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<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
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<td></td>
<td>(Premier/Classic/Essentials)</td>
<td></td>
</tr>
<tr>
<td>26.3</td>
<td>Namibia – OID Report (Real Number 502)</td>
<td>71</td>
</tr>
<tr>
<td></td>
<td>(Premier/Classic/Essentials)</td>
<td></td>
</tr>
</tbody>
</table>
1.0 RSA - ETI Import of Take-on Values (Premier/Classic/Essentials)

When adding a new VIP Company, it will be necessary to import the ETI values/periods, as this information must be reflected on the ETI Submission File, for each month separately.

The period counts must also be updated if the employee start at the Company, but previously worked at an “Associated Employer”. The ETI Import Utility makes provision for this, as well as for the import of data for the Current Pay Period.

Please Note: If the Take-on Procedure of a Company that went onto VIP after the beginning of the new Tax Year, was done on a month-by-month basis, then the ETI Take-on Import will not be necessary.

If the Company makes use of the Basic Access Control Screen, the user must have Full Access to Import: Employee – Salary Information. If the user makes use of the Advanced or Global Access Control Screen, the user must have Full Access to Batch Entry/Import on the Advanced Page 3 Tab.

To access the Employee Tax Incentive Import from the Main Menu:

Click on Interfaces
Click on Import Data
Click on Utility Imports
Click on ETI Take-on

The IMP-ETI.CSV file is in the CSV (comma delimited) format, with no header or trailer record. Click on the Guidelines Button for details concerning the File Layout. All fields on the Employee ETI History Screen can be imported, except the ‘Works Irregular Units/Hours’ indicator.
The Audit Trail and Audit Logger will both record that an ETI Take-on Import was done. The Audit Logger will also record each ETI Take-on History Transaction per Employee and it will record changes made to certain fields.
2.0 RSA – ETI – Irregular Periods of Service
(Premier/Classic/Essentials)

Provision has been made to calculate the Employment Tax Incentive (ETI) on Employees who work irregular hours or days during the month (e.g. Temporary or Casual Employees) and for Employees who do not work for a full month (this could include Employees who work less than their Standard Hours for the month).

At the time of writing, we have not yet received confirmation from the authorities on all the scenarios that fall within the scope of the above paragraph. Once confirmation is received, it will be communicated to clients in a support newsflash.

2.1 Employee ETI Screen

New fields have been added to the Employment Tax Incentive Tab, found under Change Employee on the Employee Menu. When using the Advanced or Global Access Control, access to this screen is determined by the access set on Advanced Page 2, Change Employees, More Detail, Statutory Details, the Tax, OID, UIF, SDL option. On Basic Access Control, the access set on Employee Fixed Information determines the access to this screen.

2.1.1 Employee Works Irregular Units/Hours

This option must be selected if the Employee does not work for a full month. If this option is used, the system will calculate the wage/remuneration for a full month to determine the incentive amount for a full month. The system will then calculate a pro-rata incentive according to the days/hours worked.

New and Terminated Employees who do not work for a full month are not specified here because their pro-rata calculations are done automatically.

2.1.2 Units/Hours Worked Per Period
Indicate where the Employee’s Units/Hours that are worked per Pay Period are stored from the following options:

- Hours Screen
- Own Screen
- Calculation Screen
- Shifts Worked

The Screen Name, Line Number and Value are displayed below the selection made.

### 2.1.3 Standard Units/Hours per Period

Indicate where the Employee’s Standard Units/Hours that would be worked in a full month are stored from the following options:

- Hours Screen
- Own Screen
- Calculation Screen
- Hours per Month – Increase Screen (Only in Monthly Companies)
- Shifts per Month – Increase Screen (Only in Monthly Companies)

The Screen Name, Line Number and Value are displayed below the selection made.

**Please Note:** In a Non-monthly Company, the Increase Screen records the Hours and Shifts per Period and not per Month and these values do not accumulate a Month-to-date value. Therefore, it will be necessary to record the Hours and Shifts per Period on one of the other screens that are available for selection, so that it can accumulate.

*Print Screen of Line Number Selection Screen:*
2.2 SIC Code

The SIC Code list has been amended to a list of about 500 codes that are 5 characters long, with no duplicates. When clicking on the SIC Code field, the whole list will display, instead of just a section.

When installing Release 4.3b, any SIC Codes that were not 5 digits long, were converted to the 5 digit Code. Please confirm that the correct codes are used.

2.3 Employee ETI History Screen

The ETI History Screen is accessed from the Employee Payslip Screen by means of an ETI Icon.

The ETI History Screen displays the values of the fields selected on the Employee ETI Screen.
The Units/Hours Worked per Month and the Standard Monthly Units/Hours are used to determine the Factor which calculates the ETI Actual Wage, ETI Remuneration and the Tax Incentive.
SARS have requested changes to Postal Address fields required for the August 2014 Periodic Reconciliation Submission, contained in their documentation, SARS-PAYE BRS v12.1.3, released on 29 January 2014.

The changes made to Address fields are recorded further down in these Release Notes.

Below is a list of the new or amended IRP5 Codes:

<table>
<thead>
<tr>
<th>IRP5 Code</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NEW ADDRESS INDICATORS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3247</td>
<td>Employee Postal Address is a Street Address</td>
<td></td>
</tr>
<tr>
<td>3249</td>
<td>Employee Postal Address is a P O Box Address</td>
<td></td>
</tr>
<tr>
<td>3250</td>
<td>Employee Postal Address is a Private Bag Address</td>
<td></td>
</tr>
<tr>
<td><strong>NEW FIELDS FOR P.O. BOX OR PRIVATE BAG POSTAL ADDRESSES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3251</td>
<td>Agency / Sub Unit</td>
<td>P.O.Box, Postnet Suite, Private Bag</td>
</tr>
<tr>
<td>3280</td>
<td>Special Services</td>
<td>Military Field Services Address</td>
</tr>
<tr>
<td>3253</td>
<td>Post Office Name</td>
<td>Indicates the name of the Post Office Branch of Employee’s Postal Address</td>
</tr>
<tr>
<td>3524</td>
<td>Postal Code</td>
<td></td>
</tr>
<tr>
<td>3262</td>
<td>Number</td>
<td>P.O.Box, Postnet Suite or Private Bag Number</td>
</tr>
<tr>
<td>3279</td>
<td>Flag to indicate ‘Care of’</td>
<td></td>
</tr>
<tr>
<td><strong>NEW FIELDS FOR STREET POSTAL ADDRESSES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3256</td>
<td>Complex Name</td>
<td></td>
</tr>
<tr>
<td><strong>AMENDED EXPORT OF IRP5 CODE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2066</td>
<td>Employer Physical Address: City/Town</td>
<td>VIP will truncate this field to only export 21 characters</td>
</tr>
</tbody>
</table>
Companies that are licensed for Other Africa Tax Countries, can now make a print screen of the Africa Tax Rule Linking Screen, for easy reference, by clicking on the Print Screen Button found in the top left hand corner of the screen.

To access the **Africa Rule Linking Screen** from the Main Menu:

- Click on **Payroll**
- Click on **Definitions**
5.0 Namibia – Vocational Education and Training (VET) Levy (Premier/Classic/Essentials)

According to the Government Gazette No. 5395 published on 27 January 2014, the Ministry of Education in Namibia stated that the Skills Levy will be imposed as from 1 April 2014.

All companies with an annual payroll equal to or more than N$1 000 000.00 a year will be liable to pay a 1.0% VET (Skill) Levy to the Namibia Training Authority (NTA) before or on the 20th of each month, in arrears. The NTA will act as a collecting agent and will be responsible for the administration of the VET fund in Namibia.

For the purposes of the VET Levy, payroll is defined as, “the total annual remuneration paid or payable by an employer to its employees during any financial year”.

“Remuneration” means the total value of all payments in money or in kind made or owing to an employee arising from the employment of the employee (as defined in the Labour Act 2007). Remuneration refers to money paid to the employee as well as benefits in kind. Benefits include company contributions but exclude statutory contributions.

The following Employers are exempt:

- The State
- Regional councils as defined in section 1 of the Regional Councils Act 1992 (Act No 22 of 1992)
- Charitable Organizations
- Public educational institutions and not for gain
- Faith based organisations

Whether or not supported wholly or partly by grants from public funds. An institution or employer NOT mentioned above, may apply to the Minister for exemption from paying the levy.

All Employees, natural persons, are included except Independent Contractors.

Every payment of the levy must be accompanied by a completed monthly return.

If an Employer:

- Fails to submit his monthly return,
- The NTA is not satisfied with the information provided in the return form,
- Or the Employer has failed to pay the levy in terms of the act,

The NTA may make a reasonable estimate, based on the information supplied, of the amount of any levy payable, and issue the Employer a notice of assessment for the unpaid amount.
5.1 Basic Company Information Screen

The Basic Company Information Screen has been amended to cater for the VET fields.

Provision has been made for:

- VET Bank Reference
- VET Registration Number
- VET Percentage (1%)
- Period VET Calculation (only accessible with VIP Support Password). This indicates whether the Company started paying VET in the middle of the year. In this instance, VET is based on the Current Pay Period income only.

Please Note: Period VET Calculation will be ticked during Conversion, because the VET legislation only came into effect in April. Therefore, VET calculations will only be based on the Current Period/Month values for the first year.
5.2 Earning Definition Screen

The Earning Definition Screen has been amended to make provision for an ‘Incl VET’ column.

The ‘Include for VET’ column will be populated as follows but can be changed if necessary:

- When Taxable set to Monthly or Periodic = (F)ull
- When Taxable set to Never Taxable = (N)o

Click on the [Default VET] Button to reset the ‘Incl VET’ to the original settings, as set out above.

5.3 Deduction Definition Screen

The Deduction Definition Screen has been amended to make provision for an ‘Incl VET’ column alongside the Company Contributions.
The ‘Include for VET’ column will be populated as follows, but can be changed if necessary:

- CC Tax set to Yes = (F)ull
- CC Tax set to No = (N)o

Click on the Default VET Button to reset the ‘Incl VET’ to the original settings, as set out above.

**Type of Deduction: Namibia VET**

This new Type of Deduction must be set up to calculate the VET Company Contribution automatically.

If this Deduction Line has not been defined, after doing a Start of Period, a Warning Message will be displayed:

It will not be possible to do a Start of Period into a new Tax Year if the Namibia VET Type of Deduction Line has not been defined. The following Information Message will be displayed:
5.4 Own Amount Definition Screen

The Own Amount Definition Screen is a new Definition Screen for Namibian Companies.

The Own Amount Definition Screen has an ‘Incl VET’ column that can be populated with either (F)ull or (N)o. The default will be set to ‘N’.

Click on the Default VET Button to reset the ‘Incl VET’ to the original settings, as set out above.

5.5 Calculation Fields Definition Screen

The Calculation Fields Definition Screen has been amended to make provision for an ‘Incl VET’ column.
The Calculation Fields Definition Screen ‘Incl VET’ column can be populated with either (F)ull or (N)o. The default will be set to ‘N’.

Click on the Default VET Button to reset the ‘Incl VET’ to the original settings, as set out above.

### 5.6 Perks Tax Definition Screen

The Perks Tax Definition Screen has been amended to make provision for an ‘Incl VET’ column.

The Perks Tax Definition Screen ‘Incl VET’ column will be set to (F)ull for all lines, except for Retirement Annuities (Line 13) and Study Policies (Line 17) which will default to (N)o.
Click on the **Default VET** Button to reset the ‘Incl VET’ to the original settings, as set out above.

### 5.7 Employee Statutory Details Tab

The Employee Statutory Details Tab displays a new VET section with the option ‘Excluded for VET Levy’.

![Employee Statutory Details Tab](image)

This option must be selected for all Employees who are Independent Contractors for Labour Law purposes.

If the tick is removed during a Tax Year, the system will do a monthly Levy Calculation until the end of that Tax Year. The system can calculate the VET Levy annually as from the new Tax Year.

### 5.8 VET Detail Screen

A VET Detail Screen can be accessed from the Tax screen. Click on the **VET Calc** Button to view the details.
The details of the VET calculation is set out on this screen. The VET Amount (Current) is recorded on the Employee Company Contribution Screen on the Namibia VET Line.

The ‘Period VET Calculation’ field on the Basic Company Information Screen (visible when the Company is accessed with the VIP Support Desk Password) determines whether the values seen on the VET Detail Screen are PERIOD Values or YTD+ Values.

The following values are accumulated:

- Earnings Flagged as “Full”
- Company Contributions Flagged as “Full”
- Perks Flagged as “Full”
- Calc Screen Items Flagged as “Full”
• Own Screen Items Flagged as “Full”

The current VET amount is then determined as follows:

• VET Remuneration: The total of all the flagged components for YTD+ or PERIOD
• VET Percentage: As entered on the Basic Company Information Screen (1%)
• VET Amount (YTD+): The sum of the VET Remuneration multiplied by the VET %
• Less VET Amount (YTD): Only applicable when a YTD+ calculation. This is the YTD value of the VET Company Contribution Line on the Payslip
• VET Amount (Current): The Payslip amount for the VET Company Contribution Line, for the Current Pay Period. This amount includes any adjustments in the Amount column of the VET Company Contribution Line.
• Including VET Amount (Adjustment): The value in the Amount column of the VET Company Contribution Line for the Current Pay Period. This field will only be visible when there is an Adjustment value.

Please Note: If the VET Amount YTD+ value calculates a negative value, the VET Remuneration will be zero. A message will be displayed alongside the VET Remuneration field stating this.

If the Company has Stop Further Entry on or the Employee is on Early Pay or Forced Pay, the VET Calc button will not be available on the Tax Screen. This is due to the fact that no Recalculation is done in these instances, resulting in no VET Amount being calculated.

5.9 VET Report

The VET Report must be printed for Submission purposes. Details are found in these Release Notes under the Reports section.
6.0 Address Fields (Premier/Classic/Essentials)

Changes have been made to the Employee Address Fields to cater for requests made by SARS. The changes have been made in all Tax Countries, but only need to be completed in RSA Tax Countries.

SARS now differentiate between Postal address with a Street Delivery and Postal Address with a Private Bag or Postnet Suite.

The Employee Address Screen has been modified to cater for the various new Postal Address formats. The options are:

- P.O. Box
- Private Bag
- Street Address

During the conversion process, the existing Postal Addresses were converted as follows:

- P.O. Box was used for Postal Addresses using the words ‘Posbus’, ‘P.O.Box’ or ‘PO Box’
- Private Bag was used for Postal Addresses using the words ‘Private Bag’ or ‘Suite’
- Street Address was used for all other possibilities

Depending on the selection made, certain fields are displayed on the screen.

Please confirm the correctness of the address fields.

6.1 P.O. Box and Private Bag
Postal Addresses using P.O. Box or Private Bag, have the same entry fields.

6.2 Street Address
Street Address has a different set of entry fields.
All three Postal Addresses have a new field: “Care of” Postal Address.

**Please Note:** Reports that contain Postal Address Fields will need to be amended to cater for the new and altered Address fields. A list of the new Report Writer Codes are found in these Release Notes.

**Please Note:** If Reports print fields that cannot be seen on the screen e.g. P. O. Box Address prints City/Town, it is due to the fact that this field was populated before conversion, but the field is no longer required according to the new specifications from SARS. This field can be cleared by importing the ‘#’ , as explained in the Guidelines for the Flexi Fixed Information Import, found on the Interfaces Menu.
7.0 Audit Trail – Records Global Freeze and Unfreeze of Payslips (Premier/Classic/Essentials)

There is a Global Activation function that allows the user to Globally Freeze or Unfreeze the Separate Payslips in a Company. When this function has been applied, it is recorded on the Audit Logger File.
8.0 Backups (Premier/Classic/Essentials)

The Comment field of the Backup Files now include a reference to the VIP Payroll System in which the Backup is created. This will aid the Consultants in restoring Backups received from clients into the correct System, ensuring quality support to client queries.

The Comment reads as follows: Release Sx.y e.g. P4.3a

S  Refers to the System (P = Premier, C = Classic, E = Essentials)

x.xy  Refers to Release Number and Version
9.0 Contact Us Screen (Premier/Classic/Essentials)

In an effort to provide users with valuable contact numbers for people and departments within VIP, a Support Information Screen is now available and can be accessed from the Company Selection Screen.

The Support Information Screen will display the following:

- Names, numbers and email addresses of the Support Consultants and Co-ordinators specifically allocated to support this Company, as defined by the person who implemented the VIP System
- Contact numbers and email addresses of the various divisions within VIP

In the top left hand corner there is a Print Screen Button, allowing for a print-out of these details for easy reference.
10.0 Customise Descriptions  
(Premier/Classic/ Essentials)

Companies that are licensed for Tax Countries: Lesotho, Mozambique (Premier) and Swaziland (Premier) have two new descriptions that may be customised on the Basic Information Tab:

- Tax Office
- Tax Number

This enables these fields to be used for a different purpose. Customised Descriptions are found under Company on the Main Menu.
11.0 Flexi Financial Export (Premier/Classic)

The Flexi Financial Export has been modified to allow the exporting of values for:

- Tax
- Employee and Company UIF Contributions
- Company SDL Contributions

Please Note: If these values are part of an Import File, they will be ignored, because these values are automatically calculated by VIP.

The Flexi Financial Export is found under the Interfaces Menu.
12.0 Import Values for Category and Job Grade (Premier)

The Import Utility has always made provision for the importing of Job Grade and Category Descriptions. Subsequently, this feature has been modified to allow for the importing of the financial values found on these description screens.

*Print Screen of Job Grade Description Screen indicating Amounts that can now be imported:*

To access the **Import Descriptions** from the Main Menu:

- Click on **Interfaces**
- Click on **Import Data**
- Click on **Utility Imports**
- Click on **Import Descriptions**
- Click on **Payroll and HRM Descriptions**

**Please Note:** If the financial fields are not used in a Company, no user intervention is needed and the import can be processed as usual.

Click on the **Import Guidelines** Button for details concerning the new File Layout. If applicable, amend the import file accordingly.

If financial values have been imported, a Screen Question will be displayed, asking whether a General Recalculation must be performed.

**Please Note:** It is important to do the General Recalculation to ensure that all Payslip values that are determined by Job Grade or Category Financial Values are calculated correctly.
13.0 Main Menu Displays Site Code
(Premier/Classic/Essentials)

The Main Menu displays the client specific unique Site Code in the top Menu Line. This number needs to be quoted whenever there is any interaction between the user and Sage VIP.
14.0 MIBFA (SEIFSA) – Include Current Terminations (Premier/Classic/Essentials)

The following changes will only apply to RSA Companies, where the Company Miscellaneous Screen is set to be affiliated to Seifsa.

When an Employee is terminated in a previous month, but has Month-to-date Deductions or Company Contributions for MIBFA (SEIFSA), the Employee must be included in the Industrial Council Report and Export File.

This usually occurs where the Month-end Processing Date (e.g. 04/05/2014) is greater than the end of the Calendar Month (e.g. 30/04/2014). These Employees used to print on the Warning Report.

These previously excluded Employees will now be recorded on a report listing Employees that must be taken note of who may or may not have export amounts. The wording will read as follows:

“Employee included - IC End Date before current period”

Please Note: Employees terminated in this Processing Month for a Previous Pay Period who do not have any Deductions or Company Contributions for MIBFA/SEIFSA will not be included in the Industrial Council Report nor Export File.
15.0 Payslips - New and History (Premier/Classic/Essentials)

The Payslip History Setup, found under the History option on the Main Menu, determines the content of the New and the History Payslips. A number of new fields have been added.

15.1 Payslip History Setup

15.1.1 Fixed and Secure Header Tabs

The following new fields can be printed in either of the columns on the Fixed and/or Secure Header of the Payslips:

- **Emp ZoneCd**: Employee Zone Code found on the Employee Analysis Details Screen for Companies with Advanced Access Control Passwords (Premier/Classic)
- **EmpContrct**: Employee Contract Number found on the Supplementary Screen of the Personnel Module (Premier/Classic)
- **Employee SSC Number**: found on the Employee Statutory Details Screen for Namibia Companies (Premier/Classic/Essentials)

15.1.2 Additional Information Tab

**Reference Numbers**

The **Reference No.** option on the Type of Field List referred to the Reference Numbers for Deduction Lines, therefore, it has been renamed to **Ref. No. Ded.** and a new option has been added for **Ref. No. Earn**, referring to the Reference Numbers for Earning Lines.

![Type of Field](image)

**Private Medical Aid Contribution**

Sundry Amounts on the Type of Field List has a new option for Private Medical Aid Contribution, found on the Employee Medical History Screen (MHS Screen), if they have private Medical Aid.
15.1.3 General Tab

*Hours and Balance Payslips*

The two Payslip options with Hours and Balances, print the Loan Balance alongside the specific Loan Deduction, excluding the deduction for the current Pay Period. On the General Tab, there is a new option called *Hours and Balance Payslips – Print Closing Balance*. When this option is selected, the Loan Balance will include the current deduction.

**Please Note:** This is only applicable to balances printed alongside the specific Deduction Line on the Deduction side of the Payslip. Balances printed under Additional Information are set up under the Additional Information Tab.
When this option has been changed, the following message is displayed:

![Message](image)

The new **Closing Balance** item can be found at the bottom of the Payslip Titles Tab. The Default and Alternate Language Description can be amended here. The Opening Balance option remains unchanged.
**Sundry Information**

Until now, the user could *either* print the Memo Information *or* the Current Period Totals on the payslips. A third option has been added to this selection group, **Sundry Information**.

When this option has been selected, three of the following selections can be made:

- Print Email Address, found on the Employee Personal Details Tab
- Print Job Title Description, found on the Employee Analysis Details Tab. This will print the Job Title Report Description or the Job Title entered on the screen
- Sundry Fields 1 – 5, found on the Employee Statutory Tab in Africa Tax Country Companies (Premier Only)

If any of these options have been selected, they will print in the same space that either Memo’s or Current Period Totals print, when selected.

**15.1.4 Loans Tab (Premier Only)**

If the system is licensed for the Loan Module, a new Loans Tab will be displayed.

**Please Note:** Selecting this option will result in the printing of a second page for Employees set up on the Loan Module. The Two Payslips per Page option will not cater for this feature.
The Loan Statement will print the same Header as is printed on the Payslip.

The following Loan Types and Loan Statuses can be selected to print on the Loan Statement:

**Loan Type Selections**
- Casual Loans
- Personal Loans
- Study Loans
- Educational Loans
- Vehicle Finance
- Home Loans
- All Loans (Selects all the options above)

**Loan Status Selection**
- Active
- Suspended
- Frozen
- Handed Over
- Paid Up
- Transferred
- All Current
- All Loans

The Employee’s Loans will be sorted according to the Loan Reference Number and will print the Loan Reason and Comment.
15.2 History and New Payslip Print-time Selections

A couple of new features have been added at print-time for History and New Payslips.

15.2.1 Employee Surname

It is now possible to select the Employees to be printed by entering their Surnames.

Please Note: The Employee Surname fields are case-sensitive and the Surname must be entered in full.

15.2.2 Print Payslip for ESS Employees (Premier)

If the system is licensed for the ESS (Employee Self Service) Module, this new option will be displayed on the screen, allowing the user to print a hardcopy Payslip for Employees receiving Payslips via ESS.

15.3 Two Payslips per page

Due to limited space on this Payslip Layout, a change has been made, allowing for either the printing of Year to Date Values or the printing of up to six Employee Company Contribution values.

The General Tab on the Payslip History Setup Screen has to be amended, depending on what must be printed.

If the ticks are removed from the Year to Date Totals, the first six Employee Company Contributions will automatically be printed in the space where the Year to Date Totals are usually printed.
Print Screen of the Payslip when the ticks have been removed for Year to Date Totals to print so that Company Contributions can print in stead:
The current Pay Scales Module has been revamped with a number of new features and improved functionality. The VIP directory must be licensed for Pay Scales in order to use any of these features.

**Please Note:** This feature can be used at no extra cost.

If **Basic Access Control** is used, access control to Personnel/Equity/Skills Modules controls the access to Pay Scales.

If **Advanced or Global Access Control** is used, access control is set on the Advanced Page 3 Tab for Pay Scale Definitions and Linking. Procedures that effect the Increase Screen must have Full Access to Increase Screen on the same Tab and to Global Increases on Advanced Page 2 Tab. Any Zone Codes set up for the Company will not be applied.

### 16.1 Pay Scales Menu

The Pay Scale Menu is found under the Payroll and also under the Personnel Menu options and has been expanded to cater for the new features and functionality. The options are:

- Link Scales
- Scale Codes
- Pay Scale Global Increase
- Copy Pay Scales
- Apply Pay Scales
- Import Pay Scale Links
- Import Pay Scale Codes

### 16.2 Pay Scale Codes

Pay Scale Codes is not a new feature, but is mentioned here for clarity on how the Pay Scales Module works.
Scale Values: Min/Mid/Max - These fields reflect the Minimum to Maximum Annual Salaries for the Position.

Market Values: Min/Mid/Max - These fields reflect the Minimum to Maximum Market Values for the Position in the Market.

Annual Salary: ‘A’ reflects the lowest Annual Salary entry level and ‘V’ reflects the highest Annual Salary entry level for the Employee occupying the Position.

Increment: This field reflects the Increment by which the Annual Salary increases.

Up until now, if these values were amended, they were not updated back to the Employee Increase Screens.

16.3 Link Pay Scales

Link Pay Scale Codes is not a new feature, but is mentioned here for clarity on how the Pay Scales Module works.

The Linking of Pay Scales is done on the Employee Increase Screen.
On the right hand side of the screen, click in the Pay Scale block to display the Remuneration Scales listing.

Once the applicable code is selected, the system will display the details of that Remuneration Scale. The corresponding letter for the applicable Notch is entered on the bottom right hand corner of the screen, a letter from A to V.

If the Employee’s current Salary is not the same value as the Salary of the selected Notch, a Screen Question will be displayed confirming the adjustment of the Employee’s Salary. If accepted, the Employee’s Salary is updated.

16.4 Pay Scale Global Increase
The Global Pay Scale Increase/Decrease feature makes it possible to amend Pay Scales and to update the new information to the Employee Increase Screens of all the Employees linked to the amended Pay Scale Code.
Please Note: A Backup should be made before continuing with the process. The Salary changes will be applied in the Current Processing Period and Employees terminated in the Current Pay Period, on Leave or on Early Pay, will not be updated.

The following options can either be Increased or Decreased by a Percentage or by a Fixed Amount:

- Pay Scale and Notches
- Market

The Remuneration Scales to which this is to be applied are selected in the ‘Include’ column.

If no Percentage or Fixed Amount is specified AND no Scale Code is selected, a Screen Message will be displayed stating that the process cannot be started unless these fields have been populated.

Please Note: The first Notch of the Remuneration Scale will be amended together with all the Increments.

A Confirmation Message is displayed confirming the instructions. When the instruction is processed, the Remuneration Scales are adjusted accordingly, but the Increase Screens have not yet been updated.

The followed Screen Question is displayed requesting a Recalculation of the Increase Screens:
If **No** is selected, the Increase Screens will not be updated. **Apply Pay Scales** will need to be run from the Pay Scale Menus at a later stage.

If **Yes** is selected, these changes will be applied to all the Increase Screens of all Employees linked to the Pay Scale Codes included in the Global Pay Scale Increase/Decrease instruction, by means of a General Recalculation.

This will be followed by an Information Message, with a reminder to adjust Bonus Provision amounts accordingly if increases were applied.

The **Audit Trail** and **Audit Logger** will record that a Global Pay Scale Increase/Decrease was processed and whether a Recalculation was done or not.

16.5 **Adjusted Pay Scales Update Increase Screen**

When individual Pay Scale values are adjusted, it will now be possible to update the Employee Increase Screens of all Employees linked to that Pay Scale Code immediately.

It is advisable to do a Backup before Pay Scale Codes are amended.

**Please Note:** When Stop Further Entry is activated, unlike all the other fields, Notches cannot be amended.

After editing the Pay Scale Code, the followed Screen Question is displayed requesting a Recalculation of the Increase Screens:

![Image of annual salary notches message]

If **No** is selected, the Increase Screens will not be updated. **Apply Pay Scales** will need to be run from the Pay Scale Menus at a later stage.

If **Yes** is selected, these changes will be applied to all the Increase Screens of all Employees linked to the Pay Scale Code that was amended, by means of a General Recalculation.

This will be followed by an Information Message, with a reminder to adjust Bonus Provision amounts accordingly if increases were applied.

**Please Note:** If any of the amendments to the Pay Scales result in negative values for any of the Notches, a message will be displayed to confirm whether the values must be applied to the Increase Screens.
The **Audit Trail** and **Audit Logger** will record that a Pay Scale has been changed and whether a Recalculation was done or not.

### 16.6 Copy Pay Scales

This feature will allow Pay Scales to be copied from one Company to another.

Pay Scales cannot be copied unless ‘Have you made a BACKUP’ has been ticked. A Backup can be made from this screen.

- Select the *From Company* on the Company Selection Screen. Only one Company can be selected at a time. A password will be required for all Companies other than the Company in which the user is currently in.
- The Pay Scales to be copied are selected in the ‘Include’ column.
- Select the *To Company* on the Company Selection Screen. More than one Company can be selected at a time. If the user does not have Full Access to Pay Scale Definitions in the To Company, the password entered will not be accepted (even if it is correct).

A Confirmation Message will be displayed stating that the Selected Pay Scale Codes have been copied.

**Please Note:** The Pay Scales Codes have been updated in the To Company/ies, but will not automatically be applied to the Increase Screen. This will need to be done with Apply Pay Scales.

### 16.7 Apply Pay Scales

The Apply Pay Scales option will allow for the changes made directly to Pay Scales, via Global Pay Scale Increases or due to Copy Pay Scales to be updated to the Increase Screens of Employees linked to those Pay Scales.
Please Note: A Backup should be made before continuing with the process. The Salary changes will be applied in the Current Processing Period and Employees terminated in the Current Pay Period, on Leave or on Early Pay, will not be updated.

Select the Pay Scale Code(s) that have Annual Salary Notch changes which must be applied to Employee Increase Screens.

A Confirmation Message is displayed confirming the instructions.

If **No** is selected, the Increase Screens will not be updated.

If **Yes** is selected, these changes will be applied to all the Increase Screens of all Employees linked to the Pay Scale Codes that were selected.

This will be followed by an Information Message, with a reminder to adjust Bonus Provision amounts accordingly if increases were applied.

The **Audit Trail** and **Audit Logger** will record that Apply Pay Scale was processed and that a Recalculation was done or not.

### 16.8 Import Pay Scale Links

The Import Pay Scale Links function imports the Employee Linking to Pay Scale Codes as on the Employee Increase Screen.

Click on the **Guidelines** Button for detailed instructions on:
• The creation of a CSV file (PLINKS.CSV)
• The Import process
• Screen Messages
• Import Errors

A Screen Message will be displayed when the Import has been completed, referring to the number of records read, changed and to the number of Errors.

Please Note: The Increase Screen WILL be updated automatically once the Pay Scale Links have been imported.

The Audit Trail and Audit Logger will record that an Import Pay Scale Links was processed.

16.9 Import Pay Scale Codes

Unions typically issue Annual Salary Notch increases. The Import Pay Scale Codes option can be used to Import these changes.

Click on the Guidelines Button for detailed instructions on:

• The creation of a CSV file (PCODES.CSV)
• The Import process
• Screen Messages
• Import Errors

A Screen Message will be displayed when the Import has been completed, referring to the number of records read, changed and to the number of Errors.

Please Note: The Increase Screen will NOT be updated automatically once the Pay Scale Codes have been imported. The Apply Pay Scales option will need to be applied.

The Audit Trail and Audit Logger will record that an Import Pay Scale Codes was processed.
### 17.0 Reports and Report Writer Codes

#### 17.1 New Standard Reports (Premier/Classic/Essentials)

The following New Standard Reports must be imported.

<table>
<thead>
<tr>
<th>Report Real Number</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>762</td>
<td>Financial Listing Report</td>
</tr>
<tr>
<td>763</td>
<td>VET Levy Report (Namibia)</td>
</tr>
<tr>
<td>764</td>
<td>ETI Detail Listing (RSA)</td>
</tr>
</tbody>
</table>

#### 17.2 Changed Standard Reports (Premier/Classic/Essentials)

The following Standard Reports will overwrite the existing reports when imported.

<table>
<thead>
<tr>
<th>Report Real Number</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>503</td>
<td>Company Detail (Namibia)</td>
</tr>
<tr>
<td>584</td>
<td>Contact Detail Report</td>
</tr>
</tbody>
</table>

#### 17.3 Importing Reports - Instructions

In the example below, we are presuming that your VIP Directory is on Drive C. The Export/Import Reports option is found under Reports on the Main Menu.

The Import and Export Reports screen will be displayed.

Complete the following information:

- Click on the Radio button next to Interface file, as you will import the Reports from your C Drive.
- Enter the required Drive letter, e.g. C.

Then complete the following information:
- Click on the Radio button next to Company
- Select all the applicable companies to where the changed reports must be imported, from the Company Selection Screen, in this example only Company 17.
- Click on Continue.

You will be prompted to enter the Real Number of the Report, e.g. 512.

- Enter the Real Number and click on Continue.

A message will be displayed asking you if you want to copy the New Report over the Existing Report. Click on Yes.

The Status of the Imported Report will be shown on screen.

Click on Continue and enter the Real Number of the next Report to be imported.

### 17.4 New RG Codes (Premier/Classic/Essentials)

These RG Codes are found under the Employee Information RG Code Look-Up List:

<table>
<thead>
<tr>
<th>Code and Length</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>27636 (1)</td>
<td>Postal Address Ind</td>
<td>1 = P.O.Box</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2 = Private Bag</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3 = Street Address</td>
</tr>
<tr>
<td>27637 (14)</td>
<td>Postal Address Description</td>
<td>e.g. P. O. Box</td>
</tr>
<tr>
<td>27638 (3)</td>
<td>Postal Address Care Of</td>
<td></td>
</tr>
</tbody>
</table>

### 17.5 Existing RG Codes (Amended)

These existing RG Codes have changed in length and are found under the Employee Information RG Code Look-up List:

<table>
<thead>
<tr>
<th>Code and Length</th>
<th>Description</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>27080 (26)</td>
<td>Postal Number</td>
<td>Used to be 13 long</td>
</tr>
<tr>
<td>27082 (8)</td>
<td>Postal Street Number</td>
<td>Used to be 5 long</td>
</tr>
<tr>
<td>27083 (26)</td>
<td>Postal Street Name</td>
<td>Used to be 24 long</td>
</tr>
<tr>
<td>27084 (33)</td>
<td>Postal Suburb</td>
<td>Used to be 30 long</td>
</tr>
</tbody>
</table>
17.6 Existing RG Codes (Shared)

The VET Levy in Namibia and SDL in RSA make use of the same RG Codes, defined according to the Tax Country the Company is set up for. These Codes are found under the UIF/SDL/SSC/VET RG Code Look-up List.

<table>
<thead>
<tr>
<th>Short Code and Length</th>
<th>Description</th>
<th>Long Code and Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>03160 (11)</td>
<td>YTD+ VET Remuner</td>
<td>06603 (15)</td>
</tr>
<tr>
<td>03161 (11)</td>
<td>Curr VET Amount</td>
<td>06604 (15)</td>
</tr>
<tr>
<td>03165 (11)</td>
<td>MTD VET Amount</td>
<td>06608 (15)</td>
</tr>
<tr>
<td>03168 (11)</td>
<td>YTD VET Amount</td>
<td>06611 (15)</td>
</tr>
<tr>
<td>27570 (3)</td>
<td>Co Per VET Calc</td>
<td>Same</td>
</tr>
<tr>
<td>27571 (3)</td>
<td>VET Calc Jan</td>
<td>Same</td>
</tr>
<tr>
<td>27572 (3)</td>
<td>VET Calc Feb</td>
<td>Same</td>
</tr>
<tr>
<td>27573 (3)</td>
<td>VET Calc Mar</td>
<td>Same</td>
</tr>
<tr>
<td>27574 (3)</td>
<td>VET Calc Apr</td>
<td>Same</td>
</tr>
<tr>
<td>27575 (3)</td>
<td>VET Calc May</td>
<td>Same</td>
</tr>
<tr>
<td>27576 (3)</td>
<td>VET Calc Jun</td>
<td>Same</td>
</tr>
<tr>
<td>27577 (3)</td>
<td>VET Calc Jul</td>
<td>Same</td>
</tr>
<tr>
<td>27578 (3)</td>
<td>VET Calc Aug</td>
<td>Same</td>
</tr>
<tr>
<td>27579 (3)</td>
<td>VET Calc Sep</td>
<td>Same</td>
</tr>
<tr>
<td>27580 (3)</td>
<td>VET Calc Oct</td>
<td>Same</td>
</tr>
<tr>
<td>27581 (3)</td>
<td>VET Calc Nov</td>
<td>Same</td>
</tr>
<tr>
<td>27582 (3)</td>
<td>VET Calc Dec</td>
<td>Same</td>
</tr>
<tr>
<td>27583 (3)</td>
<td>VET Calc Curr Mo</td>
<td>Same</td>
</tr>
</tbody>
</table>
18.0 Reports – Contemporary – Quick List Report  
(Premier/Classic/Essentials)

The Quick List Report, found on the Reports Menu under Contemporary Reports, has a number of modifications.

18.1 Printing of Job Grade and Job Title

The third print-time selection screen has been modified to include Job Grade and Job Title as possible selections in the Fixed Info Grid. The Report Description for these fields will be printed in the report.

Please Note: If the Job Title on the Employee Analysis Details Tab does not have a Code, the long description will not print for that employee.

18.2 Browse for Directory to Save CSV File

The Quick List Report is saved, by default, to the VIP directory or to the Default Export Directory, if this has been set up on the Company Miscellaneous Screen 3. A Browse Button is also available, enabling the user to select any folder to which the Report must be saved.
A Screen Message will be displayed to confirm that the Quick List Report has been saved to the selected directory.

18.3 Company Name Prints on All Pages
The Quick List Report now prints the Company Name at the top of all the pages of the Report, and not only on the cover page.
19.0 Reports – Contemporary - Service Certificate (Premier/Classic/Essentials)

The Service Certificate is found under Contemporary Reports on the Reports Menu. A number of additional fields can be selected for printing from the Second Print Time Selection Screen.

- Employee Tax Number
- Job Title
  - Report Description
  - Screen Description
- Employer Address
  - Company Reporting Address
  - Employee Work Address
- Printing of ID and/or Passport Numbers
  - ID Only
  - ID and Passport Number
  - Passport Number Only
- Employee Name Format
  - First block: Title, Known As, Surname, Initials
  - Second block: Title, Known As, Surname, Initials
  - Third block: Title, Surname, Initials, None
- Employee Rate per Hour

Company Name in full (all 35 characters)
20.0 Reports – History – Payroll Listing (Premier/Classic/Essentials)

The Payroll Listing History Report can be found on the History Menu under Reports. Access Control must be set to 5 for Report Print Level (1st 100). If Advanced or Global Access Control is used and Zone Codes are set up, then only the Employees in the permitted Zones will print.

20.1 First Print-time Selection Screen

![Print-time Selection Screen]

20.1.1 Print Range

The following Print Range options are available:

- Department
- Pay Point
- Category
- Job Grade
- Job Title
- Manager
- Cost Department
- Cost Centre
- Zone Code
- RSC Code
20.1.2 Sort Control Fields
The following Sort Control Fields are available:

- 0238 - Department
- 0239 - Pay Point
- 0247 - Category
- 0386 - Job Grade
- 1480 - Job Title
- 0374 - Cost Department
- 0484 - Cost Centre
- 2290 - Zone Code
- 0379 - RSC Code
- 0222 - Employee Name
- 0235 - Employee Code
- 8517 – Manager

20.2 Second Print-time Selection Screen

20.2.1 Employee Selection
The option selected here will determine which Employees are included in the Report:

- No selection will include all Current Employees
- Current Terminations
- All Terminations
20.2.2 Processing Period

The option selected here will determine which Processing Period to report on:

- Current Period
- Month to Date (Including Current) for non-monthly Companies
- Year to Date (Including Current)
- Select Period: This option will list all the Period-end Dates that have values saved on the system

20.2.3 Detail Selection

This option specifies the details of the Report.

- Employee Fixed Info: When clicking on the Make Selections Button, the following Selection Screen opens:

The minimum data that can be selected for the report are set as default ticks: Employee Code, Surname and Full Names.

All ticks can be selected or de-selected at once by means of the “Select All” option on the bottom right hand corner of the screen.

Please Note: All fields marked with a red asterix (*) will always print the details of the Current Pay Period.

- The options Earnings, Deductions, Company Contributions, Perks, Calculations Screen, Hours and Own Screen have the following printing options:
– None: None of these Definition Lines will be included in the report
– All: This is the Default and selects all these Definition Lines to be included in the report
– Selected & **Make Selections** Button: This allows for specific Definition Lines to be selected

### 20.2.4 Totals

When selecting Totals for the report, consider the selections that were made in the Details Section of the report:

- None: Only the Total will print
- All: All the values and the Total of all the values will print
- Selected: The selected values and the Total for the selected lines will print

Totals can be printed for: Earnings, Deductions, Company Contributions, Perks, Calculations Screen, Hours and Own Screen. Salary Cost and Nett Pay can also be selected.

**Please Note:** The value for “Nett Pay” will always be the actual Nett Salary value as per the selected Pay Period, and not a Nett Salary determined by the selected values.

### 20.3 Excel Report

When clicking on **Continue**, the **HistPayListing1.xls** opens in Excel.

- It may be necessary to click on the **Enable Content** to continue
- Select the VIP Directory from which the report was run
- Payroll Listing History Report will be populated with the applicable values
- Save the report
21.0 Reports – ETI Listing Report (Real Number 764) (Premier/Classic/Essentials)

The ETI Listing Report (Real Number 764) prints the information from the Employee ETI Screen.

This Report can be imported onto the Reports Menu (1 – 100), by following the Import Report Instructions set out in these Release Notes. Alternatively, the report can also be imported from Batch Import Reports found on the Reports Menu. It can be found under the Payroll group of reports.

Access Control must be set to 5 for Report Print Level (1st 100). If Advanced or Global Access Control is used and Zone Codes are set up, then only the Employees in the permitted Zones will print.

21.1 Sorting Options

To sort this report, select the report on the Reports (1 – 100) Menu Tab, click on Edit Button to the right of the screen and select the Field under Sort Control Fields that the report must be sorted by:

- 00238 - Department
- 00239 - Pay Point
- 00247 - Category
- 00386 - Job Grade
- 01480 - Job Title
- 00374 - Cost Department
- 00484 - Cost Centre
- 02290 - Zone Code
- 00379 - RSC Code
- 00222 - Employee Name

21.2 Print-time Selection Screen

The following Print Range options are available:

- Department
- Pay Point
- Category
- Job Grade
- Job Title
Up to three Print Range options can be selected besides a range that can be applied to Employee Code.

21.3 Report Details

The following fields are printed as found on the Employee ETI Screen:

- ID Number
- Valid ID Document (Yes/No)
- Actual Age
- Asylum Seeker (Yes/No)
- Work Permit Number
- Minimum Wage Code
- SIC Code
- Economic Zone Code
- Related to Employer
- Domestic Worker

If the Minimum Wage Code or the SIC Code are incomplete, ‘***’ will print in the column. If SIC Code is defined as N/A, it will print this on the report too.
22.0 Reports – Financial Listing Report  
(Real Number 762)  (Premier/Classic/Essentials)

The Financial Listing Report (Real Number 762) can be imported onto the Reports Menu (1 – 100), by following the Import Report Instructions set out in these Release Notes. Alternatively, the report can also be imported from Batch Import Reports found on the Reports Menu. It can be found under the Payroll group of reports.

Access Control must be set to 5 for Report Print Level (1st 100). If Advanced or Global Access Control is used and Zone Codes are set up, then only the Employees in the permitted Zones will print.

The functionality and selection fields of the following Reports have all been combined into the Financial Listing Report:

- XS Screen Report (Real Number 732)
- Hours Report (Real Number 733)
- Earnings Report (Real Number 738)
- Deductions Report (Real Number 739)
- Company Contributions Report (Real Number 740)

The following fields have been also been added for selection:

- Total Earnings
- Total Deductions
- Net Salary
- Total Company Contributions

22.1 First Print-time Selection Screen
22.1.1 Include Old Terminations
If Old Terminations must be included in the report, this option must be ticked in the top left hand corner of the screen. Current Terminations with values on the fields selected will automatically be included.

22.1.2 Save Changes
The selections that have been made can be saved as default selections for future use. The Save Changes option will be ticked by default in the top right hand corner of the screen. The selections are saved PER user and PER Company.

When the Save Changes tick is removed, a Screen Message will be displayed to confirm whether this is correct.

22.1.3 Field Selections
The financial values can be printed for:

- Current Pay Period
- MTD values (in non-monthly companies)
- YTD Values
- Balances or Special Totals

**Please Note:** Only nine selections can be made at a time.

22.2 Second Print-time Selection Screen
The following Print Range options are available:

- Department
- Pay Point
- Category
- Job Grade
- Job Title
- Cost Department
- Cost Centre
- Zone Code
- RSC Code

Up to three Print Range options can be selected besides a range that can be applied to Employee Code.
22.3 Printing of the Report

22.3.1 Sorting Options

To sort this report, select the report on the Reports (1 – 100) Menu Tab, click on Edit Button to the right of the screen and select the Field under Sort Control Fields that the report must be sorted by:

- 00238 - Department
- 00239 - Pay Point
- 00247 - Category
- 00386 - Job Grade
- 01480 - Job Title
- 00374 - Cost Department
- 00484 - Cost Centre
- 02290 - Zone Code
- 00379 - RSC Code
- 00222 - Employee Name

22.3.2 Group or Consolidate Report

When grouping or consolidating the Report, the first company’s Selection Screen and Payroll Definitions will be used for the Report.
23.0 Reports – Namibia VET Levy Report
(Real Number 763) (Premier/Classic/Essentials)

The VET Levy Report (Real Number 763) can be imported onto the Reports Menu (1 – 100), by following the Import Report Instructions set out in these Release Notes. Alternatively, the report can also be imported from Batch Import Reports found on the Reports Menu. It can be found under the Payroll group of reports.

Access Control must be set to 5 for Report Print Level (1st 100).

The VET Levy Report must be submitted monthly.

Type of Report:

Summary Report: Only a Totals page will be printed.
Detail Report: The VET Remuneration and Levy Amount will be printed per Employee List and the Summary Report will be printed.

Please Note: All Current Employees with VET values AND all Employees with an ‘Exclude for VET Levy’ tick will be printed on the Detail Report.

Current / Multiple Companies:

Current Company: Will report on figures for the Company from which the report is run.

Multiple Companies: Select Companies from the Company Selection Screen that lists Companies with the same VET Registration Number on their Basic Company Information Screen. The Company Password will be required.

Sort By:

It is only possible to Sort the Report when the Detail Report is selected. The sorting will not be applied to the Summary Report. The report can be sorted by:

- 238 – Department
- 239 – Pay Point Code
- 247 – Category Code
- 386 – Job Grade
- 222 – Sort Name
- 2290 – Zone code

Include Sub-Totals for this report?

It is only possible to include Sub-Totals when the Detail Report is selected. Sub-Totals will only print if the report makes use of Sort Codes.
Create CSV file?

A CSV file will be created, allowing for the import of the file into Excel. The Detail Report in Excel prints the Company Number for each Employee, which the printed report does not do. The Detail Report creates a VETDET.CSV file and the Summary Report creates a VETSUM.CSV file.

A Screen Question will be displayed to confirm whether the values must be imported into Excel for reconciliation or not.

When Excel opens, it might be necessary to **Enable Content**

Select the VIP Directory so that the values can be populated into the Excel Spreadsheet.
24.0 SAGE Pay Utility – Global Clearing Requests (Premier/Classic/Essentials)

The Sage Pay Utility is a Module that became available in Release 4.2a. This feature is only available to users that have installed Sage Connected Services and who are licensed for this Module.

Sage Pay Connected Services are found on the Employee Personal Details Tab.

Occasionally it is necessary to clear Verifications and Validations requested for a specific Employee or for a selected group of Employees.

Individual Clearing of Verification or Validation

To clear Verifications or Validations for a specific Employee, edit the Employee Surname, First Name or ID Number on the Employee Personal Details Tab. This will cancel the Verification or Validation requested. The correct details can be re-entered and the Sage Pay Connected Services request can be resubmitted at the appropriate time.

Global Clearing of Validations and Verifications

The Global Clearing of Validations and Verifications option is found under Sage Pay Services on the Payroll Menu.
This function can be applied to All Employees, New Employees or per Analysis Code:

- Job Grade
- Job Title
- Category
- Department
- Pay Point
- RSC Code
- Manager

The clearing options are as follows:

- ID Verification: Clears ID Verifications, Bank Account Validations and Bank Account Verifications
- Bank Account Validation: Clears all Bank Account Validations and Verifications
- Bank Account Verification: Clears Bank Account Verifications
In Release 4.2a, the Support Help Screen Button was added to the Company Selection Screen.

The following actions can be taken from this screen:

- View Licence Information
- Reinstall Connected Services
- Create Shortcut to VIP
- Rebuild VIP Data Files

If the VIP Directory has been corrupted for some reason, it is not possible to access the Company Selection Screen to select the Support Help function. Therefore, a Support Help Shortcut is now available in the VIP Directory.

To access the Support Help Shortcut within the VIP Directory:

- Open Windows Explorer
- Access the VIP Directory
- Click on the Support Help file
- The Support Help Screen will open
26.1 RSA – Statutory and Tax Table Changes (Premier/Classic/Essentials)

### Tax Tables

A Tax Update went out at the end of February containing the following Tax Table changes for the Tax Year End 2014 – 2015.

#### Income Tax: Individuals and Trusts

<table>
<thead>
<tr>
<th>Tax rates (year of assessment ending 28 February 2015)</th>
<th>Tax rates (year of assessment ending 28 February 2014)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 174 550</td>
<td>0 - 165 600</td>
</tr>
<tr>
<td>174 551 – 272 700</td>
<td>165 601 - 258 750</td>
</tr>
<tr>
<td>272 701 – 377 450</td>
<td>258 751 - 358 110</td>
</tr>
<tr>
<td>377 451 – 528 000</td>
<td>358 111 - 500 940</td>
</tr>
<tr>
<td>528 001 – 673 100</td>
<td>500 941 - 638 600</td>
</tr>
<tr>
<td>673 101 and above</td>
<td>638 601 and above</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Age Rebates</th>
<th>Age Rebates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Rebate</td>
<td>Primary Rebate</td>
</tr>
<tr>
<td>R12 726</td>
<td>R12 080</td>
</tr>
<tr>
<td>Secondary (Persons 65 and older)</td>
<td>Secondary (Persons 65 and older)</td>
</tr>
<tr>
<td>R 7 110</td>
<td>R6 750</td>
</tr>
<tr>
<td>Tertiary (Persons 75 and older)</td>
<td>Tertiary (Persons 75 and older)</td>
</tr>
<tr>
<td>R 2 367</td>
<td>R2 250</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tax Threshold</th>
<th>Tax Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Below age 65</td>
<td>Below age 65</td>
</tr>
<tr>
<td>R 70 700</td>
<td>R 67 111</td>
</tr>
<tr>
<td>Age 65 to below 75</td>
<td>Age 65 to below 75</td>
</tr>
<tr>
<td>R110 200</td>
<td>R104 611</td>
</tr>
<tr>
<td>Age 75 and over</td>
<td>Age 75 and over</td>
</tr>
<tr>
<td>R123 350</td>
<td>R117 111</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Medical Tax Credits</th>
<th>Medical Tax Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Main Member:</td>
<td>Main Member:</td>
</tr>
<tr>
<td>R257</td>
<td>R242</td>
</tr>
<tr>
<td>First Dependent:</td>
<td>First Dependent:</td>
</tr>
<tr>
<td>R257</td>
<td>R242</td>
</tr>
<tr>
<td>Additional Dependents:</td>
<td>Additional Dependents:</td>
</tr>
<tr>
<td>R172</td>
<td>R162</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Companies and Trusts</th>
<th>Companies and Trusts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Services Providers – Companies</td>
<td>Personal Services Providers – Companies</td>
</tr>
<tr>
<td>28% of each Rand</td>
<td>28% of each Rand</td>
</tr>
<tr>
<td>Trusts and Personal Services Providers - Trusts</td>
<td>Trusts and Personal Services Providers - Trusts</td>
</tr>
<tr>
<td>40% of each Rand</td>
<td>40% of each Rand</td>
</tr>
</tbody>
</table>
In VIP you can view the Statutory Rates of Tax by clicking on the TXB button on any Employee’s Tax Screen.

If the Tax Update has not yet been installed, then Tax will be recalculated retrospectively to the first Pay Period in March in the Current Pay Period. The new Tax Deduction Tables are also applied to R.S.A. Dormant Companies which are in the 2014 - 2015 Tax Year.

26.1.2 Subsistence Allowance and Advances

Where the recipient is obliged to spend at least one night away from his/her usual place of residence on business and the accommodation to which that allowance or advance is granted to pay for:

- meals and incidental costs, an amount of R335 per day is deemed to have been expended
- incidental costs only, an amount of R103 for each day

The rate for foreign travel can be found on www.sars.gov.za under the Legal and Policy tab.

26.1.3 Table for Calculation of Rate per Km/Travel Allowance

<table>
<thead>
<tr>
<th>Value of the vehicle (including VAT)</th>
<th>Fixed cost (R p.a.)</th>
<th>Fuel cost (c/km)</th>
<th>Maintenance cost (c/km)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - 80 000</td>
<td>25 946</td>
<td>92.3</td>
<td>27.6</td>
</tr>
<tr>
<td>80 001 - 160 000</td>
<td>46 203</td>
<td>103.1</td>
<td>34.6</td>
</tr>
<tr>
<td>160 001 - 240 000</td>
<td>66 530</td>
<td>112.0</td>
<td>38.1</td>
</tr>
<tr>
<td>240 001 - 320 000</td>
<td>84 351</td>
<td>120.5</td>
<td>41.6</td>
</tr>
<tr>
<td>320 001 - 400 000</td>
<td>102 233</td>
<td>128.9</td>
<td>48.8</td>
</tr>
<tr>
<td>400 001 - 480 000</td>
<td>120 997</td>
<td>147.9</td>
<td>57.3</td>
</tr>
<tr>
<td>480 001 - 560 000</td>
<td>139 760</td>
<td>152.9</td>
<td>71.3</td>
</tr>
<tr>
<td>exceeding 560 000</td>
<td>139 760</td>
<td>152.9</td>
<td>71.3</td>
</tr>
</tbody>
</table>

Prescribed Rate for Reimbursed Kilometres

The SARS prescribed rate per kilometre increased from R3.24 to R3.30.

26.1.4 Cumulative exemption for Retirement Benefits and Severance Benefits

The exemption increased from R315 000 to R500 000.

26.1.5 Changes in the Taxation Laws Amendment Act

Bursaries and Scholarships

A bona fide bursary enables a person to study at a recognised educational or research institution.
Open bursary: Exempt from tax.

Closed bursary: Exempt if granted to an employee and the employee agrees to repay the employer if the employee does not complete the studies. Also exempt if granted to a relative of an employee, unless the employee’s remuneration for the previous year of assessment was above R250 000. If the remuneration for the previous year of assessment was R250 000 or less, the first R10 000 of the bursary is exempt for an NQF level 1-4 qualification, and the first R30 000 of the bursary is exempt for an NQF level 5-10 qualification.

**Where the employee was not employed by the employer for the whole of the preceding year, the remuneration he/she received from the employer for the portion of the year he/she was employed by the employer, must be calculated pro rata for the full 365 days.

**If the employee was not employed by the employer for any portion of the preceding year, the employee’s remuneration for the first month he/she is employed by the employer, must be calculated pro rata for a full 365 days.

This is backdated to 1 March 2013, which means it is already effective.

26.1.6 Low Cost Housing (Acquisition of an Asset Fringe Benefit)

An asset which is given to an employee is normally taxed as a fringe benefit (subject to certain exclusions). When immovable property (for example a house) is given to an employee, then no fringe benefit should be calculated provided that:

- the remuneration of the employee for the year of assessment prior to which the employee acquires the immovable property was R250 000 or less AND
- the market value on the date of acquisition of the immovable property is R450 000 or less AND
- the employee should not be a connected person to the employer

Effective from 1 March 2014.

26.1.7 Medical Aid

Medical Aid for employees who are 65 or older will be calculated exactly the same on the payroll as employees who are younger than 65:

- employees who are 65 or older will not be entitled to a deduction but will instead be entitled to a tax credit amount,
- the tax credits will be the same amounts as for employees under 65 years of age,
- the company contribution will be taxed as a fringe benefit, unless the employee is retired from such employer

Effective 1 March 2014.
26.1.8 Changes effective March 2015

Retirement Reform

From March 2015, an employer’s contribution to a retirement fund on behalf of an employee will be treated as a taxable fringe benefit in the hands of the employee. Individuals will from that date be allowed to deduct up to 27.5% of the higher of taxable income or employment income (remuneration) for contributions to pension, provident and retirement annuity funds. The deduction will be limited to R350 000 pa.

Income Replacement Policies

Currently an employee contribution (including the fringe benefit as a deemed contribution) is tax deductible in the hands of the employee. As from 1 March 2015, no deduction will be allowed (i.e. it will not be tax deductible anymore).

26.2 RSA – OID Limits (Real Number 502) (Premier/Classic/Essentials)

According to Government Gazette No. 36273, Notice No 210 of 20 March 2013, as from 1 April 2013, the maximum amount of Earnings on which the assessment of an employer shall be calculated for OID, has been increased from the amount of R292 032 per annum to R312 480 per annum. This report (Real Number 502) is only printed at the end of February of each year for submission by 31 March.

Please Note: The limits have changed as from March 2014 for the Assessment Year 2014 – 2015. This is not part of Release 4.3b.

26.3 Namibia – OID Report (Real Number 502) (Premier/Classic/Essentials)

The Social Security Commission announced in a Public Notice that with effect from 1 March 2013, the amount that defines the Employees required to contribute to the Employees’ Compensation Fund (ECF) has been increased from N$76 000 per annum to N$81 300 (N$6 775 per month). The maximum ceiling for ECF assessments has also been increased form the N$66 000 per annum to N$70 600 per annum. This means that Employers will declare such wages up to a maximum of N$5 883 per month instead of N$5 500 per month.

If an Employee earns:

- Less than N$5 883.00 per month, then the actual value is included
- More than N$5 883.00 per month and less than N$6 775.00 per month, then N$5 883 is included
- More than N$6 775.00 in each month, then these employees are excluded from the report
- If the company applied for Voluntary Cover, then all employees who earn more than N$6 775.00 per month will be included at a rate of N$5 883 per month