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e@syFile[™] EMPLOYER

A QUICK GUIDE TO THE NEW AND UPDATED FUNCTIONS AVAILABLE

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INTRODUCTION

To assist employers, the following new and/or updated functions have been included in e@syFile™ Employer:

- New database encryption and decryption
- The ability to divide information, included in an existing database file, by Pay-As-You-Earn (PAYE) reference number
- A new notification centre (to replace the Inbox under Utilities)
- An update to the individual/bundled Income Tax Registration (ITREG) process
- Enhanced creating, merging and restoring of databases.

1. NEW DATABASE ENCRYPTION AND DECRYPTION

Information security is becoming more and more important as risks of fraud, due to unauthorised access to information and phishing which has become increasingly common.

Given the sensitive information stored, relating to employees and payroll data within e@syFile™ Employer, the South African Revenue Service (SARS) is introducing new security features to ensure the data is always protected and secure.

By incorporating industry-strength encryption and decryption standards, the latest e@syFile[™] Employer update will ensure your database and backup files are encrypted with a unique key when not in use. What this means is, only users with valid e@syFile[™] Employer login details, will be able to access the information.

Valid e@syFile™ Employer login details must be provided which will allow users to select the specific PAYE reference number for that session. The database will be unlocked through a decryption process, while the other linked PAYE reference numbers (database files) not in use, will remain secured. When logging off or closing the software, all database files will be encrypted for protection once again.

Knowing your e@syFile™ Employer login details is very important, as without these the database files cannot be accessed. This includes the administrator profile (ADMIN username), as well as the two user profiles setup during the first installation.

Note: Due to stringent security used, SARS will not be able to recover data where valid login details have been lost or forgotten; therefore it will not be possible to access encrypted data again.

e@syFile™ Employer login details will need to be provided when restoring or merging database backups. During these operations, users will be requested to provide the username and password that is applicable to the database backup being used.

It is vitally important to protect your e@syFile[™] Employer login details, as the login details will be required whenever a database or backup file is opened, restored or merged.

2. DATABASE SPLIT BY PAYE REFERENCE NUMBER

Each user will have a master database file, and additional database files for each PAYE reference number or employer included in their current database. The split in data will enable users to manage their information per employer or PAYE reference number.

All correspondence received will be included in the master database file, and information relating to the Employer Reconciliation Declarations (EMP501s), Monthly Employer Declarations (EMP201s) and payments will be included in the individual employer database files.

These changes will have a minor effect on the navigation of existing functions within e@syFile™ Employer. Users will now select a specific employer or PAYE reference number to open the software and database file.

Step 1 – Opening a database file

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A selection box will be seen after login, listing the database (employers) files available in e@syFile™ Employer. Select which database or employer you will be working with.

Click **Continue** to proceed with the decryption and opening of the database file.

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IMPORT			
Import/Export Payroll File	$\Theta(0)$ SV		
EMPLOYEE ADMIN	0000		
View/Edit Employees			
MONTHLY PROCESS			
PAYE		-00-	
Payments	Please select which company you want to use		
RECONCILIATION	Database Select		
PAYE Dashboard	75 EMPLOYER A		
Declaration	76 EMPLOYER B	NOT	
Cancel Certificate Range	EasyFile	ryer	
Adjustments		Install Info	
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SUBMIS			
Submit to SARS			
AGENT APPOINTMENTS			
Agent Appointments		S	
EMPLOYER ADMIN	Continue		
View/Edit/Change			
UTILITIES	Welcome to a new and easier way of reconciling		
Utilities	SARS. At Your Service.		
Synchronise Application			
Mismatch			
Penalty			
HELP			Proudly brought to you by
			VCADC
			J/41()
			At Your Service
CONNECTION STATUS : DISCONNECTED			LOGGED IN AS : ADMIN

A pop-up message will be displayed once decryption has completed.



Once a specific database file has been opened, user will be able to continue to accessing the e@syFile™ Employer function or menu options for that specific employer.

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Step 2 – Changing to another employer

Users with multiple employer/PAYE reference numbers included in their existing e@syFile™ Employer data may change between different database files if required:

Two options are available to navigate between data files:

1. Click **Change** on the task bar at the bottom of the screen to display the list of available database files.

e@syFile EMPLOYER			
HOME			
Notification Centre			
REGISTRATION	HAR MAR IN A		
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	EWSV		
View/Edit Employees			
MONTHLY PROCESS			
PAYE			
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View/Edit/Change			
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Utilities	SARS. At Your Service.		
Synchronise Application			
Mismatch			
Penalty			
HELP			Proudly brought to you by
Application Help			CV9C
Update			S/11(S
Log off			At Your Service
CONNECTION STATUS : DISCONNECTED	Current Tax Year : 2013 Working With : No Company Selected	Change	LOGGED IN AS : ADMIN
Current Tax Year : 2013 W	/orking With : No Company Selected	Change	

OR

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2. Click View/Edit/Change below EMPLOYER ADMIN on the left hand menu. Click Change Employer

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		Please select which o	company you want to use	
		Database	Select	
		75 - EMPLOYER A		
		76 EMPLOYER B		
		EasyFile	\checkmark	
TAPPOINTHENTS				
OYER ADMIN		Continue	Close	

Select **Click to Change**, to display the list of available database files.

Select the relevant database file and click **Continue** to proceed.

3. NEW NOTIFICATION CENTRE

To improve the synchronisation process and retrieval of electronic correspondence, a Notification Centre has been added, which replaces the Inbox in the Utilities menu.

The new Notification Centre will automatically sort retrieved letters by PAYE number and letter type, making it easier to manage correspondence and related processes.

The new Notification Centre will include a count for all correspondence requiring attention. This includes unread items, as well as new items that can be retrieved by synchronising. The count for each letter type is displayed per employer/PAYE reference number.

- The Tax year column will now display the issue date of correspondence retrieved.
- Agent appointment correspondence will be added to individual employer database files once the notification has been opened from the menu. Details can be accessed and managed from the Agent Appointments menu option, once the letter has been opened.
- Similarly, bulk ITREG results will be available for export after the ITREG notification letter has been opened.

Step 1 – Synchronise software

To access the new Notification Centre, users will have to synchronise in order to retrieve correspondence. Click **Synchronise Application** to initiate the process.

For a detailed guide on how to synchronise, refer to **chapter 6 – eFiling Synchronisation** in the e@syFile™ Employer user guide available on www.sars.gov.za.

Step 2 – Notification Centre

Click Notification Centre on the left hand menu, to display all available correspondence, listed by employer/PAYE reference number.



Correspondence count numbers/indicators marked in red indicates important new correspondence that was retrieved during synchronisation requiring immediate attention.

If the mouse cursor is moved over the correspondence counts displayed on the right, a pop-up message shows a description of further options available.



To view available correspondence, click the line entry for the relevant employer listed in the notification centre. e@syFile™ Employer will automatically open the correct employer database to access correspondence details for that PAYE reference number.

e@syFile EMPLOYER						
HOME	Notification Centre					-
Notification Centre						
aliina Resistration						
IMPORT						
Import/Export Payroll File		eference Numberi				
ENPLOYEE ADMIN						
				AYE_RECON_RESULT	EMPSA	2
NONTHLY PROCESS					1 EHPSA	
				PAYE_RECON_RESULT		
RECONCILIATION	Letter ID	Tax Payer Name	Tax Year	Message Type	Status	
	49			PAYE_RECON_RESULT		
	48			EMPSA		
		e@syFile Company Select				- 8
		The active e@syFile Employer working on has been changed	database you are to 77			
SUBMISSION						
		OK				
AGENT APPOINTMENTS						
EMPLOYER ADMIN						
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Click **OK** to view the available correspondence.

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e@syFile EMPLOYER							x		
номе	Notification Centr	'e							
Notification Centre	Here you are able to view any correspondance from SARS								
oFiling Registration	To view any of the lett	ers, please click on the applica	ble employer to expand the	list of letters					
	to their any of the read	ars, presse ener on the opprice							
Import/Export Payroll File	Search using PAYE	Reference Number:							
			<						
View/Edit Employees	72					ITA88 5 EMPSA			
						11.			
DAVE	Letter ID	Tax Payer Name		Tax Year	Message Type	Status			
	65			2011	PAYE_RECON_RESULT	READ			
Payments	66		Stale on them he of any latter	20110619	ITA88	READ			
RECONCILIATION	67		Lick on item to view letter	20110612	ITA88	ISSUED			
PAYE Dashboard	68			20110612	ITA88	ISSUED			
Declaration	70			20110517	ITA88	ISSUED			
Cancel Certificate Range	71			20110511	ITASS	ISSUED			
	72			20110419	ITA88	ISSUED			
	69			2011/01/31	EMDSA	ISSUED			
SUBMISSION									
GENT APPOINTMENTS									
Agent Appointments									
MPLOYER ADMIN									
View/Edit/Change									
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	74					EMPSA			
Synchronise Application									
Mismatch	74					EMPSA			
	76					EMPSA			
Penalty	70					CHIPCO .			
Application task						EMPSA			
Application Help	78		and the family			EMPSA	1		
Update									
Log off									
CONNECTION STATUS : DISCO	NNECTED	Current Tax Year : 201	.3 Working With : 72		Change	LOGGED IN AS :	ADMI		

The details displayed include letter type and status for all available correspondence.

Note: Agent appointment notifications must be opened to add the details to the Agent Appointments menu for processing.

Step 4

To view any specific correspondence listed in the Notification Centre, double-click on the relevant line item. Once opened, the status will be updated from **ISSUED** to **READ**.

e@syFile EMPLOYER	
	Comment • 📻 Consorrate • 🥟 Sign • 🥥 Comment • 🧰 🔛 Irino
V SARS	INCOME TAX Agent Appointment
	Enquiries should be addressed to SARS: Contact Detail:
PRETORIA 0001	Alberton Contact Centre Tel: 0800 00SARS (7277) 1528 SARS online: www.sars.gov.za
	Defails Reference number: 75 Aways quite this reference number when contacting SARS
Dear Sir/Madam,	
AGENT APPOINTMENT	
Section 99 of the Income Tax Act empowers the C respect of the Income Tax Act. We are of the unde with you or your company.	mmissioner of SARS to appoint any person as an agent to withhold and pay over to SARS any amounts due in standing that these taxpayers are either entitled to a certain income from your company or have money deposited
The taxpayers listed in the accompanying ITA88 S	atement are indebted to SARS for the amounts specified therein.

4. UPDATE TO THE INDIVIDUAL/BUNDLED INCOME TAX REGISTRATION (ITREG) PROCESS

With the introduction of the e@syFile[™] Employer Notification Centre, there has been a minor change to the synchronisation process to obtain your individual/bundled ITREG results.

The change only affects the way results are returned. Therefore, registration requests are still submitted by selecting the employees to be registered using the '**View/Edit Employee function**'. Click **Bundled IT Reg** to view the registration status for each employee, and where necessary, submit an individual or bundled ITREG request to SARS.

If the registration request is completed immediately, a popup message will provide feedback on the registration outcome. However, if additional time is required for SARS to process the registration request, a message will be displayed to advise that the results will be made available after 24 hours.

With the introduction of the new Notification Centre, the employer can easily identify which companies have pending ITREG requests. These will be shown with a '**Pending Regs**' indicator together with the count of pending items.

Notification Centre		
Here you are able to view any correspondance from SARS		
To view any of the letters, please click on the applicable employe	i to expand the list of letters.	
	A _ A	
Search using PATE Reference Number:		
,	PAYE_RECON_RESULT 1 ITA88 39	EMPSA 1 Pending Regs 10

To obtain your results for pending ITREG (individual or bundled) requests:

Step 1

2012

Select the company with pending ITREG requests in the Notification Centre. You will receive a confirmation message that the selected company has been made the active employer.

Step 2

Click Synchronise Application and select either All or Income Tax Registration option.

Click **Sync**, and you will be requested to provide your eFiling login details.

If results for pending ITREG registration requests are available:

- An alert pop-up message will be receive in the bottom right hand corner to confirm the results have been received
- The results will automatically update the Employee records in the attached company database.

Step 3

To view your ITREG results, select View/ Edit Employees

Step 4

Select the company from the dropdown box and click **IT Bundled Reg**.

The registration status for each employee will be displayed. Where an Income Tax reference number has been provided, this can be obtained by viewing the employee record.

5. CREATING, MERGING AND RESTORING OF DATABASES IN e@SYFILE™ EMPLOYER

5.1 CREATING A BACKUP OF YOUR DATABASE

It is important to make frequent back-ups of your PAYE information. The backup process on e@syFile™ Employer is quick and simple.

Step 1

Click on **Utilities**

Step 2

Click on Database Utilities

Step 3

Click on Backup DB Directory

Step 4

Select a destination folder and click **OK**

e@syFile EMPLOYER	- X
НОМЕ	SYSTEM UTILITIES
Notification Centre	On this screen you are able to run the system utilities.
REGISTRATION	
eFiling Registration	Database Utilities
IMPORT	Here you are able to create a backup of your local Database or restore your local Database from a backup
Import/Export Payroll File	Backup DB Directory Merge EasyFile DB Restore EasyFile DB
EMPLOYEE ADMIN	
View/Edit Employees	Browse For Folder
MONTHLY PROCESS	
PAYE	Backup
Payments	
RECONCILIATION	E Desktop
PAYE Dashboard	Dibraries
Declaration	D 😣 Homegroup
Cancel Certificate Range	Diser
Adjustments	≥ Computer
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Submit to SARS	Emprove Pisk (G:)
AGENT APPOINTMENTS	▷ G External HDD (b)
Agent Appointments	Safa Run charact folder
EMPLOYER ADMIN	Make New Folder OK Cancel
View/Edit/Change	EMP501 Status Dashboard
UTILITIES	Case Status Dashboard
Utilities	Pre-Submission Validation Report
Synchronise Application	Import Payroll File Log
Mismatch	Delete Payroll File
Penalty	Reset Passwords
HELP	Payroll File Editing
Application Help	Reassign Certificate
Update	Generate IRP5 / IT3(a) PDF's
Log off	Certificate Rejection/Penalty Service
	Ourrent Tay Vear - 2013 Working With - No Company Selected Change LOGGED IN AS - ADMIN
CONNECTION STATUS: DISCON	Content fax fear 2013 Working With File Company Selected Change Looded IN AS : ADMIN

A message will be displayed indicating that the database back-up was successful, click OK.

Note: Back-up files are all named in the following manner to make it easy to locate the most recent backup file: [EasyFile]+[date]+[time of backup]+[Backup].New back-up files will be zipped (compressed) and will include data for all the PAYE reference numbers included in the e@syFile™ Employer database.



Ensure the e@syFile™ Employer login details, which created the back-up, are saved with the back-up files.

The e@syFile[™] Employer login details, which created the back-up file, will be needed when restoring the back-up. The encrypted data contained in the back-up will not be accessible unless the e@syFile[™] Employer login details which created the back-up are used, due to the new added precaution – New database encryption and decryption, to secure sensitive information – refer to step 2 below for more information.

5.2 MERGE MULTIPLE DATABASES

This process should be used where:

- Multiple branches or different employees complete manual certificates and payroll files, and these should be merged for the reconciliation.
- Data for different financial periods should be merged onto one single database.

With the introduction of split database files for each PAYE number within the e@syFile™ Employer directory, the merge process has been amended to combine one employer database file at a time. When merging another user's data with your existing e@syFile™ Employer database, one employer database will be selected, to merge with your data.

This will enable tax practitioners, payroll consultants and users with multiple PAYE reference numbers to create e@syFile™ Employer database or back-up files for a single PAYE reference number.

Note 1: To ensure that no certificates are lost during the merge process, different certificate numbers or ranges should be assigned to the different staff members preparing manual certificates. Back-up all data to be merged, and transfer these files to a selected folder on the PC where the various databases will be merged.

Note 2: A new backup file (version 6 and later) will need to be 'unzipped' before the data can be merged with the existing e@syFile[™] Employer data. Access the folder where the back-up has been saved that you wish to restore. Extract or 'unzip' the file before proceeding with the merge process.

<u>Step 1</u> Click Utilities

Step 2 Click Database Utilities

Step 3 Click Merge

1. **Backups created on version 5.0.9 or prior:** Select the relevant back-up file from the destination folder where it was saved.

Click **Open** to begin the merge process.

 Backups created on version 6 and later: Select the PAYE number file within the backup directory from the destination folder where it was saved. (You will need to "unzip" the back-up folder first) Click Open to begin the merge process.

e@syFile EMPLOYER									
IOME	SYSTEM UTILITIES								
Notification Centre	On this screen you ar	e able to run the	system utilities.						
REGISTRATION				1 4					
eFiling Registration	Database Utilities								
MPORT	Here you are able to	create a backup	of your local Database or	restore yo	ur local Database from	a backup			
Import/Export Payroll File		в	ackup DB Directory	Mer	ge EasyFile DB	Restore Easy	File DB		
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	Merge databa	CAC						×	
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	(Ba	Name	*		Date modified	Туре	Size	1. 2-	
ECONCILIATION		DoNotDele	te		2012/03/15 06:47	File folder			
	Recent Places	75	.dbz		2012/03/15 05:38	DBZ File		118 KB	
		76	dbz		2012/03/15 05:38	DBZ File		118 KB	
	Desktop	EasyFile.db	Z		2012/03/15 05:38	DBZ File		38 KB	
	Libraries								
UBMISSION									
	Computer								
GENT APPOINTMENTS									
MPLOYER ADMIN	Network								
View/Edit/Change									L
TILITIES		File name:	75			4	-	Open	
		rile name:	/5				<u> </u>	Open	
Synchronise Application		Files of type:	Text				•	Cancel	
	Dalata Davinali Cil			_			_		
	Delete Payroll File								
	Reset Passwords								
ELP	Payroll File Editing								
Application Help	Concepto IPDE / T								
Update	Generate IKP5 / 1								
	Certificate Rejection	on/Penalty Ser	vice						
Log off									

Step 5

Read the pop-up message carefully before proceeding with the merge process.

IF YOU DON'T HAVE A BACK-UP, CLICK CANCEL AND FIRST MAKE A BACKUP.

If you already made a backup of your data, click **Yes** to continue.



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Merging a new, encrypted back-up file, will require the e@syFile[™] Employer login details to be completed. Click **Validate** to proceed.

Step 7

- **Back-up file created on version 5.0.9 or prior:** Additional messages will reflect the status of the merging process, and prompt a restart of the software once the merge has been successfully completed.
- Back-up file created on version 6 and later: A pop-up message will appear once the process has been completed. To access the database file merged, use the Change Employer menu option to select the relevant database file.



<u>Step 8</u>

To merge multiple database files, repeat step 4-7 above.

5.3 RESTORE DATABASE FROM A BACK-UP

Step 1

Click **Utilities**

Step 2

Click Database Utilities

Step 3

Click Restore

Step 4

Select the location from which to restore the database, and select the back-up file you wish to restore.



<u>Step 5</u>

2012

Click **Open**

The e@syFile™ Employer login details of the user that created the back-up file will be needed when restoring the back-up.



Step 6

A message will be displayed indicating that the database will be restored. Click Yes

Step 7

A message is displayed indicating that the database restore is complete. Click **OK**

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