## **Complete e@syFile submission** e@syFile



After the file was imported successfully you can continue with the steps below,

Step 1: Update Employer Detail

Click on	Employer Admin
Select	Change Employer
Click on	Click to Change
Select	Applicable <b>Company</b>
Click on	Continue

e@syFile EMPLOYER 6.7.5	_ <b>x</b>
номе	EMDLOVER ADMIN
Notification Centre	On this screen you are able to create or edit an employer.
Action Centre	Employer details entered and saved will be used to manage and complete employee tax certificates.
REGISTRATION	ADD EMPLOYER
eFiling Registration	EDIT EMPLOYER
IMPORT	CHANGE EMPLOYER
Import/Export Payroll File	
EMPLOYEE ADMIN	Click to change
View/Edit Employees	
MONTHLY PROCESS	
RECONCILIATION	
Declaration	
SUBMISSION	
THIRD PARTY APPOINTMENTS	
EMPLOYER ADMIN	
View/Edit/Change	

Please select which company you want to use				
Database	Select			
- NEW COMPANY NAME	✓			
Close				

e@syFile Company Select
The active e@syFile Employer database you are working on has been changed to
ΟΚ

Click on	Edit Employer
Select	Applicable Company
Complete	All mandatory information
Click on	Next

There are 6 screens to complete, the last screen will have a Save button, click there to save the changes.

e@syFile EMPLOYER 6.7.5		X
НОМЕ	EMPLOYER ADMIN	
Notification Centre	On this screen you are able to creat	
Action Centre	Employer details entered and saved	will be used to manage and complete employee tax certificates.
REGISTRATION	ADD EMPLOYER	
eFiling Registration	EDIT EMPLOYER	
IMPORT	Employer Information	
Import/Export Payroll File	Select a Company to update e	employer details
EMPLOYEE ADMIN	Company Name: NEW CO	DMPANY NAME -
View/Edit Employées		
MONTHLY PROCESS	Nature of Person:	····
PAYE	Trading or Other name:	NEW COMPANY NAME
Payments	Surname/Registered name:	
RECONCILIATION	Deferrer Numbers DAVE	
PAYE Dashboard	Reference Numbers: PATE:	SDL: UIP:
Declaration	Initials:	
Cancel Certificate Range	Date Of Birth:	
Adjustments	ID Number:	
SUBMISSION	Passport Number:	
Submit to SARS	Country of Issue:	
THIRD PARTY APPOINTMENTS	CK Number	Tarana Tau Bafarana
Third Party Appointments	CK Number:	
EMPLOYER ADMIN	VAT Reference Number:	
View/Edit/Change	Activity within Major Division:	0105
UTILITIES	Employer SIC7:	85410 - Sports and recreation education
Utilities	Employer Address and Phone I	Information
Synchronise Application	Employer Bank Information	
Mismatch	Employer Contact Details - Rep	presentative
HELP	Employer Contact Details - Con	itact Person
Application Help	Employer Contact Details - Tax	Practitioner
Update		Cancel all Changes Update Employer
Log off		
	CHANGE EMPLOYER	
UPDATE EMPLOY	rer	

Employe	successiony	upuateu
	Ok	



If there were any manual tax certificates issued during the year and the employees are flagged as manually submitted in payroll application, then these certificates need to be captured in e@syFile to ensure the totals of their certificates are added to the rest of the employee's totals from the import file.

<u>Click here</u> for detailed instructions on how to create a manual tax certificate in e@syFile.

Step 3: Reconciliation

This process match employer financial declarations (EMP201) with employee financial information (Certificates) and the actual amounts paid to SARS.

Click on	Declarations
Select	Tax Year
Click on	Request

e@syFile EMPLOYER 6.7.5			and the first of the second		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	_ X
Notification Centre	EMP501					
Action Centre					1942 <u>—</u>	
REGISTRATION				Select the tax year for th	e Declaration : 201702	▼ Request
eFiling Registration	EMP501 Declarati	ons for : NEW COMPAN	Y NAME -			
IMPORT	DAYE	SDI	UTE	ETT	Status	View
	PATE	SDL	UIF	EII	Status	View
EMPLOYEE ADMIN						
View/Edit Employees						
MONTHLY PROCESS	2 C					
RECONCILIATION						
Declaration						
						N I
Adjustments						
SUBMISSION	(					
THIRD PARTY APPOINTMENTS						
EMPLOYER ADMIN						
UTILITIES						
HELP						
Application Help						
Update						/
Log off						
CONNECTION STATUS : CONNECT	red 📘	Current Tax Year : 20	18 Working With :	NEW COMPANY NAM	IE Change	LOGGED IN AS : ADMIN

## Select Accept Data

To populate the return with SARS's EMP201 declaration data. SARS and SAGE strongly suggest not to select Own Values to capture your own values on the return – this might lead to issues with the Statement of Account and possible rejection of the submission.

e@syFile will populate the EMP501 with the PAYE, SDL, UIF and ETI values declared on the EMP201 monthly submissions.

If SARS values was selected, please confirm that the values balance with the submitted EMP201's, EMP501 and tax certificate values.

If Own Values is selected, complete the PAYE Liability (PAYE before deducting ETI), SDL and UIF field as per EMP201 declarations submitted to SARS.

Are you sure you don't want	to pre-populate?		
You are about to capture y and may lead to the EMP5	our own data on the EMP50 01 form not being accepted	)1 form. Note that the data at SAR I by SARS.	RS may be different
	Request SARS Data	Use my own values	

Complete **Page 1** and **2** of the Employer Reconciliation form (EMP501).

Page 1 will have all the company information that needs to be completed, if you have ETI in your company tick the box in the top left corner, you will then have 3 pages to complete on the EMP501.

e@syFile EMPLOYER 6.7.5	Print Close	_ X
· · · · · · · · · · · · · · · · · · ·		
V SARS	Employer Reconciliation Declaration EMP501	<u> </u>
Does the Reconciliation include ETI? Y X N	DINEMOS	
Dustrings information           Tension         2         1         7         Point of Recording to the colspan="2">Ref Recording to the colspan="2">Recording to the colspan="2">Recording to the colspan="2"           Recording to the colspan="2"         Recording to the colspan="2"           Recording to the colspan="2" <td></td> <td>≣</td>		≣
Tax Practitioner Details (if applicable)		
No. Tel No. Contact Details		
Reason for Over / Understatement of Declaration		
Reson		
Employment Tax Incentive (ETI)	Declaration	
bu you could be not in a logic alloy acting the Ling both SVS37 here any could and pressions, and or deal this SVS37 SIC Code 14100 SEZ Code ZAR	Ihereby dockere that     - This recordinate is the and comed and that all tax, levies and contributions required to be deducted has been declared and all payments declared have been made. I hereby accept liability for any differences due.     x00000000000000	
	Date (OCYYMMDD) Plasse onsure you sign over the 2 lines of 1% showe	
	For enquiries go to www.sam.gov.za or call 0800 00 SARS (7277)	
	-	
EMP501 L FV 2016.15.00 SV 1501 CT EASY NO	IN THE RESERVED A LODGE DURING A LODGE OF A DESCRIPTION OF A DESCRIPTION OF A DESCRIPTION OF A DESCRIPTION OF A	

e@syFile EMPLOYER 6.7.5	File Save	Print Close		-	x
2 / 3 🖶 74% -					
				-	i i
Employment Tax Incentive (ETI) Details				ETIPA01	
Transaction Year (0CYY) 2 0 1 7 Reproduction (0CYYMM) 2 0 1 7 0 2 No.		No.	No.		
ETI Brought Forward ETI Calcula Rands cnly, no cents Rands cnly, no	ted ocents	PAYE Liability Rands only, no cents	ETI Utilised PAY Rands only, no cents	E Payable (exc). Penalties, Interest and Add tax) Rands only, no cents	
March 0					
April 0	0	0		0	
May 0	0	0		0	
June	0	0	0	0	
July 0	0	0			
August	0				
	0				82
ETI not Utilized					
September					
November					
December					
January 0					
February 0	0				
Total (2nd Six Montra)	0	0			
ETI not Utilised					۰.
•					
	Y NO P 201702		n an ann an an an ann an ann an ann an a		
		III NOCIDIO CARLINA CARANTINA	ADU ANG YANG TADUN DAYAAN KIRUN KATUDA		

Financial P Transaction Year (CCY)	articulars	7 0 2 PAYE Ref			PRDFY01	
	(CCYYMM) PAYE Liability Rands only, no cents	SDL. Rands only, no cents	UIF Randis only, no cents	Total Monthly Liability Rands only, no cents	Paymonts (excl. Penellies, Interest and Add too) Rands only, no cents	
March		0				
April			0	0		
May	0	0	0	0		
June	0	0	0	0		
July	0	0	0	0		
August	0	0		0		
September	0	0	0	0		
Oclober	0	0	0	0		
November						
December						
January						
February		0	0			
Annual Total Difference-Total						
Liability & Annual Total			1 5 4 1 6			
The Certification			1 5 4 1 6			
Total			1 5 4 1 6			
Audit Result Not In Certificates						
Tax Paid on Behalf of Employee						
				_		
		Deck Rands	ared Liability only, no cents	Annual ETI Utilised Rands only, no cents (e)	Due By / To You (cl. Penalties, Interest and Add tax)	
					Rands only, no cents	
			2 8 2 6 6 3			

Page 3 - declaration by entering only rand values for SDL and UIF

Click on Save

Complete

Please Note	
You are about to Save the EMP501 return and the relevant certificates to your local disk. You will however still need to submit your return to SARS if not yet submitted.	
Ok	

			Select the ta	ex year for the Declaration :	201702 🔻	Refresh
501 Declaratio	ns for : NEW COMP	PANY NAME				
PAYE	SDL	UIF	ETI	Status		View
0.007007.00	R 20.00	R 15416.00	R 0.00	SAVED		View

Ensure that the correct values owned to SARS is captured in the declaration. If the values were overstated or understated the customer must restate the EMP201.

You are only allowed to be out with R12 on your declaration, this can be due to rounding. If you are out by more the customer should restate the EMP201 and you can enter the new figures on the declaration. You cannot continue with the submission if you don't balance.

Step 4: Submit to SARS

Click on	Declarations
Click on	<b>View</b> at the applicable EMP501

e@syFile EMPLOYER 6.7.5 HOME Notification Centre	ЕМР501		11			_ X
Action Centre REGISTRATION eFiling Registration	EMP501 Declaration	is for : NEW COMI	PANY NAME -	Select the t	ax year for the Declaration : 20170	2 🔻 Refresh
	PAYE	SDL	UIF	ETI	Status	View
EMPLOYEE ADMIN View/Edit Employees MONTHLY PROCESS	R 267227.00	R 20.00	R 15416.00	R 0.00	SAVED	View

Click on File

e@syFile EMPLOYER 6.7.5	File Save	Print Close			_ ×
▲ ↓ 3 / 3 ● ⊕ 74% -					
Financial Particulars				PRDFY01	Ê
Transaction Year (ICCVY) 2 0 1 7 Period of Reconciliation 2 0 1 7 0 2	PAYE Ref				
PAYE Liability Rands only, no cents R	SDL ands only, no cents	UIF Rands only, no cents	Total Monthly Liability Rands only, no cents	Payments (excl. Penelties, Interset and Add too) Rands only, no cents	
March 0 2 0 0 0	20	20	2040	2040	
April 2 0 0 0			3000	3000	
May 5 0 0 0		5000			
June 1 0 0 0 0					
July 2000		1000	3000	3000	
August 1 0 0 0 0	0	1000			
September 0 1 0 0 0 0	0	1000	1 1 0 0 0		
October 2 0 0 0 0 0	0	1000	201000	201000	
November 0 1 0 0 0	0	1 0 0 0	2000	2000	
December 1 0 0 0 0	0	0 1 0 0 0	1 1 0 0 0	1 1 0 0 0	
January 2000	0	1000	3000	3000	
February 1 3 2 2 7	0	1 3 9 6	1 4 6 2 3	1 4 6 2 3	
Arrual Total 2 6 7 2 2 7	20	1 5 4 1 6	282663	282663	
Lidolity & Annual Total	0	0	0		
Total Liability 2 6 7 2 2 7	20	1 5 4 1 6			
Tax Certificates	20	1 5 4 1 6			
Audt Result Not					
Tax Pald on Behalf of Engloyce					
	Declared Liability Rands only, no cent	annual Rands on	ETI Utilised nly, no cents (excl.	Due By / To You Penalties, Interest and Add tax)	
				Rands only, no cents	
					=
INNP501 L BV 2016.15.00 SV 1501	CT EASY NO	III MARAALAMBARA DO DAKA	ал ана але сансти сана шилини	NOVERALITY CONTRACTOR IN THE REAL REAL REAL REAL REAL REAL REAL REA	





The status now on the declaration screen will show ready to file.

Click on Submit to SARS

e@syFile EMPLOYER 6.7.5								_ x
HOME	SUBMISSION							
Action Centre	<u>On this screen yo</u> Please select the	u are able to submit documents you wish	documents to SAR to submit by clickin	2 ng on the Subm	nit check box			Submit
eFiling Registration	Туре	Reference	Company	Year	Status	Submit		
IMPORT	EMP501		NEW COMPANY NA	201702	READY TO FILE		View	Remove
Import/Export Payroll File								
EMPLOYEE ADMIN								
View/Edit Employees								
MONTHLY PROCESS	1							
RECONCILIATION								
Adjustments								
SUBMISSION	/							
Submit to SARS								

Tick	Submit	block
Click on	Submit	

SUBMISSION	~ ~ ~						
<u>On this screen you ar</u>	e able to submit o	locuments to SARS	5				
Please select the docu	iments you wish	to submit by clickir	ng on the Submit	check box			Submit
Туре	Reference	Company	Year	Status	Submit		
EMP501		NEW COMPANY NA	201702	READY TO FILE	$\checkmark$	View	Remove

## Select Via the Internet or Via SARS Branch Click on Submit

Step 5: Generate IRP5/IT3a from e@syFile

Click on	Utilities
Click on	Generate IRP5/IT3(a) PDF's
Tick	Export
Click on	Export

e@syFile EMPLOYER 6.7.5							_ X
НОМЕ	SYSTEM UTILITIES						
Notification Centre	On this screen you are ab	le to run the system u	itilities.				
Action Centre	Databasa Utilitias						
REGISTRATION	Database Utilities						
eFiling Registration	EMP501 Status Dashb	oard					
IMPORT	AA88 Payment Alloca	tion Dashboard					
Import/Export Payroll File	Pre-Submission Valida	tion Report					
EMPLOYEE ADMIN	Import Payroll File Log	9					
View/Edit Employees	Delete Payroll File						
MONTHLY PROCESS	Reset Passwords						
DAVE	Payroll File Editing						
	Reassign Certificate						
Payments	Generate IRP5 / IT3(a) PDF's						
RECONCILIATION	TAX CERTIFICATE G	ENERATION					
PAYE Dashboard	On this second						
Declaration	<u>On this screen you</u>	are able to generate	e your IKP5/113(a) ta:	<u>certificates</u>			
Cancel Certificate Range	Please select the do	cuments you wish	to generate by clickin	g on the Export			Export
Adjustments	Туре	Reference	Company	Year	Status	Expo	rt
SUBMISSION	EMP501		NEW COMPANY NAM	201702	READY TO FILE		View
Submit to SARS						_	
THIRD PARTY APPOINTMENTS							
Third Party Appointments							
EMPLOYER ADMIN							
View/Edit/Change							1
UTILITIES							
Utilities							
Synchronise Application							

Select	Type of Certificate
Click on	Submit

_	
E	Bulk Export
5	Save the EMP501 return and the relevant certificates to your local disk. You will however still need to submit your return to SARS if not yet submitted.
10 10	<ul> <li>* Destination folder can only be created on local disk</li> <li>* Only final tax certificates (end of year) will be generated in PDF format and saved to your PC.</li> </ul>
	Which IRP5/IT3(a) would you like to have generated in PDF format and saved to your PC?
	All OManual ONLY Import ONLY Amended None     Submit Close

The export folder will contain each employee's tax certificate and the EMP501.

