Frequently Asked Questions (FAQs) for members and associates of SAICA (June 2019) on U-Filing

Please note:

- *Every effort has been made to ensure that the information in this frequently asked questions (FAQs) document is complete and accurate. Nevertheless, the information is given purely as guidance with respect to the subject matter and SAICA will have no responsibility to any person for any claim of any nature whatsoever which may arise out of or related to the contents of this document.*

- *The information provided in this document does not constitute legal advice and should be read in that context.*

- *SAICA has engaged with the Department of Labour – Unemployment Insurance Fund in the compilation of the Frequently Asked Questions*

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Introduction

The Unemployment Insurance Fund has released an updated and modernised website in March 2019. Due to a large amount of questions asked by members and associates, SAICA has engaged with the UI Fund to provide guidance and in conjunction with the UI Fund have prepared the following questions and answers to assist.

1. **How can Unemployment Insurance Fund information be submitted?**

    Information on employees can be submitted to the UI Fund via one of three methods.

    The employer can submit a manual UI-19 form, the employer can register on U-Filing and submit the information or the employer can submit the information via an electronic portal that is included and supported by some payroll service providers.

2. **How would you register a new user on the U-Filing website?**

    Please follow the following steps:
    - Go to www.ufiling.co.za
    - Click on REGISTER
    - Agree to terms and conditions
    - Include details of user
    - Will receive sms / email with confirmation with temporary / default password
    - Log in using details
    - After login, system will prompt you to change password
    - Complete the user vetting process (5 steps)
    - Update personal information if required
    - Once registered – choose whether you are employer / employee

    NOTE: it is suggested that employer (user) register and DELEGATE to a practitioner, if a practitioner is appointed to provide service to complete UIF.

3. **What is the user vetting?**

    The user vetting asks questions regarding the user (client), dealing with information normally only known by the user. If the information is not correct a message will appear that the vetting process was failed and you will have to contact the UIF Support Services.

4. **How does the accountant obtain access to complete their clients' UIF information?**

    Accountants / bookkeepers should register as a practitioner and the client (user) should delegate the completion of the UI information to the practitioner.

5. How does the client (user) change the delegation from one accountant to another accountant?

If the Practitioner is changed the client (user) must send a request to the UIF Support Services and request that the primary user details is updated. This cannot be done via the system.

6. What is the process where the accountant previously registered the user(client) and now fails the vetting process?

The same process will apply, if the accountant previously registered the user (client) and now fails the vetting they must submit to the UIF Support Services a copy of the identity document for the account to be unlocked.

It the accountant contacts the UIF Support Services then the agent will do a telephonic verification and verify the information of the user to unlock the account.

If the accountant contacts the UIF Support Services via email the agent will request a copy of the identity document and confirm the questions incorrectly answered and request the information.

7. The new U-Filing system does not have all the user (clients) employees on the system. What must the user / accountant do?

This issue can be due to employers never having updated the UI Fund on the appointment of the employee or the system has not updated from the Master data held by the UI Fund.

If the information was previously declared the historical data needs to be retrieved.

Steps to follow:
➢ Menu
➢ Declarations manager
➢ Select employer
➢ View declarations
➢ Calculate declarations
➢ Select the view button on the grid for the applicable month
➢ Open declarations
➢ View declarations
➢ Calculate declarations

If the information was NOT previously declared then a backdated new registration needs to be completed

Steps to follow:

➢ Menu
➢ Declarations manager
➢ Select employer
➢ View declarations
➢ Calculate declarations

- ➢ Select the view button on the grid for the applicable month when the employee was appointed
- ➢ Choose add employee option
- ➢ Add employee information
- ➢ Update salary information and date of appointment
- ➢ Save

NOTE: once a declaration is saved, and declarations after this date was submitted and shown in GREEN, the declarations will change to amber and you will have to resubmit all submissions already submitted. Therefore it would be advisable to complete the information from March 2014 to ensure that it is all updated.

8. **The new U-Filing system shows employees that are no longer employed by the employer. What must the user / accountant do?**

This issue can be due to employers never having updated the UIF on the termination of the employee or the system has not updated from the Master data held by the UIF.

If the information was previously declared the historical data needs to be retrieved.

Steps to follow:
- ➢ Menu
- ➢ Declarations manager
- ➢ Select employer
- ➢ View declarations
- ➢ Calculate declarations
- ➢ Select the view button on the grid for the applicable month
- ➢ Open declarations
- ➢ View declarations
- ➢ Calculate declarations

If the information was NOT previously declared then a backdated termination needs to be completed

Steps to follow:

- ➢ Menu
- ➢ Declarations manager
- ➢ Select employer
- ➢ View declarations
- ➢ Calculate declarations
- ➢ Select the view button on the grid for the applicable month where the employee left
- ➢ Select edit / view next to the employee
- ➢ Add employee information
- ➢ Select termination date
- ➢ Update salary
- ➢ Save
- ➢ Update termination

NOTE: once a declaration is saved, and declarations after this date was submitted and shown in GREEN, the declarations will change to amber and you will have to resubmit all submissions already submitted. Therefore it would be advisable to complete the information from March 2014 to ensure that it is all updated.

9. How does the accountant / user add salaries for the periods not declared (from February 2019)?

Steps to follow:
➢ Menu
➢ Declarations manager
➢ Select employer
➢ Edit/view button (next to the employee's name)
➢ Add employment info
➢ Save declarations

10. How does the accountant / user submit the declarations?

Steps to follow:

➢ Menu
➢ Declarations manager
➢ Select employer
➢ View declarations
➢ Calculate declarations
➢ Select the view button on the grid
➢ Submit declarations

11. How do I pay the amounts owed?

Steps to follow:

➢ Menu
➢ Declarations manager
➢ Select employer
➢ View declarations submitted
➢ Calculate declarations
➢ Select the view button on the grid for the applicable month
➢ Choose the pay option either manual or online

12. The system indicates that the data is not available?

This is an error and you need to inform the UIF Support Services.

13. **The system indicates that the user (client) owes the Fund money although they normally pay via SARS?**

This is an error and you need to inform the UIF Support Services.

14. **The system indicates that when you want to submit a prior year's information that there has been not been any changes to the declaration that would require a new submission**

This is an error and you need to inform the UIF Support Services.

15. **My client has more than one employee, is there an easier option to submit the information?**

If the client has more than one employee, then a bulk declaration can be submitted.

Steps to follow

- ➤ Declarations
- ➤ Employer
- ➤ Bulk upload
- ➤ See example
- ➤ BUT fill in form, do not complete the example as you will receive error messages when submitting the example
- ➤ Upload
- ➤ Calculate
- ➤ Pay

16. **How do I reset my password?**

Request the password by selecting one of the options found under the Login menu:

- ➤ Login > the is for both the options forgot username and forgot password

- ➤ <u>Forgot username option</u>:

  - ▪ Preferred contact
  - ▪ id/passport number of the user

- ➤ <u>Forgot password option</u>

  - ▪ Preferred contact
  - ▪ Id /passport number of the user
  - ▪ Username
  - ▪ Password option

You can choose either to receive the password or username via email or sms. If you choose email, then an email confirmation will be sent and the user must click on the link sent to the user. Then login again and put in username and password.

17. How do the client (user) obtain a Compliance Certificate?

A certificate of compliance can be obtained by completing an application form, submitting the application and sworn affidavit and a valid Tax Clearance Certificate to the UI Fund and a Certificate of Compliance.

The forms is available on the SAICA UIF page

18. What is the difference between a Compliance Certificate and a Tender letter?

A UIF tender letter is for companies that do not have active employees but need to prove compliance with legislation for purposes of a tender submission.

19. When the client tries to choose Standard Bank for once off payment the system does not allow this option to be chosen. Why not?

The Standard Bank option for once-off payments has de-scoped. If the client would like to make a payment using Standard Bank they would make the payment via EFT and login and capture the payment against the relevant declaration period.

20. What do I do if an employee did not work for a period and therefor did not earn a salary?

When an employee was not paid for a specific month you can enter the R0.00 and make the employee a no- contributor with the reason no income paid for payroll period. It should not show up as an issue.

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