) (starting from 01 and going up to a maximum of 999) that you, should incrementally increase on submission of new files. The sequential numbering will have to be reset every day.

    o  A file should not contain a duplicate file name/file sequence number, as the file will not be processed, even though it may contain new EFT transactions.

Beneficiary Payments

The BDF indicator must always be checked if beneficiary payments are processed.

- Disallow Instruction File

  This is functionality to cancel/stop transactions that had been submitted previously and have not yet been processed/affected. A 'disallow instruction' file will contain a list of all transactions that you can cancelled/stop. All fields within the item layout section of the file will be the same as those of the original transaction (except for the payment reference number field).

  The file-naming convention for a 'disallow instruction' file will be the same as that for the 'transaction instruction' file although the sequence number cannot be the same.

  For a Disallow Instruction file the sequence number and submission date of the original Transaction Instruction must be captured in the relevant input fields at export time. If you are unsure, please contact your Nedbank consultant for assistance.

**Note:**

You must import the new bank file XML template before you will be able to use it. Please contact the Sage 300 People support desk for the XML template and instructions on how to import the template.

On the Navigation pane:

| | |
|---|---|
| Expand | **Company Management** |
| Double-click on | **Payments** |
| Click on | **New** |
| Navigate | **CPS Nedbank (Peer to Peer)** |

Bank File Header Definition screen
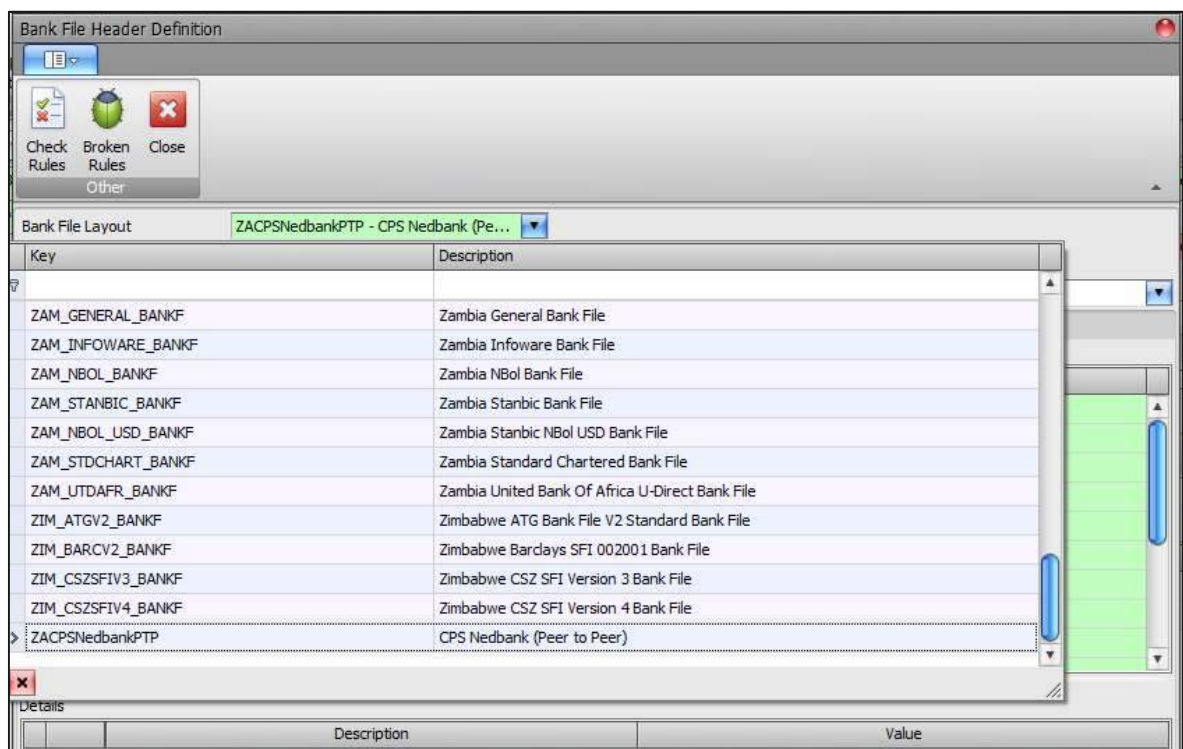


The following values must be confirmed and completed on the Bank File Header Definition screen for the Nedbank CPS bank file:

| Field | Details |
|---|---|
| Client Identifier | This unique code will be incorporated into the file name.<br><br>Example file name: PNGG00.CDPACK. ****I000.D0.SQ320.<br><br>The ****represents the client identifier |
| Sequential Number | Sequential Number must be incremented by 1 for each new file submitted on the same day. The sequential numbering must be reset every day. |

| | |
|---|---|
| Client Type | Display dropdown menu with the following options:<br><br>01 – Financial Institution<br><br>02 – Private Client<br><br>03 – Private non-residential client |
| Client Profile Number | This is a unique number that Nedbank will assign |
| File Type | Display dropdown menu with the following hardcoded options:<br><br>01 – Transaction Instruction (default)<br><br>02 – Disallow Instruction |
| Nominated Account Number | The customer's account number |
| Charges Account Number | Account from which CPS charges/fees will be drawn for this file |
| Statement Narrative | Narrative to appear on the statement of the client. |
| Action Date | Represents the date the transaction must be processed |
| Reference | This is the reference that will appear on the destination account statement |
| Submission Date | Represents the date the transaction is submitted |
| Service Type | Display dropdown menu with the following hardcoded options:<br><br>01 – SDV<br><br>02 – RTL<br><br>15 – RTC<br><br>03 – One-day |

| | |
|---|---|
| | 04 – Two-day |
| Nominated Account Reference | This is the nominated reference that will reflect on the nominated account statement |
| File Status | P – Live (default)<br><br>Q – Test |
| BDF Indicator | Selection box option. This is only applicable for beneficiary payments |
| Disallow Original Sequential number | The sequence number of the original Transaction Instruction file must be entered for a Disallow Instruction file. |
| Date of Original submission file | The submission date of the original Transaction Instruction file must be entered for a Disallow Instruction file |

**1.2    Kenya Eco Bank iBank Salary File**

**1.2.1    Detail**

We added the Kenya Eco Bank File to our list of available bank files.

The export file is a comma-delimited CSV file with variable field lengths.  The file consists of one Header Record, multiple Detail Records and one Trailer Record.

- The default File Name format is DD Month YYYY Salaries.CSV, e.g. 25 May 2019 Salaries.CSV

The maximum number of transactions allowed per batch file is 10 000. Multiple batch files will be created if there are more than 10 000 transactions.

If a transaction's net pay amount is greater than 1 000 000.000, then the Beneficiary City and Large Currency Indicator fields become mandatory.

> **Note:**
>
> You must first import the new bank file XML template before you will be able to select the layout when setting up the ACB Payment.  Please contact the Sage 300 People support desk for the XML template and instructions on how to import the template.

**1.3    Mauritius Frontier Pay Bank File**

**1.3.1    Detail**

We added the Frontier Pay Bank File to the list of available bank files in the Sage 300 People application. The file is an excel sheet with a file extension of .xls.

The Frontier Pay bank file has no limitations to the amount of transactions that may export or the amount on the net pay line.

The default file name format is Frontier Salary Bank File Month-Year.xls eg:

- Frontier Salary Bank File May-2019.xls

- Xls. is the fixed extension

> **Note:**
> You must first import the new bank file XML template and the XML Lookup File before you will be able to select the layout when setting up the ACB Payment. Please contact the Sage 300 People support desk for the XML template and instructions on how to import the template.

**1.3.2    User Input Fields on Bank File Header Definition Screen**

On the Navigation pane:

| | |
|---|---|
| Expand | **Company Management** |
| Double-click on | **Payments** |
| Click on | **New** |

Bank File Header Definition screen



| Field Name | Type | Detail |
|---|---|---|
| Direction | Alpha | This is a dropdown field which with 2 options:<br><br>• BUY (default)<br><br>• SELL<br><br>This will be used to indicate the Direction of the payment amount |
| Product | Alpha | This will default to SPOT, but the field may be changed<br><br>User to change value if required<br><br>This will be used to indicate the product in which the payment will be executed |
| Beneficiary Reference | Alphanumeric<br><br>Free text | This is an input field that will default to Salary |

| Field Name | Type | Detail |
|---|---|---|
| Value Date | Date<br><br>DD/MM/YYYY | Date field will default to the current system date but can be changed |

## 1.4    Mauritius MCB Bank File

### 1.4.1    Detail

We added the Mauritius MCB Bank File to our list of available bank files.

The export file is pipe-delimited text file with variable field lengths.  The file consists of one Header Record, one Debit Record and at least one Credit Record.

The default File Name format is BP-9999999999.TXT

- 'BP-' and .TXT are fixed

- 9999999999 = Customer Number

There is no limit on number of transactions allowed per batch file and no limit on the amount per transaction.

> **Note:**
>
> You must first import the new bank file XML template and the XML Lookup File before you will be able to select the layout when setting up the ACB Payment.  Please contact the Sage 300 People support desk for the XML template and instructions on how to import the template.

### 1.4.2   User Input Field on Bank File Header Definition Screen

On the Navigation pane:

| | |
|---|---|
| Expand | **Company Management** |
| Double-click on | **Payments** |
| Click on | **New** |

Bank File Header Definition screen



You need to complete and confirm values for the following fields on the Bank File Header Definition screen for the Mauritius MCB Bank Payment:

| Field Name | Type | Length | Mandatory / Optional | Detail |
|---|---|---|---|---|
| Customer Number | Alpha numeric | 10 | M | This is an input-based field that will default to 9999999999<br><br>This value is used in the default file name of the export file |

| | | | | |
|---|---|---|---|---|
| Payment Purpose Code | Alpha numeric | 2 | M | Input based field |
| Company Account Number | Alpha numeric | 12 | M | Input based field that will default to the Entity Account No defined on the Company screen, if no value is defined then it will be blank |
| Payment Date | Date YYYY MMD D | 8 | M | This is a user input field that will default to the current system date |
| Payment Reference | Alpha numeric | 35 | M | This is an input field that will default to the word SALARY. You may overwrite the default |
| MACSS Flag | Alpha Dropd own Field | 1 | M | Dropdown field with 2 options – user to make single select: <br><br>• Yes <br><br>• No <br><br>**Note:** This field is used to indicate if employees are paid via swift or not. If the company has both employees that is paid via swift, and not via swift, the user will have to create two separate payments, link employees to applicable option and create two separate bank files – one for swift and one without swift. |

## 1.5    HSBC ifile Bank file Malaysia

After we released the HSBC ifile Bank File for Malaysia, we received feedback from customers that we had to make amendments to the export file to ensure a successful upload of the file.

The following changes were made to the export file layout:
- First Party Account Institution Code is now a user input field on the Layout Screen.
- Second Party Identifier is now the employee code and not a running count
- Remove the Extra comma separator between the Transaction Code and the Second Party Transaction Amount
- Entry Value Date the format is now YYYYMMDD

**Note:**
You must first import the updated bank file XML template to apply the above changes.  Please contact the Sage 300 People support desk for the updated XML template and instructions on how to import the template.

# 2.0  Angola Tax Country

## 2.1  Overview

In this release, we have included the statutory calculations and reports for Angola.

The latest monthly tax tables for the 2019 Tax Year is available in this file:

| Taxable Income Bracket | | | Tax Rate on Bracket |
| --- | --- | --- | --- |
| From | To | Fixed Amount | Percentage |
| 0.00 | 34 450.00 | 0.00 | Exempt |
| 34 450.01 | 35 000.00 | 0.00 | + 100% of excess over 34 450.00 |
| 35 000.01 | 40 000.00 | 550.00 | + 7% of excess over 35 000.00 |
| 40 000.01 | 45 000.00 | 900.00 | + 8% of excess over 40 000.00 |
| 45 000.01 | 50 000.00 | 1 300.00 | + 9% of excess over 45 000.00 |
| 50 000.01 | 70 000.00 | 1 750.00 | + 10% of excess over 50 000.00 |
| 70 000.01 | 90 000.00 | 3 750.00 | + 11% of excess over 70 000.00 |
| 90 000.01 | 110 000.00 | 5 950.00 | + 12% of excess over 90 000.00 |
| 110 000.01 | 140 000.00 | 8 350.00 | + 13% of excess over 110 000.00 |
| 140 000.01 | 170 000.00 | 12 250.00 | + 14% of excess over 140 000.00 |
| 170 000.01 | 200 000.00 | 16 450.00 | + 15% of excess over 170 000.00 |
| 200 000.01 | 230 000.00 | 20 950.00 | + 16% of excess over 200 000.00 |
| 230 000.01 | And above | 25 750.00 | + 17% of excess over 230 000.00 |

No tax rebates or credits

> **Please Note:**
>
> If you already have an Angola company, please contact your consultant for assistance to convert your existing Angola Company to use the official Angola generic tax file.

Once you have converted to use the official Angola tax file, the employees should be linked to one of the following Tax Status on the employee's active tax record:

- Statutory Tables with Non-Resident flag unticked used for Angola Citizens

- Statutory Tables with Non-Resident flag ticked used for Angola Non-Citizens

- No Tax

The following Reports are available under Reports – Country Specific Reports:

| Report | Monthly | Quarterly | Annual |
|---|---|---|---|
| IRT Monthly Report | | | |
| IRT Annual Report | X | | X |
| INSS Monthly Manual Report | X | | |
| INSS Electronic Report | X | | |

## 2.2    IRT Monthly Report

The Monthly IRT Report must be submitted each month to the local tax office within a calendar month following the one in which the payment was made.  It contains income and tax detail per employee for the specific month within the current tax year.

## 2.3    IRT Annual Report

The Annual IRT Report must be submitted each year to the local tax office.  It contains income and tax detail per employee for the specific month within the current tax year.

## 2.4    INSS Monthly Manual Report

The INSS Manual report are submitted monthly to the National Social Security Institute with detail of employee's income and the INSS contribution total.  The manual one is still

accepted by the INSS for employers who have less than 20 employees. We don't know how long they will keep accepting the old version.

## 2.5    INSS Electronic File

The employer is required to pay the contributions and submit the electronic return on or before the 10th of the following month, except in special schemes where other deadlines were determined.

When running the report, a text file for submission purposes is generated as well as a reconciliation report.

# 3.0 Arabic Language Localisation

From this release onwards you will have the ability to translate the Sage 300 People application from English to a different language, in order to do so you must set up Language Localisation and import a dictionary list.

> **Note:**
>
> In this release, we translated and updated the language dictionary into Arabic only. If the system must be translated to a different language the dictionary must be exported, and the customer will have to complete the translation and then import the new language.

## 3.1 Localisation Language Mapping

The first step to set up other languages for the system to be translated in, is to add the Languages Types as per the user's requirements.

On the Navigation pane:

| | |
|---|---|
| Expand | **System Tools** |
| Expand | **Localisation Setup** |
| Double-click on | **Localisation Language Mapping** |

In the Language Type fields, select English for Language Type 1 and then from Language Type 2 to 10, select the other required languages to be used for translations, e.g. Arabic.
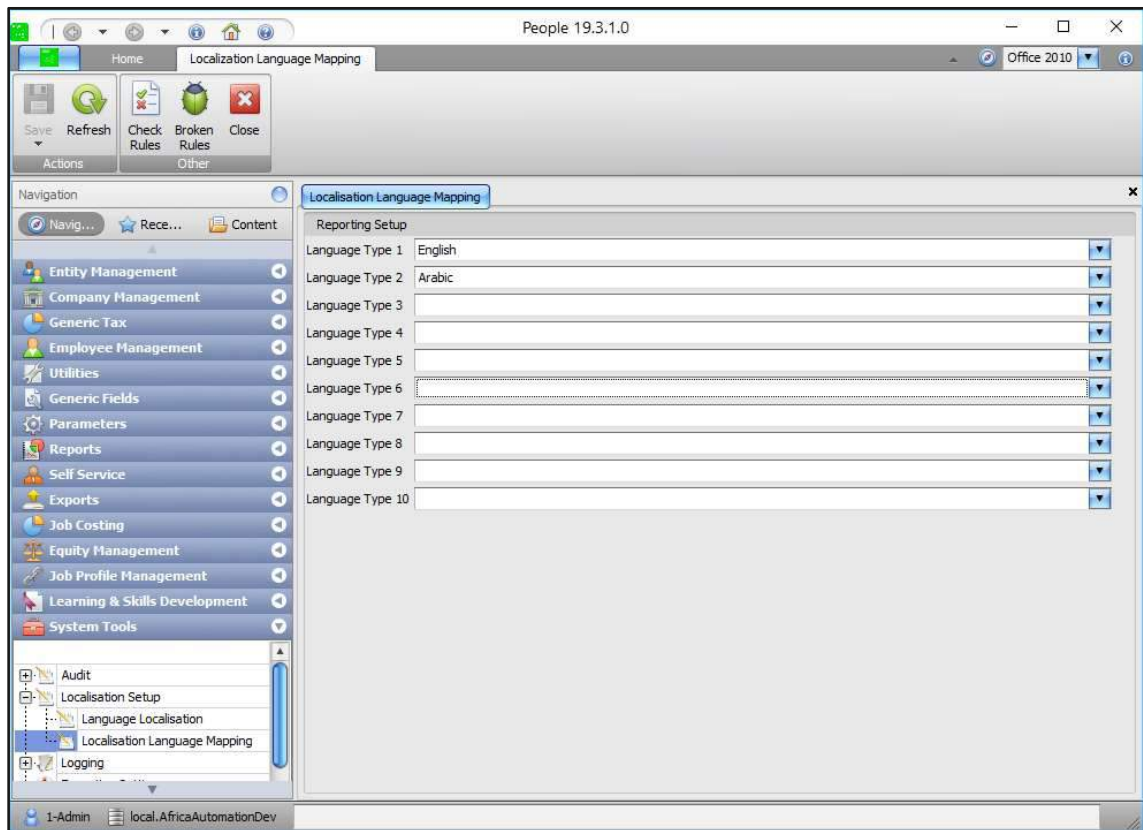
### 3.1.1 Language Localisation

After you have selected the Language Type for Arabic, you must import the Excel language dictionary with the Arabic translations – please note this can take some time to import.

Save the excel dictionary sheet with the Arabic translation in a location from where you will be able to import it into the Sage 300 People application.

On the Navigation pane:

Expand                          **System Tools**
Expand                          **Localisation Setup**
Double-click on                 **Language Localisation**

Select the Import Data button to start the import process.
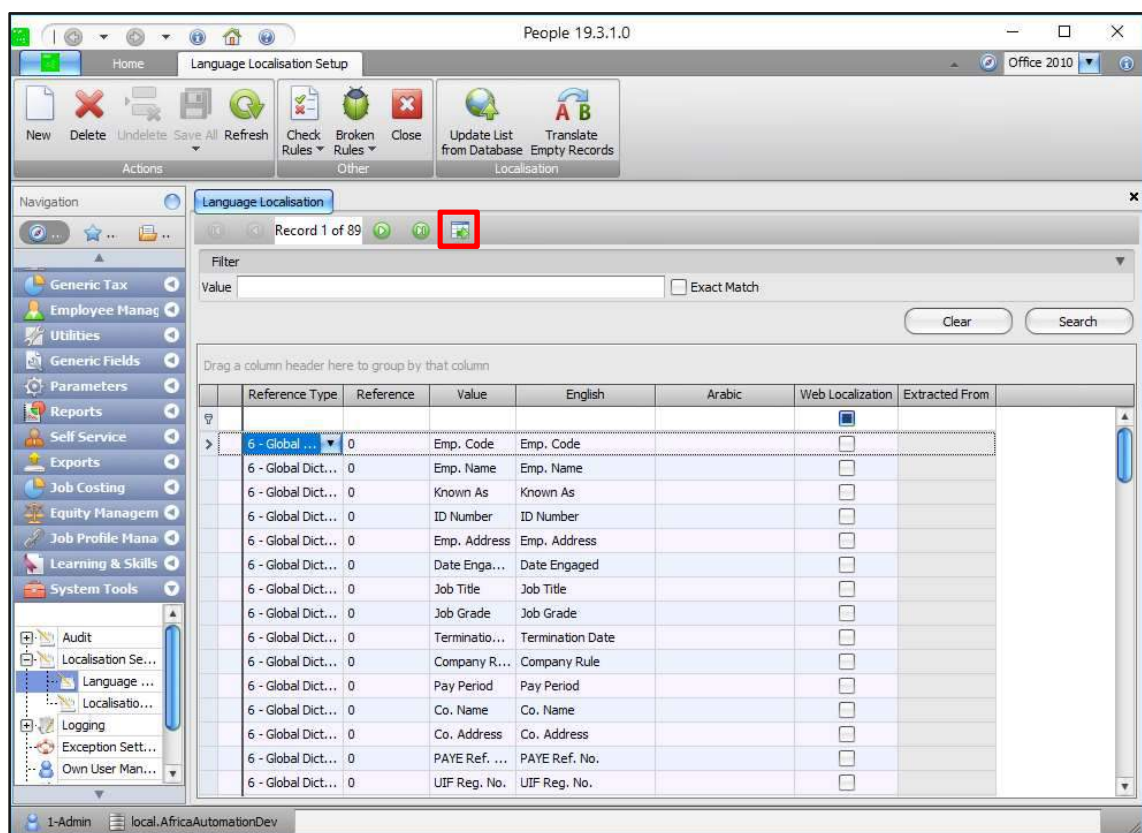


Browse to the location where the excel Arabic dictionary sheet was saved, select the file and the import process will start.  Once the importing is complete, a message will indicate how many records were processed and updated.

> **Note:**
>
> The user will have to save the changes after all the records were imported – there will not be a message to indicate that changes must be saved.

The Arabic translations will now populate the Language Localisation screen in the Arabic language column.
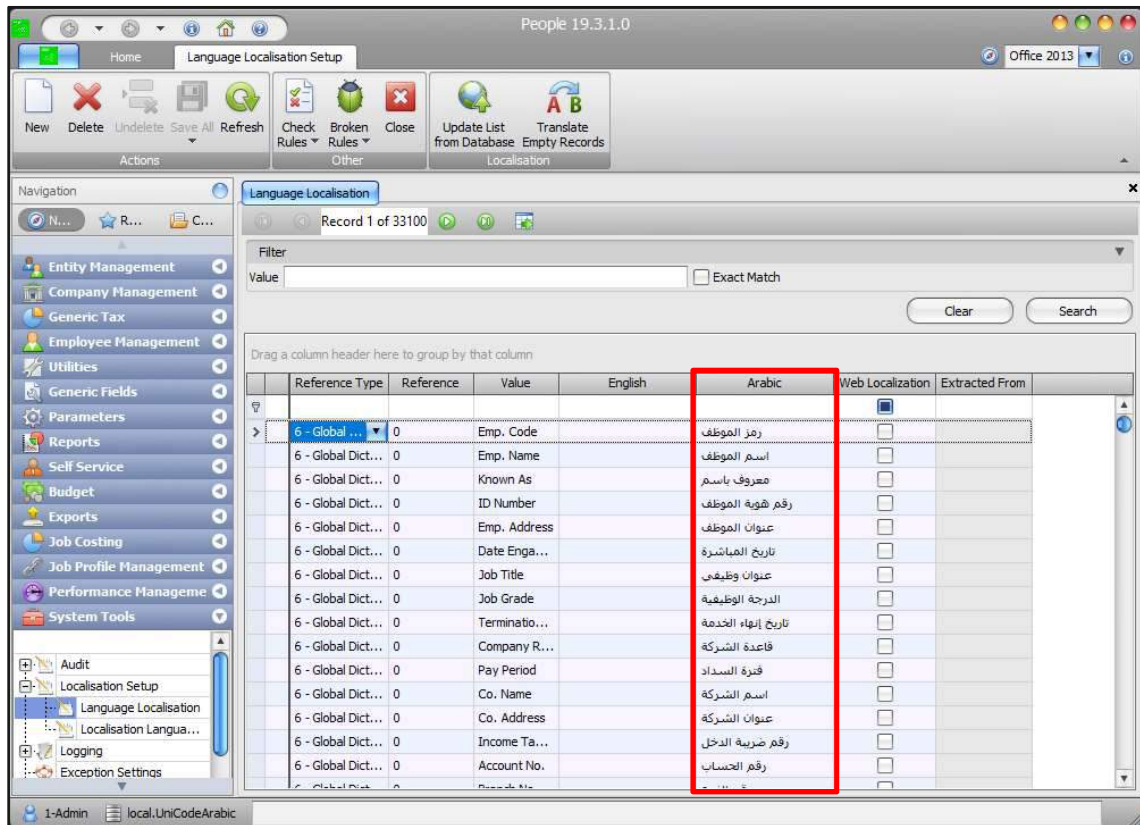


> **Note:**
>
> If you want to translate the system into any other language, e.g. Afrikaans or French, you can right-click on the language dictionary grid on the Language Localisation screen and export all the values to excel.  Once you have translated all required values, you can then import the sheet again – make sure the required language is defined as a Language Type.  If you did not define the required Language Type, there will not be a column on the language dictionary on the Language Localisation screen.

### 3.1.2   Update List from Database

To add user-defined fields or parameters to the language dictionary, the Update from Database function can be used.
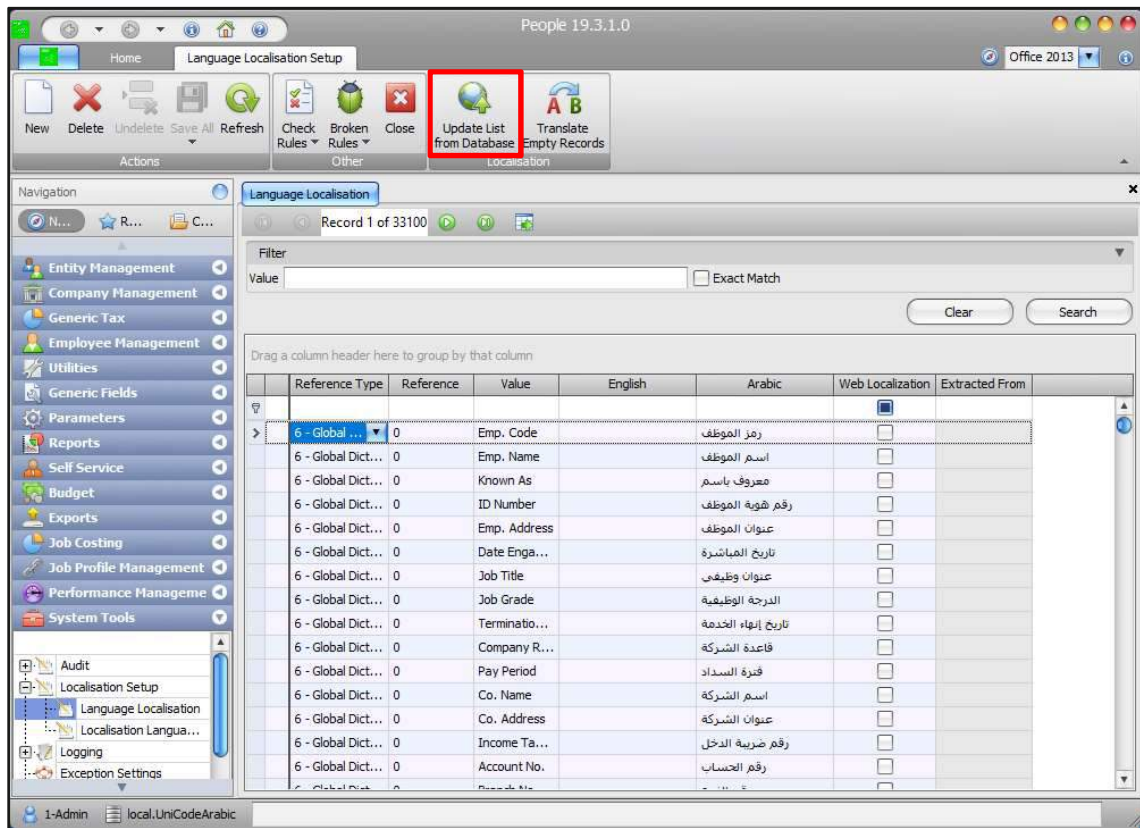
The following options are available when selecting the Update List from Database:

- Custom Description – this option will update the language dictionary by adding all fields in the Sage 300 People application that was specifically excluded from the dictionary because of the Arabic language localisation, e.g. RSA ETI Statutory screens and fields is not in the dictionary by default, but if a RSA user wants to translate these fields, they can use this option to add the fields to the dictionary – please note this option my take some time to update the dictionary.  This option can also be used when the user added custom descriptions, e.g. Hierarchy Codes, New Company Rules, etc.

- Parameters – the user can select specific items under the Parameters navigation header to be added to the dictionary, e.g. if new Job Titles, Memos, Nature of Contract, Job Grades, etc. was added then the user can select the items to be added to the dictionary for translation.

- Licence Objects – this option is for module specific items – it is advisable to not use this option as the dictionary list already has all the module fields.

### 3.1.3   Add Language on Company

Once the language dictionary is updated, the user must define the required language on company level.

On the Navigation pane:

| | |
|---|---|
| Expand | **Company** |
| Double-click | **Company** |
| Double-click on | **Required Company where language must be defined** |
| Click on | **Company Detail** |
| Click on | **Languages** |

Add the required languages to be used for the selected Company – it is recommended to make English the default language.
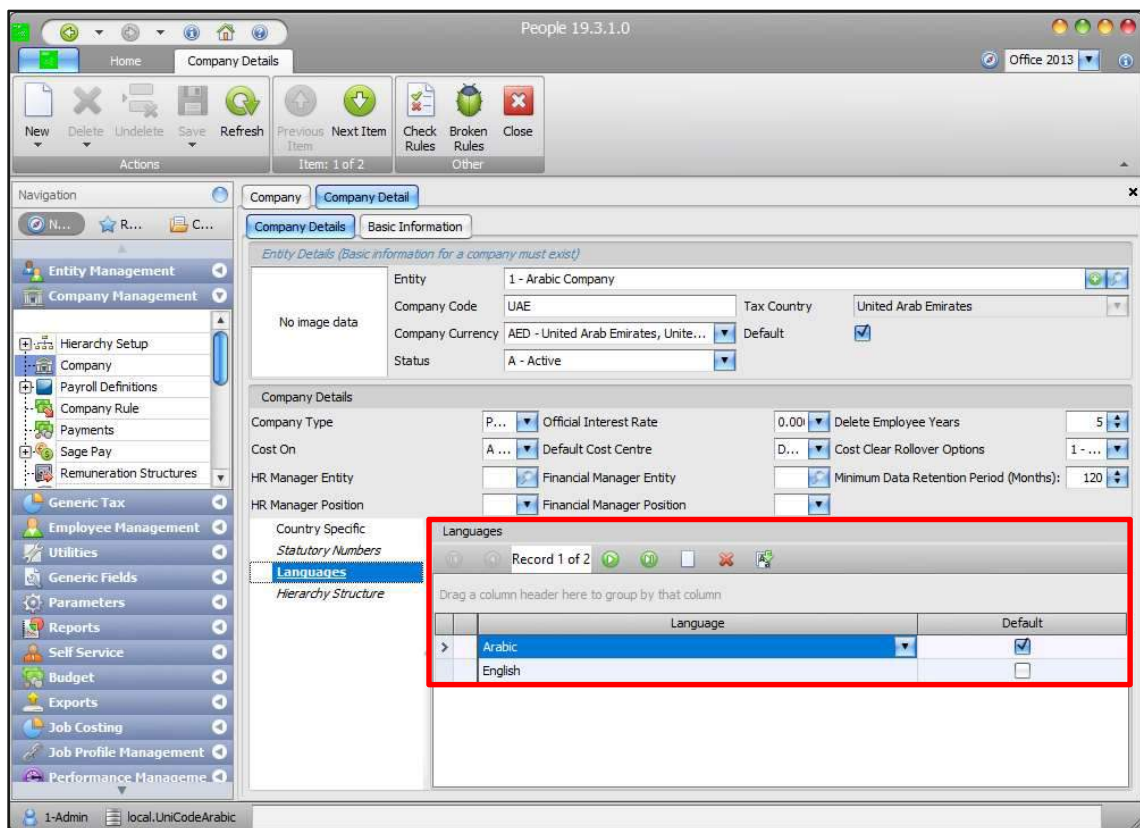


### 3.1.4   Change User Language

The default language of the Sage 300 People application is English.  If a user wants the application (not applicable to Self Service – different requirements apply) to be translated in the person's preferred language, e.g. Arabic, the user will first log in to the system as and English user.  Then only can the user change the default language he or she prefers.
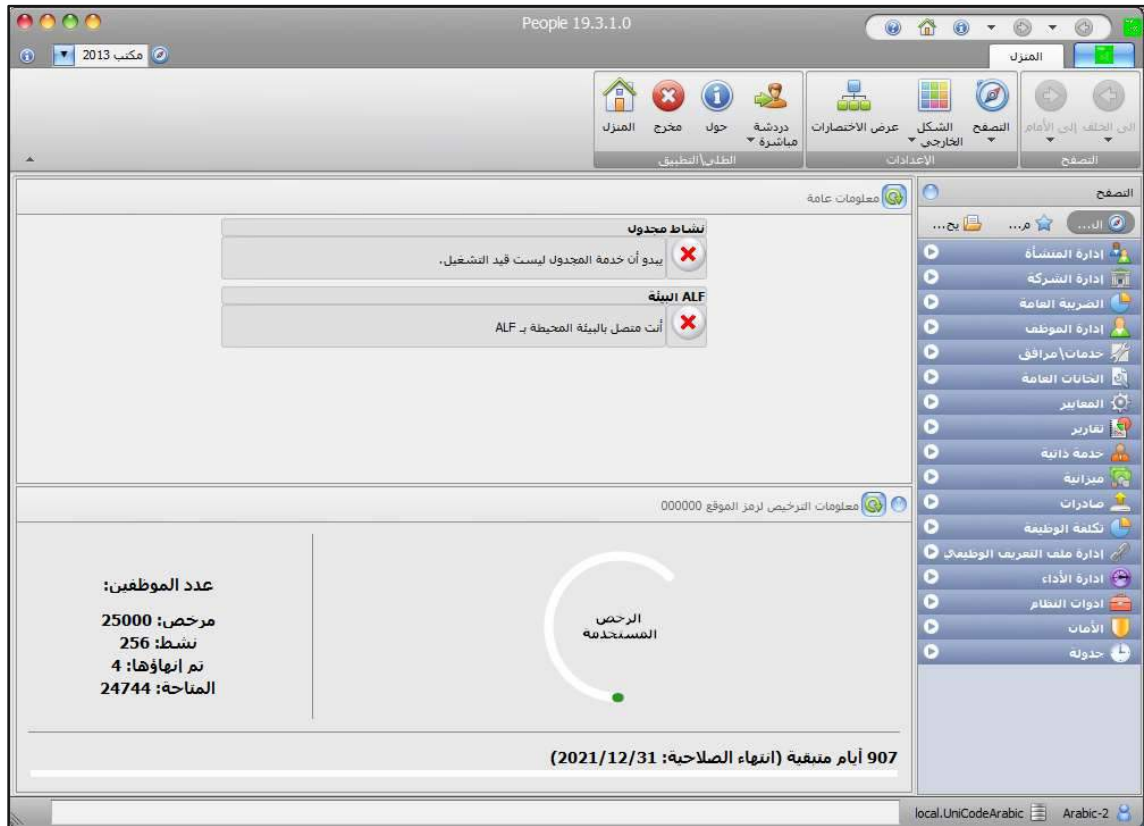
On the Navigation pane:

| Expand | **System Tools** |
|---|---|
| Double-click | **Own User Management** |
| Click on | **Default Language** |

From the dropdown field, select the language the user wants to use, e.g. Arabic.
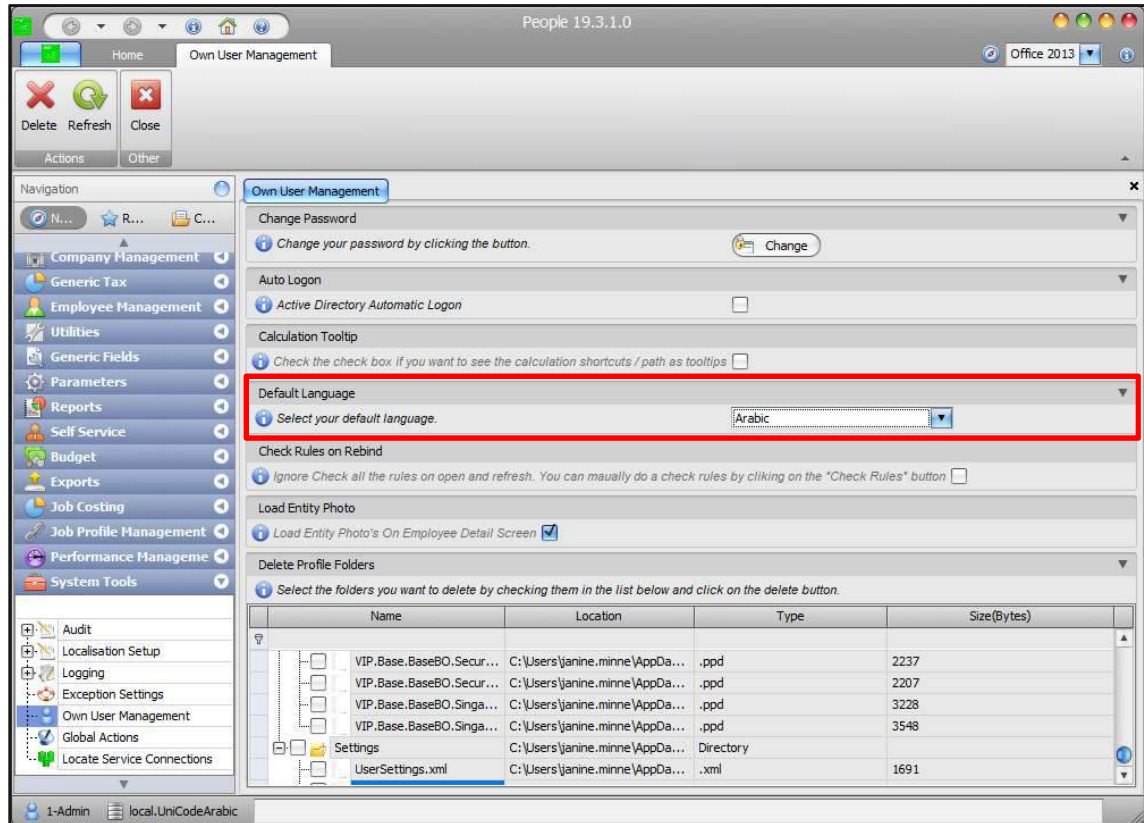


After selecting the required language, log out of the Sage 300 People application and then log in again – the system will now be translated to the selected language of the user (if the language is in the dictionary and the fields are translated). If the selected language is Arabic, the application's screens will be switched from right to left.

### 3.1.5   Employee Communication Language

The existing field for "Payslip Language on Employee Detail was renamed to "Communication Language".

On the Navigation pane:

| | |
|---|---|
| Expand | **Employee Management** |
| Double-click | **Employees** |
| Click on | **Employee Detail** |
| Click on | **Details** |

This Communication Language field determines the language that will be used in the email notifications that the employee will receive, as well as the language the employee's payslip will be printed in.

The following logic is used to determine the language to be used for mail notifications:

- The employee's Communication Language will be used for email notifications.

- If no Communication Language is selected for the employee, then the Company's default language will apply.

- On Company Detail, there can be more than one language defined. The default flag will indicate which language will be used for the notifications.

- If none of the Company Languages are flagged as the default language, then the notifications will default to English.

- Notifications are sent out per entity record but the language template to be used for the notification is determined on Employee or Company level. Per entity there can be more than one active employee record or more than one record in multiple companies. To determine which employee record to use for notification language when there is more than 1 employee record per entity:

  o If there is more than 1 employee record per entity, then first check for the latest employee's Date Engaged value and use this record.

o   If there are multiple employee records with the same Date Engaged, then use the last (maximum) EmployeeID.

## 3.2    Reporting in Other Languages

Users have the option to select the language that must apply when printing reports from the All Reports menu.  The Options Tab on the Report Filter screen was updated to provide alternative language options for the reports.



### 3.2.1   Reports Excluding Payslips

For all the reports on the All Reports menu, but excluding the standard Payslip and the Job Costing Payslip reports, the following Language options are available:

- User Language

    o   This is a new option – if this option is selected, the logged in user's language (as selected on Own User Management) will apply on the report.

    o   This is the default option for all reports but excluding the payslip reports.
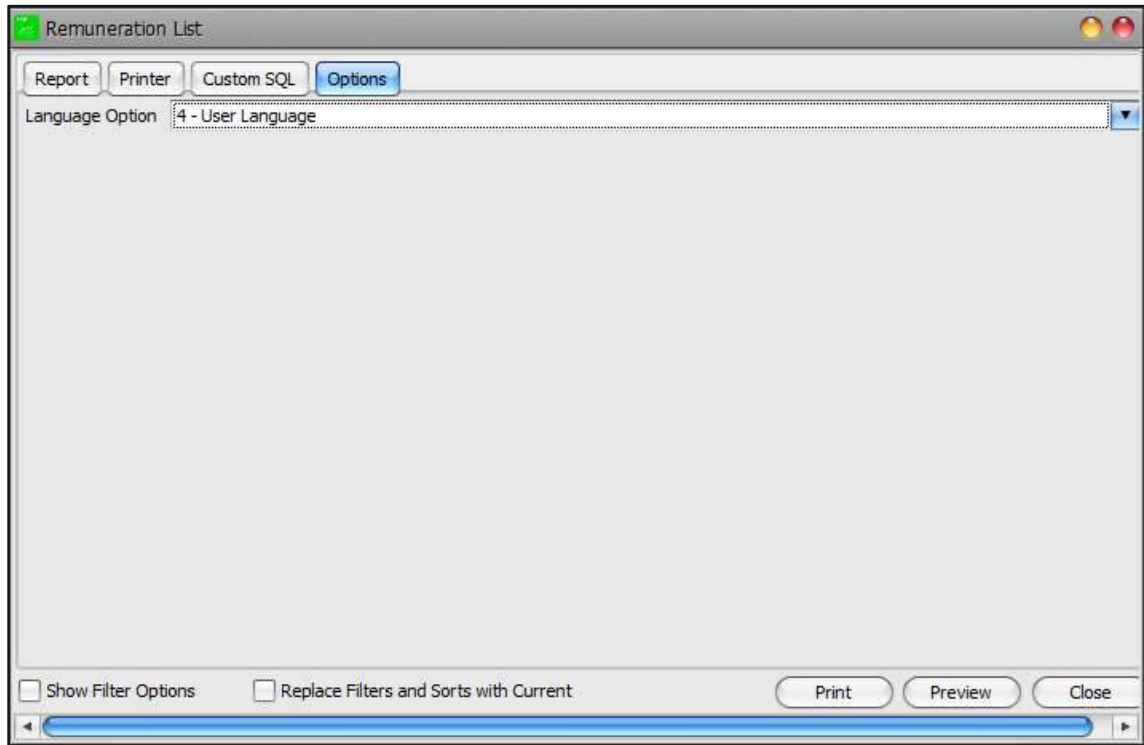
- Specified Language

  - This is an existing option that the user can select for report printing.

  - By selecting this option, the user can select the required language the report must be printed in, e.g. the logged-in user's language is Arabic, but the user must print the report in English for the CEO whose preferred language is English.

  - The Language dropdown field only displays the languages as defined in the Language Dictionary under System Tools > Language Localisation.

  - The existing options for Employee Report Language and Company Rule Language was removed.

### 3.2.2   Payslips Excluding Reports

For the Payslip reports (both standard and job costing), the following language options are available:
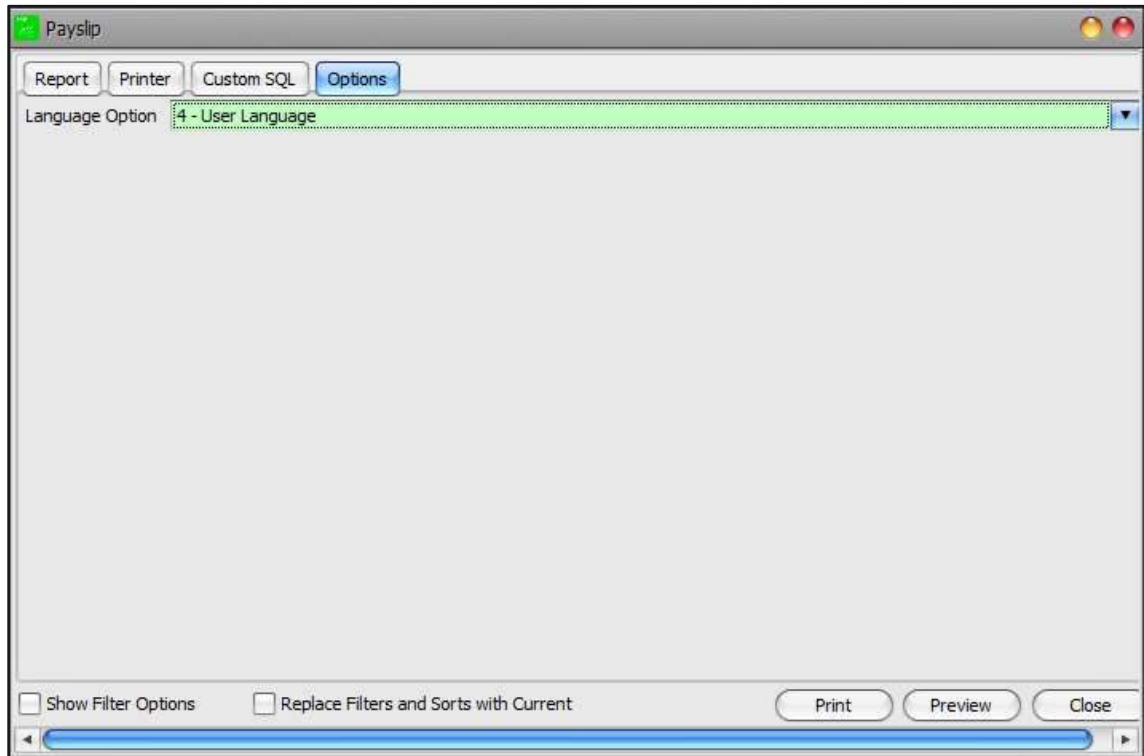
- Employee Report Language

    - This is an existing language option

    - It is the default option for payslip

    - If this option is selected, the employee's Communication Language on the Employee Detail screen will be used to print the employee's payslip.
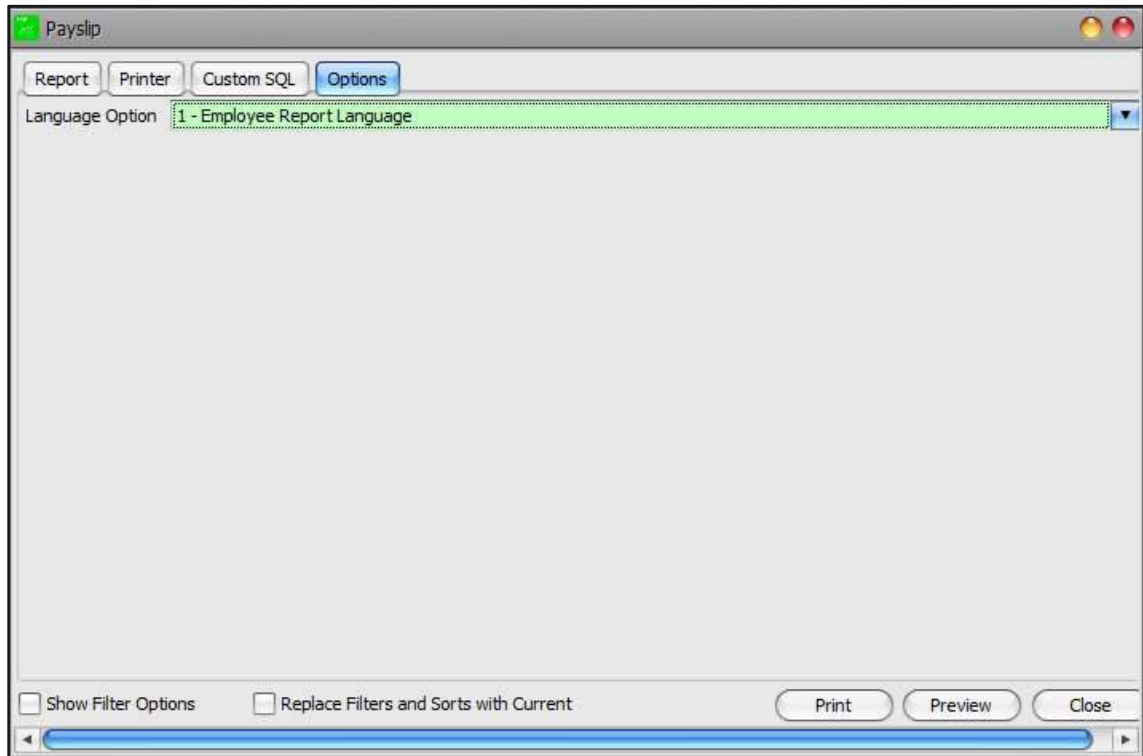
**Note:**

When printing payslips for employees with a Right to Left language, e.g. Arabic and employees with Left to Right languages, e.g. English, the user's language will determine if the payslips will be aligned from Right to Left or Left to Right – irrespective of the employee's Communication Language. You cannot print combined Right to left and Left to Right payslips. It is therefore advisable to rather print the Arabic and English payslips separately.
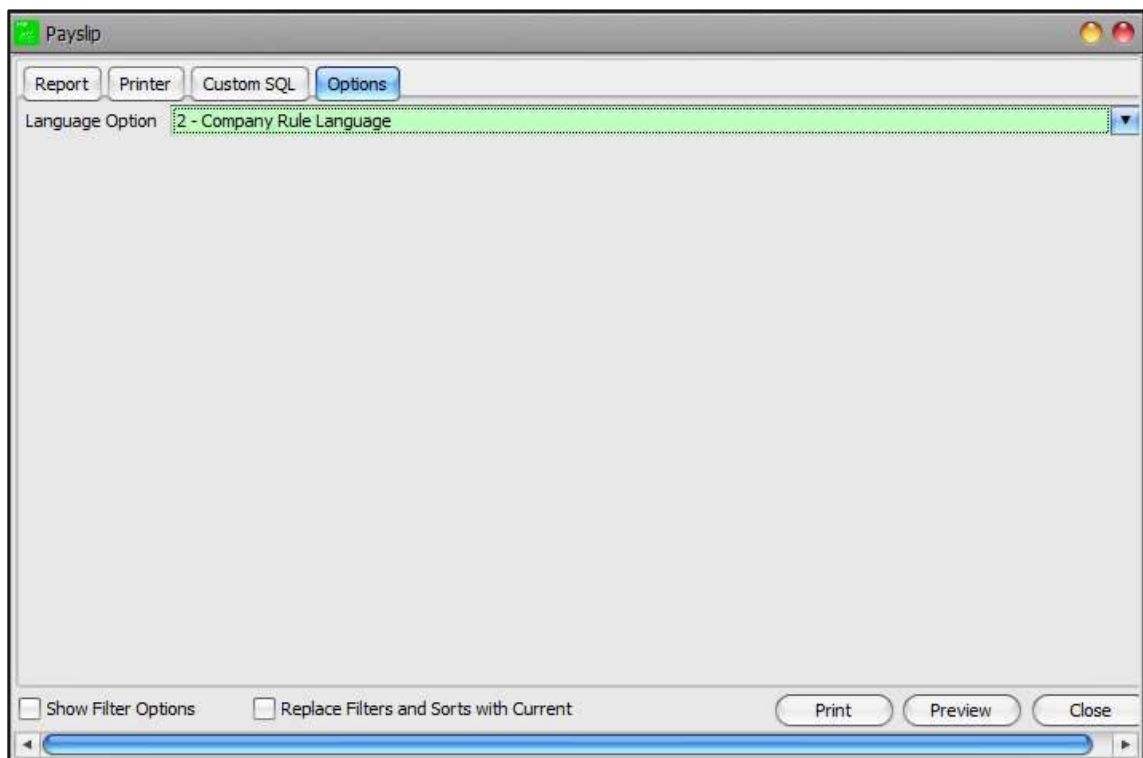
- User Language

    o  This is a new option – if this option is selected, the logged in user's language (as selected on Own User Management) will apply on the report.

- Specified Language

  - This is an existing option that the user can select for report printing.

  - By selecting this option, the user can select the required language the report must be printed in, e.g. the logged-in user's language is Arabic, but the user must print the report in English for the CEO whose preferred language is English.

  - The Language dropdown field only displays the languages as defined in the Language Dictionary under System Tools > Language Localisation.
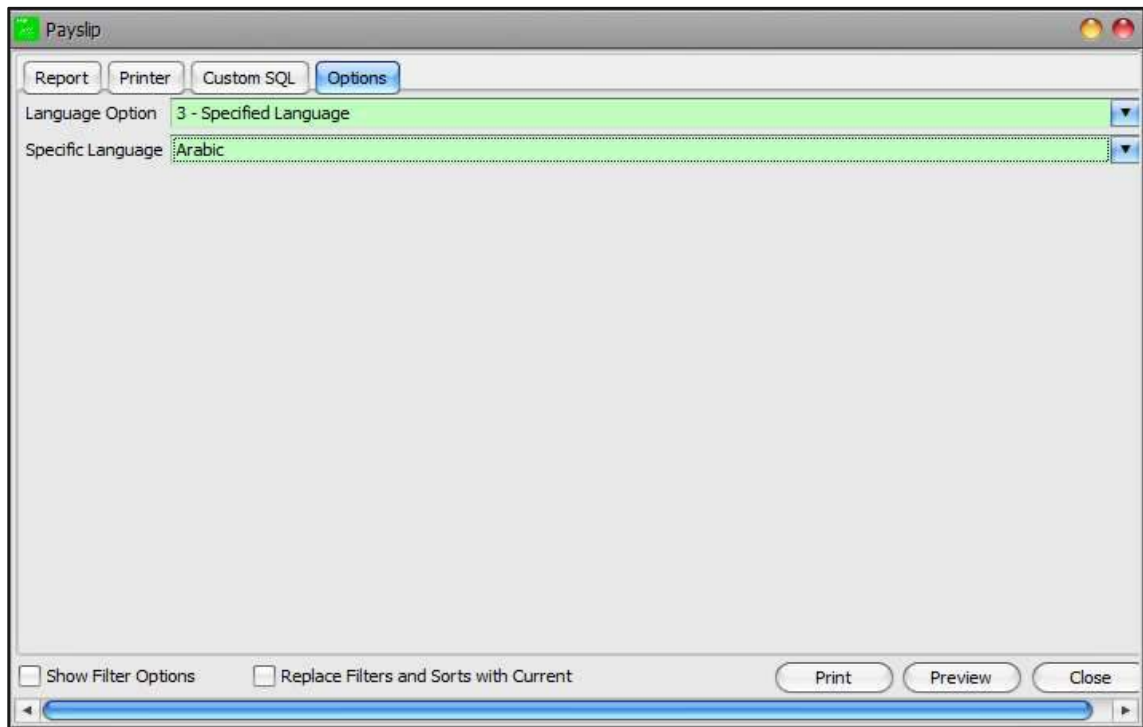
- Company Rule Language

  - This is an existing option

  - When selecting this option, the report uses the Report Language Type specified on the Default Rules Screen on Company Rule.

**Summary of the Rules applicable for Language Options when printing the Reports and Payslips**

Payslips

| Language Options | 1 = Employee Report Language | 2 = Company Rule Language | 3 = Specified Language | 4 = User Language |
|---|---|---|---|---|
| **English User** | The entire report will be LTR but will be printed in the employee's communication language | The entire report will be LTR and printed in language defined on company rule | The entire report will be LTR if specified language is not Arabic, else RTL. The payslips will print in the specific language the user selected | The entire report will be LTR and printed in English |
| **Arabic User** | The entire report will be RTL but will be printed in the employee's communication language | The entire report will be RTL and printed in language defined on company rule | The entire report will be LTR if specified language is not Arabic, else RTL. The payslips will print in the specific language the user selected | The entire report will be RTL and printed in Arabic |

Non-Payslip Reports

| Language Options | 1 = Employee Report Language | 2 = Company Rule Language | 3 = Specified Language | 4 = User Language |
|---|---|---|---|---|
| **English User** | N/A | N/A | The report will be LTR if specified language is not Arabic, else RTL. The report will print | The report will be LTR and printed in English |

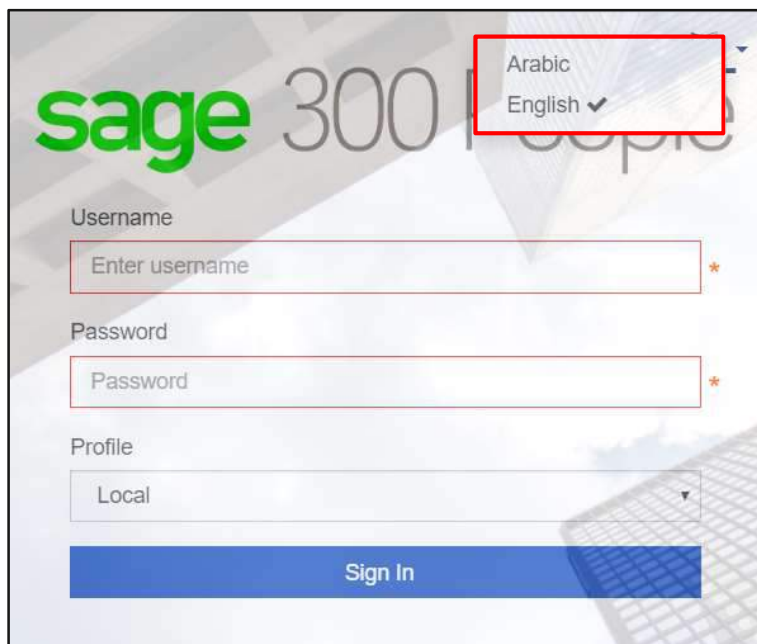| | | | The report will be LTR if specified language is not Arabic, else RTL. The report will print in the selected language | |
|---|---|---|---|---|
| | | | in the selected language | |
| **Arabic User** | N/A | N/A | The report will be LTR if specified language is not Arabic, else RTL. The report will print in the selected language | The report will be RTL and printed in Arabic |

### 3.3    Translation on Web Self Service

When launching Web Self Service, the default language is English.

If the user wants to change the language for Web Self Service, they can select the required language option from the dropdown on the top-right corner of the screen.
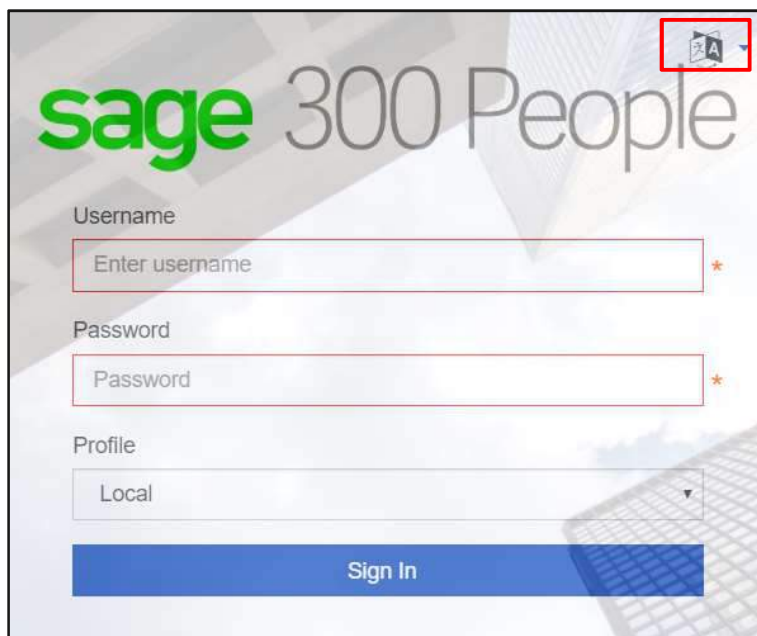
Once the user for example selected Arabic, the login screen will switch to Arabic and the rest of the application as well.
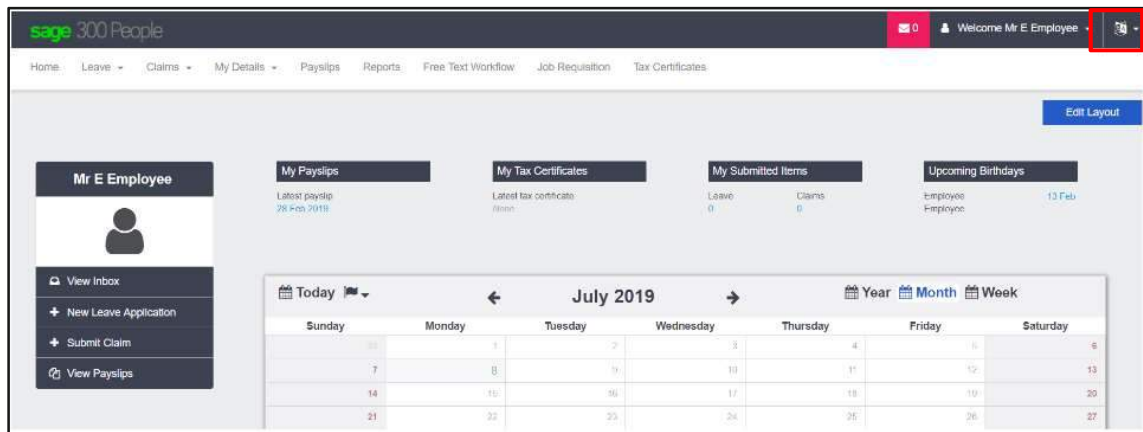




The user will also be able to switch the language once logged in to the application.

## 3.4    Items to Note

- The Login Screen for the Sage 300 People application will not translate or switch to Right to Left, because at this point the application does not yet know what the language preference is of the user that is busy logging in

- Usernames and Passwords will not be translated.  If the username and password was created in English, it will remain in English.  If a username and password must be in different language, then it must be created in the applicable language

- Calendar's display will default to the operating system's regional settings

- Using numbers, with spaces in text fields, e.g. Telephone numbers, with right to left scripts, will change the order of the numbers, e.g. (012) 420 7000 will display as 7000 420 (012)

Left to Right (LTR)



Right to left (RTL)

- Code fields – it is not recommended to translate Codes as this can affect custom calculations

- Email Addresses do not translate as it must remain the same as an ASCII character email address

- The language translation cannot handle words/phrases which have multiple meanings

    o For example, "I" can refer to me as a person or it could mean 'Inactive' in the People system – though it is very unlikely that "I" as a person will appear in People as a text

- For export batches (e.g. system defined batches) where the translated text is on the cell comments, the application cannot support the translated texts when the user exports in csv because cell comments are not supported in csv file types

- Shortcut keys are not translated because short cut keys are universal, like functions on a calculator

- Case Sensitivity

    o The Sage 300 People application is not case sensitive where Web Self Service is case sensitive, for example:

| Value ▲ | English |
|---|---|
| Birthday | |
| Birthday | B-Day |
| BIRTHDAY | Date of birth |

    o In the Sage 300 People application, 'Birthday' and 'BIRTHDAY' will translate to B-Day – it will use the first translated value for Birthday on the dictionary list.  In Web Self Service, each value will translate separately

# 4.0 Saudi Arabia Tax Country

## 4.1 Overview

In this release, we have included the statutory calculations and reports for the Kingdom of Saudi Arabia.

> **Note:**
>
> If you already have a Saudi Arabia company, please contact your consultant for assistance to convert your existing Saudi Arabia Company to use the official Saudi Arabia generc tax file.

On the Navigation pane:

| | |
|---|---|
| Expand | **Company Management** |
| Double-click on | **Company** |
| Select the | **Company Details Tab** |

The Saudi Arabia screen was specifically created with the required Saudi Arabia company detail.

Under Employee Management on Employee Basic Information we added screens and fields specifically for Saudi Arabia.

The following statutory calculations were added for United Arab Emirates:

- GOSI Old Age Social Security

- GOSI Occupational Health

- Unemployment Insurance

- End of Service Gratuity



The following reports and exports are available:

- Final Settlement Report under All Reports

- WPS Payment Message Salary Transfer File under Payments for ACB

> **Note:**
>
> Please contact the Sage 300 People support desk for the SAWPSSE.xml file that must be imported to enable the user to setup ACB Payments using the WPS Payment Message File.

# 5.0  Zimbabwe Changes

## 5.1     Background on Zimbabwe Currency Changes

Late in February 2019, Zimbabwe introduced a new currency called the Real Time Gross Transfer Dollars or RTGS Dollars.

As per a public notice that was issued, the payroll should be processed in the new currency known as RTGS$ with currency code ZWL.

The rate of exchange of the USD to the RTGS$ for the months of January 2019 and February 2019 was 1:1. This meant that all the values used to calculate PAYE are now in ZWL, e.g. tax tables, tax credits, deduction limits, etc. These values remained the same.

The main change for Zimbabwe payroll systems was to change the payroll currency for Zimbabwe companies from a USD to ZWL.  Then from March 2019 and onwards, the exchange rate would be provided by Interbank.

## 5.2     System Changes for Zimbabwe Currency Code Change

The Currency Code for Zimbabwe Dollar was updated from ZWD to ZWL.  This change will only apply to companies already linked to currency code ZWD.

The currency for Zimbabwe companies linked to USD – US Dollar currency will not be updated and changed to ZWL.

> **Note:**
>
> Please contact the Sage 300 People support desk if you need assistance to update Zimbabwe companies still linked to the USD currency code.

# 6.0 Rwanda Tax Country

## 6.1 Overview

In this release, we have included the statutory calculations and reports for Rwanda.

The latest monthly tax tables for the 2019 Tax Year is available in this file:

**Statutory Tax Table effective 1 January 2019:**

| Taxable Income Bracket | | Tax Rate on Bracket | |
| --- | --- | --- | --- |
| From | To | Fixed Amount | Percentage |
| 0.00 | 30 000.00 | 0.00 | 0% |
| 30 000.01 | 100 000.00 | 0.00 | 20% of excess over 30 000.00 |
| 100 000.01 | And above | 14 000.00 | 30% of excess over 100 000.00 |

**Casual Tax Table effective 1 January 2019:**

| Taxable Income Bracket | | Tax Rate on Bracket | |
| --- | --- | --- | --- |
| From | To | Fixed Amount | Percentage |
| 0.00 | 30 000.00 | 0.00 | 0% |
| 30 000.01 | And above | 0.00 | 15% of excess over 30 000.00 |

No Tax Credits or Rebates are applicable.

> **Please Note:**
> If you already have a Rwanda company, please contact your consultant for assistance to convert your existing Rwanda Company to use the official Rwanda generic tax file.

Once you have converted to use the official Rwanda tax file, the employees should be linked to one of the following Tax Status on the employee's active tax record:

- Statutory Tables – Statutory Tables applied on Taxable Income (no Tax-Deductible Deductions allowed)

- Secondary\Temp – 30% Fixed Rate applied on Taxable Income (no Tax-Deductible Deductions allowed)

- Casual – Casual Table applied on Taxable Income (no Tax-Deductible Deductions allowed)

    o Applicable to both normal casual employees and Directors of the Board

- No Tax (0%) – No PAYE

The following reports are available under Reports – Country Specific Reports:

| Report | Monthly | Quarterly | Annual |
|---|---|---|---|
| PAYE Monthly Return Report | X | | |
| Unified Declaration Submission Report | X | | |
| PAYE Quarterly Return Report | | X | |
| CSR Monthly Submission Report | X | | |
| RAMA Monthly Submission Report | X | | |
| Maternity Leave Declaration Submission Report | X | | |

## 6.2    PAYE Monthly Return Report

The Monthly PAYE Report must be submitted each month to the local tax office within 15 days following the month in which the payment was made.  It contains income and tax total amounts per employment type for the specific month within the current tax year.

## 6.3    Unified Declaration Submission Report

The Unified Declaration file was first introduced as the e-Tax file report, but has since been renamed as the Unified Declaration.

This submission file is a combined statutory contribution file that includes values for PAYE and all RSSB contributions for Pension, Maternity, Medical and Occupational Hazards

Schemes (previously known as NSSF Pension\CSR, RAMA Medical). Three separate text files are generated for Permanent, Casual and Secondary employees.

The employer must download the Annexure File from the RRA e-Tax site and then enter/paste the required data into the relevant columns of the annexure. After the data entry is done, the data is validated (button on template) to generate the text file. The text file must then be imported into the RRA e-Tax system. The Sage 300 People application must create the text files which is required for e-Tax, identical to the one generated by the template.

The Unified Declaration is a monthly report only. It is not used for quarterly submissions. Employers who have permission to submit quarterly, must do separate submissions for each of the 3 months in the quarter if they make use of the Unified Declaration.

## 6.4    PAYE Quarterly Return Report

The Quarterly PAYE Report must be submitted per quarter to the local tax office. The deadline for the quarterly declaration submission is 15 days after the end of the quarter for which the tax is due.

The report contains income and tax total amounts per employment type for the specific quarter – like the Monthly PAYE report but with quarterly values for the following periods:

- December to February

- March to May

- June to August

- September to November

> **Note:**
>
> The Rwanda tax year is from January to December, but the reporting quarters does not fall within the tax year but over two tax years, e.g. for 2019 tax year, the first quarter will include Dec 2018 to February 2019 values.
>
> When printing the report for the current quarter, all the active company rules for the selected company must be in the last month of the selected quarter. For example – the user selects to print the report for the quarter June to August 2019 and all company rules are in July 2019, the report will generate an error to indicate that no records exist for the selected reporting period.
>
> If one of the company rules are in the last month of the quarter, the report will generate without any errors, but will only include employees linked to the company rule that is in the last mnonth of the quarter.

## 6.5    CSR Monthly Submission Report

The employer is responsible for deducting, declaring and paying their employees' pension scheme contribution to RSSB.

The employer downloads the Pension Annexure File from the RRA e-Tax and then enter/paste the required data into the relevant columns of the annexure. The text file can be imported into the RRA e-Tax system. The Sage 300 People application creates the text file which is required for e-Tax submission purposes.

## 6.6    RAMA Monthly Submission Report

The employer is responsible for deducting, declaring and paying their employees' medical scheme contributions over to RSSB.

The employer downloads the Annexure File from the RRA e-Tax and then enter/paste the required data into the relevant columns of the annexure.  After the data entry is done, the data is validated (button on template) to generate the text file. The text file must then be imported into the RRA e-Tax. The Sage 300 People application creates the text file which is required by the e-Tax system.

## 6.7    Maternity Leave Declaration Submission Report

The employer is responsible for deducting, declaring and paying their employees' maternity scheme contributions over to RSSB. Both male and female employees contribute to this fund.

The employer downloads the Annexure File and then enter/paste the required data into the relevant columns of the annexure. After the data entry is done, the data is validated (button on template) to generate the text file. The text file can be imported into the online portal. The Sage 300 People application creates the text file, which is uploaded online, identical to the one generated by the template after validation.
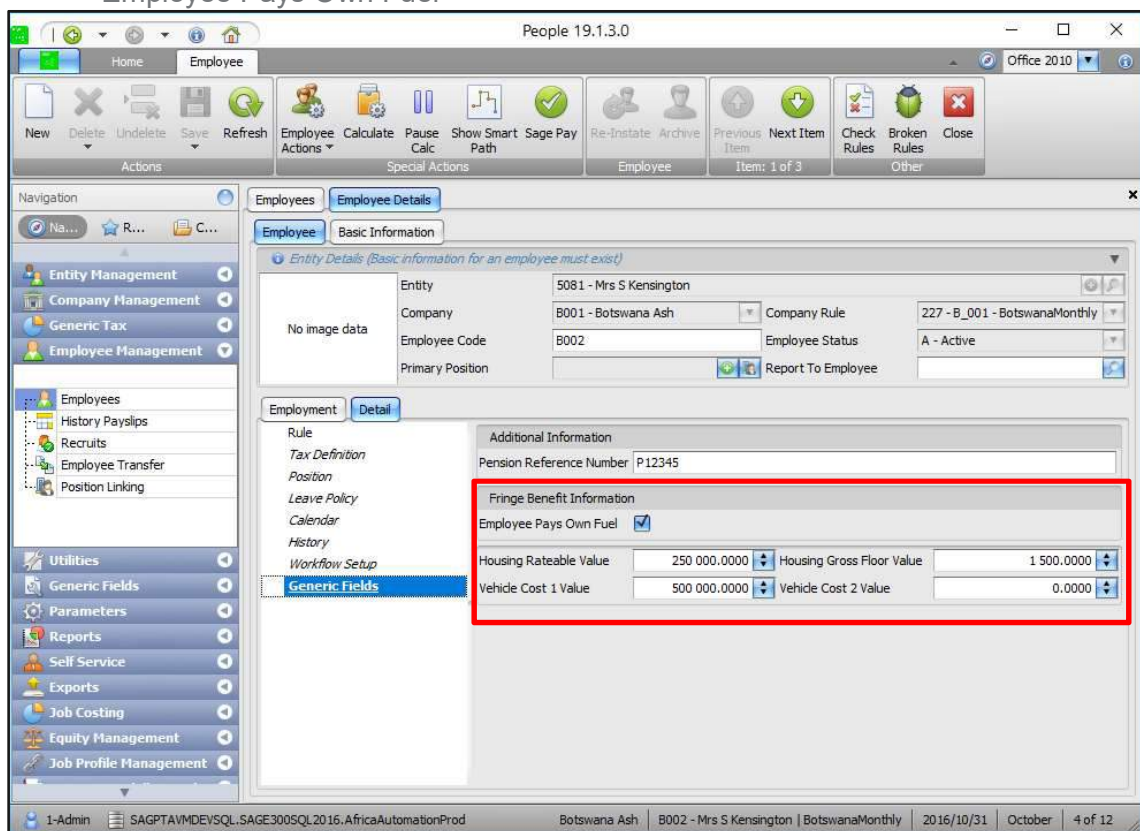
# 7.0 Botswana Changes

## 7.1 New Employee Generic Fields

The existing ITW8 certificate did not populate any values for additional fringe benefit information for Housing and Vehicle Benefits, e.g. Gross Floor Value, Rateable Value, Vehicle Cost and Employer Pays Fuel.

For the new ITW8 Tax Certificate report, (refer to section 7.2 of the release notes) we added new Employee Generic fields for additional Fringe Benefit Information.  The values captured in these fields will be used in the new ITW8 report (not applicable to existing report):

- Housing Rateable Value

- Housing Gross Floor Area

- Vehicle Cost 1 Value

- Vehicle Cost 2 Value

- Employee Pays Own Fuel

### 7.2    New Layout for ITW8 Tax Certificate

BURS updated the layout for the ITW8 Tax Certificates – on both the plain-paper and pre-printed stationary certificates.  The layout is now the same for the two types of stationary where in the past there where a few differences between values on plain paper and pre-printed certificate.  The information that prints on the report is the same but the look, feel and display of values were changed.  The new layout must be used for the June 2019 submissions.

We did not remove the previous layout because of history reporting requirements.

When the tax certificates are printed, a summary of the certificates as well as a detail report is generated for reconciliation purposes.

The report includes all employees with gross remuneration and\or tax deducted in the current tax year.

On the Navigation pane:

| | |
|---|---|
| Expand | **Reports** |
| Expand | **Country Specific Reports** |
| Double-click on | **Statutory Reports** |
| Select | **BWAITW8_2019 report option for the new layout** |
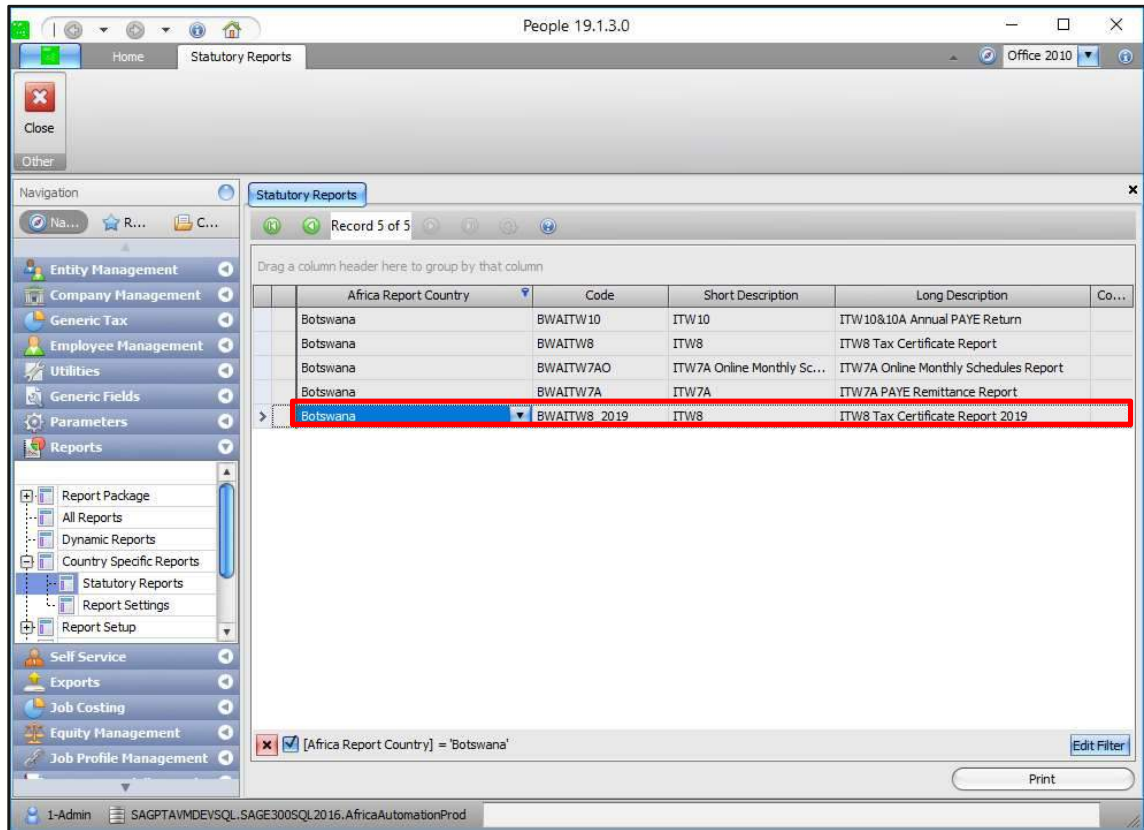
The Botswana ITW8_2019 has customisable fields that is used when your payroll values differ from the default values for certain fields in the report. The reason for this is that each customer has a different setup, and this allows for flexibility to accommodate different payroll setups.

On the Navigation pane:

| | |
|---|---|
| Expand | **Reports** |
| Expand | **Country Specific Reports** |
| Double-click on | **Report Settings** |
| Double-click on | **BWAITW8_2019 - ITW8 Tax Certificate Report 2019** |
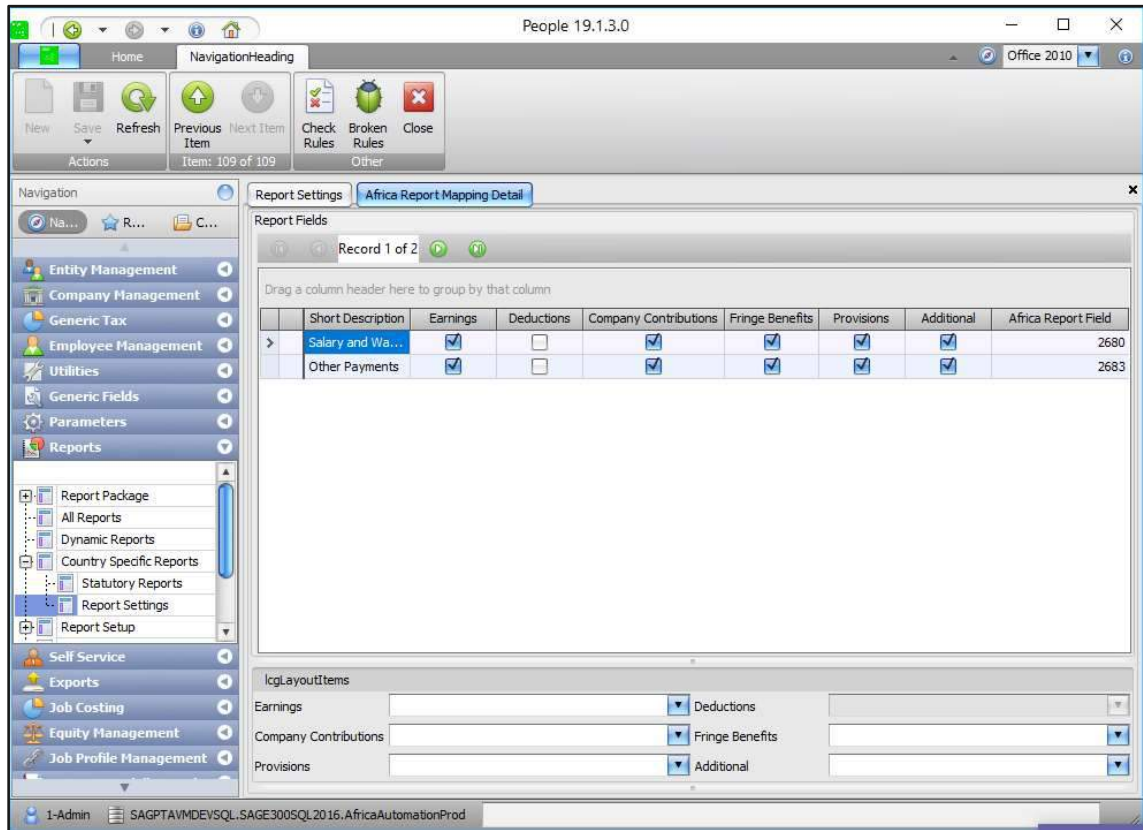
Select the relevant item for which you want to do a mapping, e.g. Other Payments.

At the bottom of the screen you can select multiple items per Earning, Company Contributions, Fringe Benefits, Provisions and Additional definitions.

When selecting to run the report, there are additional fields and selections on the Report Filter screen that must be completed to ensure the correct values are included in the report.

| Field | Description |
|---|---|
| Company Representative Full Name | This is an input field where you must enter the name of the person submitting the certificates |
| Capacity of Company Representative | This is an input field where you must enter the capacity or position of the person submitting the certificates |
| Type of Run | The field is a dropdown selection that allows you to select one of the following options:<br><br>• Year End: Includes all employees who have YTD+ Gross Income and\or tax deducted for the selected reporting year<br><br>• Current Terminations: Includes all employees with Employee Status equal to Terminated without an Interim Tax Certificate number and who have YTD+ Gross Income and\or tax deducted for the selected reporting year |

| Field | Description |
|---|---|
| | • All Terminations: Includes all employees with Employee Status equal to Terminated and who have YTD+ Gross Income and\or tax deducted for the selected reporting year |
| Print Report For | This field is a dropdown selection to select if Tax Certificates must be printed for:<br><br>• All Employees with YTD+ Gross Remuneration – this is the default option<br><br>• Only Employees With YTD+ Tax/PAYE Amounts |
| Type of Stationary | The field is a dropdown selection that allows you to select one of the following options:<br><br>• Pre-Printed Stationary – this is the default option<br><br>• Plain White Paper |

Once all the fields on the Report Filter Screen have been made, you can continue to run the report.

The report will open in MS Excel. You will be prompted to select the location and save the tax certificate report.

> **Note:**
>
> To update the system with the new ITW8 report, you have to import the latest BWA-GenericTax.xml file.
>
> Before importing the new BWA-GenericTax.xml file please ensure that the Sage 300 People application is updated to either version 19.1.3.0 or 19.3.1.0

Please take note of the following printer settings when printing hard copy versions of the tax certificates:

**Pre-Printed Stationary**
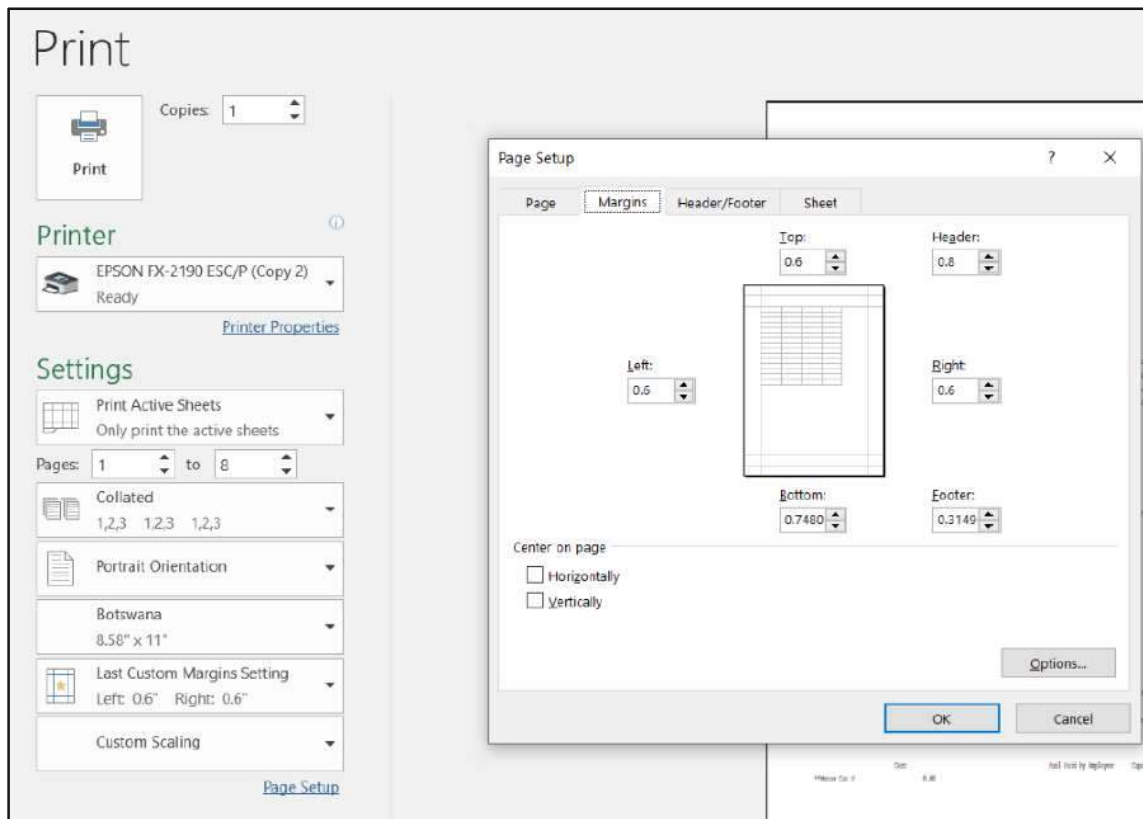
**Plain White A4 Paper**
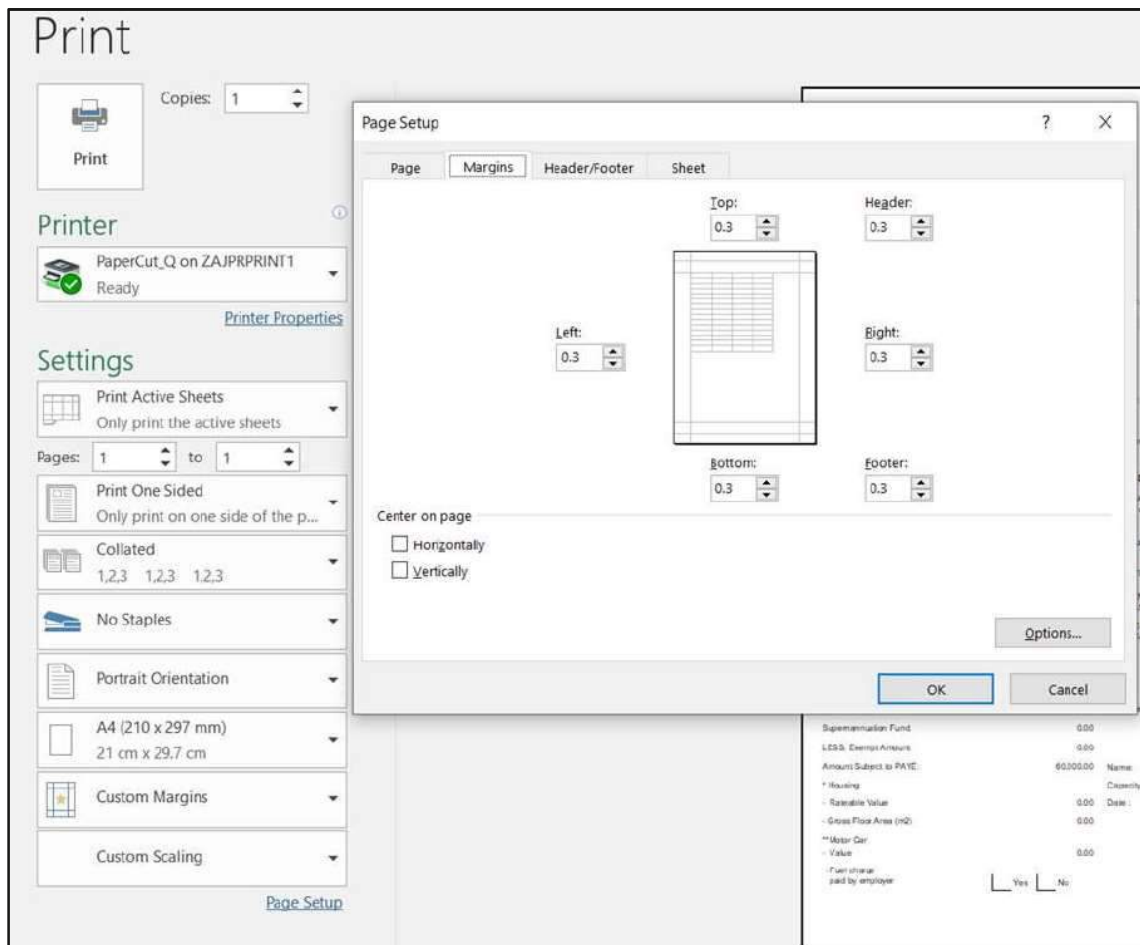


## 7.3    ITW7A Online Monthly Schedule Changes

When an employee has no income or negative income and this results in negative PAYE, then the employee's tax calculation method should be changed from Average Tax to Normal Tax to ensure that there is no tax refund.  When the person has income again, the tax calculation method must then be changed back to Average Tax to ensure the correct recalculation of PAYE (similar process to RSA when a person goes on unpaid leave).

This is the correct manner to treat this scenario on the payroll.

However, it makes sense to include a person with no income and negative PAYE as it is a PAYE Remittance Form.

Currently the report only includes employees with balance of remuneration unequal to 0.00.  We updated the report to also include employees with a PAYE amount unequal to 0.00, e.g. to include employee with a tax refund but no income.

> **Note:**
>
> For the online submission there might be a rejection if a person with no income is included in the file – you will then have to change the employee's tax calculation from average to normal tax or do a manual adjustment or submission.

### 7.4    ITW7A PAYE Remittance Report Changes

When an employee has no income or negative income and this results in negative PAYE, then the employee's tax calculation method should be changed from Average Tax to Normal Tax to ensure that there is no tax refund.  When the person has income again, the tax calculation method must then be changed back to Average Tax to ensure the correct recalculation of PAYE (similar process to RSA when a person goes on unpaid leave).

This is the correct manner to treat this scenario on the payroll.

However, it makes sense to include a person with no income and negative PAYE as it is a PAYE Remittance Form.

Currently the report only includes employees with balance of remuneration unequal to 0.00.  We updated the report to also include employees with a PAYE amount unequal to 0.00, e.g. to include employee with a tax refund but no income.

# 8.0 Kenya Changes

## 8.1 Housing Fund Levy

### 8.1.1 Background

Kenya has introduced a Housing Fund Levy which will be used to fund the Affordable Housing Scheme. This is a new statutory contribution for Kenyan payrolls.

The Housing Fund Levy contributions must be paid over by the 9th of each succeeding month. The first contribution will be in the current month of April 2019, due on 9th May 2019.

According to the public notice, the payment processes for this contribution will be announced soon.

**Important Note:**

The Kenyan Federation of Employers (KFE) has issued a statement, warning employers about the Public Notice regarding the Housing Fund Levy. Although the Housing Fund Levy has been enacted, the KFE says that the Public Notice is against a court order which suspended its introduction pending a hearing on the KFE's objection.

The Kenya Revenue Authority has not withdrawn its public notice. It is uncertain if the contributions should be made or not.

You will have to decide if you want to contribute to the Housing Fund Levy or not.

### 8.1.2 Detail of the Kenya Housing Fund

What is the calculation for the Housing Fund contribution?

- Employee – 1.5% of basic salary

- Employer – 1.5% of basic salary

- Maximum total contribution for both employee and employer combined is KShs 5 000.00 a month (e.g. 2 500.00 per employee and 2 500.00 per employer)

- Contributions cannot be a negative value

- The employee's deduction is not tax deductible and the employer's contribution are not taxable

<u>Who must Contribute?</u>

All employees must contribute – no exemptions were specified.

<u>What income is included for the calculation of the Housing Fund Levy?</u>

The Housing Fund contributions are based on actual basic salary.  All earnings that makes up an employee's basic salary for the month is included in the income the contribution is based on.

### 8.1.3   To Add the Housing Fund Levy System Changes

Import the new Kenya generic tax file to add the following setup requirements to your system:

- Deduction and Company Contribution Types for Housing Fund Levy

- Calculations for the Housing Fund Levy contributions

- Housing Fund Income Consolidated Total

The file must be imported <u>before</u> doing any payroll processing, printing payslips or reports or making any payments.

**Note:**

Before importing the new KEN-GenericTax.xml file please ensure that the Sage 300 People application is updated to at least version 18.4.1.0

### 8.1.4   Setup the Housing Fund Levy

If you have decided to start contributing towards the Housing Fund Levy, you need to make the following setup changes for the Housing Fund Levy to your Kenya companies after importing the updated Kenya tax file:

- Create a new Deduction definition linked to Deduction Type HOUS_FUND for the employee deduction and link to the applicable company rule and pay run definition

- Create a new Company Contribution definition linked to Company Contribution Type HOUS_FUND for the employer contribution and link to the applicable company rule and pay run definition

- Check and confirm that the earnings included for the Housing Fund Income is correct and if you need to add or remove an earning, do a Consolidated Total Override. The default earnings for Housing Fund Income is all Earning Definitions linked to the following Earning Types:

    o  BASIC – Basic Income

    o  LEAVEPAY – Leave Pay

- Recalculate all affected company rules to apply the changes



### 8.1.5  Additional Information on Housing Fund Levy Setup

- The contributions are based on actual basic salary – if there is no Housing Fund Income, then no contribution will calculate

- If the Housing Fund Income is negative, then no contribution will calculate

- Irrespective of the employee's status, e.g. active, terminated, if there are Housing Fund Income, then the contributions will calculate

- Deduction and Company contributions for the Housing Fund Levy are not set as mandatory and you will have to add the deduction and company contribution definitions manually to both existing companies and new companies you create

- After adding the Housing Fund Levy setup, the contributions will only calculate when your company rule is in the 2019 tax year and in month of April and onwards

# 9.0  Uganda Tax Country

## 9.1  Overview

In this release, we have included the statutory calculations and reports for Uganda.

The latest monthly tax tables for the 2019 Tax Year is available in this file (these tables have been in effect since 2012):

**Monthly Tax Table – Resident:**

| Taxable Income Bracket | | Tax Rate on Bracket | Tax per Bracket | Cumulative Tax on Income |
|---|---|---|---|---|
| From | To | Percentage | | |
| 0.00 | 235 000.00 | 0% | 0.00 | 0.00 |
| 235 000.01 | 335 000.00 | 10% | 10 000.00 | 10 000.00 |
| 335 000.01 | 410 000.00 | 20% | 15 000.00 | 25 000.00 |
| 410 000.01 | 10 000 000.00 | 30% | 2 877 000.00 | 2 902 000.00 |
| 10 000 000.01 | And above | 40% | | |

**Monthly Tax Table – Non-Resident:**

| Taxable Income Bracket | | Tax Rate on Bracket | Tax per Bracket | Cumulative Tax on Income |
|---|---|---|---|---|
| From | To | Percentage | | |
| 0.00 | 335 000.00 | 10% | 33 500.00 | 33 500.00 |
| 335 000.01 | 410 000.00 | 20% | 15 000.00 | 48 500.00 |
| 410 000.01 | 10 000 000.00 | 30% | 2 877 000 | 2 925 500.00 |

| Taxable Income Bracket | | Tax Rate on Bracket | Tax per Bracket | Cumulative Tax on Income |
|---|---|---|---|---|
| 10 000 000.01 | And above | 40% | | |

No Tax Rebates or Credits are applicable

**Please Note:**

If you already have a Uganda company, please contact your consultant for assistance to convert your existing Uganda Company to use the official Uganda generic tax file.

The Uganda Tax Calculation consist of two separate calculations:

- Tax Calculation for Normal Monthly Income based on Monthly Tax Tables

- Annual Tax Calculation for Annual Payments and Lumpsum applying Annual Tax Tables.

Once you have converted to use the official Uganda tax file, the employees should be linked to one of the following Tax Status on the employee's active tax record:

- Statutory Tables (Resident) – Statutory Tables applied on Balance of Remuneration (after Tax Deductible Deductions)

- Statutory Tables (Non-Resident) – Statutory Tables applied on Balance of Remuneration (after Tax Deductible Deductions)

- No Tax (0%) – No PAYE.  Applied on Remuneration (before Tax Deductible Deductions)

- Part Time – Fixed Rate of 30% applied on Balance of Remuneration (after Tax Deductible Deductions)

The following Reports are available under Reports – Country Specific Reports:

| Report | Monthly | Quarterly | Annual |
|---|---|---|---|
| NSSF Monthly Schedule | X | | |
| LST Return | X | | |
| Monthly PAYE DT2008 Manual Return | X | | |
| Monthly PAYE DT2008 Electronic Return | X | | |

**Note:**

The Monthly PAYE DT2008 Manual and Electronic returns will only be released end of July 2019 – an updated UGA-Generic. xml file will be released with the two outstanding reports.

## 9.2     NSSF Monthly Return

The NSSF Return is submitted monthly to the National Social Security Fund with detail of employees' income and the NSSF contribution total.

## 9.3     LST Return

Employers must submit a salary schedule with the respective local service tax computation to the local municipality for assessment.  Payments must usually be done by latest October each year, but this can differ per municipality from customer to customer.

## 9.4     Monthly PAYE DT2008 Manual Return

*To be released end July 2019.*

The DT-2008 Monthly PAYE Report must be submitted each month to the local tax office.

The report consists of 4 sub-reports:

- Section A-D: a summary report with submission detail for the selected reporting month

- Schedule 1: Detailed report for Normal Income and PAYE deducted

- Schedule 3: Detailed report for Termination Annual\Lumpsum payments and PAYE deducted

- Schedule 4: Detailed report for Other Annual\Lumpsum payments and PAYE deducted

## 9.5    Monthly PAYE DT2008 Electronic Return

*To be released end July 2019.*

For employers who choose to not do manual submissions, the DT-2008 Monthly Electronic PAYE Report should create a csv file for Schedules 1,3 and 4 in order to upload it directly to the URA website.

The three CSV files to be generated are:

- Schedule 1: Detailed report for Normal Income and PAYE deducted

- Schedule 3: Detailed report for Termination Annual\Lumpsum payments and PAYE deducted

- Schedule 4: Detailed report for Other Annual\Lumpsum payments and PAYE deducted

# 10.0 South Africa

## 10.1 New Company Contribution Definition

A new Company Contribution Type has been created where you can report bargaining council benefits paid by the employer on behalf of the employee.

- BARCOUN – Bargaining Council

All values reported on this company contribution definition is 100% taxable.

> **Note:**
> The IRP5 code will be added in the Sage 300 People application as soon as the newest BRS is available.

## 10.2 Stop Roll over

In March 2019 a new health check warning was added on the Sage 300 People application landing page, that will warn the user when there are Travel definitions that must be changed:



**Travel Allowance Setup**
From March 2019 employees may no longer be taxed 100% on Travel Allowances (3701,3802,3816). Please amend the Travel Earning and Fringe Benefit Payroll Definition.
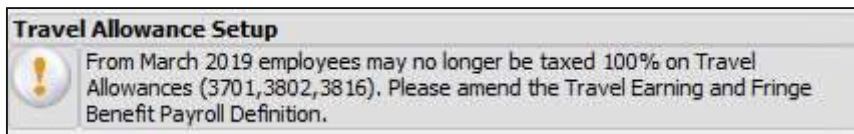
From this release onwards users will not be able to complete a roll over if this warning is on the landing page. You must amend the tax percentages for travel allowances before you will be able to roll over into the following period.

This is vital as you will not be able to do a mid-year reconciliation submission to SARS due to a new rule that is built into the business requirement specification issued by SARS. This rule indicates that the taxable portion of Travel Allowances (4582) may not be greater than 80% of the total sum of all Travel Allowances(3701, 3802 and 3816).

# 11.0 Security

## 11.1 Audit Report Changes

When rebuilding the security roles, each role that is rebuilt will now be indicated individually in the audit detail.

## 11.2 Web Self Service Security User

From this release onwards the Sage 300 People application will now have the functionality to create users for web self-service users only. This system role, can create users and will only have the ability to link then to groups, that only have linked ESS roles.

This user will also have the ability to reset ESS users password.

On the Navigation pane:

Expand          **Security**

Expand          **Web Self Service Users**
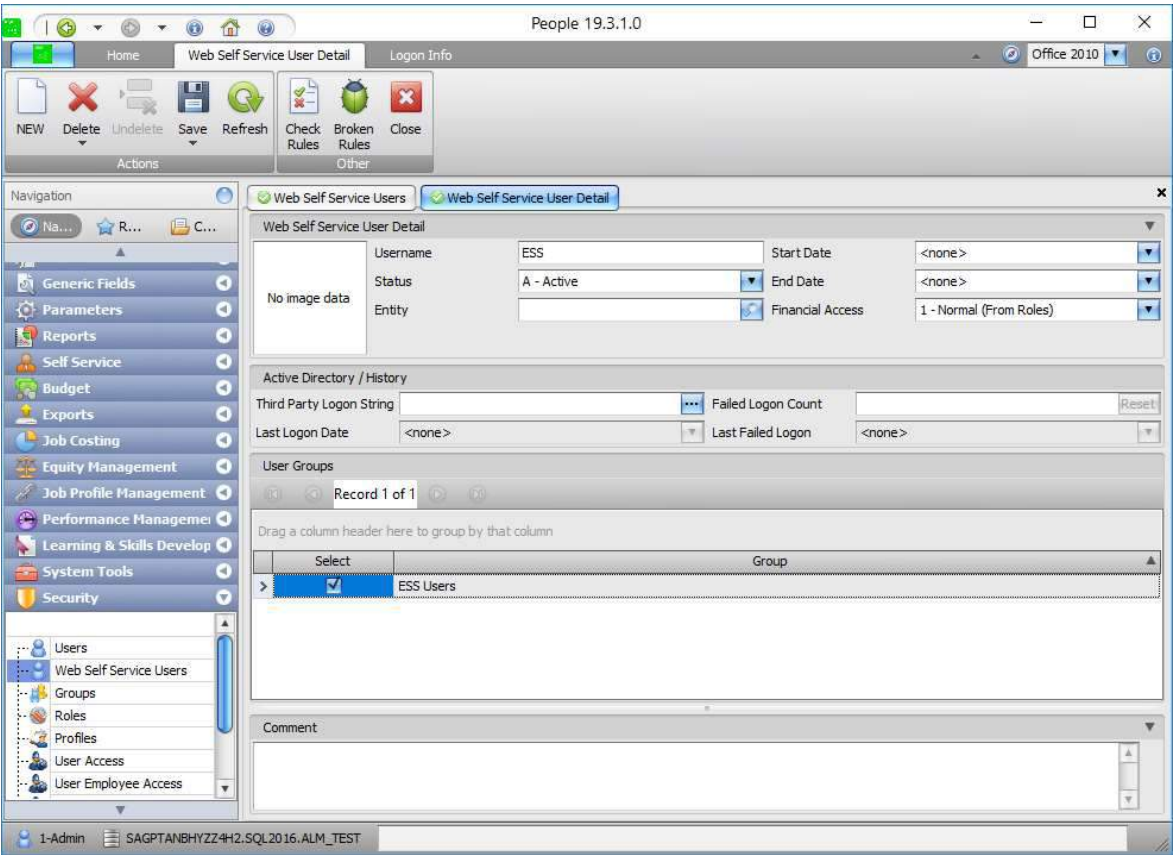


Note:

Please contact your Sage 300 People consultant to assist with the security setup changes.

# 12.0 Development Plan

A new report has been added to the system and Self Service to print the employee's individual development plan details.

On 300 People App:

Navigate        **Reports**

Select          **All Reports**

Select          **Employee Transactions**

Select          **Development Plan Report**

On Self Service:

Navigate        **Reports**

Select          **Employee Transactions**

Select          **Development Plan Report**

The development plan report has been designed in the same format as the on-screen grid development plan sections, additional fields from the development plans are available under the Report Customisation Field list.

## Development Plan Report

### Employee Details

| | | | |
|---|---|---|---|
| Employee Code | H01 | Employee Name | Mrs H HR |
| Date Engaged | 2017/08/01 | Reports To | B01 - Mrs B Bitten |
| Job Title | HR Generalist | Job Grade | Paterson C |
| Position | HR Generalist | Position Start Date | 2017/08/01 |
| Duration In Position | 0 Years / 3 Months | | |

### Development Goals

**Short Term Goals**

Manage my time better in my daily activities

**Long Term Goals**

Improve team productivity by 75% by the end of the financial year

### Performance Development

| What | How | Action | Why | By When | Status |
|---|---|---|---|---|---|
| Risk Management | Training | Risk Management | Rating Received: 3 | 2018/07/26 | Awaiting Approval |

### Position Development

| What | How | Action | Why | By When | Status |
|---|---|---|---|---|---|
| Presenatation Skills | Self-Study | LinkedIn Learning courses to attend on my own time and readying Presentations for dummies. | Daily presentations to managers and new employees | 2018/11/30 | Awaiting Approval |

### Succession Development

| What | How | Action | Why | By When | Status |
|---|---|---|---|---|---|
| Decisiveness | Mentoring | Monthly meetings with my manager and being part of decisions made to learn why and how it is made. | To learn to be able to make decisions quickly and know what is important and when | 2019/11/01 | Awaiting Approval |

### Personal Development

| How | Action | Why | Desired Outcome | By When | Status |
|---|---|---|---|---|---|
| Other | Read as many books and articles on time management theories. | Time Management | To learn how to manage my time better at work and at home | 2018/08/24 | Awaiting Approval |

### Sign Off

Mrs H HR

2019/07/05

B01 - Mrs B Bitten

2019/07/05

# 13.0 Performance Management

## 13.1 Performance Reviews

Previously when a review was created where the contract criteria detail was blank and a % allocated to the criteria itself the review would be sent out incorrectly as there was no criteria for the user to complete the review, making the % total incorrect. This has been fixed so that the review cannot be sent out with a % allocated to a blank contract criteria detail. The user needs to amend the % before the review can be processed.
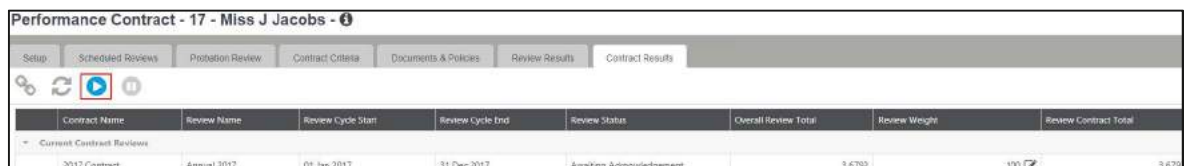
## 13.2 Performance Contract Results

Multiple reviews from the same or different Performance Contracts can be linked together for a final Performance Overall rating. This will be useful in scenarios where the employee perhaps moved between departments during the Performance cycle and thus has two separate Performance Contracts with completed reviews on both. At the end of the Performance cycle the reviews from the first Performance Contract must be combined on the current active Performance Contract with the final review results for an overall year /cycle rating.

Once the final overall Performance Contract rating has been agreed on and discussed with the employee the Performance Contract results can be released to the employee for acknowledgement.

### 13.2.1 Release Performance Contract Results

On the Contract Results tab of the specific employees Performance Contract select the "Release" icon.



Performance Contract results can only be released when:

- The overall weight of the Performance Contract is 100%

- All Reviews which has a weight allocated has been completed and has an Overall Review Total

Once the Contract results has been released to the employee the Contract Status will change to "Awaiting Acknowledgement" and the Contract cannot be edited any longer.

### 13.2.2  Remove Performance Contract Results

Should the Contract Owner realise that the results were incorrect and must be corrected, the Performance Contract Results can be removed from the employee's inbox to be able to edit before the final results is released again to the employee.

Select the relevant Performance Contract and access via the View mode (the edit mode will not be available as Performance Contracts which has been released cannot be edited anymore) and navigate to the Contract Results tab.

Select the "Remove" icon. The icon will only be available to select if the results has already been released. Once the "Remove" is selected the results will be removed from the employee's inbox and a notification will be sent to inform the employee that the results have been recalled.

The Contract Owner can now make changes to the results as required and release again once ready.

| Performance Contract - 17 - Miss J Jacobs - ⓘ | | | | | | | |
|---|---|---|---|---|---|---|---|
| Setup | Available Criteria | Scheduled Reviews | Probation Review | Contract Criteria | Documents & Policies | Review Results | Contract Results |

| Contract Name | Review Name | Review Cycle Start | Review Cycle End | Review Status | Overall Review Total | Review Weight | Review Contract Total |
|---|---|---|---|---|---|---|---|
| − Current Contract Reviews | | | | | | | |
| 2017 Contract | Annual 2017 | 01 Jan 2017 | 31 Dec 2017 | Awaiting Acknowledgement | 3.6792 | 100 ✎ | 3.3 |

### 13.3  Acknowledge Performance Contract Results

Once the Contract Results has been released to the employee it will be visible on his Performance Contract Results in his Self Service Inbox.

To access the Performance Contract Results on the Inbox:

Open Self Service Navigate to Inbox:

Select **My Performance Items**

Select **Contract Results**

The Contract Results screen will open with a list of all released Contract results. The current list will display all previously acknowledged results as well for reference.

The following action icons are available:

| Icon | Description | Function |
|---|---|---|
| 👁 | View | View the selected Contract results |
| ▯▯ | Column chooser | Select to add or remove columns in the grid |

| Icon | Description | Function |
|---|---|---|
|  | Refresh | Refresh the Review Result screen |

Select the specific Performance Contract Results to view, the results will display in the same format as on the Contract Results Tab of the Performance Contract.

| Field Name | Description |
|---|---|
| Review Name | Indicate the name of the reviews linked on this Performance Contract |
| Review Cycle Start | Indicate the specific review cycle start date |
| Review Cycle End | Indicate the specific review cycle end date |
| Review Status | Indicate the status of the review, only reviews with the following statuses will be displayed on the Contract Results: <ul><li>Captured</li><li>Awaiting Acknowledgement</li><li>Acknowledged</li><li>Disputed</li></ul> |
| Overall Review Total | Indicate the specific reviews final overall result |
| Review Weight | Indicate the current weight % allocated to the review, depending on the review setup the Contract Owner will have the ability to change the weight. HR will always be able to edit the weight of a review on People Online |
| Review Contract Total | Calculated review total based on the weight % for the specific review |
| Contract Total | The overall Contract Total based on all the reviews and their weights |
| Contract Final Result | The final result on the Overall Rating Scale |

At the bottom of the Contract Result detail the following options are available to select:

| Field Name | Description |
|---|---|
| Cancel | Close the screen |
| Acknowledge & Agree | Select this option to acknowledge the results if agreeing. The status of the Performance Contract will change to "Acknowledged" |
| Acknowledge & Dispute | Select this option to acknowledge the results but indicating the results are disputed.  A comment block will |

| Field Name | Description |
| --- | --- |
| | open for the employee to note the reasons for the dispute, these comments will be available for the Contract Owner to read on the Contract Results screen on the contract. The status of the Contract will change to "Disputed" |

# 14.0 Bug Fixes

### 14.1 Namibia ETX Report

Previously employees with zero income (Gross Remuneration and Tax Directive Income equal to zero) were included. This is now corrected and employees with no income and old terminated employees with no income will be excluded from the report.

### 14.2 Namibia PAYE 4 Report

Previously duplicate values where omitted from the YTD Taxable remuneration in the Namibia PAYE 4 Report, this specific scenario only happened if an employee received the same amount for the same earning, on two different payruns. This has now been corrected.

The employee's e-mail address that did not display correctly on the PAYE4 has also been corrected.

### 14.3 Namibia VET Remuneration

As per instruction received from the Namibia Training Authority (NTA), the Total Income for employees must be included in the VET Income irrespective of the taxability of the value, e.g. Travel Allowance has a taxable and a non-taxable portion – but the full value must be included in the VET remuneration.

Currently in the system, only the taxable amount for Earning Definitions linked to the following Earning Types are included in the income used for the VET Levy calculation:

- Travel Allowance

- Vehicle Allowance

- Entertainment Allowance

In addition to the above issue, Subsistence Allowance that is a non-taxable earning was also incorrectly excluded from the VET remuneration.

The VET remuneration calculations were updated to include Total Amounts instead of Taxable Amounts as well as Subsistence Allowance. The VET Levy report was also updated to include the same values used in the calculation.

### 14.4 Namibia VET Levy Report

Import the new Namibia generic tax file to update the VET Levy calculations and VET Levy report.

The file must be imported in any pay period <u>before</u> doing any payroll processing, printing payslips or reports or making any payments

> **Note:**
>
> Before importing the new NAM-GenericTax.xml file please ensure that the Sage 300 People application is updated to at least version 19.1.3.0.

### 14.5 Unable to approve Leave in ESS

Approving workflow in Web Self Service was slow in certain security setup instances. We have corrected this by streamlining the security verification calls to the Sage 300 People application.

### 14.6 Performance: Closed Contracts

Performance Review results can be released to the employees Self Service Inbox to acknowledge. Performance Review results will remain in the employee's inbox after being acknowledge in order to refer to these results during future reviews and discussions.

However, if the Performance Contract status was changed to Closed and/or Archived the reviews were removed from the Employee's Self Service Inbox and thus the employee had no way of referring to old reviews. This has now been rectified and even if the Performance Contract status is changed the reviews will not be removed from the Inbox.

### 14.7 Mandatory Review Dates

During the Performance Contract Initiation process the current year will default according to the template dates. However, if the default year is changed to a history year the pre-defined dates on the mandatory reviews were not updated correctly on the Performance Contract which led to the reviews being in error once released. The system will now validate that all dates has been amended as per the Performance Contract Cycle start and End Dates.

### 14.8 Kenya ITaxP10 Report

Under the Employee Details section, there is a column for Leave pay and Other Allowance. The earning type Leave Allowance's value reflected on both the Leave Pay column and the Other Allowance column, so the value was duplicated.

Earning definitions linked to the Earning Types – LEAVEALL (Leave Allowance) and LEAVEPAY (Leave Pay) are now included in the Leave Pay column.

Earning definitions linked to the Earning Types – NLEAVE (Normal Leave Payout) and TLEAVE (Termination Leave Payout) are now included in the Other Allowances column.

## 14.9 INSS Report Location

On a previous release the INSS report still appeared under the navigation pane item "All Reports". This has now been corrected.

## 14.10 Loans and Savings Batch Error

Previously when importing the Loans and Savings System Defined Batch the loan definition linked to the company rule did not create on the employee's payslip. This has now been corrected, but only if the definitions are available on the company rule.

## 14.11 Web SS Failed Login

Invalid login attempts to Web Self Service was not being logged in the Sage 300 People application; this was due to changes made when requesting the profile type in Web Self Service. This has been corrected and all failed and successful login attempts are now recorded and processed accordingly.

## 14.12 Unable to Change Password Within Web Self Service

Users were unable to change their Web Self Service password from within the website. Only if the password was reset by an admin could they change their password. This has been corrected and users can now freely change their own passwords from within Web Self Service by using the Change Password functionality.

## 14.13 Help Functions and Sage City

The Help button on all ribbons was disabled and has now been corrected. The function will no longer open the original help document but open the Sage City support link in the default web browser. This also applied to the F1 keystroke in the system.
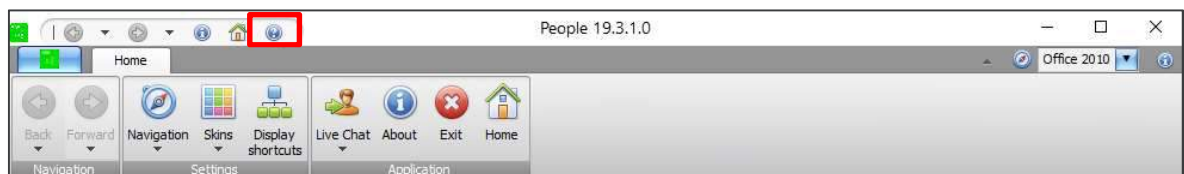


## 14.14 Standard Bank Best Layout

The current system file has been failing due to the Employee Number not being left aligned and zero filled. This has now been corrected as confirmed with the bank.