Release Notes: e@syFile™ Employer version 5.0.2

- Enhancements to search and filter options on "View/Edit Employees" screen includes the following:
  - In order to enhance search and filter functionality, a "Search" button was added to the "View/Edit Employees" page. Users can now enter or select search criteria before using the "Search" button to initiate the database filtering
  - Correction to search results display: previously, search results were reset when "Next page" button was used
  - Income Tax reference number Status drop down will now sort and display as expected
- "2012" was added to the drop-down list when requesting a PAYE Statement of Account
- The "Export to Payroll" button was removed from the "View/Edit Employees" page. The option on the left hand side menu "Import/Export Payroll File" will include Bulk, Bundle and Individual Income Tax Registration results in the export file
- An extra option to select a specific Recon Period was added to the Export Payroll file functionality
- Correction to generation of EMP601 PDF's when multiple certificates (more than 8) or more than 4 certificate ranges were cancelled
- Correction to the Utilities menu option to generate IRP5 / IT3(a) PDF's: previously all certificates available for the specific recon period were generated in the selected folder
- Corrections to validation with CSV import, manual capture and Pre-submission validation to align with current PAYE BRS document available for download on www.sars.gov.za:
  - Employer business address street number field (source code 2063) now optional
  - "Gratuities (PAYE)" (3901) can now be used in conjunction with "Non-refundable Employee's Tax Deductions" (4115)
- A new ITREG BRS document has been published and is available for download on www.sars.gov.za

Release Notes: e@syFile™ Employer version 5.0.1

- Enhancements to search and filter options on "View/Edit Employees" screen includes the following:
  - Correction to filtering process when Tax Year drop-down menu is used
  - Correction to filtering when First Name or Last Name options were used as search criteria
- Correction to display of Income Tax Registration status on "View/Edit Employees" function for individuals that have the correct income tax reference number recorded.
- Correction to "Export to Payroll" file trailer totals to align with PAYE BRS published on www.sars.gov.za

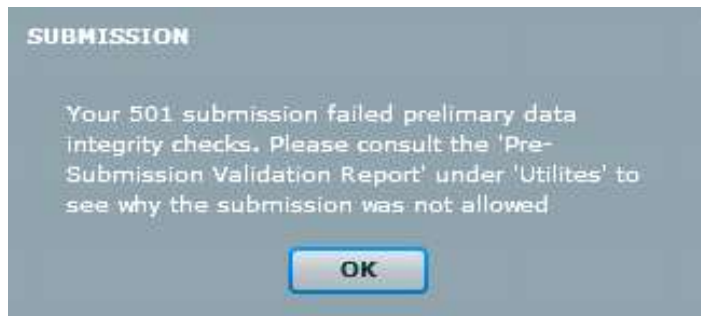# Release Notes: e@syFile™ Employer version 5.0.0

1. **Version lock-out of old e@syFile versions**

   To ensure that users do not use previous versions with outdated validation rules, a "version check" will be added to the EMP501 submission files as well as Income Tax Registration (ITREG) functionality.
   - **Users will not be able to submit using previous versions (V4.3.4 and prior)** - both internet and manual submissions will be rejected
   - Income Tax Registration requests submitted from prior versions will also be rejected

2. **Pre-submission validation**

   - Additional validation will be performed upon submission to ensure successful processing of EMP501 and certificates
   - Should the EMP501 submission fail the preliminary data integrity check, the user will be directed to a new menu option, "Utilities – Pre-Submission Validation Report" where errors will be clarified, including the certificate number, surname and incorrect field.

SUBMISSION

Your 501 submission failed prelimary data integrity checks. Please consult the 'Pre-Submission Validation Report' under 'Utilites' to see why the submission was not allowed

OK

3. **Utilities – Status Dashboard**

- Status updates will provide more specific information when EMP501 submission is rejected

4. **Income Tax registration**

- Bundled ITREG process is now available on e@syFile™ Employer, enabling employers to register up to 100 employees at a time, but not exceeding 1 000 within a month. Employee details can be captured manually on e@syFile™ Employer for Bundle ITREG request or the employee records can be imported from the payroll application using a CSV file.
  (Specifications included in published PAYE BRS on www.sars.gov.za)
- Bundle ITREG results will be available within 24 hours via the synchronisation process.
- Bulk, Bundle and Individual ITREG results will include one of the following statuses
  - o Registered (new Income Tax reference number provided)
  - o Existing Taxpayer (employer to obtain number from the individual)
  - o Unable to Register–Employee must contact SARS (i.e. multiple registration found)
  - o Insufficient Information (i.e. invalid postal address, incomplete address details)
  - o Non-Individual (i.e. ID supplied belongs to a TRUST)
- Enhancements to layout and search options on "View/Edit Employee" page, including a column on employee listing panel to display Income Tax reference number status for employee records
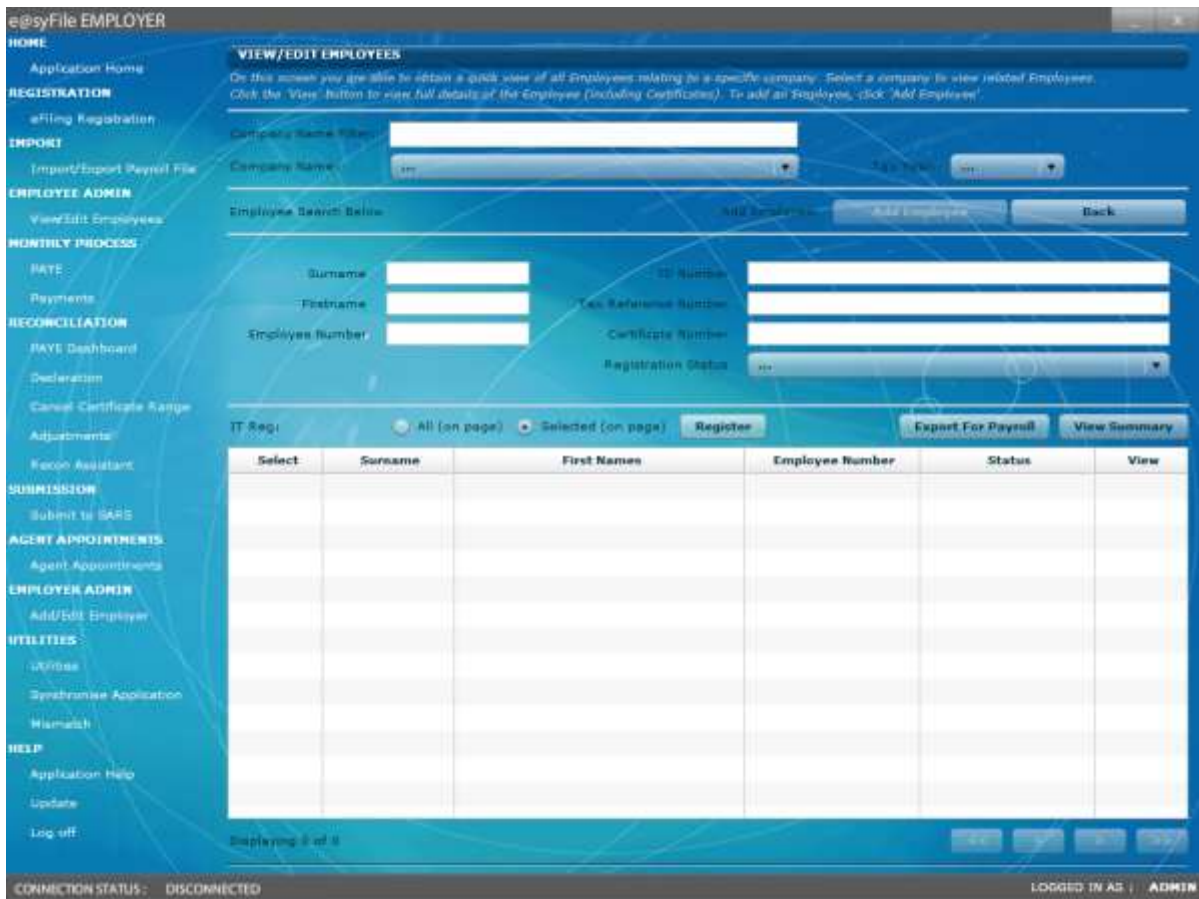
- "View Summary" button added on View/Edit Employee page – this will display a summary of Income Tax reference number status for all employee records

- "Export for Payroll" button added on View/Edit Employee page to create a CSV file with Bulk, Bundle and Individual ITREG results that can be imported on the payroll application to update employee records. Individual ITREG results were excluded from the export file before.

5. **Synchronise application - enhancements**

- ITREG results can only be retrieved when using e@syFile™ Employer V5.0.0 or later
- Enhancements to the process when retrieving ITA88 correspondence to approve application stability
- When synchronising to retrieve results for the Bulk ITREG performed by SARS, the process will fail should the user initiate the process without the relevant database or certificates (previous EMP501 submission). The synchronisation status for the relevant PAYE number(s) will not change – this will enable users to restore or import the relevant data, and repeat synchronisation process without requiring the synchronisation status to be reset by SARS first.
- An option was added to indicate specific items to retrieve when Synchronise Application is selected
  - eFiling Profile and Employer Information
  - Letters and Correspondence (Including ITA88 notices)
  - Taxpayer Income Tax Registrations
  - All

Note: Please use the "All" or "eFiling Profile and Employer Information" option when using your eFiling username for the first time or when switching between eFiling usernames.

Please select which item you want to synchronise

Here you can select which item you wish to sync

- ○ eFiling Profile and Employer Information
- ○ Letters and Correspondence (including IT88 notices)
- ○ Taxpayer Income Tax Registrations
- ○ All

Note: Please use the "All" or "eFiling Profile and Employer Information" option when using your eFiling username for the first time or when switching between eFiling usernames.

SYNC   CANCEL

6. General

- Where Employers have entered an agreement with SARS as part of the Voluntary Disclosure Programme (VDP), they will now be able to specify the VDP application number when submitting EMP201 returns via e@syFile.
- Validation when capturing manual certificates changed. User must capture all mandatory fields before cancelling an incomplete certificate – message prompt will display to indicate incomplete fields
- Incomplete IRP5/IT3(a)'s cancelled before the EMP501 submission, failed validation when processed and resulted in EMP501 rejection. An error message displayed on Declaration page or Submission screen. Therefor an option was added to re-cancel error certificates, this will validate information captured, and user can then amend incorrect fields on the relevant certificate before re-cancelling, and resubmitting their EMP501
- Pipe symbol (" | ") will not be allowed in any field for manual capture and CSV import
- Minor adjustments in functionality to improve Recon Assistant process

Release Notes: e@syFile™ Employer version 4.3.4

- Improvement to single IT Registration process:
  - when immediate server response is not available, registration requests will be queued and can be retrieved by synchronising the application.
  - reduced the wait time before the IT registration process queues the request
- Synchronisation error message detail expanded to specify eFiling security profiles with restrictions that are affecting successful completion of a synchronisation.
- Changes to the e@syFile application and servers to improve connectivity and response times during peak times
- Update service re-enabled for e@syFile release V4.3.4

Release Notes: e@syFile™ Employer version 4.3.3

- Correction to validation rules on employee records to include Postal Code as mandatory field when using IT Reg function on e@syFile™ Employer
- Adjustments to synchronisation process to improve connectivity.

Release Notes: e@syFile™ Employer version 4.3.2

- Update functionality re-enabled for users to update the application when new versions are released instead of downloading the full installer.
- Improvement to eFiling validation process, this will improve synchronisation as well as online functionality in the application
- Resolved function restrictions experienced on computers with Windows 7 64bit Operating systems. It might still be necessary to enable the option in preferences to "Run the application as administrator" to ensure full access to all functionality

Release Notes: e@syFile™ Employer version 4.3.1

- Minor corrections to synchronisation process
- e@syFile™ Employer version for MAC operating systems released and available for download on www.sarsefiling.co.za

Release Notes: e@syFile™ Employer version 4.3.0

- Recon Assistant functionality will now be available offline, before only available online once employer received electronic notification from SARS
- e@syFile™ Employer upgraded to Adobe® AIR® 2 platform, installation of the latest version will also remove e@syFile Service component. This improves application stability and will enable auto-updates for Windows 7 users. For this reason a full install of the application is required to complete the upgrade to version 4.3.0.
- Correction to processing of EMP701 submissions that hanged before
- IRP5/IT3(a) PDF's for older periods (with short certificate numbers) will now display correctly when opened from "View/Edit Employee" menu option
- Correction to validation when importing CSV files, numeric characters in surname field will now result in failed validation

- Correction to validation when importing CSV files, Employer name field will now allow 39 characters free text as published in BRS
- Correction to manual capture of employee records or certificate: "|" (pipe) character previously allowed, resulting in rejected submission, "|" character will now be blocked
- Correction to import process: previously, new CSV file did not update existing employee records with new information included, now corrected to overwrite historical information on import
- Correction to Export file format: duplicate employee records displayed before
- Correction to Export file format: Trailer total (code 6010) now correct
- Correction to Export file format: values entered for code 3075 included
- Warning message displayed when mandatory fields excluded from CSV file updated
- Corrections to EMP201 display and submission process
- Corrections to Recon Assistant process, payments, debits and dates will now display correctly
- Windows 7 users: to ensure that application and functionality is not restricted by your Windows 7 Operating system, please right-click on the e@syFile Employer desktop icon, and select "Run as administrator" from the menu displayed.

Release Notes: e@syFile™ Employer version 4.2.6

- IRP5/IT3(a) PDF's for older periods (with short certificate numbers) will now display correctly when opened from "View/Edit Employee" menu option
- Corrections to Export of IT number details to align with published BRS
- Importing CSV files – minor adjustments to update warning and failure messages to align with current BRS
- When capturing / editing certificates, code 4497 can now be deleted
- Corrections to Employee address fields to align with current BRS, including asterisk indicating mandatory field for business telephone number
- 2011/02 submissions added to the Utilities option to generate IRP5/IT3(a)'s
- Description for Nature of Person option 'N' updated to "Lump Sum Recipient / Pensioner
- Addition of 2011/02 Recon period on the PAYE Dashboard drop-down selection list
- Addition of 2011/02 Recon period on the Recon Assistant drop-down selection list

Release Notes: e@syFile™ Employer version 4.2.5

- IT Letters: Synchronisation process improved to allow retrieval of huge volumes of data simultaneously
- Employee records prepared to retrieve and populate IT Numbers received after auto-registration by SARS following 2010/08 submission.

Release Notes: e@syFile™ Employer version 4.2.4

- IT Letters: Synchronisation process adapted to enable Employers to receive SARS Letters with IT numbers registered in bulk once synchronisation is complete.
- Correction made to calculations on Recon Assist when allocating payments, previously multiplied payment allocation amount.
- Correction made on Monthly PAYE Dashboard – history of transactions now displays correctly
- Cancelled certificates previously excluded from resubmission will not process correctly
- EMP501s with negative amount due previously displayed incorrectly on PAYE Dashboard, corrected to reduce total liability

- Date on ITA88 letters will now display correctly.
- Submission of ITA88 outcomes previously generated an error message – fixed to allow submission
- Rejected submissions will now display valid reason for rejection on Status Dashboard
- EMP701 processing corrected to generate correct submission file
- Previous delays when merging two databases now resolved.

Release Notes: e@syFile™ Employer version 4.2.3

- IT Reg: Relaxation of validation of fields to align with CSV specification in BRS
- New employees will now display correctly even if IRP5/IT3 not captured yet
- Recon bug fix: Reallocate unallocated payment to period resulted in incorrect calculation if multiple unallocated payments existed with the same PRN number
- EMP501 Declaration – new RESUBMISSION option was added to EMP501 declaration.
  Once selected, this option will enable employers to replace all information previously submitted to SARS with certificates and amounts included in new submission.

Release Notes: e@syFile™ Employer version 4.2.2

- Correction of incorrect calculation in Due to/by field on Recon Assistant Step 4
- EMP501 certificate value will now display correctly on the PAYE Dashboard
- Issue of 0 month on date now corrected on bulk payments and ITA88 submissions
- "Add employee" function: will now display employees accurately, even if no certificates have been added for employee yet

Release Notes: e@syFile™ Employer version 4.2.0

1. Employee Admin
- Manage Source Codes option now active after new employee record is saved

2. ITA88s/Agent Appointments
- Outcomes can now be edited when additional ITA88s are issued after original outcome submitted (e.g. outcome submitted "Deceased" – additional penalties will be open to resubmit outcome)
- Incorrect display of ITA88 letter corrected

3. Reconciliations
- Status Dashboard – updates should be available where electronic update was unavailable before
- Resubmission of older EMP501 declaration (e.g.2009) now blocked and available only on Adjustments option (EMP701)
- Duplicated values of certificates on declaration now fixed, calculation of certificate values correct

4. Utilities
- SQL error when restoring backup files fixed – known issues with 2009 and older backup files
- Backup restore that displayed no data now fixed

5. PAYE Dashboard

- New functionality added to e@syFile™ Employer. You need to synchronise your local data (e@syFile™ Employer) with your SARS eFiling website profile before you can access this new menu option.
- This will display a summary of all aspects of your PAYE account, reflecting sub-totals for EMP201s, monthly Payments, your EMP501 declarations, Certificate Values and ITA88 details.
- For details regarding this new process and the synchronisation option, please refer to the updated e@syFile™ Employer user guide available for download from www.sarsefiling.co.za

6. PAYE Recon Assistant
- New functionality added to enable Employers to manage their PAYE account with SARS, EMP501, EMP201, payments and certificate values
- Where your PAYE reconciliation submission fails to balance across these elements, SARS will issue a letter notifying you that your reconciliation submission was unsuccessful. Information displayed on the PAYE Dashboard should indicate what the reason is for the request for resubmission. The reasons for this could be that your employee tax certificates do not match your tax liability, or your monthly declarations and payments do not match the amounts entered on the Employer Reconciliation declaration (EMP501).
- You will then need to use the PAYE Reconciliation Assistant in order to correct your PAYE tax affairs
- The Recon Assistant will guide you through these steps:
    o Confirm your payments
    o Reconcile your monthly Declarations (EMP201s) to your payments and Reconciliation Declaration (EMP501)
    o Raise cases for missing payments
    o Allocate unallocated payments
    o Make payments (if required)
- For detailed instructions, please refer to updated e@syFile™ Employer user guide available for download from www.sarsefiling.co.za

7. Mismatch
- New functionality added to e@syFile™ Employer to enable Employers to manage and allocate/re-allocate payments made towards EMP201 returns. This option is similar to aspects included in the new Recon Assistant, but will not be linked to a letter from SARS. Employers will be able to access Mismatch functionality whenever they need to allocate or re-allocate payments.
- This option is also blocked until the user has synchronised their e@syFile™ Employer data with their eFiling website profile.
- For detailed instructions, please refer to updated e@syFile™ Employer user guide available for download from www.sarsefiling.co.za

Release Notes: e@syFile™ Employer version 4.1.3

1. New EMP201 return
- New EMP201 return introduced on e@syFile™ Employer as well as SARS eFiling website
- The new return has two additional fields for penalties and interest amounts.
- Please refer to e@syFile™ Employer manual and www.sars.gov.za for details.
- Revised EMP201 with higher amounts than original submission will now prompt for payment, Save Online and File buttons will function as expected

2. EMP501 / Reconciliation process
- Final certificate indicator (tick) now remains selected when IRP5/IT3a is saved
- Employer drop-down list now displays correctly after import
- Certificate range (certificate numbers) corrected to display actual range for selected employer and period of reconciliation
- Backup restore function previously did not display certificate values for PAYE, SDL and UIF – corrected to reflect actual values
- Import Payroll File log listing incorrectly displayed listings using PAYE reference number, amended to display actual filename

- Import Payroll File log will now display total number of certificates included with CSV file after successful import
- Employer Admin function will now allow user to update Employer data without scrolling through all the tabs – previously error message displayed with prompt regarding mandatory information
- Cancellation of old format certificate numbers corrected – display issue corrected to reflect certificate number in old format and cancel actual certificate number

3. IT Reg (Single registration)
- Updated return message when no banking details provided before IT Reg function used

4. eFiling Registration
- eFiling registration screen now displays correctly when selecting this option on the menu

5. ITA88 / Agent Appointments
- ITA88/Cancellations screen display included help index, fixed to display correctly.

Release Notes: e@syFile™ Employer version 4.1.2

1. **EMP501 & EMP701 / Reconciliation process**
   - Decimal values (cents) displayed incorrectly on amounts entered for income source codes, corrected to exclude cents
   - Source codes and amounts were duplicated when "View certificate" option used to display certificate in PDF format – corrected now to display codes and amounts accurately.
   - Final PDF certificates displayed without source codes and amounts, not corrected to reflect actual values
   - After submission, cancelled certificate status did not update, now corrected to display "cancelled-submitted" after submission
   - Values for multiple years displayed on EMP701 corrected to only reflect the values for selected transaction year
   - EMP701 status reset to Saved after View option used, corrected to display actual status
   - Adjustment to entries on "Generate PDF certificates" listing to ensure all submissions available for selection
   - Delays/no-action when selecting and submitting a declaration in Ready to File status corrected
   - Generic error message with CSV import corrected to "failed" message indicating error
   - PDF File Generation Error message - ERR:I/O error while parsing input stream, now corrected, sub-folder with PDF certificates generated
   - Employer name not displayed on drop-down list when using Edit/View Employees function corrected to accurately display Employer name
   - Auto-calculation of certificate totals on previous declaration displayed incorrectly, corrected to reflect actual value of certificates for the relevant transaction period
   - Large amounts that incorrectly displayed, and ended with a dot (full stop) now display correctly.
   - EMP701 difference fields not calculating and displaying correctly
   - 2008 DB (backup) files can no longer be merged with current DB

2. **EMP201 / monthly process**
   - SDL and UIF fields incorrectly allowed editing when not registered for SDL or UIF, corrected
   - EMP201 not displayed for selection on "Submit to SARS" listing, corrected
   - EMP201 declaration remained on "Submit to SARS" listing after submission, fixed to move declaration to history view after submission

3. **ITA88 / Agent Appointments**
   - Error with field length for address fields corrected

Option to print a single ITA88 (appointment letter per individual) corrected, employer now able to print one letter per individual using ITA88 with bulk detail imported on e@syFile™ Employer

Release Notes: e@syFile™ Employer version 4.1.1

1. Incorrect PDF view / display
   - Source codes and amounts were duplicated when "View certificate" option was used to display certificate in PDF format – this has been corrected to display codes and amounts accurately.
   - Large amounts displayed with a "dot" (full stop) stop now corrected to display only amount in PDF

2. ITA88 functionality changes
   - ITA88 cancellations now displayed on Agent appointments view
   - Outcome now updates to "SARS response received"
   - Functionality added to print a single ITA88 per individual

Release Notes: e@syFile™ Employer version 4.1.0

1. ITA88 (Agents Appointments) functionality added – please refer to comprehensive ITA88 guide for details

2. IRP5s/IT3As folder – certificates in PDF format
   In previous versions of the software, a subfolder with PDF certificates was generated during the submission process. This function has been removed from the submission process to ensure quick, effective submissions via the internet.
   The option to generate PDF certificates for a specific EMP501 was moved to the Utilities menu:
   Generate IRP5 / IT3(a) PDFs
   After submission, you will be able to generate all PDF certificates included in the submitted reconciliation by selecting the relevant EMP501 from the list displayed.

Release Notes: e@syFile™ Employer version 4.0.2

Updates to EMP201, EMP601, EMP701 PDF.

Release Notes: e@syFile™ Employer version 4.0.1

URL change for the payment service – no noticeable changes for end-user