

Premier and Classic

Release Notes

6.2a

6 March 2024

Sage

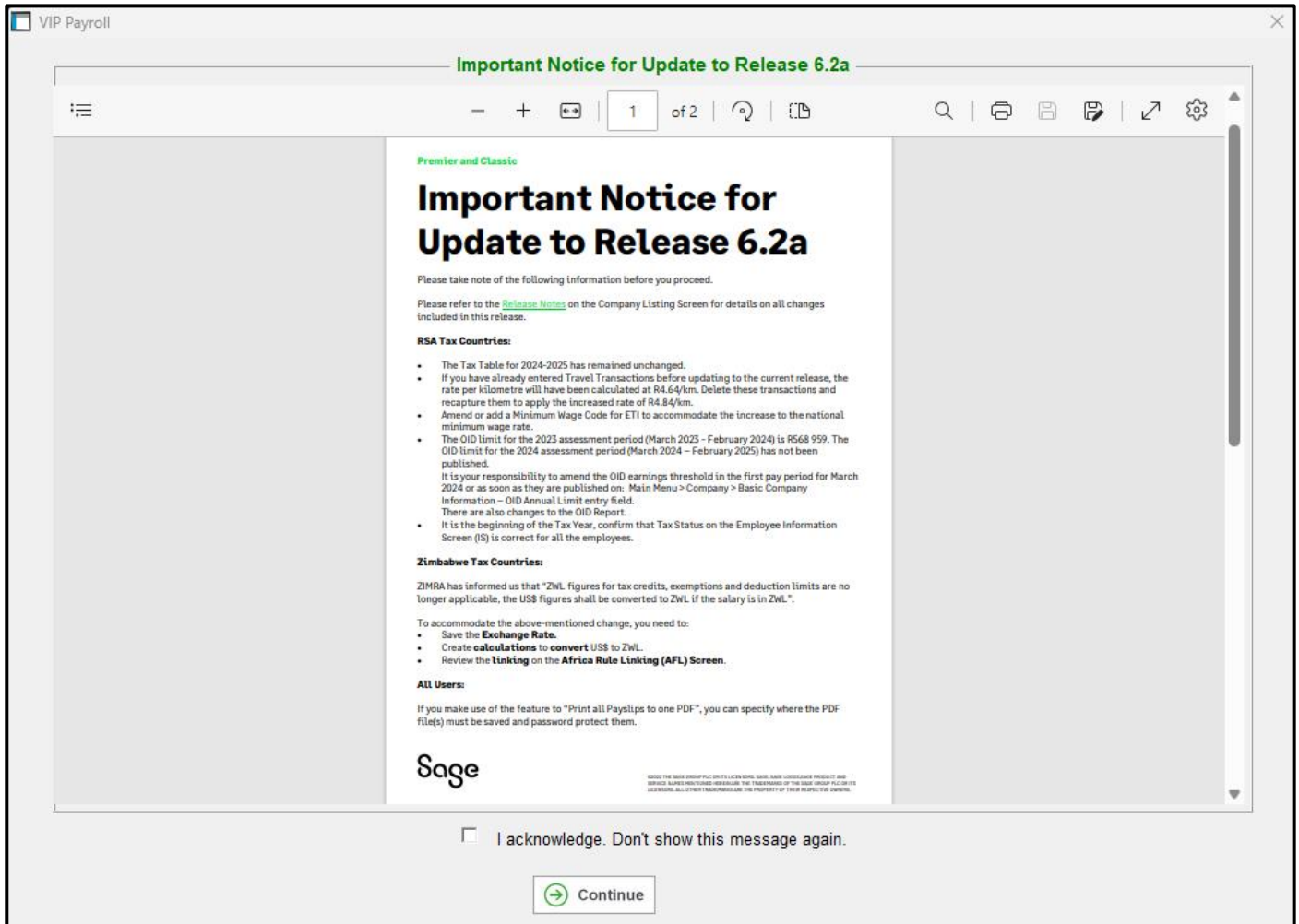
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1.0 Important Notice

When you access any of your companies for the first time, an Important Notice will display in PDF format.



The Important Notice is a synopsis of some of the items recorded in these Release Notes.

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.

2.0 RSA: Tax Related Items Relevant to the System

The following amendments, according to the Budget Speech by the Minister of Finance on 21 February 2024, are effective from 1 March 2024 (2024/2025 Tax Year ending on 28 February 2025), unless stated otherwise.

Please Note:

Many items have remained unchanged.

2.1 Tax Table 2024/2025

The Tax Table has remained unchanged.

Taxable Income (R)	Fixed Amount	Rate of Tax (R)
1 – 237 100	0	18% of taxable income
237 101 – 370 500	42 678 +	26% of taxable income above 237 100
370 501 – 512 800	77 362 +	31% of taxable income above 370 500
512 801 – 673 000	121 475 +	36% of taxable income above 512 800
673 001 – 857 900	179 147 +	39% of taxable income above 673 000
857 901 – 1 817 000	251 258 +	41% of taxable income above 857 900
1 817 001 and above	644 489 +	45% of taxable income above 1 817 000

Tax Rebates

Primary	R17 235
Secondary (Persons 65 and Older)	R9 444
Tertiary (Persons 75 and Older)	R3 145

Age Tax Thresholds

Below age of 65	R95 750
Age 65 to below 75	R148 217
Age 75 and over	R165 689

Medical Scheme Fees Tax Credit

Main Member	R364
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First Dependant	R364
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Additional Dependants	R246
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Personal Service Providers (Company):	27%
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Personal Service Providers (Trusts)	45%
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You can view the Statutory Rates of Tax by clicking on the <Tax Rates> button on any Employee's Tax Screen or on the Basic Company Information Screen.

2.2 Retirement Fund Lump Sum Withdrawal Benefits

These rates have remained unchanged.

Taxable Income (R)	Fixed Amount	Rate of Tax (R)
1 – 27 500	0	0% of taxable income
27 501 – 726 000	0	18% of taxable income above 27 500
726 001 – 1 089 000	125 730 +	27% of taxable income above 726 000
1 089 001 and above	223 740 +	36% of taxable income above 1 089 000

2.3 Retirement Fund Lump Sum Benefits or Severance Benefits

These rates have remained unchanged.

Taxable Income (R)	Fixed Amount	Rate of Tax (R)
1 – 550 000	0	0% of taxable income
550 001 – 770 000	0	18% of taxable income above 550 000
770 001 – 1 155 000	39 600 +	27% of taxable income above 770 000
1 155 001 and above	143 550 +	36% of taxable income above 1 155 000

2.4 Subsistence Allowances and Advances

Where the recipient is obliged to spend at least one night away from his/her usual place of residence in South Africa for work purposes:

Subsistence Allowance (RSA)

Meals and Incidentals	R548 per day/part of a day
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Incidentals Only	R169 per day/part of a day
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Foreign subsistence rates can be found on the SARS website.

2.5 Reimbursement/Advance for Business Travel on Day Trips

Reimbursement/Advance for Business Travel on Day Trips (RSA)

Meals and Incidentals R169 per day/part of a day

2.6 Vehicle Lookup for the Purpose of Calculating a Travel Allowance

Where the value of the vehicle -	Fixed Cost R	Fuel Cost c/km	Maintenance Cost c/km
does not exceed R100 000	34 480	151.7	46.0
exceeds R100 000 but does not exceed R200 000	61 770	169.4	57.6
exceeds R200 000 but does not exceed R300 000	89 119	184.0	63.5
exceeds R300 000 but does not exceed R400 000	113 436	197.9	69.3
exceeds R400 000 but does not exceed R500 000	137 752	211.8	81.5
exceeds R500 000 but does not exceed R600 000	163 178	243.0	95.6
exceeds R600 000 but does not exceed R700 000	188 653	247.1	107.3
exceeds R700 000 but does not exceed R800 000	215 447	251.2	118.9
exceeds R800 000	215 447	251.2	118.9

2.6.1 Prescribed Rate for Reimbursive Kilometres (Travel)

Prescribed Rate Per Kilometre

R4.84 per kilometre (increased from R4.64)

Please Note:

If you have entered Travel Transactions before updating to the current release, the rate per kilometre was calculated at R4.64. Delete these transactions and recapture them to apply the increased rate of R4.84/km.

2.7 Cumulative Exemption for Retirement Fund Benefits and Severance Benefits

This amount has remained unchanged.

Cumulative Exemption for Retirement Benefits and Severance Benefits

R550 000.00

2.8 Value of 'B' in the Residential Accommodation Fringe Benefit Calculation

The value of "B" is currently R95 750.

The value of "B" has not yet been promulgated at time of printing. Please verify this value before doing the calculation.

3.0 RSA: Other Important Payroll/Labour Related Items

The following includes required changes according to the Taxation Laws Amendment Act (TLAA), 2023 and the Tax Administration Laws Amendment Act (TALAA), 2023.

All amendments are effective 01 March 2024 except where otherwise mentioned.

3.1 Explanation of Payroll Tax Changes

3.1.1 PAYE

Definition of an Employer

The definition of ‘employer’ has been widened to include non-resident employers conducting business through a permanent establishment in South Africa, and representative employers. These employers will be required to register for PAYE, UIF and SDL purposes.

Deduction for Contributions Towards Retirement Funds

Deductions towards retirement funds will be limited to R350 000 for any twelve-month period. Before the amendment, the deduction was limited to R350 000 for each year of assessment. This resulted in individuals who had two years of assessment in a twelve-month period (due to ceasing SA tax residency) possibly claiming a deduction in excess of R350 000.

Limitation of Deemed Employee Contributions Towards Retirement

An employee is allowed a tax deduction for contributions made towards retirement funds. Contributions made by the employer for the benefit of the employees are “deemed employee contributions” and are also allowed as a deduction, subject to the limits. The Act is amended in that “deemed employee contributions” (fringe benefit value) will be allowed as a deduction provided that the fringe benefits are not exempt from tax e.g., if the fringe benefit is not taxed because it is exempt under the foreign employment income exemption, then the deemed employee contribution (fringe benefit value) may not be allowed as a tax deduction.

Please Note:

The system does not apply the exemption automatically. If you need to make provision for this scenario, please contact your designated Sage Accredited Business Partner for assistance.

Tax Directives for Vested Instruments to Take into Account Foreign Taxes Paid

When applying for a tax directive for a vested equity instrument (section 8C), an employer may consider the foreign taxes paid when determining the PAYE on the gains.

3.2 National Minimum Wage Increase

From March 2024, the National Minimum Wage rates will increase as follows:

- from R25.42 to R27.58 per hour,
- from R25.42 to R27.58 per hour for farm workers,
- from R25.42 to R27.58 per hour for domestic workers,
- from R13.97 to R15.16 per hour for workers employed on an expanded public works programme, and
- for workers who have concluded learnership agreements contemplated in section 17 of the Skills Development Act, new rates are indicated in Schedule 2 of the Government Gazette.

3.2.1 Impact on ETI (Employment Tax Incentive)

One of the requirements for an employee to qualify for ETI is that the employee must earn at least the minimum wage, which is:

- the higher of:
 - the applicable minimum wage according to the National Minimum Wage Act, or
 - the applicable minimum wage according to the wage regulating measure (i.e. collective agreement, bargaining council or sectoral determination), or
- if none of the above is applicable (i.e. no wage regulating measure is applicable and the employer is exempt from the National Minimum Wage after successful application), then the employee must earn a monthly wage of at least R2 000 for a full month (160 ordinary employed and remunerated hours).

Please Note:

For Employment Tax Incentive (ETI) purposes, you must confirm that the correct minimum wage rate per hour is processed for each employee from 1 March 2024, to ensure the correct 'minimum wage test' is applied by the system.

3.3 OID Maximum Earnings and Annual Application

The OID limit for the 2023 assessment period (March 2023 - February 2024) is R568 959. The OID limit for the 2024 assessment period (March 2024 – February 2025) has yet to be published.

Please Note:

It is your responsibility to amend the OID earnings threshold in the first pay period for March 2024 or as soon as they are published on:

Main Menu > Company > Basic Company Information – OID Annual Limit entry field.

Basic Company Information		Address Details		Contact Information		Additional Information		Employment Tax Incentive	
Company Name (for Reports)	RELEASE 6.2A								
Company Name (for Screens)	RELEASE 6.2A	Company Status	Live						
E-Mail Address									
Co. Registration Number		Business Tel Number							
Payment Cycle	Weekly (52 Periods)	=	52	Pay Periods,	364	Paid Calendar Days			
Use Tax Tables for	R.S.A	OID Annual Limit	568959.00						
PAYE Reference Number	1234123121	Enjoys Diplomatic Indemnity	<input type="checkbox"/>						
Trade Classification	1520 Motor vehicle parts & accessories (ex tyres & tubes, glass & elec. eq)								
IRP5 Sequence Number	0	006	Interim Cert. No.	000000	Last Periodic No.	000000	Live Cert. No.	000000	

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 to the Excel Report.

3.4 OID Report Changes

The amended Compensation for Occupational Injuries and Diseases Act (COIDA) of 2022, was promulgated on 17 April 2023. The Department of Employment and Labour have published the “ROE explanatory memorandum” for which they provided guidance on how to report earnings calculated to complete the ROE form. These amendments directly affect the payroll.

3.4.1 Maximum Earnings

The return of earnings (ROE) explanatory note for the 2022 reporting season (Government Gazette No. 48337) has provided guidance on how the annual maximum earnings should be applied:

- The limit is an annual limit and should not be pro-rated as a monthly figure.
- The annual limit must be applied to earnings irrespective of whether the employee worked for less than 12 months.

This means the maximum earnings should be the lesser of actual earnings and the annual limit.

The Fund did not clarify how the monthly earnings must be reported for the purpose of the manual ROE submission, but we applied the following calculation method:

- If the employee’s/director’s earnings are greater than the maximum annual limit, the monthly earnings should be the maximum annual limit divided by period of service.
- If the employee’s/director’s earnings are less or equal to maximum annual limit, the monthly earnings should be the actual monthly earnings.

We have inserted a message on the last Print-time Selection Screen to remind you that this is an Annual Report:

PLEASE NOTE: This report is intended for use at Tax Year End.

Annual limits can only be accurately applied in the last period of the Tax Year.

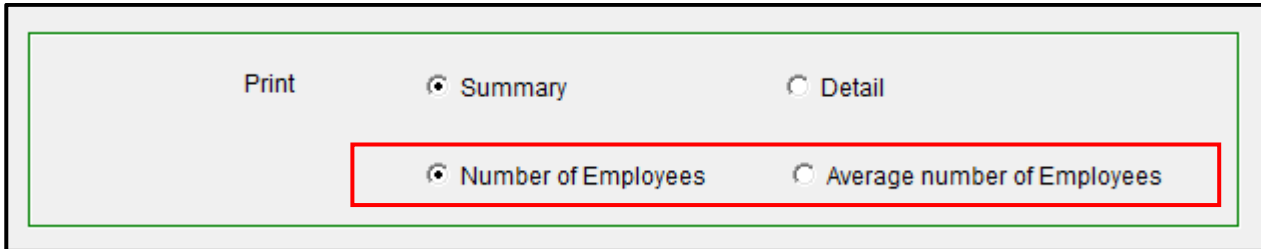
3.4.2 Employee and Director Count

We have updated the method of calculating the employee count to provide for a method for “headcount” and “average” count. For example, if the employee/Director was employed for only 3 months during the year, should they be counted as 0.25 (average) or 1 (headcount) for that year.

The Fund, however, clarified that when an employee is promoted to a Director during the year, they will be counted as a director for the whole year.

The employer is given an option to apply either an average count or a total headcount of employees and directors employed during the year.

We have amended the last Print-time Selection Screen to accommodate this:



The screenshot shows a selection screen with the following options:

- Print
- Summary
- Detail
- Number of Employees
- Average number of Employees

Examples for Reporting of Employees:

Example 1:

An employee received earnings of R100 000 per month. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R100 000	R47 413.25	1
April	R100 000	R47 413.25	1
May	R100 000	R47 413.25	1
June	R100 000	R47 413.25	1
July	R100 000	R47 413.25	1
August	R100 000	R47 413.25	1
September	R100 000	R47 413.25	1
October	R100 000	R47 413.25	1
November	R100 000	R47 413.25	1
December	R100 000	R47 413.25	1
January	R100 000	R47 413.25	1
February	R100 000	R47 413.25	1
Total	R1 200 000	R568 959	12

*OE per month = R568 959/12

Example 2:

An employee received earnings of R100 000 per month. Employee went on unpaid maternity leave from 31 August. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R100 000	R47 413.25	1
April	R100 000	R47 413.25	1
May	R100 000	R47 413.25	1
June	R100 000	R47 413.25	1
July	R100 000	R47 413.25	1
August	R100 000	R47 413.25	1
September		R47 413.25	1
October		R47 413.25	1
November		R47 413.25	1
December		R47 413.25	1
January		R47 413.25	1
February		R47 413.25	1
Total	R600 000	R568 959	12

*OE per month = R568 959/12

Example 3:

An employee received earnings of R200 000 per month. Employee was terminated on 31 May 2023. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R200 000	R189 653	1
April	R200 000	R189 653	1
May	R200 000	R189 653	1
Total	R600 000	R568 959	3

*OE per month = R568 959/3

Depending on the count option selected by the employer, the employee will be counted as either 0.25 or 1 when calculating the employee count.

Example 4:

An employee received earnings of R100 000 per month. Employee was terminated on 31 June 2023. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R100 000	R100 000	1
April	R100 000	R100 000	1
May	R100 000	R100 000	1
June	R100 000	R100 000	1
Total	R400 000	R400 000	4

*OE per month = R100 000

Depending on the count option selected by the employer, the employee will be counted as either 0.333 or 1 when calculating the employee count.

Example 5:

An Employee was employed from 1 March to 31 June 2023 (termination date). They had earnings of R100 000 for March & May and R75 000 for April & June. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R100 000	R100 000	1
April	R75 000	R75 000	1
May	R100 000	R100 000	1
June	R75 000	R75 000	1
Total	R350 000	R350 000	4

*OE per month = AE per month

Depending on the count option selected by the employer, the employee will be counted as either 0.333 or 1 when calculating the employee count.

Examples for Reporting of Directors:

Example 1:

An employee received earnings of R100 000 per month. They were promoted to a Director on the 1st of September. The employees' earnings as a Director were R150 000 per month. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R100 000	R47 413.25	1
April	R100 000	R47 413.25	1
May	R100 000	R47 413.25	1
June	R100 000	R47 413.25	1
July	R100 000	R47 413.25	1
August	R100 000	R47 413.25	1
September	R150 000	R47 413.25	1
October	R150 000	R47 413.25	1
November	R150 000	R47 413.25	1
December	R150 000	R47 413.25	1
January	R150 000	R47 413.25	1
February	R150 000	R47 413.25	1
Total	R1 500 000	R568 959	12

*OE per month = R568 959/12

The employee will be counted as a Director for the entire year.

Example 2:

A Director received earnings of R100 000 per month. The Director was terminated on 31 June 2023. Their earnings for the 2023 ROE season (OID limit of R568 959) will be reported as follows:

Period	Actual Earnings (AE)	OID Earnings (OE)	Periods of Service (PoS)
March	R100 000	R100 000	1
April	R100 000	R100 000	1
May	R100 000	R100 000	1
June	R100 000	R100 000	1
Total	R400 000	R400 000	4

*OE per month = R100 000

Depending on the count option selected by the employer, the Director will be counted as either 0.333 or 1 when calculating the employee count.

3.4.3 Earnings Definition

The latest explanatory note (2022 explanatory note) amended the definition of “Earnings”. The definition is almost the same as the previous definition with the only change being that ex-gratia payments will no longer be excluded from earnings. Some of the inclusions and exclusions were also reworded.

This definition will be applied until either a new ROE explanatory note is issued or the COID Act of 2022 is made effective.

The Notice on the Initial Print-time Selection Screen has been amended accordingly:

OID REPORT

The ROE explanatory notes for RSA (previously W.As8) give a list of the items which must be included as Earnings and those which must be excluded. In the selection screens which follow YOU MUST ENSURE that all the items which should be included are set to "Yes" for Include, and those which must be excluded are set to "No".

Select <Restore Defaults> below to set or reset the default values as follows: Earnings and Company Contributions which are defined as Taxable will default to "Yes", and those which are Not Taxable will default to "No". Perks Items will default to "Y" or "N" depending on the latest information which Sage has. Calculation (XS) Screen and Own Screen Items will default to "N".

YOU MUST go through all the items to ensure that the "Y's" and "N's" are set correctly so that the amounts calculated for the OID Report are correct. Any changes will be stored for subsequent use.

Select <Continue> to Continue with, or change the current settings.
Select <Restore Defaults> to Reset to Sage's default settings.
Select <Close> to Exit.

Inclusion and exclusion lists have been amended on the Print-time Selection Screens for Earnings, Company Contributions, Calc (XS) Screen and Own Screen:

Earnings to be included for OID

No	Earning	Include
01	Wage	Y
02	O/T 1.5	Y
03	O/T 2.0	Y
04	Pd PH	Y
05	PH NW	Y
06	Unp Lve	Y
07	SickPay	Y
08	Lve Pay	Y
09	BCEA	Y
10	Notice	Y
11	Prd Bon	Y
12	Travel	Y
13	TermLve	Y
14	Ann Bon	Y
15	Lumpsum	N
16	BP Wage	Y
17	BP 1.5	Y
18	BP 2.0	Y

Items which must have "Include = Y" are:
Salaries or Wages, Regular Overtime,
Commission, All Bonuses, 13th cheques,
Value of Food and Quarters, Travel
and other Regular Allowances, All items which
are part of a Package / Service contract, except
Employer Contributions to Medical Aid, etc.

Earnings/Drawings paid to working Directors of a
Company or Member of a Close Corporation.

Ex-gratia Payments removed.

Items which must have "Include = N" are:
Re-imbursive payments, Occasional Overtime,
Payments for non-recurrent tasks,
Intangible Fringe Benefits such as Employer
Contributions to Medical Aid, Payments to cover
Special Expenses e.g. Travel and Subsistence costs.

Profit sharing of directors and members.

3.4.4 Changes to the Report

The **Detail Report** records the information per month for each employee:

Detail O.I.D. Report						
Emp Code	Employee Name	Month	Actual Monthly Earnings	Adjusted OID Earning	Periods in Service	Dir. Terminated Exclusion Reason
VD9009	MR A.B.C VAN DULLSTROOM	03/2023	24782.28	24782.28	1 of 12	
		04/2023	24367.28	24367.28	2 of 12	
		05/2023	24367.28	24367.28	3 of 12	
		06/2023	51907.28	51907.28	4 of 12	
		07/2023	24367.28	24367.28	5 of 12	
		08/2023	24367.28	24367.28	6 of 12	
		09/2023	26152.71	26152.71	7 of 12	
		10/2023	26152.71	26152.71	8 of 12	
		11/2023	26226.67	26226.67	9 of 12	
		12/2023	52399.67	52399.67	10 of 12	
		01/2024	25869.67	25869.67	11 of 12	
		02/2024	25869.67	25869.67	12 of 12	

If you selected **"Average Number of Employees"** it will be indicated by an asterisk as follows:

Up to R568959 p.a.	Number of Employees	Amount	Above R568959 p.a.	Number of Employees	Amount	Total
Directors	.00*	0.00	Directors	.00*	0.00	0.00
Normal Employees	36.83*	11936475.04	Normal Employees	18.00*	10241262.00	22177737.04
Total Employees	(*Average) 36.83*	11936475.04	Total Employees	(*Average) 18.00*	10241262.00	22177737.04

The **Detail and Summary Reports** end with a total per month:

Period	Normal Employees		Directors		Total OID Earnings
	Number of Employees	Employees OID Earnings	Number of Directors	Directors OID Earnings	
March	54	1730732	0	0	1730732
April	55	1757271	0	0	1757271
May	55	1741639	0	0	1741639
June	55	2472244	0	0	2472244
July	54	1643671	0	0	1643671
August	54	1654790	0	0	1654790
September	54	1722660	0	0	1722660
October	56	1777393	0	0	1777393
November	56	1791025	0	0	1791025
December	55	2237452	0	0	2237452
January	55	1815719	0	0	1815719
February	55	1833140	0	0	1833140
Total	54.83	22177736	.00	0	22177736

NB! Truncation of the monthly totals to whole numbers for the ROE submission will result in small discrepancies between the audit totals and ROE totals

3.4.5 Changes to the Return of Earnings Excel Report

The following changes have been made to the Return of Earnings Excel Report:

- The Excel Report renders when you print the Summary Report.
- The Return of Earnings is now called the **CF-2A**.
- The report has been amended to align with the new format.

4.0 Angola: Tax Changes (Premier Only)

You received a patch file with the following change on 18 January 2024.

Law no. 15_23 – IRT 2024 introduces the following change to tax tables, as discussed in the General State Budget 2024, presented to the National assembly on 31 October 2023:

- Increasing the threshold for employment income tax by exempting individual taxpayers who earn employment income of up to AOA100 000 from Employment Income Tax.

Monthly Tax Table effective 1 January 2024:

From	To	%	Amount Over	Fixed Amount
0.00	100 000.00	0%	0.00	0.00
100 000.01	150 000.00	13%	100 000.00	0.00
150 000.01	200 000.00	16%	150 000.00	12 500.00
200 000.01	300 000.00	18%	200 000.00	31 250.00
300 000.01	500 000.00	19%	300 000.00	49 250.00
500 000.01	1 000 000.00	20%	500 000.00	87 250.00
1 000 000.01	1 500 000.00	21%	1 000 000.00	187 249.00
1 500 000.01	2 000 000.00	22%	1 500 000.00	292 249.00
2 000 000.01	2 500 000.00	23%	2 000 000.00	402 249.00
2 500 000.01	5 000 000.00	24%	2 500 000.00	517 249.00
5 000 000.01	10 000 000.00	24.5%	5 000 000.00	1 117 249.00
10 000 000.01	And above	25%	10 000 000.00	2 342 248.00

Tax File version: 202401

5.0 Ghana: Tax Changes (Premier Only)

You received a patch file with the following change on 22 January 2024.

The Income Tax Act, 2015 (Act 896) is amended in the First Schedule by updating the Rates of income tax for individuals.

Annual Tax Table effective 1 January 2024:

From	To	Taxable Income	Tax Rate
0.00	5 880.00	5 880.00	0%
5 880.01	7 200.00	1 320.00	5%
7 200.01	8 760.00	1 560.00	10%
8 760.01	46 760.00	38 000.00	17.5%
46 760.01	238 760.00	192 000.00	25%
238 760.01	605 000.00	366 240.00	30%
605 000.01	And above	5 395 000.00	35%

5.1 SSNIT Changes

The Social Security and National Insurance Trust (SSNIT), in consultation with the National Pensions Regulatory Authority (NPRO), has increased the maximum insurable earning for 2024 from GHS42 000.00 to GHS52 000.00 effective **1 January 2024**.

This means that from 1 January 2024, the maximum contributions payable to SSNIT will be GHS7 020.00 and GHS66.16 for the minimum.

6.0 Zambia: Tax Changes (Premier Only)

You received a patch file with the following change on 18 January 2023.

On 26 December 2023, Zambia enacted the Income Tax Amendment Act of 2023, which includes the following changes as proposed in the 2023/24 budget speech:

- Increasing the exempt threshold to K5 100 from K4 800 per month.
- Reducing the top tax rate to 37.0 percent from 37.5 percent.

Monthly Tax Table effective 1 January 2024

From	To	Rate
0.00	5 100.00	0%
5 100.01	7 100.00	20%
7 100.01	9 200.00	30%
9 200.01	And above	37%

Tax File version: 202401

7.0 Zimbabwe: Tax Changes (Premier Only)

7.1 Bonus Exemption

You received a patch file with the following change on 11 December 2023.

The minister of finance of Zimbabwe has delivered the 2023/2024 budget speech. The following change is effective from 1 November 2023:

- The tax-free ZWL bonus threshold is increased from ZWL500 000 to ZWL7 500 000.

Tax File version: 202306

Please Note:

If you retrieve any backup on R6.1b, tax tables for the previous year will be applied (File version 202306). To apply the 2024 tables you will need to replace the data in the live folder.

7.2 Tax Changes

You received a patch file with the following change on 18 January.

The Finance Act of 2023 has been promulgated.

Annual Tax Table effective 1 January 2024

From	To	%	Rebate
0.00	9 000 000.00	0%	0.00
9 000 000.01	27 000 000.00	20%	1 800 000.00
27 000 000.01	90 000 000.00	25%	3 150 000.00
90 000 000.01	180 000 000.00	30%	7 650 000.00
180 000 000.01	270 000 000.00	35%	16 650 000.00
270 000 000.01	And above	40%	30 150 000.00

Tax File version: 202401

7.3 Tax Rule Changes

ZIMRA has informed us that “ZWL figures for tax credits, exemptions and deduction limits are no longer applicable, the US\$ figures shall be converted to ZWL if the salary is in ZWL”.

The following USD values should be converted to ZWL when calculating PAYE :

- Pension deduction: limited to USD 5 400 per year.
- Elderly person, blind person & mentally or physically disabled person tax credits: USD 900 per year.
- Bonus exemption: USD 400 per year.
- Retrenchment Package exemption: Higher of USD 3 200 or 1/3 of package up to USD 15 100 per year.

To accommodate the above-mentioned change, you need to:

- Save the **Exchange Rate**.
- Create **calculations** to **convert** US\$ to ZWL.
- Review the **linking** on the **Africa Rule Linking (AFL) Screen**.

Please Note:

Pension Deduction Limit, Tax Credit and Bonus Exemption values can fluctuate during the year if the exchange rate used in the calculations is fluctuating.

7.3.1 System Setup

Step 1: Define Calculation Screen Lines

Define Calculation (XS) Screen lines for:

- Exchange Rate
- Bonus Exemption
- Tax Deductible Pension Limit
- Elderly Tax Credit
- Blind Tax Credit
- Disabled Tax Credit

Step 2: Exchange Rate

- Create a **Method** for the relevant **Exchange Rate**.
- Link all employees in the company to this method.
- Update the method as the Exchange rate changes.

This rate **MUST be used** in the conversion of USD to ZWL.

Step 3: Bonus Exemption

- Create a Bonus exemption line on the XS Screen.
- Add a Method to calculate the **ZWL** Bonus Tax Exemption portion: 400 USD per year.

Example of linking on Africa Rule Linking Screen

BON001	A Bonus	E11,E12	Linked Amount1 - Linked Amount2	Tax Per. Earn. (2)
BON001	Link 2nd Total of Items	XS37		

- Link the actual Bonus earning value on the Payslip to the line with description “A Bonus”.

- Link the Bonus Tax Exemption value as calculated on the XS Screen to the line with description “Link 2nd Total of Items”.

Step 4: Pension Deduction

- Create a Pension Tax Deduction Limit line on the XS Screen.
- Add a Method to calculate the **ZWL** tax-deductible limit for Pension Fund: USD 5400 per year.

Example of linking on Africa Rule Linking Screen

TD002	A Tax Deductible NSSA/Pens/Annuity	D05,D06	Lesser of (Total & Linked Amount1 & Linked	Tax Ded. Ded's (2)
TD002	Link 2nd Total of Items	XS38		

- Link the actual Pension deduction lines to the line with description “A Tax Deductible NSSA/Pens/Annuity”.
- Link the Tax-deductible Pension limit line as calculated on the XS Screen to the line with description “Link 2nd Total of items”.

Step 5: Tax Credits for Elderly Person, Blind Person and Mentally or Physically Disabled Person

- Create three lines on the XS Screen for Elderly Person, Blind Person and Disabled Person
- Add Methods to calculate the **ZWL** tax credit: USD 900 per year.

Suggestion for the methods:

Elderly Person: If age is greater than 55, then calculate the tax Credit.

Blind Person: If Blind Indicator on XS Screen is greater than 0, then calculate the Credit.

Disabled Person: If Disabled indicator on XS line is greater than 0, then calculate the Credit.

- Link the newly created XS lines to the Tax Rule for Elderly Tax Credit, Blind Tax Credit Disabled Tax Credit.

Example of linking on Africa Rule Linking Screen

AGE002	AElderly Tax Credit	XS39	Linked Amount1	Tax Rebate (2)
BON001	ABonus	E11,E12	Linked Amount1 - Linked Amount2	Tax Per. Earn. (2)
BON001	Link 2nd Total of Items	XS37		
BP002	ABlind Person Tax Credit	XS41	Linked Amount1	Tax Rebate (2)
DIS002	ADisabled Tax Credit	XS40	Linked Amount1	Tax Rebate (2)

8.0 RSA: Employment Verification Services (EVS)

The following feature is only available for **RSA Tax Countries**.

Employment Verification is a new benefit for your employees without any cost to you or to them and will be available for your employees through several trusted partners. Employees take control of their data to be shared for credit applications, while you save time and can be more confident with a secure, automated data transfer.

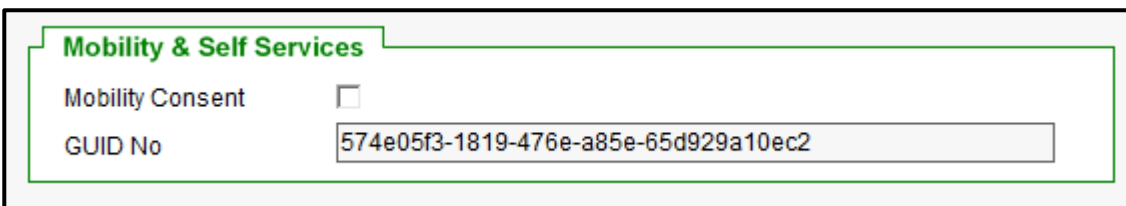
More information about this benefit can be found in Release Notes 6.1a.

8.1 All Users

When you access your companies for the first time, you may notice a “processing screen” as new employee fields are initialised.

During this time all employees will be issued with a GUID number. There is no need for you to do anything, however, if you did want to view the newly populated field from the **Main Menu**:

- Click on **Employee**
- Click on **Change Employee**
- Select **Employee**
- Click on **Analysis Details Tab**



Mobility & Self Services

Mobility Consent

GUID No

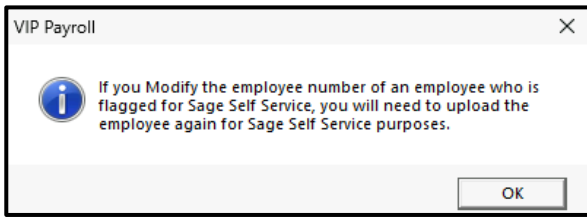
8.1.1 Users Licensed for Premier Employee Self Service (ESS) (Premier Only)

If you are licensed for Premier Employee Self Service (ESS), then your companies will not be taken through this process and new GUIDS will not be allocated to your employees. You and your employees will not benefit from this feature.

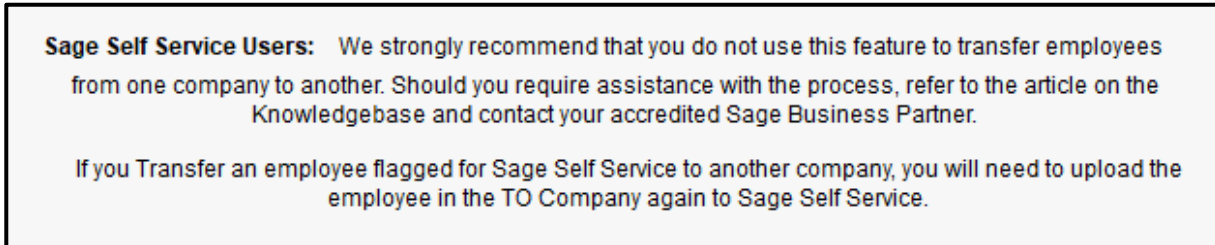
8.1.2 Users Licensed for Sage Self Service (SSS)

If you are licensed for Sage Self Service (SSS) and you transfer employees to another company or modify an employee number, a new GUID will be allocated to the employee. At this point you will need to upload the employee again to SSS and the employee should be treated as a new employee.

We have added the following information to the Modify Employee Screen.



We have added the following information to the Transfer Employee Initial Screen.



8.2 First Time Access to Company

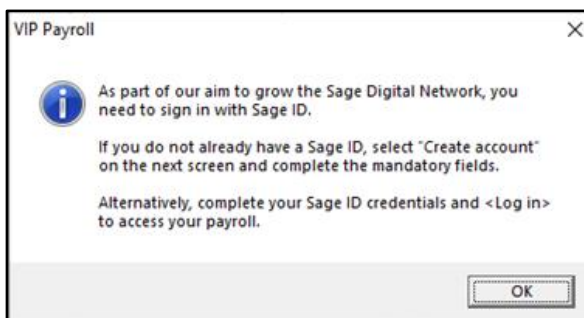
8.2.1 Sage ID Login

Step 1:

After installing the update to Release 6.2a and converting your companies to the new release, once you access a company, the following validations will be performed:

- Is the company set to RSA Tax Country?
- Is the company ready for Employment Verification (Company Miscellaneous Tab 4)?
- Does the user logging into the company have Full Access to Start of Period ?

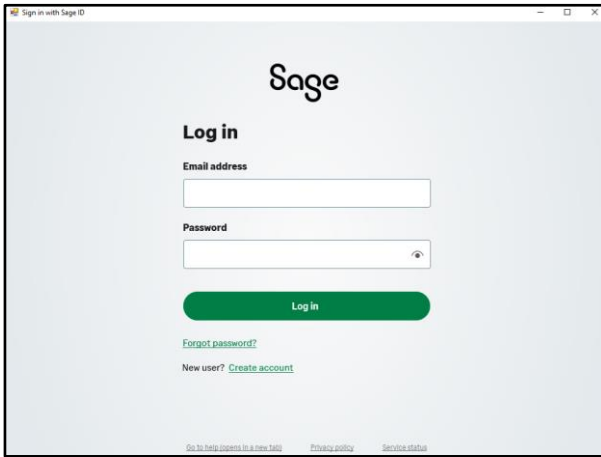
If all the validations are true, the following message will be displayed:



- Click on <OK> to access your company.

Step 2:

The **Sign in with Sage ID** Login Screen will open.



Please Note:

Sage ID is a password to allow for the upload of payroll data. It is NOT replacing your normal payroll application password.

Do not close the “Sign in with Sage ID” Login Screen without completing the fields.

- If you do not have a Sage ID, select **Create account** and complete the mandatory fields.
- If you do have a Sage ID, complete your Sage ID credentials and **<Log in>**.

Please Note:

At Sage, we safeguard our customers data, value their privacy, and uphold the highest standards of data ethics. To continue keeping businesses safe from cyberattacks and fraud, we are adding an extra layer of security, called 2-factor authentication (2FA).

We appreciate how busy our customers are, so we’ve made this process as easy as possible - there are six simple steps to follow when a customer logs in with their Sage ID. Once 2FA is set up in any of your Sage Products, Sage ID will automatically be turned on for all other platforms that you use that have a Sage ID.

If 2FA is already used to access our platforms, there is no further action to take.

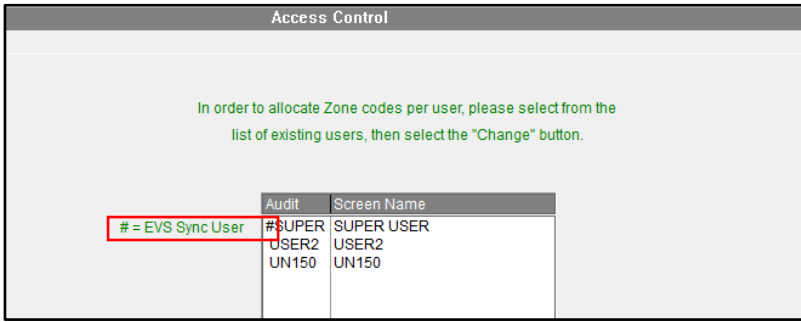
If you have any concerns about the 2FA mandate you can learn more [here](#).

8.2.2 EVS Sync User Flagged

We have flagged the user that has completed the Sage ID Login details, permitting the syncing of payroll data to the Sage digital network secure servers.

You can see which user is flagged from the **Main Menu**:

- Click on **Company**
- Click on **Access Control**
- Click on **Continue** (Advanced Access Control will be selected)

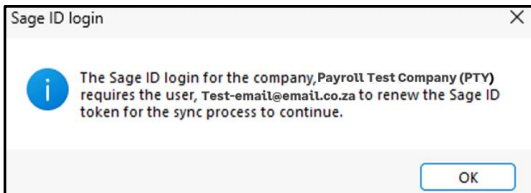


The user that completed the Sage ID Login details is indicated by a “#”.

8.2.3 Payroll Inactive for Extended Period of Time

If you do not process a Start of Period for a long time, then the Sage ID token will expire, and it will be necessary to renew the token before the syncing of payroll data to the Sage digital network secure servers can continue.

When this happens, on accessing the said company, the following screen message will be displayed:



- Click on **<OK>** to access your company.
- Complete the subsequent **Sign in with Sage ID** Login screen.

The syncing of your payroll data to the Sage digital network secure servers will be resumed.

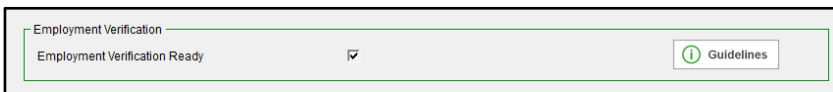
8.3 Opting Out

8.3.1 Withdraw a Company

The Employee Verification feature is automatically enabled, however you can disable this feature at any time. From the **Main Menu**:

- Click on **Company**
- Click on **Miscellaneous**
- Click on **Miscellaneous 4**

Unselect (remove the tick) from **Employment Verification Ready**:



If the ‘Employee Verification Ready’ tick was already removed prior to this release, no further action is required. It will remain unselected after the release.

8.3.2 Withdraw an Employee

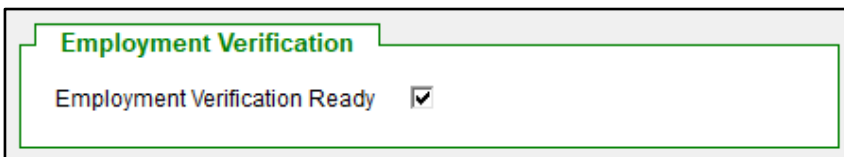
Employment Verification is designed to improve data security by giving employees more control of their data and when they want to share details with a service provider.

This feature is automatically enabled, however you can disable this feature at any time. From the

Main Menu:

- Click on **Employee**
- Click on **Change Employee**
- Select **Employee**
- Click on **Analysis Details Tab**

Unselect (remove the tick) from **Employment Verification Ready:**



If the 'Employee Verification Ready' tick was already removed prior to this release, no further action is required. It will remain unselected after the release.

8.4 Test Data and EVS

If you are using a “dummy” employee on your payroll to calculate sample payslips, we strongly recommend that you:

- do not enter the employee ID and Passport Number on this “dummy” record, and
- remember to unselect (untick) “Employee Verification Ready” for this employee on the Employee Analysis Screen as described [above](#).

This will prevent the employee from Syncing to the cloud environment for Employee Verification purposes.

9.0 RSA: Public Holiday

The President of the South Africa published Proclamation Notice 157 of 2024 declaring 29 May 2024 as a public holiday.

This impacts the processing of salary/wage payments for employees and the processing of leave applications.

Several factors need to be considered:

- Whether you are licensed for the **Leave Module** or not.
- Whether **leave transactions** over this period have been **processed** or not.
- Whether your employees make use of either of the **Self Service Modules**.

Please Note:

Follow the detailed steps applicable to your set-up on the [Sage Community Hub](#) to accommodate this day.

10.0 All Users: Other System Changes

10.1 Basic Access Control Users

Due to future software requirements, we will be removing the Basic Access Control option from the payroll soon.

Please Note:

If you are currently making use of Basic Access Control, we encourage you to set up Advanced Access Control before the system forces you to make the change.

Access to VIP's screens, and to the printing of reports, is controlled by Operator Passwords.

For each Password the Access Rights to the different screens in the System must be specified. An operator may be assigned Full Rights, View Only Rights, or No Access Rights to a screen or area of the System, and report printing is controlled by security levels.

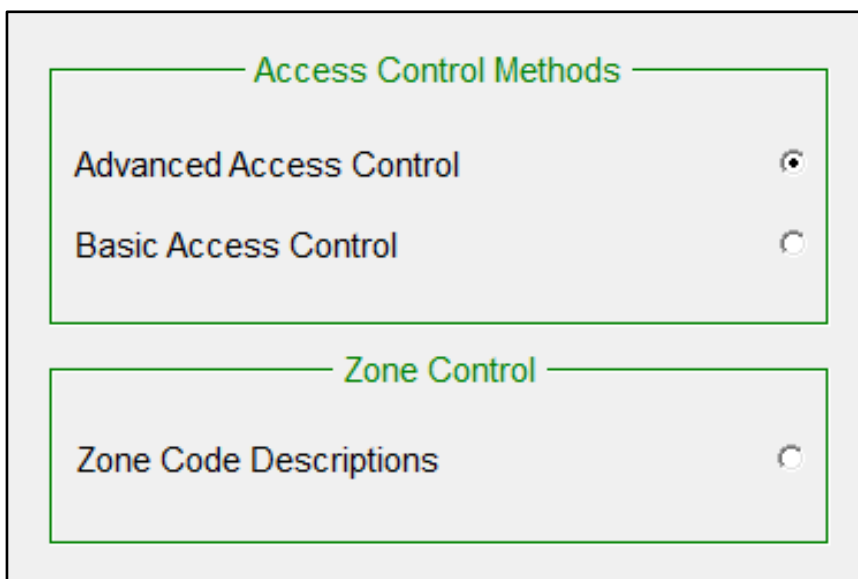
Basic Access Control allows you to set up passwords for five operators, and to specify which areas of the System may be accessed by each of these operators.

Advanced Access Control allows you to specify unique passwords for many different operators in each Company.

For additional security you may also assign a **Zone Code** to each employee, and operators may only access employees in the zones to which they have access.

To access the **Advanced Access Control Screen** from the **Main Menu**:

- Click on **Company**
- Click on **Access Control**
- Click on the Radio Button next to **Advanced Access Control**



The screenshot shows a web interface for 'Access Control Methods'. It features two main sections, each with a green title and a light gray background. The first section, 'Access Control Methods', contains two radio button options: 'Advanced Access Control' (which is selected) and 'Basic Access Control'. The second section, 'Zone Control', contains one radio button option: 'Zone Code Descriptions'.





The Advanced Access Control Password Screen will be displayed.


You may **<Add>**, **<Change>** or **<Delete> Operator Passwords** on this screen:

Please select from the list of existing users, then select the "Change" or "Delete" button.


To add a new user, select the "Add" button (only if there are still available entries)

Audit	Screen Name
SUPER	SUPER USER
VIP	VIP

 Add  Change  Delete  Close

 Save Detail

Save the detail of ALL the Users to a File that can be opened in Excel.

 Print Detail

Print the detail of ALL the Users to a Printer

Please access the **How to File** for detailed steps on how to set up your Advanced Access Control:

To access the **How to File** from the **Main Menu**:

- Click on **Help**
- Click on **How To**

To access **Advanced Access Control** in **How To**:

- Click on **Company Information**
- Click on **Changing Company Details**
- Click on **Access Control**
- Click on **Advanced Access Control**

10.2 Payslip Selection Screen and Printing

10.2.1 Print All Payslips to One PDF

The **Print all Payslips to one PDF** option is available for the:

- Standard Payslips,
- Secure Standard Payslips,
- Payslips with Hours and Balance,
- Secure payslips with Hours and Balance,
- Loan Payslip, as well the
- History Payslips for the respective layouts.

To access **New Payslips** from the **Main Menu**:

- Click on **Payroll**
- Click on **New Payslip Print**
- Click on Preferred **Payslip Layout**

Print all Payslips to one PDF is a **new** option since **Release 6.1b**.

Please Note:

If you need to print **more than 400 payslips**, we recommended that you make use of this option.

Payslips will be printed in **batches of 400** per .pdf file.

Upload/Email or Print to PDF / HTML:

- Print Payslips to PDF/Upload Payslips for Self Service or ESS
- Print all Payslips to one PDF**
- Print to HTML and view in browser

When you select this option an additional Print-time Selection Screen will display.

Screen

Your payslips will be saved in: Browse (Browse to Change Export Location)

C:\Premier62a\Exports

Add password to the combined PDF file

- No Password
- Define Password
- Password as defined for PDF printing

Enter Password

Here you can specify where the PDF file(s) should be saved, and you can indicate whether you want to password protect the payslips.

Export Path

If you have a default location specified for Payslips on Company Miscellaneous 3, then this will be the default location displaying on the screen.

To access the **Company Miscellaneous Tab 3** from the **Main Menu**:

- Click on **Company**
- Click on **Miscellaneous**
- Click on **Miscellaneous 3**

If you have not specified a location for Payslips on the Company Miscellaneous 3 Tab and you make use of the PDF Setup on Reports and Maintenance, then this location will be used as the default location displaying on the screen.

To access the **Reports and Maintenance Screen** from the **Main Menu**:

- Click on **Reports**
- Click on **Reports and Maintenance**
- Click on **<PDF>**

Please Note:
The “Use this Layout” must be selected (ticked).

If you have not specified a “PDF Report Path” on this screen, but you have specified the “PDF Report Path” on the Company Miscellaneous 5 Tab, then this location will be used as the default location displaying on the screen.

To access the **Company Miscellaneous Tab 5** from the **Main Menu**:

- Click on **Company**
- Click on **Miscellaneous**
- Click on **Miscellaneous 5**



A screenshot of a software interface showing a text input field labeled "PDF Report Path" containing the path "C:\Premier61b\Exports". To the right of the field is a green "Browse" button.

Alternatively, you can also browse on the Print-time Selection Screen to change or specify the export location at print time.

Password Selection

- No Password: If you select this option the PDF document that creates will not be password protected.
- Define Password: This option allows you to add a password for the PDF at print time. The password will not be visible on the screen. Each character will be represented by an asterisk.
- Password as defined for PDF Printing: If you make use of the PDF Setup on Reports and Maintenance, the password that is setup on this screen will be used.

Please Note:
If the “Use this Layout” is not selected (ticked) or the “Add Password to PDF File” is not selected (ticked) or the Password field is empty, and you have selected to use the “Password as defined for PDF Printing”, then the payslips will not be password protected.



A screenshot of a software interface for PDF setup. It includes a "Report Font" dropdown set to "Cousine" and a "Use this Layout" checkbox. Below is an "Example:" section with the text "the quick brown fox jumps over the lazy dog" and a list of font color settings: Header Font Colour (#000000), Heading Font Colour (#004080), Heading Fill Colour (#E0E1DD), Detail Font Colour (#4D4F53), Footer Font Colour (#4D4F53), and Solid Line Colour (#0000FF). There are also checkboxes for "Insert Logo" (set to "Right") and "Insert Watermark" (set to "C:\WPoldisoft1.bmp"). At the bottom, there is a "PDF Report Path" field and an "Add Password to PDF File" checkbox, both highlighted with red boxes.

10.2.2 Issues Resolved

The following issues relating to Payslips have been resolved:

Issue	Detail
Branding	Once you have made all your selections and you select to print payslips to PDF or HTML, the screen that displays while processing still had old branding.
Font Size	All payslip details printing on all Payslip Layouts have been amended to be the same font size.
History Payslips Error	Main Menu > History > Print History Payslips > Secure Standard Payslip and Secure with Hours and Balances When you made use of the Date Range and continued, a File error 22 on the VPAUDXXX.PAY used to occur.
History Payslip Zip File Name	Main Menu > History > Print History Payslips > Select Layout > Print Payslips to PDF/Upload Payslips for Self Service or ESS : Select Zip Payslips. The “Enter Name for Zip File” will now be unique. <ul style="list-style-type: none">• When no Range has been selected according to Analysis Codes, the file name will be MobilePSFile_UserNumber_SecondsStamp e.g.: MobilePSFile_007_587.• When a Range has been selected according to Analysis Codes, the file name will be AnalysisCode_UserNumber_SecondsStamp e.g.: DEP1_007_789.
Sage Logo	The “Print Payslips to PDF/Upload Payslips for Self Service or ESS” printed the old green Sage logo at the bottom of the page. This has been replaced with the new Sage logo.
Sage Logo	The Black Sage Logo prints next to the Net Salary for all Payslip Layouts.

11.0 Other Tax Countries: Existing Statutory Report Changes (Premier Only)

11.1 Template Changes

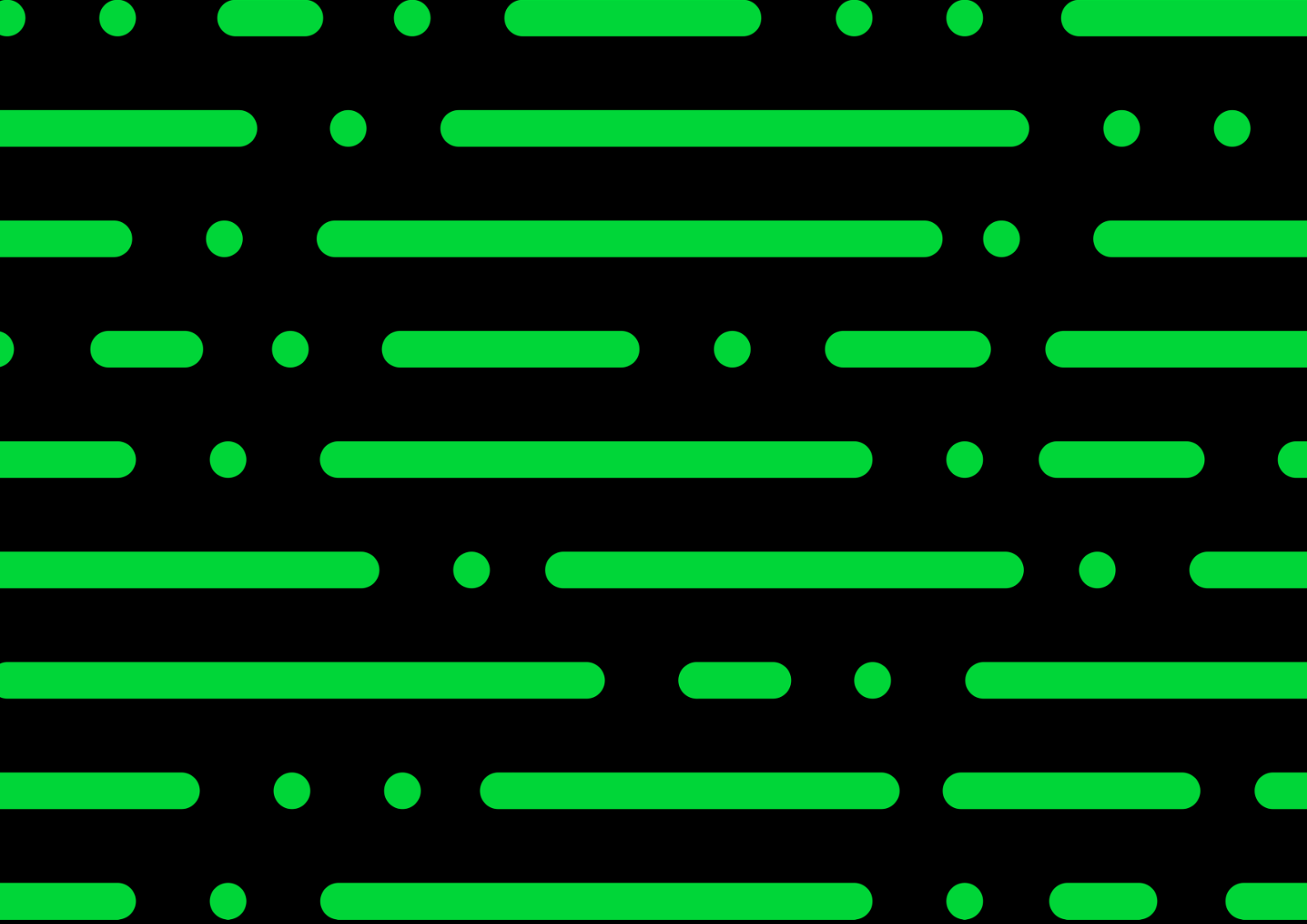
The following template changes have been implemented:

Template Changes		
Country	Report	Details
Malawi	P12 and P12A	The format of the TPIN field has been changed from general to text.
Tanzania	LAPF	Selections added for “Supplementary % for Employee” and “Supplementary % for Employer” at print time. Spelling corrected for “Employer’s”
Tanzania	SDL Half Year Return	Percentage changed from 4% to 3.5%.
Tanzania	SDL Monthly Return	Percentages changed from 4% to 3.5%.
Tanzania	WCF Form	Amendment made to the Percentage fields at print time to accommodate no input.

12.0 System Modifications/Known Issues

The following system modifications have been made. Take note of the known issues.

Area	Issue	Detail
System Modifications		
Access Copy System	New message	<p>When you make a copy of your payroll system e.g.: for Tax Year End processing, and you access this copy of your system, the following screen question will be displayed: “You have accessed the payroll from a different location. Will this be your working directory?”</p> <p>Select <Yes> if this is where you will continue with your monthly payroll processing.</p>
Sage City	Renamed	<p>Reference to Sage City have been renamed to Community Hub in the following system locations:</p> <ul style="list-style-type: none"> • Company Lookup Screen • Main Menu > Help <p>Clicking on either of these options will take you to Community Hub product specific page.</p>
Known Issues		
Employee Leave and Hour Screens	Memory Access Violation	<p>We are aware that some clients are experiencing a “Memory Access Violation” error message when moving between Employee Leave and Hours Screens.</p> <p>Our team is actively investigating this issue and a solution will be provided as soon as possible.</p>
Various Employee Screens	Blank Screen	<p>We are aware that some clients may encounter a blank screen after navigating through different areas of the system.</p> <p>Our team is actively investigating this issue and a solution will be provided as soon as possible.</p>



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