

# **Sage X3 People**

South Africa – Pay plan changes  
August 2018

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# 1. Pay Plan Patch

## 1.1 Pay plan patch contents

- Unemployment Insurance Fund
- ETI Age Qualifying test
- ETI Special Economic Zones
- Skills Development Levy
- Pay Periods Worked
- Personal Services Provider
- New IRP5 codes for tax year 2018/2019
- Employment Equity
- Invalid Headings
- BCEA

## 1.2 Order of patch integration

1. EQ\_PRORATA\_V9
2. W\_HR007\_ZAFU9.dat
3. PDP012\_ZAFU9.pay

## 1.3 Update patch path

### 1.3.1 Sequence number changes

**Access:** *Development > Utilities > Patches > Patch Integration*

The file name is EQ\_PRORATA\_V9

### 1.3.2 Totals, Headings and Variables

**Access:** *Setup > Payroll plan > Update payroll plan > Update integration*

The screenshot shows the 'Update payroll plan' interface. At the top, there is a search bar and a 'Patch' input field. Below this, there are several checkboxes for update options: 'Client' (selected), 'Server', 'Update integration', 'Selective integration', and 'Update profiles'. A 'Folders' section contains a table with two rows. The first row is highlighted in green and shows a folder named 'PAYREFZAF' with a search icon and the description 'Reference folder ZAF'. The second row is highlighted in light green and is currently empty.

	Folder	Name
1	PAYREFZAF	Reference folder ZAF
2		

The file name is PDP012\_ZAFU9.pay

With the integration of the patch, it is possible to update the profiles of existing items if they were changed. In this case, you have to activate the check mark 'Update profiles'. If the 'Update profiles' box is not ticked, only the profiles of the new features included in the pay plan patch will be updated.

### 1.3.3 Exceptions and Miscellaneous table

*Access: Development > Utilities > Patches > Patch Integration*

The file name is **W\_HR007\_ZAFU9.dat**

## 2. Payroll Plan Setup

### 2.1 Unemployment Insurance Fund (UIF)

Amendments were made to the UIF calculation for South Africa to ensure that the MTD value of UIF does not go into a negative when negative adjustments are made on the payroll during a month.

The following headings with access code STAT was amended:

- UIF\_INC\_2
- UIF

The following exception was amended to calculate UIF for employees who receives remuneration while on maternity leave, illness leave or when a contract is ended.

- UIF (UIF exception)

### 2.2 ETI Age qualifying test

The heading used in the South African pay plan to determine if an employee qualifies for ETI according to age, has been changed to use total months instead of years.

The following heading with access code STAT was amended:

- ETI\_AGE

### 2.3 ETI Special Economic Zones (SEZ Codes)

The Minister of Finance has designated the following 6 Special Economic Zones in GG 41759 effective 1 August 2018:

- Coega Special Economic Zone
- Dube Tradeport Special Economic Zone
- East London Special Economic Zone
- Maluti-a-Phofung Special Economic Zone
- Richards Bay Special Economic Zone
- Saldanha Bay Special Economic Zone

ETI application effective 1 August 2018:

If an employee is employed by an employer operating through a fixed place of business located within a Special Economic Zone (designated by notice by the Minister of Finance in the Gazette) **and** that employee renders services to that employer mainly within that Special Economic Zone, then the age qualifying criteria (aged from 18 to 29 years old on the last day of the calendar month), will not apply and will be replaced with the approved Special Economic Zone.

**Note:** All the other qualifying criteria remains the same and will still apply in order to determine if the employee is a qualifying employee for ETI.

The following miscellaneous table (11674) – Special Economic Zones, has been updated with correct IRP5 codes as per SARS PAYE BRS V17.2:

**PLEASE CHECK THAT THERE ARE NO CODES OTHER THAN THE ONES LISTED BELOW; IF ANY OTHER CODES EXIST, PLEASE DELETE THESE BEFORE INTEGRATING THE PATCH OR CALCULATING PAYSLIPS.**

### Miscellaneous tables

⏪ ⏩ ⏴ ⏵

**Table \***  **Title**  **Dependency table**

List of values

7 Results Display: 500

	Code	Title	Short title	ETI Age Exem
1	COE	Coega Special Economic Zone	COEGA	Yes
2	DTP	Dube Tradeport Spec Econ Zone	DUBE	Yes
3	EAL	East London Special Econ Zone	EASTLOND	Yes
4	MAP	Maluti-a-Phofung Spec Econ Zon	MALUTI	Yes
5	RIB	Richards Bay Special Econ Zone	RICHBAY	Yes
6	SLB	Saldanha Bay Special Econ Zone	SALDBAY	Yes
7	ZAR	Republic of South Africa	South Africa	No
8				

Option

**Default value**

The following heading with access code STAT has been updated to cater for the new SEZ codes:

- ETI\_SEZ

## 2.4 Skill Development Levy (SDL)

When an employee is a learner for skills, SDL should not calculate on the pay plan. When the field is ticked on the employment contract (payroll tab), SDL will now not calculate.

The following STAT exception was amended:

- SDL (SDL exception)

The following heading was adjusted where code 3293 was included for SDL, but is now excluded:

- T\_SDL\_MTD

## **2.5 Pay periods worked**

Headings and totals were added to the South African pay plan to allow for the calculation of pay periods worked. This has been added to allow for easier reporting on the tax extract where employers are required to report the actual pay periods worked for each employee.

The different headings are applied to full and partial periods worked, as partial periods must be reported as a decimal.

The use of these headings and totals will be incorporated into future years of assessment and not the current 2018/2019 year as this would require payroll recalculation of previously processed payslips.

The following headings with access code STAT were added:

- CLR\_PERS
- PERIOD\_NEW
- PERIOD\_ACT
- PERIOD\_TER
- PERIOD\_TOT

The following totals with access code STAT were added:

- PAYPERS
- PAYPER\_TOT
- PPER\_ACSUP
- PPER\_NWSUP
- PPER\_TESUP

## **2.6 Personal Services Provider**

The description on heading T\_PSP now reads Personal Service Provider. Previously it was Total Public Service Provider.

## **2.7 New IRP5 codes for Tax Year 2018/2019**

The following totals with access code STAT have been added to the pay plan:

- 3829\_MTD
- 3829\_YTD
- 3830\_MTD

- 3830\_YTD
- 3831\_MTD
- 3831\_YTD
- 3832\_MTD
- 3832\_YTD
- 3924\_MTD
- 3924\_YTD

The following headings with access code STAT have been adjusted to comply with the new IRP5 code totals added:

- T\_FB\_ETI
- T\_FB\_GRO
- T\_FB\_MTD
- T\_FB\_TX
- T\_NON\_TAX
- T\_NON\_TAX2
- T\_LUMP\_GRO
- T\_LUMP\_ETI
- T\_LUMP\_MTD
- T\_LUMSPSUM
- FUND\_REM

## **2.8 Employment Equity**

Equity enhancements were made to ensure the correct accumulation on the Equity remuneration screen with regards to supplementary runs and employees who were transferred with year to date amounts.

The following total with access code STAT has been added:

- EQUITY\_R\_M

The following headings with access code STAT have been changed:

- EQUITYRTZ
- EQUITYRTZ2
- EQUITY\_REM

Further changes were made to allow for correct annualization of equity remuneration where an employee has been transferred with and without year to date totals.

The following totals with access code STAT have been added:

- EQ\_CTRDAT
- EQ\_DATANC

The following headings with access code STAT have been added:

- EQUITYRTZ3
- EQ\_PERCTR
- EQ\_PERANC
- EQ\_PRORAT1
- EQ\_PRORAT5

The following headings with access code STAT have been changed:

- EQ\_PRORATA
- EQ\_PRORAT4

## **2.9 Invalid Headings**

The following headings with access code STAT have been ended with an Activation to date of 02/29/2016, as these headings are no longer valid:

- EFFECTIF
- EFFECTIFTP
- HRES\_BASE
- DCP\_ARB\_AW
- PVT\_MEDAID

## **2.10 BCEA**

The termination rate per day for BCEA now calculates for employees who do not earn variable income, where previously it was only taking variable income into account.

The following heading with access code STAT has been changed:

- TERM\_RATE