

Sage Business Cloud Payroll Professional (SBCPP)

Release Notes

6.2a

5 March 2024



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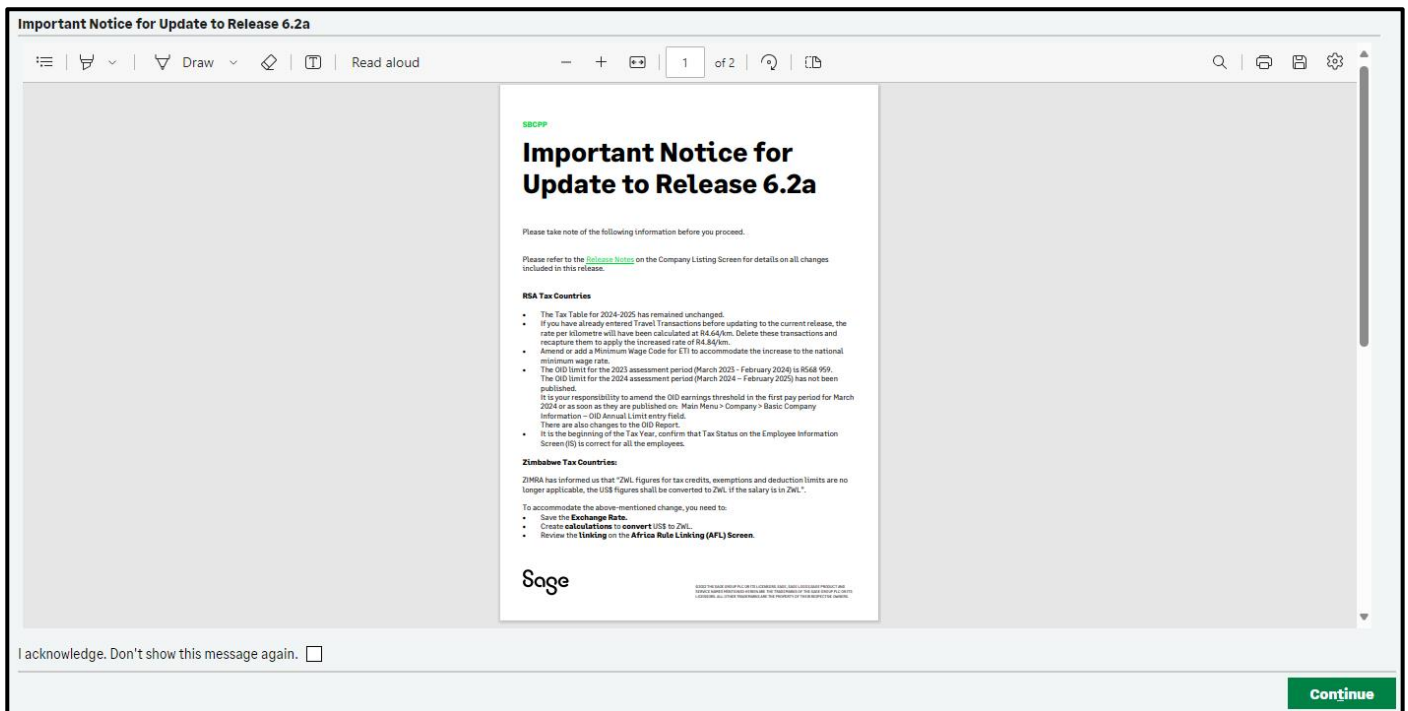
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1.0 Important Notice

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 download or print this document for reference purposes.

This notice will be displayed each time you access the company until you acknowledge the message at the bottom of the screen.

2.0 RSA: Tax Related Items

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 Changes 2024/2025

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

First Dependant R364

Additional Dependents R246

Personal Service Providers (Company): 27%

Personal Service Providers (Trusts) 45%

Medical Scheme Fees Tax Credit

Main Member R364

First Dependant R364

Additional Dependents R246

Personal Service Providers (Company): 27%

Personal Service Providers (Trusts) 45%

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
Incidentals Only	R169 per day/part of a day

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
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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 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 Changes

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

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 on:

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

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

- Main Menu | Reports | Reports and Maintenance
- Main Menu | Utilities | RSA Submissions | OID Report.

Basic Company Information	Address Details	Contact Information	Additional Information	Employment Tax Incentive
Company Name (for Reports)	SCRAMBLED CLIENT			
Company Name (for Screens)	SCRAMBLED CLNT	Company Status	Live	
E-Mail Address	one@email.com			
Co. Registration Number	2016/538007/07	Business Tel Number	0129977498	
Payment Cycle	Monthly (12 Periods) = 12	Pay Periods, 366 Paid Calendar Days		
Use Tax Tables for	R.S.A	<input type="checkbox"/> Enjoys Diplomatic Indemnity		
PAYE Reference Number	1234123121	OID Annual Limit	568959.00	

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 lessor 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. Select the option you want to use:

- 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 (formerly 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 [Cancel] 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	PACKAGE	Y
02	BASIC	Y
03	O/T 1.5	N
04	O/T 2.0	N
05	CELLPH	N
06	INCENTI	N
07	ACTING	N
08	TRAVEL	N
09	CAR ALL	N
10	U/P LEA	N
11	P/O LEA	N
12	MEDICAL	N
13	RB CELL	N
14	TRAV 20	N
15	BONUS	N
16	ANN B A	N
17	COVID19	N
18	BACK	N
19	COVID A	Y
20	COV APR	Y
21	BAS DIR	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 Members of a Close Corporation.

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.

Ex-gratia Payments removed.

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. 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	Ex-gratia Payments removed
		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.

Issue Resolved

Issue	Detail
Company Name on Excel	If you printed the Summary Report from your Live Instance and then from a Tax Year End Instance or from a Backup, the Company Name from the Live Instance would print on the first page of the Excel Report for the Report you printed from the Live Instance or Backup.

4.0 Angola: Tax Changes

Your system was updated 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

Your system was updated 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 (NPRA), 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

Your system was updated 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

7.1 Bonus Exemption

Your system was updated 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

Your system was updated 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: USD900 per year.
- Bonus exemption: USD400 per year.
- Retrenchment Package exemption: Higher of USD 3 200 or 1/3 of package up to USD15 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 N SSA/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 N SSA/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	A Elderly Tax Credit	XS39	Linked Amount1	Tax Rebate (2)
BON001	A Bonus	E11,E12	Linked Amount1 - Linked Amount2	Tax Per. Earn. (2)
BON001	Link 2nd Total of Items	XS37		
BP002	A Blind Person Tax Credit	XS41	Linked Amount1	Tax Rebate (2)
DIS002	A Disabled 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 and Self Service

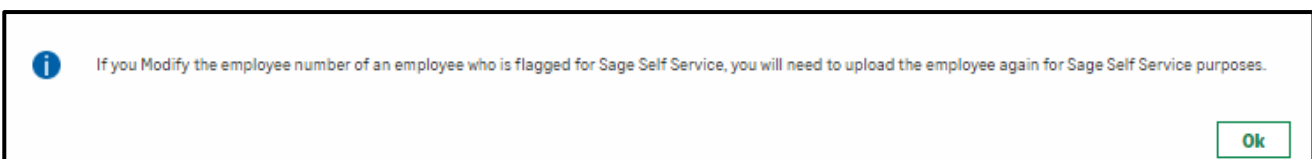
Mobility Consent

GUID No

8.1.1 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.

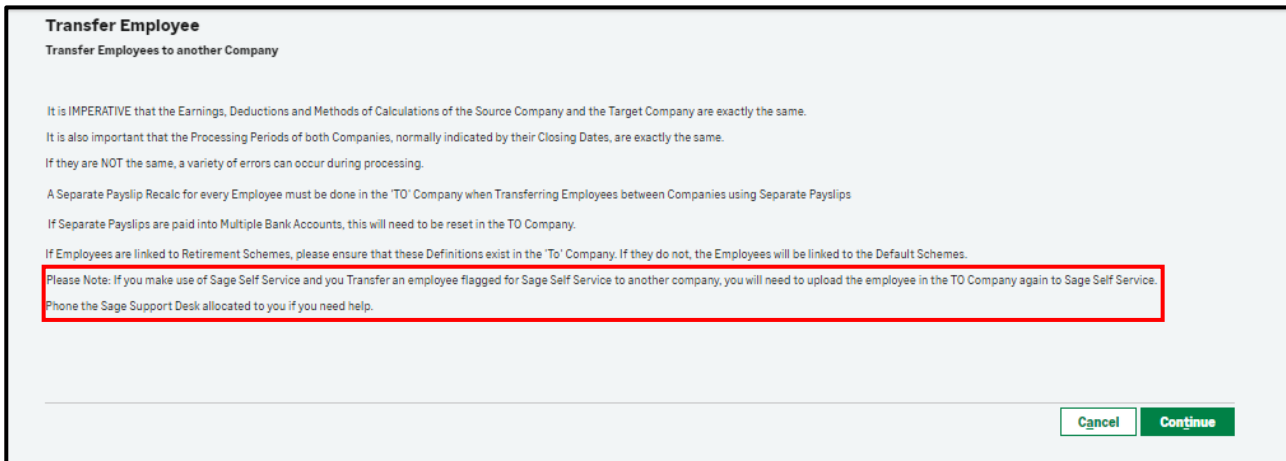
We have added the following information to the Modify Employee Screen.



i If you Modify the employee number of an employee who is flagged for Sage Self Service, you will need to upload the employee again for Sage Self Service purposes.

Ok

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



8.2 Opting Out

8.2.1 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.

8.2.2 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**:

Employment Verification	
Participate in Employment Verification	<input checked="" type="checkbox"/>

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 Test Data and EVS

If you are using a "dummy" employee on your payroll to calculate sample payslips, we strongly recommend that you remember to unselect (untick) "Employee Verification Ready" for this employee on the employee screen as described [above](#).

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 System Changes

10.1 Two-factor Authentication (2FA)

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](#).

10.2 Payslip Selection Screen and Printing

To print Payslips from the **Main Menu**:

Click on	Payroll
Click on	New Payslip Print
Click on	Applicable layout

10.2.1 Changes to Print-time Selection Screen

The changes have been applied to all the Payslip options as well as to the History Payslips.

Please Note:

The print screens below are taken from a system that is licensed for all modules that impact payslip printing and Separate Payslips is set up. Therefore, your screens may look a little different, depending on your licensing and set up.

Example: Standard Payslips (Payslips with Hours and Balances and Loan Payslips are the same)

Before 6.2a

Payslip Printing
Standard Payslip

Payslip Print Selections

None From To

Employee Code:

Employee Surname:

Date to be Printed on the Payslips: 2023/02/28

Print Payslip for InfoSlip Employees

Print Payslip for Employees flagged for Mobile Delivery

Print Payslip to PDF/Upload Payslip for Mobility

Sort Control Fields

Field	Description
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Separate Payslip Selection

Please Select which Separate Payslip to Print

- FIRST
- SECOND
- THIRD
- Leave Pay

From 6.2a

Payslip Printing
Standard Payslip

Payslip Print Selections

None From To

Employee Code:

Employee Surname:

Date to be Printed on the Payslips: 2023/03/18

Print Payslips including:

- InfoSlip Employees
- Employees flagged for Mobile Delivery

Upload/Email or Print to PDF:

- Print Payslips to PDF/Upload Payslips for Mobility

Sort Control Fields

Field	Description
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Separate Payslip Selection

Please Select which Separate Payslip to Print

- FIRST
- SECOND
- THIRD
- Leave Pay

Print Loan Statement

Before 6.2a

Secure Payslip Printing
Secure Payslip

Payslip Print Selections

None [v] From [] [Q] To [] [Q]

Employee Code: [] []

Employee Surname: [] []

Date to be Printed on the Payslips: 2023/02/28 []

Print Payslip for InfoSlip Employees

Print Payslip for Employees flagged for Mobile Delivery

Sort Control Fields

Field	Description
[] [Q]	
[] [Q]	

Separate Payslip Selection

Please Select which Separate Payslip to Print

- FIRST
- SECOND
- THIRD
- Leave Pay

From 6.2a

Secure Payslip Printing
Secure Payslip

Payslip Print Selections

None [v] From [] [Q] To [] [Q]

Employee Code: [] []

Employee Surname: [] []

Date to be Printed on the Payslips: 2023/03/18 []

Print Payslips including:

- InfoSlip Employees
- Employees flagged for Mobile Delivery

Sort Control Fields

Field	Description
[] [Q]	
[] [Q]	

Separate Payslip Selection

Please Select which Separate Payslip to Print

- FIRST
- SECOND
- THIRD
- Leave Pay

Print Loan Statement

We have made a distinction between who to include when printing payslips and the printing option to be implemented.

- Options for employees to be included in the printing is on the left hand side of the screen:
 - **Print Payslip for InfoSlip Employees:** Select this option if you are licensed for InfoSlips and you want to print copies of the payslips for employee’s setup to receive an InfoSlip.
 - **Print Payslip for Employees flagged for Mobile Delivery:** Select this option if your company is setup for Mobile Delivery of payslips and you want to print copies of the payslips for these employees.

Please Note:
If you are licensed for Sage Self Service you cannot use Mobile Delivery.

- Options for the format that the payslip should print in is on the right hand side of the screen:
 - **Print payslips to PDF/Upload for Self Service:** This option allows for the printing of individual payslips, as before. (This option is not available for secure payslips.)

10.2.2 Issues Resolved

Issue	Detail
Font Size	All payslip details printing on all Payslip Layouts have been amended to be the same font size.
History Payslips Error	<p>Main Menu History Print History Payslips Secure Standard Payslip and Secure with Hours and Balances</p> <p>When you made use of the Date Range and continued, a File error 22 on the VPAUDXXX.PAY used to occur.</p>
History Payslip Zip File Name	<p>Main Menu History Print History Payslips Select Layout Print Payslips to PDF/Upload Payslips for Self Service:</p> <p>Select Zip Payslips.</p> <p>The “Enter Name for Zip File” will now be unique.</p> <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.
History Payslip Bundles	History Payslips will create in bundles of 300 instead of 400, so that the system does not hang.
Sage Logo	The “Print Payslips to PDF/Upload Payslips for Self Service” 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.



10.3 Company Selection Screens (e.g.: ACB Export)

Some of the system screens had a misalignment of headings and columns. This was because the Header was a grid and the body of the table was a list box.

Example of ACB Nedbank Business Secure Format Export - Company Selection Screen:

ACB Payroll Data
NetBank Business (Secure Format)

Please select the next company to be included in the ACB Export.

Company Number and Name	Selected	Processed	Date	Period	Employees
425 ACB MONTHLY NS	Yes	Monthly	30/11/2021	9 of 12	15
435 ACB MONTHLY NS	No	Monthly	30/11/2021	9 of 12	15

We have amended the appearance of these screens and in some instances the functionality.

The most used screen of this nature is the Company Selection Screen at Export time, e.g.: ACB Exports.

As from Release 6.2a:

- The header and body of the table are part of one grid.
- Once you have completed the export for the first company, the company you are in, this company will be removed from the Company Selection list, and only the companies that are set up for the same ACB will be displayed on the Company Selection list.

ACB Payroll Data

NetBank Business (Secure Format)

Please select the next company to be included in the ACB Export.

Number	Company Name	Selected	Processed	Date	Period	Employees	Type
435	ACB MONTHLY NSP	No	Monthly	30/11/2021	9 of 12	15	Live

In this example, Company 425, the company from which the export is being run, has been exported and removed from the Company Selection list and only Company 435 remains for selection.

11.0 Other Tax Countries: Existing Statutory Report Changes

11.1 Issues Resolved

The following issues have been resolved:

Issues Resolved		
Country	Report	Details
Malawi	P12 and P12A	Template Change: The format of the TPIN field has been changed from general to text.
Swaziland	IRP5 Electronic Submission File	Main Menu Reports Swaziland Reports IRP5 Electronic Submission File After making all the necessary selections, the system returned an error "File does not exist". This occurred when the Site Code was less than six characters long.
Tanzania	LAPF	Template Change: Selections added for "Supplementary % for Employee" and "Supplementary % for Employer" at print time. Spelling corrected for "Employer's"
Tanzania	SDL Half Year Return	Template Change: Percentage changed from 4% to 3.5%.
Tanzania	SDL Monthly Return	Template Change: Percentages changed from 4% to 3.5%.
Tanzania	WCF Form	Template Change: Amendment made to the Percentage fields at print time to accommodate no input.

12.0 Other Tax Countries: Bank File Changes

The following issue has been resolved:

Issues Resolved		
Country	Report Name	Change
Tanzania	FNB Online Banking Enterprise (RSA)	This Report incorrectly displayed as Workers Compensation Fund on the Tanzania Reports list.

13.0 System Modification/Issues Resolved/Known Issue

The following system modifications have been made and issues have been resolved in this release. Please take note of the Known Issues.

Area	Issue	Detail
System Modifications		
Africa Tax Countries	Tax Tables applicable from specified date only.	Tax Tables for Other Africa Countries are applied irrespective of the Tax year or period that your company is in. The system will now apply the Tax Tables from a specific date within a tax year.
Sage City	Renamed	Reference to Sage City have been renamed to Community Hub in the following system locations: <ul style="list-style-type: none"> • Launch Screen Quick Links • Company Lookup Screen • Main Menu Help Clicking on either of these options will take you to Community Hub product specific page.
Update software	Option to make a Backup	Once your software has been updated to the new release, you need to convert your companies too. Below the list of “Update company options”, you can select (tick) the option to make a Backup of the companies before they are converted.
Update software	Block other users	If a user has already started the “Update Companies” process after a new software release, no other users are permitted to access the system and simultaneously attempt to update the companies. If a second user does access the payroll while the update process is running, a message will display informing the user to try again later. If the Super User were to access the payroll during the “Update Companies” process, a message will be displayed permitting the Super User to override the update.
<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;"> <div style="display: flex; align-items: center;"> <p style="font-size: small;">Another user might be busy updating the software or the update process was interrupted and did not finish. If the previous attempt to update the software was unsuccessful or incomplete, then select Yes to override. In all other circumstances select No.</p> </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </div> </div>		

Please Note:

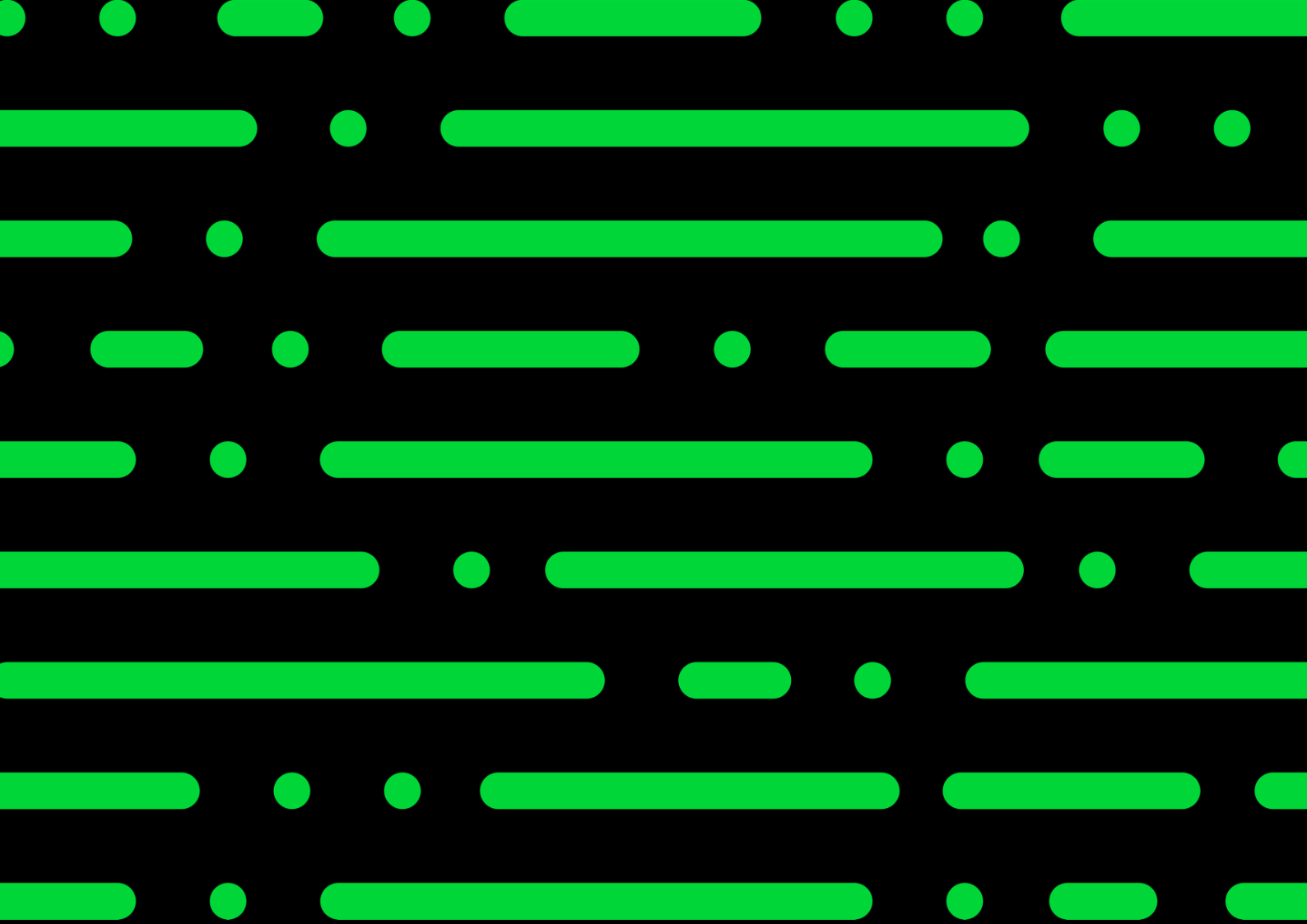
This should ONLY be considered if the update process was interrupted or unsuccessful.

Issues Resolved

12-Month History Report	Release Number reference incorrect	<p>Main Menu History Reports 12 Months History Report</p> <p>On the Report Selection Screen, click on the <Make Selections> button under Special Fields and select "Release Number".</p> <p>The Release Number was printing with a prefix of "P" for Premier. It now prints correctly.</p>
HS Screen – MTD Input	Error	<p>Main Menu Payroll Payslip Information Select Employee HS Button</p> <p>When you edited or added an amount in the MTD column, it resulted in the following error:</p> <p>"File error 48,02 on PRINTER"</p>
Leave Flexi – Leave Transactions	Number of Days Truncate	<p>Main Menu Interfaces Flexi Utility Leave Information Import</p> <p>When importing leave transactions with four decimals e.g. 4.9253, only two decimals were being imported e.g. 4.92.</p>
Memos for Next Employee on Payslip Screen	Current Employee Name is retained	<p>Main Menu Payroll Payslip Screen Select an employee</p> <p>On the Payslip Screen Memos Next Employee with</p> <p>Irrespective of which option you select, the employee's name never changed to that of the next employee. The Payslip Screen continued to display the name of the employee you were on when you made the selection.</p>
Personnel – Attachments	Type not always displayed	<p>Main Menu Personnel Attachments Select Employee</p> <p>Attachments for type "Mobile User Consent" did not display in the "Type" column.</p> <p>Any attachments for type "Mobile User Consent" loaded before this release, will still not display but it will be correct as from Release 6.2a.</p>
RSA – IRP5 Validation	Validation missed error.	<p>Main Menu Employee Change Employee Select Employee Statutory Details Tab</p> <p>When an employee with a Tax Status set to "No Tax" also has a "Tax Number", the IRP5 Validation Test did not pick the scenario up as an error.</p>
Batch Import Reports	Excel did not download the file.	<p>Main Menu Reports Exports/Import Reports Batch Import Reports Select <Real List></p> <p>When you select <Excel> on this screen, the following message used to display:</p> <p>"REAL.CSV has been created in your directory".</p>

This message has been removed and the “File Download” screen is displayed instead. The file will download automatically, according to your Browser setup. Alternatively, you can click on this screen to download the file.

Sage Self Service (SSS)	SSS Sync Report error message reworded.	When a leave transaction syncs that has been previously synced, the “Duplicate Dates” error message was confusing. It has been reworded to read “Already Processed”.
Sage Self Service (SSS)	SSS Public Holidays on System Setup	Self Service Sage Self Service System Setup Public Holidays When you view the public holidays uploaded to Sage Self Service, you could not scroll down if there were more than 16 holidays, as there was no scroll bar.
Known Issue		
Logo File Name	Logo sometimes does not upload.	Main Menu Company Miscellaneous Miscellaneous 3 If the file name of the logo contains spaces, the logo will not upload. We are not going to amend the logic of this feature. Ensure that the file name does not contain spaces.



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