

Premier and Classic

Release Notes

6.5a

17 September 2025

Sage

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1.0 Important Notice

When you access an RSA Company, an Important Notice will display in PDF format.

The Important Notice is a synopsis of some of the items recorded in these Release Notes. Be sure to page down to read the information on the second page.

You can save or print this document for reference purposes.

Please Note:

This notice will be displayed each time you access the company until you tick the tick box “I acknowledge. Don’t show this message again.” at the bottom of the screen.

South African Companies

The screenshot shows a PDF document titled "Important Notice for Update to Release 6.5a" displayed in a viewer. The document content includes:

- Premier and Classic**
- Important Notice for Update to Release 6.5a**
- Please take note of the following information before you proceed.
- Please refer to the [Release Notes](#) on the Company Listing Screen for details on all changes included in this release.
- Mid-Year Submission Legislative Changes**
- The system has been aligned to the latest **SARS Business Requirements Specification** for 2025/2026, including the validations for the Interim Employer Reconciliation for March to August 2025 (Period 202508).
- Employee Tax Numbers are mandatory.
- Please Note:**
The employee **income tax reference numbers** will be **mandatory** in specific scenarios as part of the SARS submission requirements, effective from Tax Year End for March 2025 to February 2026 (Period 202602). Please consult the [Community Hub](#) for a step-by-step guide to assist you. Please follow these guidelines to prevent a possible rejection of the submission of your IRPS file in February 2026.
- This includes providing for the following **IRPS codes**:
 - IRPS codes 3603 for 'Pension(PAYE)' and 3610 for 'Annuity from RAF (PAYE)' are existing codes that may now be set up as non-taxable earnings.
 - IRPS code 3623, replaces IRPS code 3907 for 'Antedated salary/pension'.
 - IRPS code 4042 represents the tax-deductible portion of amounts deducted on the payroll in the current tax year according to section 11(nA) and Fourth Schedule paragraph 2(4)(g).
 - IRPS code 4588 represents the total amount repaid by the employee in the tax year for a section 11(nA) recoupment.
 - IRPS code 4589 represents the total amount repaid by the employee in the tax year for a section 11(nB) recoupment.

At the bottom of the document, there is a checkbox labeled "I acknowledge. Don't show this message again." which is currently unchecked. Below this checkbox is a "Continue" button with a right-pointing arrow.

2.0 RSA: Mid-Year Submission Legislative Changes

The South African Revenue Services (SARS) have published the latest SARS Business Requirements Specification for 2025/2026, including the validations for the Interim Employer Reconciliation for March to August 2025 (Period 202508).

The system has been aligned to the latest SARS requirements for mid-year submissions. This includes the IRP5 file, reports and certificates.

Please implement any necessary changes that are applicable to your unique company setup and employee needs.

2.1 Employee Tax Numbers Mandatory

Please Note:

The employee **income tax reference numbers** will be **mandatory** in specific scenarios as part of the SARS submission requirements, effective from Tax Year End for March 2025 to February 2026 (Period 202602). Please consult the [Community Hub](#) for a step-by-step guide to assist you.

Please follow these guidelines to prevent a possible rejection of the submission of your IRP5 file in February 2026.

2.2 Changes to Existing IRP5 Codes 3603 and 3610

IRP5 code 3603 (Pension (PAYE)) and IRP5 code 3610 (Annuity from RAF (PAYE)) are **not new** codes, however, they may **now** also be set up as **non-taxable** earnings.

From the **Main Menu > Payroll > Definitions > Earning Definitions** you can select “Never” in the “When Taxable” column.

| No | Short | English | Alternate | Earning Type | When Taxable | BCEA | RFI | IRP5 Code | Incl SDL |
|----|---------|-----------------|-----------------|--------------|--------------|------|-----|-----------|----------|
| 01 | Salary | Salary | Salary | Basic Sal | Monthly | N | N | 3601 | F |
| 02 | Pension | Pension Taxable | Pension Taxable | Not Calc | Monthly | N | N | 3603 | N |
| 03 | PensNT | Pension Non-Tax | Pension Non-Tax | Not Calc | Never | N | N | 3603 | N |
| 04 | Annuity | Annuity Taxable | Annuity Taxable | Not Calc | Monthly | N | N | 3610 | N |
| 05 | AnntyNT | Annuity Non-Tax | Annuity Non-Tax | Not Calc | Never | N | N | 3610 | N |

The **non-taxable earning line** for IRP5 codes 3603 or 3610 will only be used when a **tax directive** from SARS has been applied for.

2.3 New IRP5 Code 3623 (Antedated Salary/Pension(PAYE))

There is a new IRP5 code 3623 (Antedated Salary/Pension (PAYE)) that is applicable as from the 2025 Year of Assessment as a **non-taxable** earning.

From the **Main Menu > Payroll > Definitions > Earning Definitions** you can select “Never” in the “When Taxable” column.

| No | Short | English | Alternate | Earning Type | When Taxable | BCEA | RFI | IRP5 Code | Incl SDL |
|----|---------|---------------|---------------|--------------|--------------|------|-----|-----------|----------|
| 01 | Salary | Salary | Salary | Basic Sal | Monthly | N | N | 3601 | F |
| 02 | AntdS/P | AnteD Sal/Pen | AnteD Sal/Pen | Not Calc | Never | N | N | 3623 | F |

The value entered against IRP5 code 3623 is included in the SDL and UIF calculations by default, but it may be excluded, depending on whether an exemption applies to the payment. It may be included in RFI calculations and defaults to “Full” for ETI Remuneration, but may be amended if necessary.

IRP5 code 3623 is also available on the **Calculation** and **Own Definition Screens**.

Employers are required to **apply for a directive** when paying antedated salary or pension for prior tax years. These amounts must be reported under the **non-taxable earning** line using IRP5 code 3623.

2.4 New IRP5 Code 4042 and 4588 (Repayment/Refund/Recoupment of s11(nA) Amount)

2.4.1 IRP5 Code 4042 (Repayment/Refund of s11(nA) Amount)

IRP5 code 4042 was added in Release 6.4a to the Deduction Definition Screen with the description “Repayments/Refunds”. Refer to the [Release Notes for 6.4a](#) for more information concerning “Repayments/Refunds to Employers”.

Please Note:

After we released our software update to Release 6.5a, SARS amended the description for IRP5 code 4042 and added code 4588 and 4589.

As from this release, the description has been revised to read “Repayment/Refund of s11(nA) Amount”.

- **Deduction Definitions:** Use this option when the employee repays a “s11 (nA) amount” via the payroll as a deduction on the payslip. This amount is permitted to be a Tax-Deductible Deduction.

From the **Main Menu > Payroll > Definitions > Deduction Definitions**, select “Y” (Yes) in the “Tax Ded” column, because the amount is tax deductible and is fully included for SDL purposes.

Please Note:

It is your responsibility to NOT enter an amount that is greater than the employee remuneration in the current pay period.

If the repayment exceeds what is permitted in the current pay period, the outstanding amount must be captured in a subsequent pay period.

It is your responsibility to ensure that the employee's tax for the current pay period is not negative due to the value captured against IRP5 code 4042 on Payslip Deductions.

If the employee's tax is negative, you must only capture an allowable value against IPR5 code 4042. The difference can be captured in a following pay period, if the pay period falls within the same year of assessment.

| No | Short | English | Alternate | Ded Type | Tax Ded | IRP5 | Incl SDL | Clearance No | CC Tax | IRP5 | Incl SDL | BCEA |
|----|--------|-----------------|-----------------|----------|---------|------|----------|--------------|--------|------|----------|------|
| 01 | Tax | Tax | Tax | Tax/PAYE | N | 4102 | N | | N | 4102 | N | N |
| 02 | U.I.F. | U.I.F. | U.I.F. | U.I.F. | N | 4141 | N | | N | 4141 | N | N |
| 03 | SDL | SDL | SDL | Skills | N | | N | | N | 4142 | N | N |
| 04 | RP11nA | Repay/Refnd11nA | Repay/Refnd11nA | Not Calc | Y | 4042 | F | | N | | N | N |

Please make a selection

- 001 Employee Pension Fund Contributions
- 003 Employee Provident Fund Contributions
- 005 Medical Aid Contributions
- 006 Employee Retirement Annuity Contributions
- 030 Donations paid over by Employer
- 4042 Repayment/Refund of s11(nA) Amount**
- 4589 Section 11(nB) Recoupment
- Not Used

For IRP5 purposes, the value captured against IRP5 code 4042 is automatically reflected against IRP5 code 4588 (s11(nA) Recoupment).

- **Perks Tax Definitions:** Use this option when the employee repays a “s11 (nA) amount” directly into the company’s bank account, to grant the employee the tax benefit.

You can also accommodate this scenario by entering the value against a tax-deductible line set up for IRP5 code 4042 (details above) and then counter the input by entering the same value on another deduction line so that the Net Salary is only impacted by the tax benefit.

From the **Main Menu > Payroll > Definitions > Perks Definitions**, change any line that is **linked to IRP5 code 3601 or 3801** that you are not currently using e.g.: Line “01 – Entertainment Allowance” to read “Repayment/Refund of s11(nA) Amount”.

The amount is fully included for SDL purposes.

Please Note:

The value must be entered as a **negative** to reduce the employee’s taxable income by the amount repaid. The Net Salary will be influenced by the reduction of the Perks value.

It is your responsibility to ensure that the employee’s tax for the current pay period is not negative due to the value captured against IRP5 code 4042 on the Taxable Benefits (Perks) Screen.

If the employee’s tax is negative, you must only capture an allowable value against IRP5 code 4042. The difference can be captured in a following pay period.

If the employee is terminated without getting the full tax benefit, the differences should be captured against IRP5 code 4588 on the Employee Calculation Control Screen (details follow below) and may be claimed on assessment.

079 - IRP5 Perks Tax Definition Screen 2025/09/30 [07 of 12]

| No | Perks | BCEARemuneration | IRP5 Code | Incl SDL |
|----|-----------------------------|------------------|---|--------------|
| 01 | Repayment/Refund of s11(nA) | Not Linked | 4042 - Repayment/Refund of s11(nA) Amount | Full |
| 02 | Subsistence Allowance | Not Linked | 3714 - Subsistence Allowance - Local Travel(IT) | Not Included |

Please make a selection

- 3601 Income(PAYE)
- 3701 Travel Allowance(PAYE)
- 3704 Subsistence Allowance - Local Travel(IT)
- 3715 Subsistence Allowance Foreign Travel(IT)
- 3801 General Fringe Benefits(PAYE)
- 3802 Use of Motor Vehicle(PAYE)
- 3805 Accommodation(PAYE)
- 3806 Services(PAYE)
- 3808 Employee's Debt(PAYE)
- 3809 Taxable Bursaries/Scholarships Basic Educ
- 3813 Medical Services Costs(PAYE)
- 3820 Bursaries/Scholarships Further Educ(PAYE)
- 3829 Bursaries for Disabled, Basic Educ(PAYE)
- 3831 Bursaries for Disabled, Further Ed.(PAYE)
- 3833 Bargaining Council Employer Contrib(PAYE)
- 3835 Long Service Award - Taxable
- 4042 Repayment/Refund of s11(nA) Amount

For IRP5 purposes, the negative value captured against IRP5 code 4042 on the employee’s Taxable Benefits (Perks) Screen, is automatically reflected against IRP5 code 4588 (s11(nA) Recoupment) as a positive value.

2.4.2 IRP5 Code 4588 (s11(nA) Recoupment)

- Calculation Fields Definitions:** You will only use this option if the employee repaid the amount, or portion of the amount, directly into the company’s bank account (not as a deduction on the payslip). The value captured is only for information purposes and does not reduce the Net Salary.

This typically occurs when an employee is terminated before repaying the full amount, due to insufficient time or insufficient remuneration to accommodate the deduction or tax benefit.

From the **Main Menu > Payroll > Definitions > Calculation Fields Definitions**, select “4588 – Section 11(nA) Recoupment” in the “IRP5 Code” column.

| No | Description | Type of Calc | BCEA | IRP5 Code | Incl SDL | Clear Special Totals |
|----|-----------------|--------------|------------|-----------|----------|------------------------------|
| 01 | S11 (nA) Recoup | Not Calc | Not Linked | 4588 | N | Clear during every Roll-over |

For IRP5 purposes, the value captured against IRP5 code 4588 on the employee’s Calculation Control Screen, is reflected against IRP5 code 4588 (s11(nA) Recoupment).

Please Note:
 The inclusion of this code on the IRP5/IT3(a) Certificate replaces the repayment confirmation letter that the employer issued to the employee in the past.

In Summary:

The amount actually repaid by the employee to the employer will be reported under code 4588, while the portion allowed as a tax-deductible deduction will be reported under code 4042. This does not apply to administrative errors.

| Code | Description |
|------|---|
| 4588 | The total amount repaid by the employee in the tax year for a s11(nA) recoupment. This amount will be used by the ITR12 assessment process |
| 4042 | Amounts deducted for the purpose of calculating PAYE—i.e., tax-deductible amounts —in the current year of assessment, in respect of remuneration paid to an employee in the current or a previous year, which the employee refunded to the employer in the current year, such as the recoupment of overpaid remuneration or clawback of commission received for the employee’s own benefit, excluding administration errors. |

2.5 New IRP5 Code 4589 (Section 11(nB) Recoupment)

The total amount **repaid** by the employee in the tax year for a s11(nB) recoupment, i.e. **restraint of trade**. This amount will NOT be used by the ITR12 assessment process, and the employee must still declare the repayment in source code 4058 on the ITR12 return.

- **Deduction Definitions:** Use this option when the employee repays a “s11 (nB) amount” via the payroll as a deduction on the payslip. The code is only applicable from the 2026 Year or Assessment. This amount is not allowed as a tax deductible on the payroll.

From the **Main Menu > Payroll > Definitions > Deduction Definitions**, select “4589 – Section 11(nB) Recoupment” in the “IRP5 Code” column.

079 - IRP5 Deduction Definition Screen 2025/09/30 (07 of 12)

| No | Short | English | Alternate | Ded Type | Tax Ded | IRP5 | Incl SDL | Clearance No | CC Tax | IRP5 | Incl SDL | BCEA |
|----|--------|----------------|----------------|----------|---------|------|----------|--------------|--------|------|----------|------|
| 01 | Tax | Tax | Tax | Tax/PAYE | N | 4102 | N | | N | 4102 | N | N |
| 02 | U.I.F. | U.I.F. | U.I.F. | U.I.F. | N | 4141 | N | | N | 4141 | N | N |
| 03 | SDL | SDL | SDL | Skills | N | | N | | N | 4142 | N | N |
| 04 | Rs11nB | Recoupmt s11nB | Recoupmt s11nB | Not Calc | N | 4589 | N | | N | | N | N |

Please make a selection

- 4001 Employee Pension Fund Contributions
- 4003 Employee Provident Fund Contributions
- 4005 Medical Aid Contributions
- 4006 Employee Retirement Annuity Contributions
- 4030 Donations paid over by Employer
- 4602 Repayment/Refund of s11(nA) Amount
- 4589 Section 11(nB) Recoupment
- Not Used

IRP5 code 4589 is also available on the **Calculation Fields Definition** screen. You will only use this option if the employee repaid the amount, or portion of the amount, directly into the company’s bank account (not as a deduction on the payslip).

2.6 Details of Directives

If employees receive a **never taxable earning amount** for IRP5 Codes 3603, 3610 or 3623, you are required to enter a Directive Number and other relevant information on **Main Menu > Employee > Change Employee > Statutory Details Tab > Details of Directive**:

Please Note:
The directive numbers entered for these IRP5 codes may only contain numeric values.

Personal Details | Address Details | Statutory Details | Payment Details | Analysis Details

Tax Details

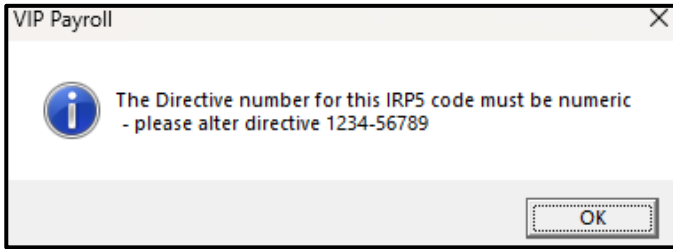
Tax Office: Pretoria
 Tax Number: 1234123121 *
 Tax Status: Statutory Tables *
 Voluntary Over Deduction:
 Legally Retired:
 Directive %: 00 %
 Fixed Rate Directive Number:
 Lump Sum Directives: Details of Directives →

Details of Directives

| No | Directive Number | Date Issued | Source Code | Amount |
|----|------------------|-------------|-------------|----------|
| 1 | 123456789 | 2025/03/01 | 3603 | 36003.00 |
| 2 | 987654321 | 2025/08/01 | 3610 | 36010.00 |
| 3 | 546879213 | 2025/08/01 | 3623 | 36023.00 |
| 4 | | | | |
| 5 | | | | |

Close

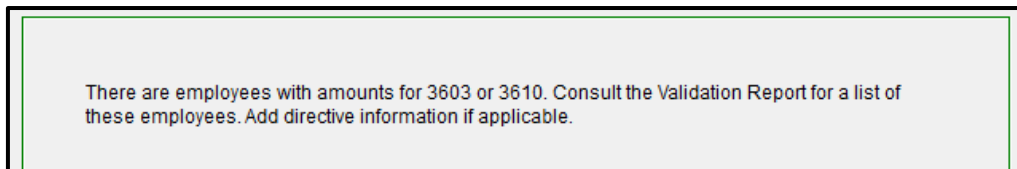
If alpha-numeric values are entered for any of the range of IRP5 codes included in this validation, the following message will be displayed, and the Directive number will be cleared:



2.7 IRP5 Validation Errors/Warnings

The following errors/warnings have been added to the various IRP5 Runs:

- If there are employees with values on IRP5 Codes 3603 or 3610, whether these lines are taxable or not, a message will always be displayed, except during a Live Run, advising the user to consult the Validation Report to determine whether directive information is missing:



- All runs, except the Periodic Live Run, will be stopped if there are employees that have a PAYE deduction (IRP5 code 4102) but no Tax Number.

2.8 Requests Implemented/Issues Resolved

The following IRP5 requests have been implemented, or issues have been resolved:

| Area | Issue | Detail |
|-----------------------------|-------------------------------------|--|
| Requests Implemented | | |
| IRP5/IT3a Certificates | Emailing only available on Live Run | <p>Users typically only send out the tax certificates after the EMP501 and tax certificates have been accepted by SARS through eFiling or e@syFile, and not as part of the Live Run process.</p> <p>Therefore, we have amended the “Print Tax Certificates?” options to include “Blank Paper and Email” for the following runs:</p> <ul style="list-style-type: none"> Duplicate Resubmission Resubmission – New Number <p>This is available from Main Menu:</p> <ul style="list-style-type: none"> Reports > Reports and Maintenance > IRP5/IT3(a) (Report Real Number 507) Utilities > RSA Submissions > SARS Submission Process > Continue > Step 8 |

RSA Submission Process Step 5.4 message reworded

Main Menu > Utilities > RSA Submissions > SARS Submission Process > Continue > Step 5 > Step 5.4

- The second option used to read “Please help me”. It has been amended to now read “EMP501 values do not balance”.
- If you **<Continue>** on this option, an information message will be displayed, stating:

For assistance in the Reconciliation of your EMP501, please refer to Steps 5.2 and 5.3.

If the reconciliation remains unresolved, we suggest you:
 - Contact your Business Partner for assistance.
 - Review possible solutions on the Knowledgebase.
 - Log a webform for our Support Desk to review.

| | | |
|-------------------|------------------------------|---|
| Validation Report | Recording of Assessment Year | If the Assessment Year field has been completed on the Main Menu > Employee > Change Employee > Statutory Details tab , the Validation Report will record this information. |
|-------------------|------------------------------|---|

Issues Resolved

| | | |
|-------------------------------------|--|---|
| Error Message – Stops IRP5 Live Run | Incorrect validation relating to Long Service Awards | <p>When printing IRP5's in non-monthly companies, the following error message occurred in certain scenarios: “Long service award 3622 + 3835 tax free > R5000.”</p> <p>This happened when:</p> <ul style="list-style-type: none"> • There are values for IRP5 code 3622 and for IRP5 code 3835 (taxable) in period 1 of 4 of February (the last month of the year and the last month of the tax year) and you print the IRP5's at the end of the month. • There are values for IRP5 code 3622 and for IRP5 code 3622 (taxable) in any period in February (the last month of the year and the last month of the tax year) OTHER than the last period in February, and you print the IRP5's at the end of the month. |
|-------------------------------------|--|---|

| | | |
|----------------|----------------------------|---|
| RSA Submission | Live Run wording incorrect | <p>Main Menu > Utilities > RSA Submissions > SARS Submission Process > Continue > Step 8 – Perform Live Run – Periodic and Tax Year End Run > Continue through next two screens.</p> <p>The Print Options screen duplicated the label for “Print IRP5/IT3 Recon Report (Blank paper)?”</p> |
|----------------|----------------------------|---|

| | | |
|-------------------|--|---|
| Validation Report | Unexpected error relating to Medical Aid | When an employee has Employee and Company Medical Aid Contributions and Employee and Company Retirement Annuity Contributions, then an invalid validation error occurred: “Code 3810 is not allowed if code 4493 is specified”. |
|-------------------|--|---|

3.0 RSA: Employment Equity Changes

The following section is for **South African** Tax Countries that are licenced for **Equity**.

The amended **Employment Equity Regulations** were promulgated on 15 April 2025 under Government Gazette No. 52515.

3.1 Overview

All employers will now follow a **standard reporting cycle** running from **1 September to 31 August** each year. Employers must develop a **five-year Employment Equity (EE) Plan** (or a shorter plan, if applicable), with the **first cycle ending on 31 August 2030**. In addition, employers are required to set **annual numerical targets**.

Please Note:

A notable new requirement is that employers must also align their targets with sector-specific numerical goals for the top four occupational levels.

The key changes are summarised below; however, users are encouraged to consult the full regulations for comprehensive details.

Deadlines and plans

- Deadlines remain unchanged, but all designated employers must submit new EE Plans covering the period 1 September 2025 to 31 August 2030.
- Employers must start their planning from scratch, both the five-year EE Plans and the one-year annual targets.

Submission Periods

- Manual submissions: 1 September to the first working day of October.
- Electronic submissions: 1 September to 15 January of the following year.

Newly Designated Employers

Employers who become designated **after 1 April 2025** must:

- Prepare an EE Plan for the **remaining period** up to 31 August 2030.
- Submit their report in the **next reporting cycle**.
- Note: Employers will **not be assessed** for compliance with annual targets in their **first submission after becoming a designated employer**.

Developing plans

Employers must consider:

- Their current workforce profile.
- The relevant five-year sectoral targets.
- The applicable Economically Active Population (EAP).

They may also consider:

- Inherent job requirements.
- Availability of suitably qualified candidates.
- Qualifications, experience, and potential to acquire skills.
- Turnover and attrition rates.
- Recruitment and promotion trends.

5-Year Sectoral Targets and Compliance

Designated employers must:

- Comply with the numerical targets set for their economic sector.
- Refer to the EEA17 or the relevant government notice to determine their sector.
- Apply the targets for the sector where the majority of their employees are engaged, if they operate in multiple sectors.

Annual Targets and EAP Considerations

When setting annual EE targets to meet the five-year sectoral goals, employers must:

- Set targets for all designated groups in the **four upper occupational levels**, aligned with **sector targets** and **Economically Active Population (EAP)** data, and for persons with disabilities.
- Set numerical goals and annual targets for **semi-skilled** and **unskilled levels**, considering the **applicable EAP**.

Designated employers will be assessed for compliance based on the annual targets they set to achieve the applicable five-year sectoral numerical goals.

Additional Important Information

- Employers must record whether they are using **national or regional EAP** for analysis.
- EE Plans must be **retained for five years after the expiry of the plan**.
- Employers may refer to **EEA9** for guidance on occupational levels.
- Employees may add information to their **EEA1 (employee declaration)**.

Please consult [Department of Employment and Labour](#) for more information.

All changes to templates are mentioned below as well as how we have made provision for this in the software and instructions for any action you need to take.

3.2 Setup New Numerical Goals and Targets

From the **Main Menu > Equity > Numerical Goal Plans**, set up a **new plan** with a Plan Date for **August 2030**.

No changes have been made to the Numerical Goal and Target setup screens.

059 - Equity Test Employment Equity Numerical Goal 2025/04/30 [02 of 12]

Plan Number: 0059 Plan Date: 2030 / 8 Description: Company 59
Workplace: Province: Not Used
Company: 059-Equity Test Industry: Testing

Numerical Goals for the full period (2030 / 08)

All employees per Occupational Level
 Disabled employees per Occupational Level

(1) Numerical Targets for the interim period up to: 2026 / 08 **(3) Numerical Targets for the interim period up to 2028 / 08**

All employees per Occupational Level All employees per Occupational Level
 Disabled employees per Occupational Level Disabled employees per Occupational Level

(2) Numerical Targets for the interim period up to: 2027 / 08 **(4) Numerical Targets for the interim period up to 2029 / 08**

All employees per Occupational Level All employees per Occupational Level
 Disabled employees per Occupational Level Disabled employees per Occupational Level

Delete Close

Once you have considered all the factors and consulted all the relevant documentation mentioned above, set up your 5-Year Goal and Annual Targets.

Set up **Numerical Goals** for the full period, that must be reached by 2030/08, for “All employees per Occupational Level”, and for “Disabled employees per Occupational Level”.

Set up **Numerical Targets** for every year leading up to the goal for “All employees per Occupational Level”, and for “Disabled employees per Occupational Level”.

Please Note:
We are not making provision in the system to capture Sector Targets, as these will be incorporated into the employer's Annual Targets.

Print Screen of Numerical Goal for all employees per Occupational Level:

J59 - Equity Test Employment Equity Numerical Goal 2025/04/30 (02 of 12)

Plan Number Description Plan Date /

All Employees

| Occupational Levels | Male | | | | Female | | | | Foreign Nationals | | TOTAL |
|---|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|---------------------------------|----------------------------------|
| | African | Colour | Indian | White | African | Colour | Indian | White | Male | Female | |
| Top management | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="1"/> | <input type="text" value="10"/> |
| Senior management | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="2"/> | <input type="text" value="20"/> |
| Professionally qualified and experienced specialists and mid-management | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="3"/> | <input type="text" value="30"/> |
| Skilled technical and academically qualified workers, junior management, supervisors, foremen and superintendents | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="4"/> | <input type="text" value="40"/> |
| Semi-skilled and discretionary decision making | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="5"/> | <input type="text" value="50"/> |
| Unskilled and defined decision making | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="6"/> | <input type="text" value="60"/> |
| TOTAL PERMANENT | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="21"/> | <input type="text" value="210"/> |
| Temporary Employees | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="7"/> | <input type="text" value="70"/> |
| GRAND TOTAL | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="28"/> | <input type="text" value="280"/> |

3.3 Equity Reports

All Equity Reports can be found on the **Main Menu > Equity > Employment Equity Reports > Reports 401 – 600 Tab**

3.3.1 EEA1 – Employee Declaration

We have aligned the Employee Declaration in the system to accommodate the slight changes made to this report. Please note that there is a slight difference between the Employee Declaration in the Regulations and the template provided by the Department of Employment and Labour.

Please import the new report from the **Main Menu > Reports > Export/Import Reports > Export/Import Reports:**

- Select “Interface file”.
- Browse to the directory where your payroll resides.
- Select “Company”.
- Select the applicable companies on the Company Selection list by clicking in the “Selected” column to change “No” to “Yes”.
- Click **<Select All>** if you report on Equity for all your companies.
- Click on **<Close>**.
- Enter the Real Number “**615**” of the report.

- Click on **<Continue>**.

- Click **<Yes>** to overwrite the existing report on the following message:

- Click **<Continue>** and take note of the report line number.

- These previous two steps will be repeated for each company you selected to import the report to.
- Click on **<Continue>** when you have imported the report for all selected companies, until you are back on the Main Menu.

- The new “**EmpEQDecl**” Report can be found on the **Reports 401 – 600 Tab**.

3.3.2 EEA2 – Section A: Employer Details and Instructions

From the **Main Menu > Equity > Employment Equity Reports > Reports 401 – 600 Tab > Equity Rep**

We have changed the **Version** to **2025**.

- Select the applicable **new Plan Number**.
- If you select to Print for “**Selected**” reports.
- Select “**3. Employer Detail**”.
- Complete the relevant date.

IMPORTANT: It is advisable to perform an Equity General Recalculation in ALL Companies that are included in the Equity Plan, PRIOR to printing this Report.

| 1. Print using Equity Plan number | | <input type="text"/> | | | | |
|---|------------|---------------------------|---|---------|------|-------|
| For Workforce | | <input type="text"/> | | | | |
| For Province | | <input type="text"/> | | | | |
| For Company | | <input type="text"/> | | | | |
| 2. Print All or Selected reports | | <input type="radio"/> All | <input checked="" type="radio"/> Selected | | | |
| Report Description | Section | Print | Date | Include | Type | Using |
| 3. Employer Detail | EEA2 A | <input type="checkbox"/> | <input type="text"/> | | | |
| 4. Workforce Profile | EEA2 B | <input type="checkbox"/> | <input type="text"/> | | | |
| 5. Workforce Movement | EEA2 C | <input type="checkbox"/> | <input type="text"/> | | | |
| 6. Skills Development | EEA2 D | <input type="checkbox"/> | <input type="text"/> | | | |
| 7. Numerical Goals | EEA2 E | <input type="checkbox"/> | <input type="text"/> | | | |
| A. Employer Details | EEA4 A | <input type="checkbox"/> | <input type="text"/> | | | |
| C. Workforce and Remuneration | EEA4 C D E | <input type="checkbox"/> | <input type="text"/> | | | |
| Print the details of the Employees included in the Report | | <input type="checkbox"/> | | | | |

Enter Equity Plan number for Printing, <Enter> or click <Close> to exit

Version : 2025

Some fields have been removed from the “EEA2 Employer Details and Instructions”, the sequence of some fields have changed and in some cases the wording has been amended.

Please Note:

Employers must indicate whether they have used the National or Provincial EAP to set up their equity plan.

3.3.3 EEA2 – Section B: Workforce Profile and Numerical Targets

EEA2 Section B now **combines** the **workforce profile and annual numerical targets** for the current reporting year.

- The workforce profile must reflect the status as at 31 August each year. For the first submission, this means the profile as at **31 August 2025**.

Please Note:

To avoid inconsistent information being printed, the Companies included in your Equity reporting should:

- all be in the same Processing Period, and
- the Processing Period for all companies must be after 31 August.

- In the **first year**, employers will:
 - Only report the workforce profile.
 - **No annual targets** are required, as none would have been submitted for the period ending 31 August 2025 (because all plans have been started from scratch and no previously submitted plans are considered).
- From the **second year** onward, the DoEL (Department of Employment and Labour) system will:
 - **Pre-fill annual targets** submitted in the previous year (from Section E:7).
 - Compare these targets with the actual workforce profile.
 - Display whether targets were met, including **percentage achievement**.

From the **Main Menu > Equity > Employment Equity Reports > Reports 401 – 600 Tab** select the “**Equity Rep**”.

- Select the applicable **new Plan Number**.
- If you select to Print for “**Selected**” reports.
- Select “**4. Workforce Profile**”.
- Date must be **31 August 2025**.

Before Release 6.5a

When selecting to **only** print the **Workforce Profile**, you had the option to include “Percentages” or “Numbers” and “Variances” or “Actual” figures.

The screenshot shows a selection screen with three columns of radio button options:

- Include:**
 - All Employees
 - Disabled Employees
 - All Reports
- Type:**
 - Actual
 - Variance
- Using:**
 - Numbers
 - Percentage

A "Continue" button with a right-pointing arrow is located at the bottom center.

These options are no longer available as percentages and values are now included in the new reports.

As from Release 6.5a

To accommodate the new requirements to include the Numerical Goal or Annual Targets as part of the Workforce profile (Section EEA2), the Report Selection Screen has been amended for the Workforce Profile.

When selecting to print “All” or “Selected” reports, the following selection screen is displayed for the Workforce Profile.

The screenshot shows a selection screen with the following text and options:

Select the Numerical Target/Goal that should be included on the Workforce Profile (EEA2B) Report.

Workforce Profile

- Interim Numerical Target 1 (2026-08)
- Interim Numerical Target 2 (2027-08)
- Interim Numerical Target 3 (2028-08)
- Interim Numerical Target 4 (2029-08)
- Numerical Goal for the full period (2030-08)
- No Numerical Target/Goal

A "Continue" button with a right-pointing arrow is located at the bottom center.

When printing the Workforce Profile, you have the option to select:

- **Interim Numerical Target 1 to 4:** These are your annual targets.
- **Numerical Goal for the full period:** This is your 5-year plan.
- **No Numerical Target/Goal:** This is what DoEL requires for the **first reporting year** because your plans have been set up from scratch and no previous plans are considered.

Values as defined in the selected Target or Goal plan will be used to print values and calculate percentages in the Equity Reports.

Please Note:

You may select to print according to any of the options to track your progress at any point in the year.

- Both numbers and percentages will be reported.
- While the DoEL system will auto-calculate percentages, our system will also calculate these values to help you track progress and identify variances before submission.
- **Rounding differences** may occur between the Sage system calculation and the DoEL portal i.e.: the system truncates the percentage at two decimal places.
- Targets for the **current year** go in Section B (1.1 and 1.2); targets for the **next year** go in Section E:7.

Section 1.1. of the EEA2– All Employees (incl employees with disabilities)

Print Screen of Section 1.1, reporting on all employees (including employees with disabilities):

1.1 Please report the total number of **employees** (including employees with disabilities) and annual EE targets in each of the following **occupational levels**: Note: A=Africans, C=Coloureds, I=Indians and W=Whites

| Occupational Levels | | Male | | | | Female | | | | Foreign Nationals | | Total |
|---|-------|------|---|---|---|--------|---|---|---|-------------------|--------|-------|
| | | A | C | I | W | A | C | I | W | Male | Female | |
| Top management – Workforce profile | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Top management target – current year | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Senior management – Workforce profile | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Senior management target – current year | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Professionally qualified – Workforce profile | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Professionally qualified target – current year | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Skilled technical – Workforce profile | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Skilled technical target – current year | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Semi-skilled – Workforce Profile | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Semi-skilled target – current year | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Unskilled – Workforce profile | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Unskilled target – current year | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Total employees (excluding temporary employees) | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Temporary employees | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| GRAND TOTAL | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |

- Workforce Profile: Value

All active employees are included in the headcount per Occupational Level (as previously reported) per Gender and Group, reflecting Foreign Nationals separately from RSA Citizens, and are printed in the “**Workforce Profile value**” rows.

Excluded employees are all terminated employees with a termination date equal to or before the reporting date e.g.: from and before 31 August of any given year.

- Workforce Profile: %

The value of the headcount for the specific Occupational Level (split according to Gender and Group) is calculated as a percentage (%) of what this value is of the total number of employees in the Occupational Level and are printed in the **“Workforce Profile %”** rows.

For example:

Workforce value is 8 African Males in Top Management.

Total Number of Employees in the Top Management is 18.

$8 / 18 * 100 = 44.44\%$ of the total workforce in Top Management are African Males.

- Target Current year: Value

The total number of employees as defined on the Goal/Numerical Targets selected at print time will print here.

Please Note:

When you select “No Numerical Target/Goal”, the section for “Target Current Year” will be blank for all Occupational Levels.

- Target Current Year: %

The **target** value on the selected Goal/Numerical Targets for the specific Occupational Level (split according to Gender and Group) is calculated as a percentage (%) of what this value is of the **total target** value of employees for the Occupational Level.

For example:

Target value is 3 African Males in Senior Management.

Total Target Value of Employees in Senior Management is 15.

$3 / 15 * 100 = 20\%$ of the total target in Senior Management are African Males.

Please Note:

Temporary Employees do not have a section for “Current Year Target Value and Percentage”.

Section 1.2 –Employees with Disabilities

Print Screen of Section 1.2, only reporting on employees with disabilities:

1.2 Please report the total number of **employees with disabilities only** in each of the following occupational levels and the annual EE target of the total workforce: Note: A=Africans, C=Coloureds, I=Indians and W=Whites

| Occupational Levels | | Male | | | | Female | | | | Foreign Nationals | | Total |
|---|-------|------|---|---|---|--------|---|---|---|-------------------|--------|-------|
| | | A | C | I | W | A | C | I | W | Male | Female | |
| Top management | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Senior management | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Professionally qualified | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Skilled technical | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Semi-skilled | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Unskilled | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| TOTAL PERMANENT | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| Temporary employees | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| GRAND TOTAL | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| ANNUAL EE TARGET FOR EMPLOYEES WITH DISABILITIES | | | | | | | | | | | | |
| Workforce Profile of Employees with Disabilities of total Workforce | % | | | | | | | | | | | |
| Annual target for employees with Disabilities of the total workforce–current year | % | | | | | | | | | | | |

Section 1.2 –Employees with Disabilities do not reflect the targets per Occupational Level.

- Occupational Level: Values

All active employees with disabilities are included in the headcount per Occupational Level (as previously reported) per Gender and Group, reflecting Foreign Nationals separately from RSA Citizens, and are printed in the **“value” rows**.

- Occupational Level %:

The value of the headcount for employees with disabilities in the specific Occupational Level (split according to Gender and Group) is calculated as a percentage (“%”) of what this value is of the total number of employees with disabilities in the Occupational Level.

- Annual EE Target for Employees with Disabilities:

From the **second year** of reporting, it is our understanding that these values will be pre-populated by the DoEL online system based on the previous submission, however, our system will also calculate these values.

- Workforce Profile of Employees with Disabilities of total Workforce - %:

Use the total number of employees with disabilities to calculate what percentage (%) of the total workforce are employees with disabilities.

For Example:

Total number of employees with disabilities = 5

Total number of employees in the workforce = 180

Percentage Calculation: $5 / 180 * 100 = 2.78\%$ of the total workforce are disabled.

- Annual Target for Employees with Disabilities of the Total Workforce – Current Year - %:

The **total target** value on the selected Goal/ Numerical Targets for **employees with disabilities** is calculated as a percentage (%) of what this value is of the **total workforce** of the **current year**.

For example:

Total Target number of employees with disabilities = 9

Total number of employees in the current workforce = 180

$9 / 180 * 100 = 5\%$ of the total workforce is targeted to be employees with disabilities.

Section 1.3 and 1.4 – New Sections

These two new sections will not be populated by our system.

You need to complete these sections manually and state:

- Whether you have met your annual numerical targets for the current year or not.
- If not, what your justifiable reason is for not meeting your targets in any or all of the Occupational Levels and/or for employees with disabilities.

3.3.4 EEA2 – Section C: Workforce Movements

Workforce Movements include three reporting areas for the selected reporting period i.e.: from 1 September 2024 to 31 August 2025 for the first reporting cycle:

- Recruitments
- Promotions
- Terminations

From the **Main Menu > Equity > Employment Equity Reports > Reports 401 – 600 Tab > Equity Rep**

- Select the applicable **new Plan Number**.
- If you select to Print for “**Selected**” reports.
- Select “**5. Workforce Movement**”.
- Complete the relevant date.

The number of employees (value as previously reported) as well as the percentages (new fields) are reported by Occupational Level.

Print Screen of first Occupational Level for Section 2.1, reporting on all employees (including employees with disabilities) who were recruited for the selected reporting period:

2.1 Please report the total number of new recruits, including employees with disabilities. Note: A=Africans, C=Coloureds, I=Indians and W=Whites

| Occupational Levels | Male | | | | Female | | | | Foreign Nationals | | Total |
|---------------------|-------|---|---|---|--------|---|---|---|-------------------|--------|-------|
| | A | C | I | W | A | C | I | W | Male | Female | |
| Top management | value | | | | | | | | | | |
| | % | | | | | | | | | | |

3.3.5 EEA2 – Section D: Skills Development

From the **Main Menu > Equity > Employment Equity Reports > Reports 401 – 600 Tab > Equity Rep**

- Select the applicable **new Plan Number**.
- If you select to Print for “**Selected**” reports.
- Select “**6. Skills Development**”.
- Complete the relevant date.

The number of employees (value as previously reported) as well as the percentages (new fields) are reported by Occupational Level.

The instruction that explains who is included in the report has been amended to include the words "sector targets".

Please Note:
 The report does not require “Foreign Nationals” to be recorded in a separate column. However, we have always printed these columns and are retaining this information.

Print Screen of first Occupational Level for Section D, reporting on all employees (including employees with disabilities) who received applicable training for the selected reporting period:

5.1 Please report the total number of employees, including employees with disabilities, who received training ONLY for the purpose of achieving the sector targets numerical goals, and not the number of training courses attended by individuals. Note: A=Africans, C=Coloureds, I=Indians and W=Whites

| Occupational Levels | | Male | | | | Female | | | | Total |
|---------------------|-------|------|---|---|---|--------|---|---|---|-------|
| | | A | C | I | W | A | C | I | W | |
| Top management | value | | | | | | | | | |
| | % | | | | | | | | | |

3.3.6 EEA2 - Section E: 5 Year Sector Targets, Numerical Goals and Annual Numerical Targets.

- Employers are required to set numerical targets for all designated groups in each of the **four upper occupational levels in relation** to the applicable **sector targets and EAP**, and for persons with disabilities.
- Employers must set numerical goals for the **lower occupational levels** (semi-skilled and unskilled levels) guided by the **national or regional EAP** that they are applying.
- Note that these 5-year sector targets and goals are not broken down into race but rather a combined target/goal for the designated group, per male and female.
- The 5-year [PDF](#) [sectoral numerical targets](#) set out are not intended to add up to 100%; as the sectoral numerical target excludes white males with no disabilities and foreign nationals as part of the workforce profile.
- Employers who become designated during the sector target period must prepare an EE plan with annual targets for the remainder of the period.

5 Year Sector Targets and Numerical Goals for Semi-Skilled and Unskilled Level (2025-2030)

Please Note:
 We have not saved any sector specific documentation for reference purposes in the system. This section of the report is not populated automatically by the system and must be completed manually by you.

Annual Numerical Targets for the Next Year

The information captured on the newly created plans will be reported here.

From the **Main Menu > Equity > Employment Equity Reports > Reports 401 – 600 Tab > Equity Rep**

- Select the applicable **new Plan Number**.
- If you select to Print for “**Selected**” reports.
- Select “**7. Numerical Goals**”.
- Complete the relevant date.
- Select the relevant **Interim Target** for the applicable reporting period.

In the **first year** of reporting, you should select the Interim Target set up for the following year i.e.: (2026 – 08).

From the **second year** onward, the DoEL (Department of Employment and Labour) system will **pre-fill annual targets** in the Workforce Profile (Section B: 1.1) with the information you submitted here.

Our system will always print the information for the Numerical 5-year Goal and then all the Interim Targets you select at print time.

The Goal and Target Plans, selected at print time, for employees with disabilities, will still print separately on their own sheet despite the change to the new reporting structure, as explained below.

IMPORTANT: It is advisable to perform an Equity General Recalculation in ALL Companies that are included in the Equity Plan, PRIOR to printing this Report.

| 1. Print using Equity Plan number For Workforce For Province For Company | <input type="text" value="0830"/> <input type="text"/> <input type="text" value="056"/> | AUGUST 2030 All Workplaces All Provinces EQUITY CLIENT SCRAMBLE | | | | |
|---|---|--|---|---------|------|-------|
| 2. Print All or Selected reports | <input type="radio"/> All <input checked="" type="radio"/> Selected | | | | | |
| Report Description | Section | Print | Date | Include | Type | Using |
| 3. Employer Detail | EEA2 A | <input type="checkbox"/> | <input checked="" type="checkbox"/> VIP Payroll | | | |
| 4. Workforce Profile | EEA2 B | <input type="checkbox"/> | | | | |
| 5. Workforce Movement | EEA2 C | <input type="checkbox"/> | | | | |
| 6. Skills Development | EEA2 D | <input type="checkbox"/> | | | | |
| 7. Numerical Goals | EEA2 E | <input checked="" type="checkbox"/> | | | | |
| A. Employer Details | EEA4 A | <input type="checkbox"/> | | | | |
| C. Workforce and Remuneration | EEA4 C D E | <input type="checkbox"/> | | | | |
| Print the details of the Employees included in the Report | | | | | | |

×

You have more than 1 interim Numerical Target defined for the Numerical Goal Plan (2030 / 08) you have selected. Please Indicate below which of these Numerical Targets you want to print, in addition to the main Numeric Goal Plan

Include

Interim Numerical Target (2026 - 08)

Interim Numerical Target (2027 - 08)

Interim Numerical Target (2028 - 08)

Interim Numerical Target (2029 - 08)

Version : 2025

The number of employees (value as previously reported) as well as the percentages (new fields) are reported by Occupational Level.

Employees with disabilities are no longer reported separately but are recorded at the bottom of this report.

| | | | | | | | | | | | | |
|--|-------|--|--|--|--|--|--|--|--|--|--|--|
| GRAND TOTAL | value | | | | | | | | | | | |
| | % | | | | | | | | | | | |
| ANNUAL EE TARGET FOR EMPLOYEES WITH DISABILITIES | | | | | | | | | | | | |
| Annual Target for Employees with disabilities (value) | | | | | | | | | | | | |
| Annual Target for Employees with disabilities (% of total workforce) | | | | | | | | | | | | |

Annual EE Target for Employees with Disabilities:

- Annual Target for Employees with disabilities (value)
The total number of employees with disabilities as defined on the Goal/Numerical Targets selected at print time will print here.
- Annual Target for Employees with disabilities (% of total workforce)
The total **target** number of employees with disabilities on the selected Goal/Numerical Targets is calculated as a percentage (%) of what this value is of the **total target workforce**.
For Example:
Target of total number of employees with disabilities = 10
Target of total number of employees in the workforce = 210
Percentage Calculation: $10 / 210 * 100 = 4.76\%$ of the total target workforce are planned to be employees with disabilities.

3.3.7 EEA2 - Section F: Consultation and Affirmative Action Measures

Minor changes have been made to the wording of this section.

- Consultation
- Barriers and affirmative action measures

Please Note:
This section must be completed by you. The information is not available in the software and interpretation of data and insights into the company is required for completion of these sections.

3.3.8 EEA2 – Section G: Monitoring and Evaluation

Minor changes have been made to the wording of this section.

- Monitoring and progress
- Achievement of annual objectives

Please Note:

This section must be completed by you. The information is not available in the software and interpretation of data and insights into the company is required for completion of these sections.

3.3.9 EEA2 – Section H: Signature of the Chief Executive Officer/Accounting Officer

Please Note:

This section needs to be signed by the Chief Executive Officer or Accounting Officer.

3.3.10 EEA4 - Section A: Employer Details and Instructions

Some fields have been removed from the “EEA4 Employer Details and Instructions”, the sequence of some fields have changed and in some cases the wording has been changed.

Please Note:

Employers must indicate whether they have used the National or Provincial EAP to set up their equity plan.

3.3.11 EEA4 – Section B: The Following Must be Taken into Consideration when Completing the EEA4 Form

Under the section “Variable Remuneration Includes”, overtime is now specifically mentioned as being ‘variable remuneration’.

To define Equity Remuneration, go to the **Main Menu > Equity > Equity Remuneration Control**.

Please Note:

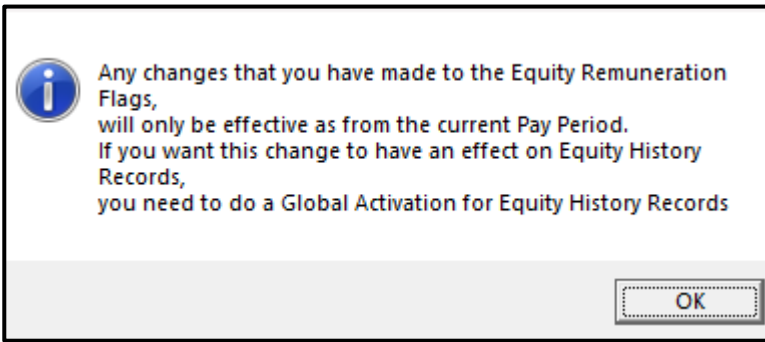
All definitions default to “Fixed/Guaranteed”. It is your responsibility to change “Overtime” to “Variable” in the “Remuneration Type” column.

The system will automatically run a general recalculation when you exit this screen.

Please Note:

This change will only take effect as from the current Pay Period. To apply this change to the Equity History records, go to **Main Menu > Equity > Equity General Recalc.**

The following message will remind you to take this action:



3.3.12 EEA4 – Section C – Workforce Profile and Total Remuneration

No changes have been made to EEA4 Section C.

3.3.13 EEA4 – Section D1: Fixed/Guaranteed and Variable Remuneration

The indication of the lowest remuneration for the lowest occupational level in the organisation has been removed. The report is now **split into two**.

Section D1 will be used to report the **highest remuneration** per occupational level, and the new **Section D2** will be used to report the **lowest remuneration** per occupational level.

The same principle as previous reporting periods applies to the **highest remuneration reporting (D1)**: Where a choice has to be made between two employees with the same total remuneration, i.e. one employee having a higher fixed/guaranteed remuneration and the other employee having a higher variable remuneration, the employee with the higher variable remuneration should be chosen when completing the form below.

If there is only one employee at a particular occupational level, only capture their information in table D1 and do not repeat their information in table D2. See note in bold which was added.

SECTION D1: FIXED / GUARANTEED AND VARIABLE REMUNERATION

Please provide the remuneration of the employee with the **highest total remuneration (i.e. fixed/guaranteed and variable remuneration)** in terms of population group and gender for each occupational level, where applicable. Where a choice has to be made between two employees with the same total remuneration, i.e. one employee having a higher fixed/guaranteed remuneration and the other employee having a higher variable remuneration, the employee with the higher variable remuneration should be chosen when completing the form below. **(NB: If there is only one employee at a particular occupational level, only capture their information in table D1 and do not repeat their information in table D2)**

| Occupational levels | | MALE | | | | FEMALE | | | | FOREIGN NATIONALS | |
|--|--------------------|------|---|---|---|--------|---|---|---|-------------------|---|
| | | A | C | I | W | A | C | I | W | M | F |
| Top Management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Senior Management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Professionally qualified, experienced specialists and mid-management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Skilled technical, academically qualified and junior management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Semi-skilled and discretionary decision making | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Unskilled and defined decision making | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |

3.3.14 EEA4 – Section D2: Fixed/Guaranteed and Variable Remuneration

EEA4 Section D2 is a **new** report.

The same principle as previous reporting periods applies to the **lowest remuneration reporting (D2)**: Where a choice has to be made between two employees with the same total remuneration, i.e., one employee having the lowest fixed/guaranteed remuneration and the other employee having the lowest variable remuneration, the employee with the lowest variable remuneration should be chosen when completing the form below.

If there is only one employee at a particular occupational level, only capture their information in table D1 and do not repeat their information in table D2.

SECTION D2: FIXED / GUARANTEED AND VARIABLE REMUNERATION

Please provide the remuneration of the employee with the **lowest total remuneration (i.e., fixed/guaranteed and variable remuneration)** in terms of population group and gender for each occupational level, where applicable. Where a choice has to be made between two employees with the same total remuneration, i.e., one employee having the lowest fixed/guaranteed remuneration and the other employee having the lowest variable remuneration, the employee with the lowest variable remuneration should be chosen when completing the form below.

| Occupational levels | | MALE | | | | FEMALE | | | | FOREIGN NATIONALS | |
|--|--------------------|------|---|---|---|--------|---|---|---|-------------------|---|
| | | A | C | I | W | A | C | I | W | M | F |
| Top Management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Senior Management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Professionally qualified, experienced specialists and mid-management | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Skilled technical, academically qualified and, junior management, | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Semi-skilled and discretionary decision making | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |
| Unskilled and defined decision making | Fixed / Guaranteed | | | | | | | | | | |
| | Variable | | | | | | | | | | |
| | Total Remuneration | | | | | | | | | | |

3.3.15 EEA4 – Section E: Median Remuneration and the Remuneration Gap

EEA4 Section E has revised instructions explaining exactly how to calculate the required values. Some of these fields are new and a few of the questions have been amended slightly.

The most significant change to the requirements is that the calculations are now based on 5% instead of 10%.

Please Note:

We have not changed the way in which we calculate the number of employees determined by the 5% of total workforce calculation. We will continue to “round up” and not “round off”.

For example: If 5% is equal to 26.1, the system rounds this up to 27 employees.

The following information is automatically calculated by the system:

- Number of employees covered in the top 5% of the highest paid employees in your organisation.
- Total Annual Remuneration of the top 5% of the highest paid employees in your organisation.
- Range of the top 5% of the highest paid employees in your organisation (total annual remuneration).
- Number of employees covered in the lowest 5% paid employees in your organisation.
- Total Annual Remuneration of the lowest 5% paid employees in your organisation.
- Range of the lowest 5% paid employees in your organisation (total annual remuneration).
- Median Remuneration for employees in your organisation.

Please Note:

It is your responsibility to complete the rest of this report.

SECTION E: MEDIAN REMUNERATION AND THE REMUNERATION GAP

Please note that in order to complete this section properly, your payroll must be sorted in ascending order from the lowest pay to the highest pay. **Total annual remuneration** includes fixed/guaranteed and variable pay. The **'median'** is the "middle" value in a list of payments (i.e. total remuneration) ranked from lowest to highest. When the payroll contains an even number of values, the median is the sum of the two middle values divided by 2. The **range** is the area of variation that includes the lower and upper limits of a particular scale. To calculate the range of the top 5% highest paid employees and the range of the lowest 5% paid employees, please do the following:

- Sort the payroll in ascending order (from the lowest pay to the highest pay).
- Multiply the total number of employees by 5% (Round off decimals to the nearest whole number).
- Refer to the earnings of employees that correlate to the number referred to above.
- Capture the range (lowest and highest) remuneration of the top 5% of the highest paid employees, e.g. from R1000, 000 (lowest) to R2000, 000 (highest).
- Repeat the exercise for the lowest 5% paid employees, e.g. from R100, 000 (lowest) to R200, 000 (highest).

| | | |
|--|----------------------------------|--------------|
| Number of employees covered in the top 5% of the highest paid employees in your organisation | Number of employees | |
| What is the total annual remuneration of the top 5% of the highest paid employees in your organisation? | Total Annual Remuneration | |
| What is the range of the top 5% of the highest paid employees in your organisation (total annual remuneration)? | Range | |
| | From (Lowest) | To (Highest) |
| | R | R |
| Number of employees covered in the lowest 5% paid employees in your organisation | Number of employees | |
| What is the total annual remuneration of the lowest 5% paid employees in your organisation? | Total Annual Remuneration | |
| What is the range of the lowest 5% paid employees in your organisation (total annual remuneration)? | Range | |
| | From (Lowest) | To (Highest) |
| | R | R |
| What is the median remuneration for employees in your organisation? | Median Remuneration | R |
| Please indicate whether your organisation has a remuneration policy in place to address and close the vertical gap/ horizontal gap between the highest and lowest paid employees in your workforce? (Mark with X) | YES | |
| | NO | |

| | | |
|--|---------------------------------|--|
| How many times (e.g. 10x, 15x, 20x) is the vertical gap between the highest paid employee and lowest paid employee in your organisation? | _____ | |
| Is the remuneration-gap between the highest and lowest paid employees in your organisation aligned to your remuneration policy? (Mark with X) | YES | |
| | NO | |
| Are there measures to address the remuneration gap in your Employment Equity Plan? (Mark with X) | YES | |
| | NO | |
| Please indicate a key reason for the Income Differentials that apply to your organisation. (Mark with X) | a) Seniority/ length of service | |
| | b) Qualifications | |
| | c) Performance | |
| | d) Demotion | |
| | e) Experiential training | |
| | f) Shortage of skill | |
| | g) Transfer of business | |
| | h) Other | |
| If other is chosen as a key reason above, please specify the key reason- | | |

3.3.16 SECTION F: Signature of the Chief Executive Officer/Accounting Officer

This section is not printed by the system.



3.4 Printing of Other Information

3.4.1 Employee Data Sheets

When printing the Equity Report, select (tick) the option “Print the details of the Employees included in the Report”

| | |
|---|-------------------------------------|
| Print the details of the Employees included in the Report | <input checked="" type="checkbox"/> |
|---|-------------------------------------|

This option will create additional sheets as part of the Equity Report, listing the employees included in every (selected) section and the remuneration used to calculate the values printed in Sections C, D and E.

3.4.2 Summary Report

At the time of printing, the following summary will open in your default browser:

| 057 - EQUITY | | Employment Equity Reports | | 30/09/2025 (07 of 12) | | |
|------------------------------------|-----------------------------|--|------------|---|--------|---------|
| | | | | R711 Printed on 07/09/2025 | | |
| Employment Equity Report Detail | | | | | | |
| EEA1 | Declaration of the Employee | | | To be completed manually by all Employees | | |
| EEA2 | Section A | Employer Details & Instructions | | Non-printed sections to be completed manually | | |
| EEA2 | Section B | Workforce Profile | | Partially System Generated. Section 1.3 and 1.4 to be completed manually | | |
| EEA2 | Section C | Workforce Movement | | System Generated Report | | |
| EEA2 | Section D | Skills Development | | System Generated Report | | |
| EEA2 | Section E | Numerical Goals | | Partially System Generated. 5 Year Sector Target to be completed manually | | |
| EEA2 | Section F | Consultation and Affirmative Action Measures | | To be completed manually | | |
| EEA2 | Section G | Monitoring & Evaluation | | To be completed manually | | |
| EEA2 | Section H | Signature of the CEO | | To be completed manually | | |
| EEA4 | Section A | Employer Details | | Non-printed sections to be completed manually | | |
| EEA4 | Section C | Workplace Profile and Total Remuneration | | System Generated Report | | |
| EEA4 | Section D | Fixed / Guaranteed and Variable Remuneration | | System Generated Report | | |
| EEA4 | Section E | Average and Median Remuneration and Remuneration Gap | | Non-printed sections to be completed manually | | |
| EEA4 | Section F | Signature of the CEO | | To be completed manually | | |
| EMPLOYMENT EQUITY REPORT SELECTION | | | | | | |
| Print using equity Plan Number | 0830 | AUGUST 2030 | | | | |
| For Workplace | | All Workplaces | | | | |
| For Province | | All Provinces | | | | |
| For Company | 057 | EQUITY | | | | |
| Print All or Selected Reports | | All Standard Reports | | | | |
| Report Description | Section | Print | Date | Include | Type | Using |
| Employer Detail | EEA2 A | Yes | 31/08/2025 | | | |
| Workforce Profile | EEA2 B | Yes | 31/08/2025 | All/Dis | Actual | Numbers |
| Workforce Movement | EEA2 C | Yes | 31/08/2025 | | | |
| Skills Development | EEA2 D | Yes | 31/08/2025 | | | |
| Numerical Goals | EEA2 E | Yes | 08/2030 | | | |
| Employer Details | EEA4 A | Yes | 31/08/2025 | | | |
| Workforce and Remuneration | EEA4 C D E | Yes | 31/08/2025 | | | |

Please Note:
The sections not populated by the system are clearly indicated on this report.

3.5 Printing the Equity Report

When all print time selections have been made and you **<Continue>** to print the Equity Report, CSV files are created and saved to a subfolder in your payroll directory, called “EQReport” e.g.: C:\Premier\EQReport.

From here the data is merged with an Excel template and automatically opens in Excel.

Please Note:

It is your responsibility to save the report to the location and with the naming convention of your choice.

3.6 Issue Resolved

The following issue has been resolved:

| Area | Issue | Detail |
|---------------------------------|--|--|
| Issue Resolved | | |
| Equity Report (Real Number 711) | Index Out of Bounds, upper bound = 150, index = 0 error in some instances. | If you were on Advanced Access and your users do not follow onto each other i.e. there are gaps between your users, the following error would have occurred when printing the Equity Report. |

4.0 RSA: OID Earnings Threshold

The following is specific to **RSA Tax Countries**:

The Minister of Employment and Labour increased the OID earnings threshold from R597 328 per annum to **R633 168** per annum effective **1 March 2025** (2025/2026 year of assessment).

Please Note:

It is your responsibility to amend the OID earnings threshold in the first pay period for March 2025 or as soon as the OID earnings are published.

To amend the OID earnings, go to:

Main Menu > Company > Basic Company Information and amend the OID Annual Limit entry field.

| | | | | | | | | | |
|----------------------------|---|---------------------|--|---------------------|-----|------------------------|--|--------------------------|--|
| Basic Company Information | | Address Details | | Contact Information | | Additional Information | | Employment Tax Incentive | |
| Company Name (for Reports) | <input type="text" value="RELEASE 6.5a"/> | | | | | | | | |
| Company Name (for Screens) | <input type="text" value="RELEASE 6.5a"/> | Company Status | <input type="text" value="Live"/> | | | | | | |
| E-Mail Address | <input type="text"/> | | | | | | | | |
| Co. Registration Number | <input type="text"/> | Business Tel Number | <input type="text"/> | | | | | | |
| Payment Cycle | <input type="text" value="Monthly (12 Periods)"/> | = | <input type="text" value="12"/> | Pay Periods, | 365 | Paid Calendar Days | | | |
| Use Tax Tables for | <input type="text" value="R.S.A"/> | OID Annual Limit | <input type="text" value="633168.00"/> | | | | | | |

You can find the OID Report (Real Number 502) at:

- Main Menu > Reports > Reports and Maintenance
- Main Menu > Utilities > RSA Submissions > OID Report

The new limit is automatically applied to the OID PDF Details and Summary Reports as well as the Excel Report.

5.0 Lesotho: Tax Changes

You received a **patch file** with the following change on **7 April 2025**.

The 2025 Income Tax Amendments for Lesotho have been passed into law as per Income Tax (AMA) Regulations No.50 of 2025 and are effective as from **1 April 2025**. The amendments are as follows:

Annual Tax Table for the 2025/2026 Tax Year:

| Annual Income | | Rate % | Fixed Amount (M) |
|---------------|-----------|--------|------------------|
| From (M) | To (M) | | |
| 0.00 | 74 040.00 | 20% | 0.00 |
| 74 040.01 | And above | 30% | 14 808.00 |

The Annual Tax Credit is M11 640.

6.0 Other Tax Countries: New Reports

6.1 Kenya: Simplified P10 Return (Premier Only)

You received a **patch file** on **30 July 2025** with this new report.

The new Simplified P10 Return replaces the existing New iTax PAYE Online - New P10 Report as the monthly PAYE submission file.

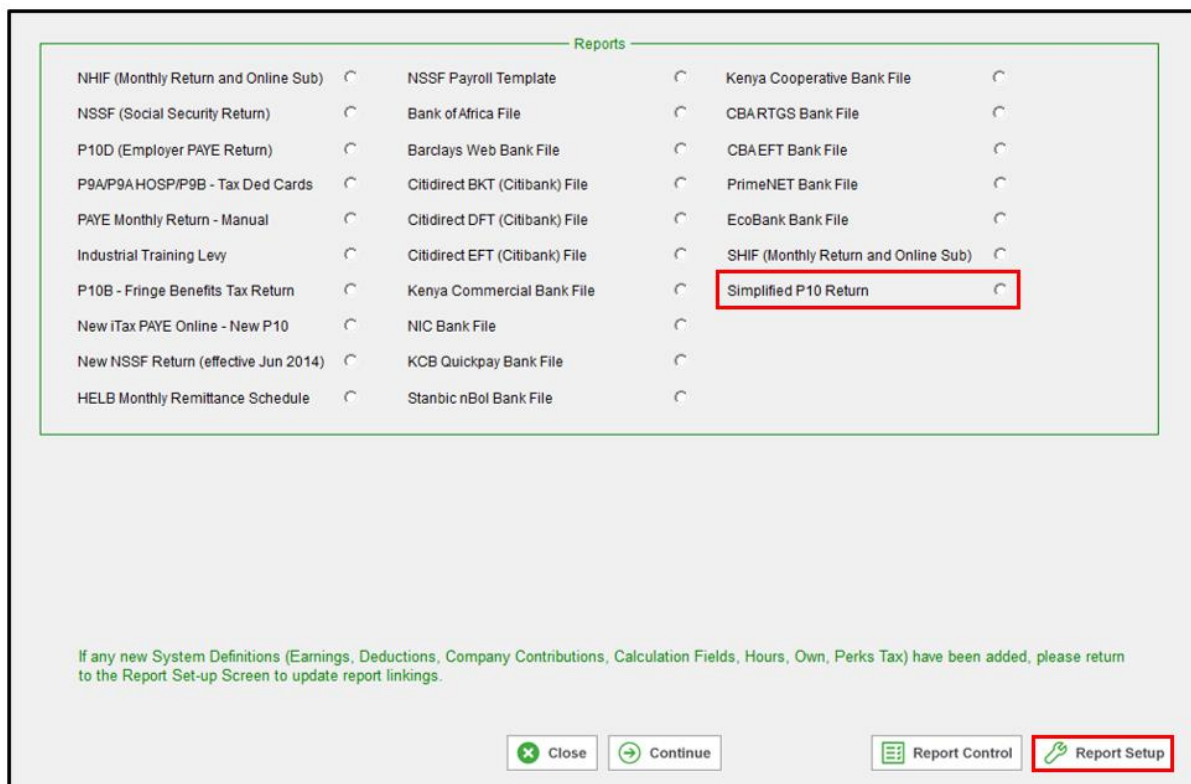
Functionally, the report works the same as the previous report version, and the return process remains unchanged: CSV files are generated, imported into the P10 template for validation, and the final file is produced for submission once all validations have passed.

The new template has been streamlined and only contains three sheets for us to populate:

- Sheet B – Employee Details
- Sheet C – Lump Sums (not doing until further notice)
- Sheet D – Fringe Benefits Tax

The new Simplified P10 Return will become mandatory for all taxpayers from July 2025 due for submission in August.

The Simplified P10 Return can be found on: **Main Menu > Reports > Kenya Reports:**



When you print the report for the first time, access the **<Report Setup>** Screen and link the relevant line items to the available options.

The screenshot shows a 'Report Setup' screen with two tabs: 'Report Setup 1' and 'Report Setup 2'. Below the tabs is a table of fields and their associated options. Each field has a green arrow icon to its left. The options are buttons for 'Earnings', 'Deductions', 'Co Contrib', 'Perks', 'Calc Screen', 'Own Screen', and 'Hrs Screen'. The 'Calc Screen' option is highlighted in blue for most fields.

| Field | Options |
|--------------------------------|--|
| Disable Flag | Earnings, Deductions, Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |
| Total Cash Pay | Earnings , Deductions, Co Contrib, Perks, Calc Screen, Own Screen, Hrs Screen |
| Value of Car Benefit | Earnings, Deductions, Co Contrib, Perks , Calc Screen , Own Screen, Hrs Screen |
| Value of Meals | Earnings , Deductions, Co Contrib, Perks , Calc Screen , Own Screen, Hrs Screen |
| Non Cash Benefits | Earnings, Deductions, Co Contrib, Perks , Calc Screen , Own Screen, Hrs Screen |
| Type of Housing | Earnings, Deductions, Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |
| Housing Benefit | Earnings , Deductions, Co Contrib, Perks , Calc Screen , Own Screen, Hrs Screen |
| Other Benefits | Earnings , Deductions, Co Contrib, Perks , Calc Screen , Own Screen, Hrs Screen |
| Social Health Insurance (SHIF) | Earnings, Deductions , Co Contrib, Perks, Calc Screen, Own Screen, Hrs Screen |
| NSSF Contribution | Earnings, Deductions , Co Contrib, Perks, Calc Screen, Own Screen, Hrs Screen |
| Approved Pension | Earnings, Deductions , Co Contrib, Perks, Calc Screen, Own Screen, Hrs Screen |
| Post Retirement Medical Fund | Earnings, Deductions , Co Contrib, Perks, Calc Screen, Own Screen, Hrs Screen |
| Mortgage Interest | Earnings, Deductions, Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |
| Affordable Housing Levy | Earnings, Deductions , Co Contrib , Perks, Calc Screen , Own Screen, Hrs Screen |
| Insurance Relief | Earnings, Deductions , Co Contrib , Perks, Calc Screen , Own Screen, Hrs Screen |
| PAYE Tax Deducted | Earnings, Deductions , Co Contrib, Perks, Calc Screen, Own Screen, Hrs Screen |
| Loan Deduction | Earnings, Deductions , Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |
| Initial Loan Amount | Earnings, Deductions, Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |
| Loan Interest Rate | Earnings, Deductions, Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |
| Prescribed Market Int Rate | Earnings, Deductions, Co Contrib, Perks, Calc Screen , Own Screen, Hrs Screen |

At the bottom of the screen, there are buttons for 'Continue', 'ES', and 'Support Letter'.

| Field | Description |
|----------------------|--|
| Disable Flag | No Change (Calc Screen is the default option). |
| Total Cash Pay | Total amount of all Taxable Earnings for the current month. If the earning has an exemption or is partially taxable, show only the taxable portion. |
| Value of Car Benefit | Taxable Value of the Car Benefit of the Employee. |
| Value of Meals | Value of Meals for the current month. |
| Non Cash Benefits | Total Taxable Fringe Benefits excluding Car Benefit, Housing Benefit, Value of Meals and items linked to Other Benefits. |
| Type of Housing | The different Types of Housing are: <ol style="list-style-type: none"> Benefit not given Employer's Owned House Employer's Rented House Agriculture Farm |

5. House to Non full-time service Director

Please Note:

The mapping for Type of Housing differs from the “New iTax PAYE Online – New P10” report. If you want to make use of the existing line, you will need to relink employees.

If you want to continue using the “New iTax PAYE Online – New P10” report, we strongly suggest that you create a new Housing Type line on the Calculation Screen (Route with XS) and link Type of Housing on this line for use when printing the “Simplified P10 Return”.

| | |
|--------------------------------|--|
| Housing Benefit | The Taxable value of the Housing Benefit for the current month. |
| Other Benefits | Other Taxable Benefits excluded from the Fringe Benefit exemption. |
| Social Health Insurance (SHIF) | Social Health Insurance for the current month. |
| NSSF Contribution | The actual NSSF Contributions for the month. |
| Approved Pension | Actual current Pension contributions made to approved pension funds other than the NSSF. |
| Post Retirement Medical Fund | Post Retirement Medical Fund for the current month. |
| Mortgage Interest | The Interest paid by the Employee towards his/her own Mortgage. |
| Affordable Housing Levy | Affordable Housing Levy for the current month. |
| Insurance Relief | Insurance Relief for the Current Period. |
| PAYE Tax Deducted | The actual PAYE Deduction for the Current Month. |
| Loan Deduction | Link the line where the Loan amount is deducted from the employee. This line will be used to calculate the outstanding loan balance. |
| | Please Note: We only make provision for ONE loan per employee. |
| Initial Loan Amount | The original Loan Amount given to the Employee. |
| Loan Interest Rate | Interest Rate charged by the Employer on Loan Amount granted to the Employee. |
| Prescribe Market Int Rate | The prescribed market interest rate. |

Complete the necessary fields, then click on **<Continue>**.

Firstly, select a location where you want to save the CSV files, and **secondly**, where you want to save the report with the detail contained in the CSV files.

The following CSV files will be created:

- B_Employee_Dtls_Simplified.csv
- D_FBT_Dtls.csv (This file will only be created if there are employees with qualifying loan transactions.)

B_Employee_Dtls_Simplified CSV File

The B_Employee_Dtls_Simplified.csv file contains the combined information previously included in B_Employees_Dtls and C_Disabled_Employees_Dtls CSV files of the “New iTax PAYE Online – New P10” Return. This file includes employees with the sum total of Total Cash Pay plus Total Non-Cash Pay greater than 0.00.

D_FBT_Dtls CSV File

The D_FBT_Dtls.csv file contains employee loan details where the interest charged on an employee loan captured on the Payslip Screen results in a Low Interest Loan Fringe Benefit, e.g. where the official interest rate on the Calculation Screen is greater than the interest charged on the employee’s loan transaction, also entered on the Calculation Screen.

6.1.1 Issue Resolved

| Issue | Description |
|------------------------------------|--|
| Terminations printing unexpectedly | You received a patch file on 5 August 2025 , to amend the following: Employees who received no income during the month – neither cash nor non-cash payments - were included in the report. As a result, terminated employees appeared in the report unexpectedly. |

7.0 Other Tax Countries: Existing Report Changes

7.1 Kenya: SHIF (Monthly Return and Online Sub)(Premier Only)

You received a **patch file** on **19 June 2025** to accommodate the change to this report.

The Social Health Authority (SHA) has released an updated SHIF submission template, which now includes a new column for "Identity Type" that is recorded in column "D".

From the **Main Menu > Employee > Change Employee > Personal Details Tab:**

- **National ID Number:**
If the employee has a **National ID Number**, enter it in the "**ID Number**" entry field. The word "National ID" will automatically print in the "Identity Type" column "D".
- **Other Number:**
If the employee does not have a National ID Number, but a **Refugee ID** or **Alien ID**, enter this number in the "**ID Number**" entry field.

| | | | |
|-------------------------|-------------------|----------|---------------------|
| Personal Details | | | |
| Title | MR | Initials | F |
| Surname | EMPLOYEESURNAME * | | |
| First Name | FIRSTIE | | |
| Second Name | | | |
| Also Known As | | | |
| Maiden Name | | | |
| Spouse Names | | | |
| ID Number | 888101-0123456 | | |
| Date of Birth | 1980/01/01 | * | 44 yrs (Actual Age) |
| Passport Number | | | |
| Passport Country | | | |

Route to the **Memo Screen** by typing "MEM" in the Routing entry field at the bottom of the Personal Details screen.

Under "**General Messages**", enter one of the following in entry field "**C**":

- Alien ID
- Refugee ID

The “Identity Type” column “D” will print what you have entered here.

| General Messages | | |
|------------------|---|------------|
| 5 | | |
| 6 | | |
| 7 | | |
| 8 | | |
| 9 | A | |
| B | | |
| | C | Refugee ID |

- **Passport Number:**

If the employee has a **Passport Number**, enter it in the “**Passport Number**” entry field.

| Personal Details | |
|------------------|----------------------------------|
| Title | MR Initials T |
| Surname | SECONDEMPLOYEE * |
| First Name | TREVOR |
| Second Name | |
| Also Known As | |
| Maiden Name | |
| Spouse Names | |
| ID Number | |
| Date of Birth | 1980/01/01 * 44 yrs (Actual Age) |
| Passport Number | PN3456789012 |
| Passport Country | ZAF South Africa |

Route to the **Memo Screen** by typing “MEM” in the Routing entry field at the bottom of the Personal Details screen.

Under “**General Messages**”, enter “Passport Number” in entry field “**C**”.

The “Identity Type” column “D” will print what you have entered here.

Please Note:

If you capture the incorrect wording on the **Memo Screen - General Messages - “C”**, then the incorrect wording will export as the Identity Type on the report.

7.2 Mauritius Reports (Premier Only)

You received a **patch file** on **7 April 2025** to accommodate the changes on these reports.

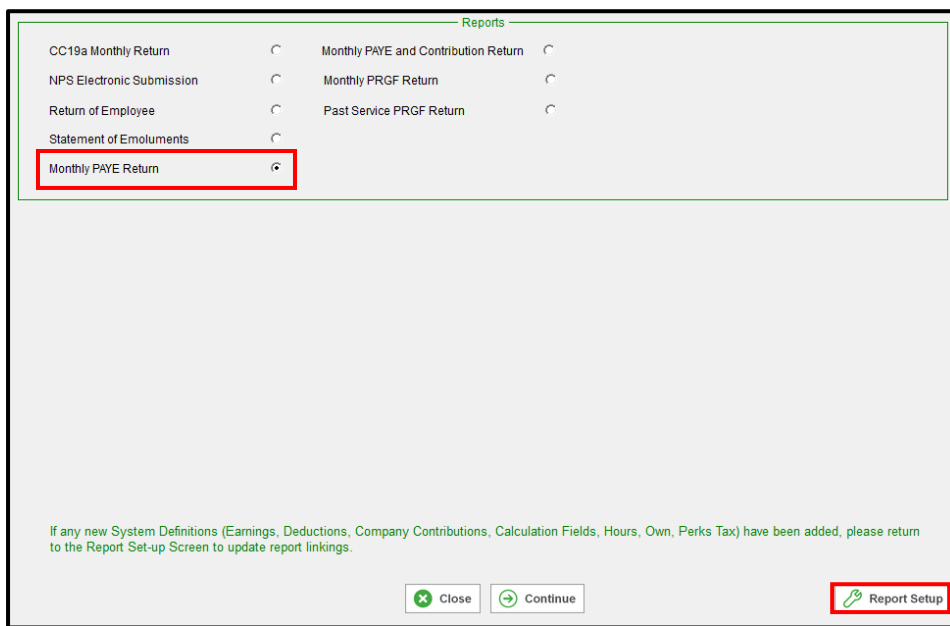
7.2.1 Monthly PAYE Return

We have amended the Mauritius Monthly PAYE Return to accommodate changes that came into effect in **December 2024**.

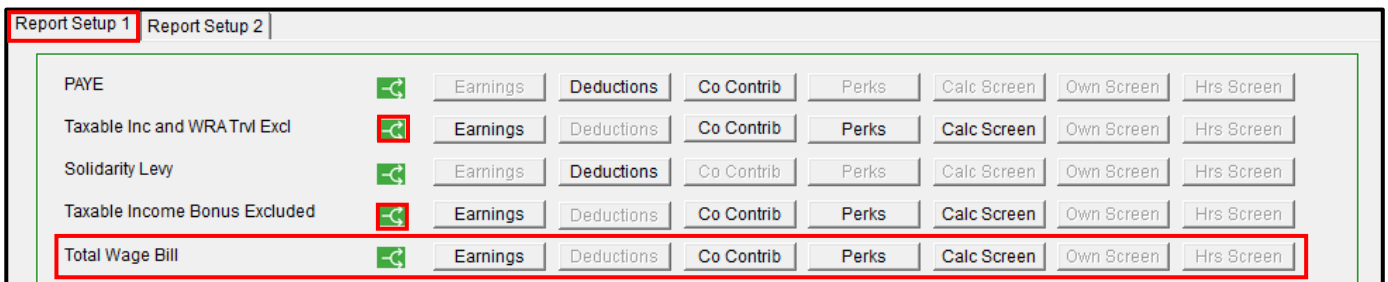
Summary of Changes

- Under Report Setup, the Guideline Instruction for “Taxable Inc and WRA Trvl Excl” has been amended to also exclude “Special Allowances”.
- Under Report Setup, the Guideline Instruction for “Taxable Income Bonus Excluded” has been amended to also exclude “Special Allowances”.
- Under Report Setup, there is a new selection for “Total Wage Bill” and Guideline Instruction.
- “Taxable Income and WRA Trvl Excl” exports to column AZ now and no longer to column AR.
- The value for “Total Wage Bill” exports to column BG.
- The Headings of the report have been changed accordingly.
- The CSV File Name has been changed to “PAYE_YYYYMM.CSV” where “YYYY” is the year of the selected reporting month and “MM” is the selected reporting month.

The **Monthly PAYE Return** can be found on: **Main Menu > Reports > Mauritius Reports > Monthly PAYE Return**



Access the **<Report Setup>** to amend **existing** linking and to set up linking for the **new** option.



| Report Setup Tab | Field | Description |
|------------------|-------------------------------|---|
| Report Setup 1 | Taxable Inc and WRA Trvl Excl | Guideline Instruction now reads: “Current Taxable earnings, benefits and Wage Relativity Adjustment excluding Travel and Special Allowances.” Adjust your linking accordingly. |
| Report Setup 1 | Taxable Income Bonus Excluded | Guideline Instruction now reads: “Current Taxable earnings and benefits excluding Year end Bonus and Special Allowances.” Adjust your linking accordingly. |
| Report Setup 1 | Total Wage Bill | Click on <Earnings> , <Co Contrib> , <Perks> or <Calc Screen> and select the relevant lines. |

7.2.2 Monthly PAYE and Contribution Return

We have amended the Monthly PAYE and Contribution Return to accommodate changes that came into effect in **December 2024**.

Summary of Changes

- Under Report Setup, the Guideline Instruction for “Taxable Income Travel Excluded” has been amended to also exclude “Special Allowances”.
- Under Report Setup, the Guideline Instruction for “Taxable Income Bonus Excluded” has been amended to also exclude “Special Allowances”.
- Under Report Setup, the Guideline Instruction for “Wage Bill excluding WRA” has been amended to also exclude “Special Allowances”.
- The Headings of the report have been changed accordingly.
- The CSV File Name has been changed to “PACO_YYYYMM.CSV” where “YYYY” is the year of the selected reporting month and “MM” is the selected reporting month.

| Report Setup Tab | Field | Description |
|------------------|--------------------------------|---|
| Report Setup 1 | Taxable Income Travel Excluded | Guideline Instruction now reads: “The Taxable Income on which the PAYE is based on but excluding the Travelling and Special Allowances.” Adjust your linking accordingly. |
| Report Setup 1 | Taxable Income Bonus Excluded | Guideline Instruction now reads: “The Taxable Income on which the PAYE is based on but excluding the End of Year Bonus and Special Allowances.” Adjust your linking accordingly. |
| Report Setup 1 | Wage Bill excluding WRA | Guideline Instruction now reads: “Wage Bill excluding Wage Relativity Adjustment and Special Allowances.” Adjust your linking accordingly. |

7.3 Uganda: NSSF (Monthly Schedule) (Premier Only)

You received a **patch file** on **19 June 2025** to accommodate the changes on this report.

We have amended the Uganda NSSF Monthly Schedule to accommodate changes that came into effect in **May 2025**.

Summary of Changes

- New headings for:
 - “Schedule Type”
 - “Currency”.
- Under report details, removed:
 - “No”
 - “Total”
- Under report details, added :
 - “Income Type”
 - “Termination Date”
 - “Reason for omission”
- Detail for “Contribution Type” changed to:
 - “STANDARD”
 - “VOLUNTARY”
 - “SPECIAL”

The Employee Status (Termination Reason) found on the **Main Menu > Employee > Change Employee > Personal Details Tab** is mapped to the following for the “Reason for omission” on the report:

| Employee Status (Termination Reason) in Payroll | Reason for omission on Report |
|---|-------------------------------|
| Resigned | Resigned |
| Discharged | Dismissal |
| Pensioned | Termination |
| Transferred | Termination |
| Retrenched | Termination |
| Absconded | Dismissal |
| Deceased | Died |
| Misconduct | Dismissal |
| Illness | Termination on medical ground |
| End of Contract | Termination |
| Employer Insolvency | Termination |
| Business Closed | Termination |
| Constructively Dismissed | Dismissal |

The **NSSF (Monthly Schedule)** can be found on: **Main Menu > Reports > Uganda Reports > NSSF (Monthly Schedule)**.

The screenshot shows a 'Reports' section with a list of report types. The 'NSSF (Monthly Schedule)' option is selected, indicated by a radio button and a red box. Other options include 'ATG Version 2 Bank File', 'Standard Chartered Bank File', 'Monthly PAYE Return (Manual)', 'Citibank DFT Bank File', 'Monthly PAYE Return (Electronic)', 'Stanbic nBOL Bank File', and 'Tax Monthly LST Return', 'Barclays Web Bank File'.

There are two new selections on the **third print-time selection screen**:

- Schedule Type
- Currency

The screenshot shows a form with several fields. The 'Area/Branch Office' field contains 'Area Branch Office Field xxxxX'. Below it, the 'Schedule Type' dropdown is set to 'Initial' and the 'Currency' dropdown is set to 'UGX'. These two dropdowns are highlighted with a red box.

| Field | Description |
|---------------------------------------|---|
| Schedule Type | The options are: <ul style="list-style-type: none"> • Initial (This is the default) • Supplementary |
| Currency | The drop-down list will display all the Currencies as per the Payslip Currency List. The default option is “UGX”. |
| Contribution Type (Changed column) | For items linked to “Normal”, “Bonus”, “Multiple”, “Arrears” or “Interest” detail will export as “STANDARD”. For items linked to “5% Contribution” or “Special Contribution” detail will export as “VOLUNTARY”. For items linked to “10% Contribution” detail will export as “SPECIAL”. |
| Income Type (New column) | If “Contribution Type” is “STANDARD”, Income Type will print as “Gross Salary”. If “Contribution Type” is “VOLUNTARY”, Income Type will print as “Additional Salary”. If “Contribution Type” is “SPECIAL”, Income Type will print as “Bonus”. |

Please Note:

The contents of the following columns can be amended if required: Contribution Type, Income Type and Reason for Omission.

7.4 Amendments/Template Changes/Issues Resolved

The following amendments have been made, templates have been modified, and issues have been resolved.

| Country | Report | Details |
|-------------------------------|-----------------------------|--|
| Amendments | | |
| All Countries | All Reports | <p>Main Menu > Reports > “Country Name” Reports</p> <p>It is no longer necessary to request a VIPSD Password to set up the <Report Control> for any report, for any country.</p> <p>This option will always be available.</p> |
| Namibia | E.As.6 (Annual Wage Return) | <p>You received a patch file on 19 June 2025 with the following amendment:</p> <p>The report has been updated to accommodate the amendments to the Employment Compensation Act and Social Security Act, as per Government Notice No. 8461 dated 01 October 2024, effective 1 March 2025.</p> <p>The annual earnings ceiling for Employees’ Compensation Fund (ECF) coverage has increased from N\$81,300.00 to N\$101,625.00.</p> <ul style="list-style-type: none"> • All references/calculations using the annual OID Limit value has been changed from N\$81 300.00 to N\$101 625.00. • All references/calculations using the monthly OID Limit value has been changed from N\$6 775.00 to N\$8 469.00. • All references/calculations using the weekly OID Limit value has been changed from N\$1 563.00 to N\$1 954.00. |
| Template Changes | | |
| Nigeria (Premier Only) | NHF Return | <p>You received a patch file on 19 June 2025 to implement the following template change:</p> <ul style="list-style-type: none"> • Two files are created when running the report. • File name for existing report: Nigeria NHF Report.xlsx • The existing report has an additional Sheet with all the details of the new report. • File name for new Electronic NHF Return: NHF_ElectronicReturn_MMYYYYY.xlsx. • The two files contain the same information. |
| Zambia (Premier Only) | NAPSA | <p>You received a patch file on 19 June 2025 to implement the following template change:</p> <ul style="list-style-type: none"> • Three reports are generated and saved to a .ZIP file, but ONLY the electronic NPS900-1Export.CSV file is changed. |

- The date format for “Date of Birth” changed from CCYY/MM/DD to DD/MM/CCYY.
- The column/field “Activity Indicator” has been removed.

Zimbabwe (Premier Only)

PAYE Return

You received a **patch file** on **7 April 2025** to accommodate the following template change:

- Reconciliation Report
 - The existing field that is currently populated with the employee's Tax or ID Number is changed to use the ID or Passport Number.
 - The heading is changed to “ID/Passport Number of Employee”.
- Submission File
 - The TIN Number field only populates with the Tax No and not ID Number if the Tax Number has not been entered.
 - There is a new field “ID/Passport Number” in column B.

The change is applicable from **February 2025**.

Issues Resolved

Botswana

ITW7a Online Submission (July 2024 – June 2025)

This report has been renamed to: ITW7a Online Submission (effective From July 2024)

Kenya (Premier Only)

P9A/P9A HOSP/P9B Tax Ded Cards

When selecting **<Report Control>**, you were successfully taken to the Setup Control Page 1 Tab, but **<Continue>** would take you back to the Report Selection Screen instead of to the Setup Control Page 2 Tab.

Mauritius (Premier Only)

Monthly PAYE Return

You received a **patch file** on **29 April 2025** to resolve this issue.
Version number in the header record of the csv file exported as v.01 instead of V.01

Mauritius (Premier Only)

Monthly PAYE and Contribution Return

You received a **patch file** on **29 April 2025** to resolve this issue.
Version number in the header record of the csv file exported as v.01 instead of V.01

Namibia

Bank Windhoek Payment File

You received a **patch file** on **29 April 2025** to resolve this issue.
The export “Creation Date” was exporting to the “Payment Settlement” field instead of the “Payment Date”.

Namibia

Form 10 (SSC Submission)

You received a **patch file** on **7 April 2025** to resolve this issue.

Main Menu > Reports > Namibia Reports > Form 10 (SSC Submission)

On the third print-time selection screen, if you selected "Print Report for Previous Months", and you select to print for a month prior to March 2025, the new limits were applied.

Swaziland

PAYE Monthly Reconciliation Schedule When an employee has a Termination Date prior to the Period End Date, then the Tax-Deductible value used to calculate Tax, as found on **Main Menu > Payroll > Payslip Screen > Employee Payslip > "Tax" in Routing > <TXD>**, printed incorrectly on this report.
All other employees printed the correct Tax-Deductible value.

8.0 System Modifications/Issues Resolved

The following system modifications have been made, and issues have been resolved.

| Area | Issue | Detail |
|--|--|---|
| System Modifications | | |
| ACB Export: Investec | Layout no longer supported by Investec | <p>We have been requested by Investec Bank to remove this layout as an option from our system, because they no longer support this version.</p> <p>If you were set up to use Investec and you access:</p> <p>Main Menu > Interfaces > Export Data > ACB Payroll Data</p> <ul style="list-style-type: none"> A message will prompt you to “Please define parameters before performing Export.” <p>Main Menu > Interfaces > Export Control > ACB</p> <ul style="list-style-type: none"> The “Bank used for ACB processing” entry field will display “Not used”, however, all other information will still be on the screen. Take a screen shot of these details. Contact your accredited Sage Business Partner to assist you in setting up a Custom Bank File Layout according to the latest version of the Investec ACB Export File. |
| Other Africa Companies: History Screen | No changes allowed | <p>Main Menu > Payroll > Payslip Screen > Employee Payslip Screen > Click on <HS></p> <p>To avoid incorrect tax calculations in Other Africa Companies, no History Screen changes are permitted.</p> |
| SSS Users: Log file | Record syncing requests | <p>Main Menu > Self Service > Sage Self Service > Sync and Report</p> <p>When you <Sync Now> for the following options:</p> <ul style="list-style-type: none"> Sync all Self Service Transactions for Company Sync all Leave Balances for Company <p>The user information and the time of the sync will be recorded on the Main Menu > Reports > Log File > View and/or Print as:</p> <ul style="list-style-type: none"> Transactions Sync Leave Balance Sync |

Issues Resolved

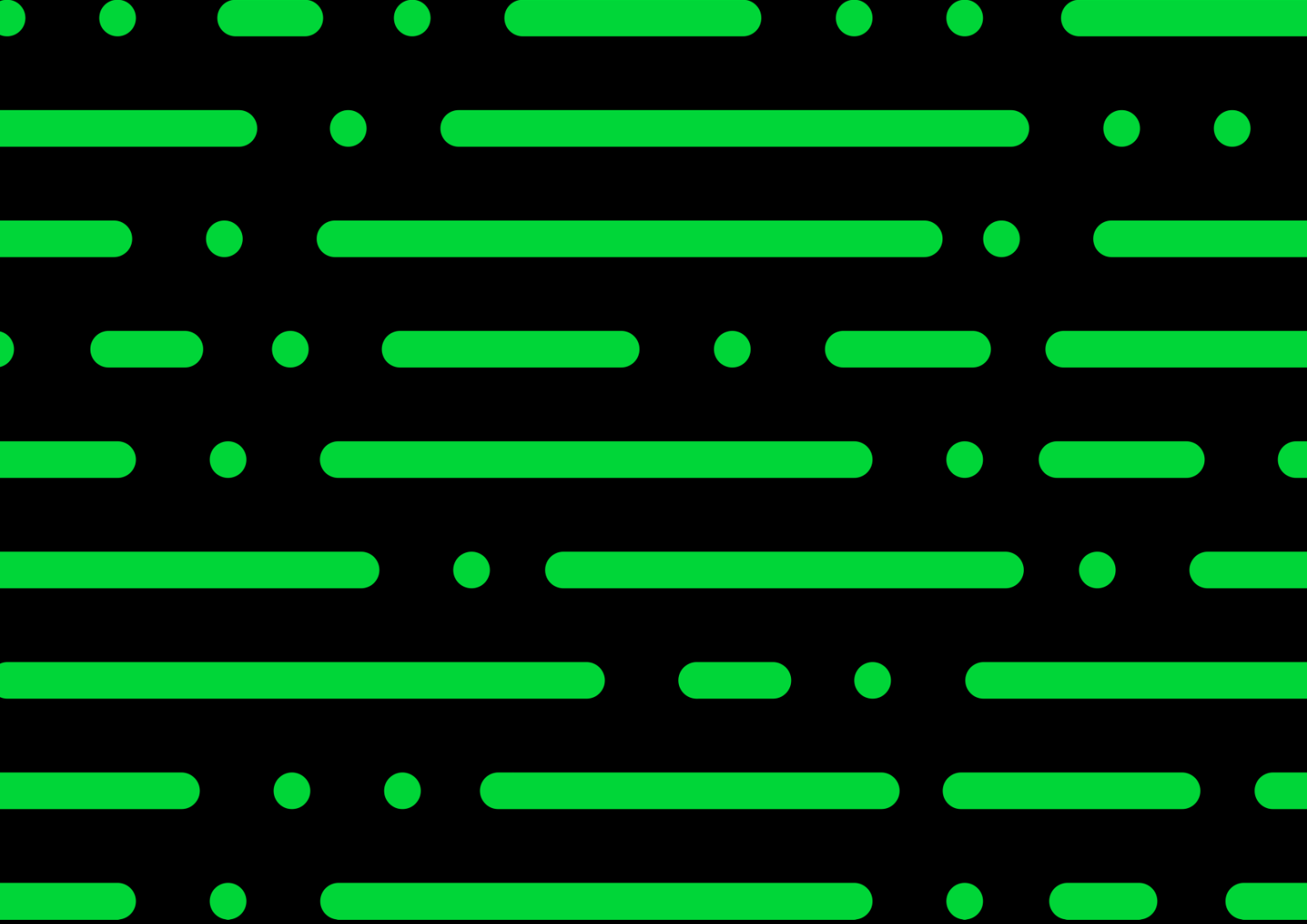
| | | |
|--|---|---|
| <p>All Users: Available Real Numbers</p> | <p>Index Out of Bounds Error if Group Companies are set up.</p> | <p>If companies have been grouped together on: Company Lookup Screen > Options > Groups and you go to Main Menu > Reports > Reports and Maintenance ></p> <ul style="list-style-type: none"> • Click on the “Available Real Numbers” button on the top ribbon. • Select the Group of Companies. • Then the following error occurred: “Index out of bounds, upper bound = 501, index = 502 COBOL error at 004E09 in VIPREP1.ACU. |
| <p>Affiliated to: Seifsa</p> | <p>VAT increase withdrawn</p> | <p>You received a Patch file on 19 May 2025 concerning the following:</p> <p>The proposed VAT increase affecting the "VAT Tech Levy" line on the Export Summary Report and the Export File was implemented with Release 6.4a, effective May 2025.</p> <p>In a media statement released on 24 April 2025, it was announced that the proposed VAT increase has been withdrawn.</p> <p>When you installed the SEIFSA Patch file, the VAT increase was reversed. The VAT percentage on the Technical Fund Levy will remain at 15%.</p> |
| <p>RSA Users: ETI Validation</p> | <p>Status 47 when accessing other screens</p> | <p>Main Menu > Utilities > ETI > ETI Validation > STEP 1</p> <p>If you export the report and then access:</p> <p>Main Menu > Payroll > Print Payslips OR</p> <p>Main Menu > Utilities > Start of Period as well as some other screens, the process would have been stopped by a Status 47 error message.</p> |
| <p>RSA Users: ETI Import</p> | <p>Validation on limit incorrect</p> | <p>Main Menu > Utilities > ETI > ETI Validation - Step 3 Import Amended ETI File</p> <p>When importing the file with employee Remuneration greater than R6499.99, the following Validation Error was reported: “Remuneration exceeds permitted maximum”.</p> <p>From April 2025 the maximum Monthly Remuneration Limit for ETI changed from R6499.99 to R7499.99.</p> <p>The import file was still validating against the old limit.</p> |
| <p>RSA Users: Reimbursive Travel</p> | <p>Adjustment does not automatically recalculate tax</p> | <p>Main Menu > Payroll > Payslip Information > Select Employee > <RT> - Reimbursive Travel Screen</p> <p>When you deleted reimbursive travel transactions and returned to the payslip, the employee’s tax did not recalculate immediately as it should.</p> |
| <p>RSA Users: UI19 Report (Real Number 769)</p> | <p>Font too small</p> | <p>Main Menu > Reports > Reports and Maintenance</p> <p>The font size of the UI19 (Real Number 769) has been increased to make it more legible.</p> |

SSS Users:
Mobile App

Freezes on Approval
Screen

**Sage Self Service Mobile App > Workflow Inbox > View
> View Transaction**

The screen was hanging making it impossible to select
<Approve>, <Decline> or <Cancel>.



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