

# Release 5.1a+

## ETI Period Recalculation process

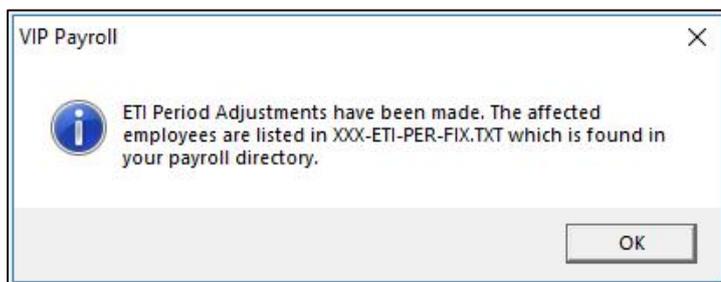


If you previously updated to Release 5.1a before 20 September 2018 and claim ETI, the following document will assist you to ensure the ETI Periods are correct for your employees.

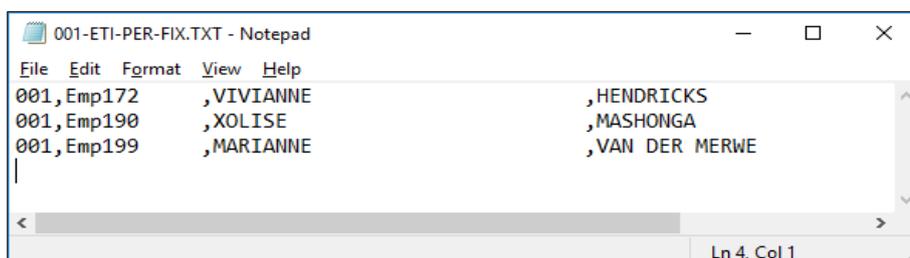
We became aware of an issue on the Release 5.1a software, where the ETI periods increment when they should not. The impact of this issue is that you can claim less ETI than permitted. We strongly recommend you update to Release 5.1a+ in the same period you updated to Release 5.1a.

The steps below are only required to be followed in companies where ETI is calculated for qualifying employees.

- Access Company
- Click on Payroll > ETI Period Recalc
- The recalculation process will commence and will display “Updating ETI History File” with progress bar
- The following message will display onscreen, if any changes were made:



- The XXX of the file name displayed in the message, will be the same as that of your payroll company e.g. if you run the recalculation in company 001, the file name in your folder will be 001-ETI-PER-FIX.TXT
- You will be prompted to do a General Recalculation (Recommended)
- Navigate to your system folder where the file was saved
- Open the text file created for the specific company. This file will display the Company number, Employee Code, Employee Name and Employee Surname



- Run the ETI History reports (Interfaces > Export Data > ETI History) to generate the Excel file with all ETI History for the 2018 Export Year
- On the Excel Report, activate the filter setting on all the headings (In Excel, select the top line displaying the headings, click on Data, and then Filter)
- Apply the filter on the Tax Incentive column (Column S) and select to display all values greater than zero
- Apply the filter on the Employee column (Column B) and select the employee number as per the text file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Compar	Employee	Yea	Mon	Start date	Age	Valid	SEZ Coc	Filk	SIC Coc	Tax Status	UIF	Wage Coc	Min Wag	Actual Wag	Period S	Period Cou
2	001	Emp172	2018	1	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		1
3	001	Emp172	2018	2	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		2
4	001	Emp172	2018	3	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		3
5	001	Emp172	2018	4	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		4
6	001	Emp172	2018	5	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		5
7	001	Emp172	2018	6	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		6
8	001	Emp172	2018	7	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		7
9	001	Emp172	2018	8	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		8
10	001	Emp172	2018	9	20180101	26	Yes			47110	N.Statutory Tables	R.UIF	#001	12.50	12.50		8

- The sheet will display the employees' ETI History as from January 2018, and Period count will increment numerical order – The Period Set only changes after your Period Count is more than 12.
- If the Period Set reflects as a 0 (zero) in a period where ETI is calculated (employee was loaded on payroll in previous period, and qualified for ETI), you can access the Employment Tax Incentive tab (routing ETI) screen on the Employee Information (routing IS) screen, enter a . (full-stop) in the Routing box and press Enter – this will correct the set number for the specific employee
- Take note, the Period Count for the current month will always be the same as the previous month – it will only increment when you do a Start of Period to a new calendar month. In the example above, the payroll company is still in September.

Should you experience any issues or have concerns regarding this process, you can subscribe to the Sage City forum (<https://sagecity.na.sage.com/za/sage-vip-payroll-hr-south-africa/>) or contact our support desk.