

uFiling System User Guide



### Introduction

uFiling is a free online service which completely replaces the manual declaration of monthly UIF returns and contributions. Employers (Commercial and Domestic), Agents or Tax Practitioners can easily use uFiling to declare and pay UIF contributions online, view all previous declarations and contributions made, and receive notifications about future declarations.

### Background

Employers are required to provide the UIF with details of all their employees every month, by not later than the 7<sup>th</sup> of every month, as defined by the Unemployment Insurance Act 63, 2001, which excludes non-natural persons and independent contractors. These details are added to the UIF Employee Database in order to maintain a record of each employee's employment history, which will form the basis for the payment of benefits in terms of section 57 (2) of the Unemployment Insurance Act 63, 2001.

### **Benefits**

There are many benefits to using UIF, which include:

- Submit Claims for various UIF Benefits
- Submit a request for Payment for various UIF Benefits
- View Claims History
- Submit a Notice of Appeal
- View your Employee Declaration Status
- Declare and pay UF contribution to the fund
- Verify that returns are up to date
- Submit monthly or annual returns

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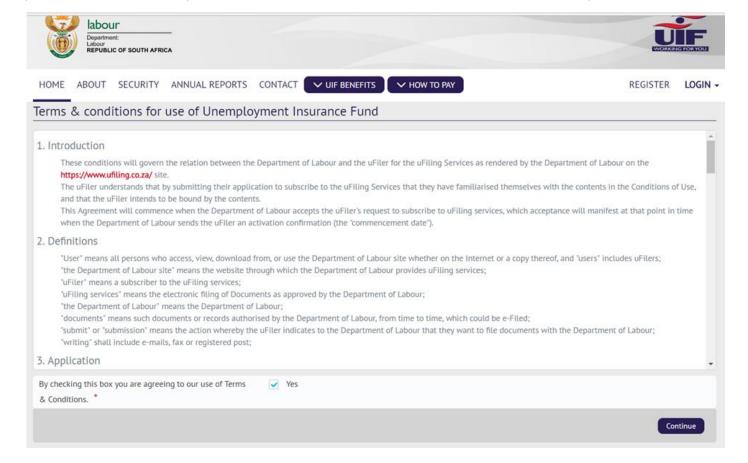
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### Chapter 1: uFiling Registration Process

In order to use the <u>uFiling website</u> and services, you need to complete a registration process to obtain your own unique login name and password.

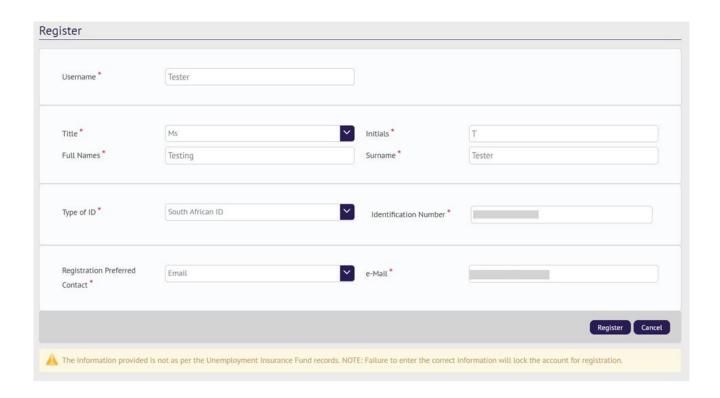
### Step 1

Open a browser and go to <a href="www.ufiling.co.za">www.ufiling.co.za</a> to access the home page. Click on "REGISTER" in the top right-hand corner to review the terms and conditions for use of the Unemployment Insurance Fund portal. You need to accept the terms and conditions and then click on "Continue" to proceed.



### Step 2

Complete all the required information and click on "Register". This will send the captured data to the UIF for verification.



When you receive the activation message via your preferred method of contact, click on the link provided to activate your account.



### Dear MS ,

Thank you for registering on U-Filing. Please note, you will require your U-Filing login name and temporary password to access your U-Filing account. Click on the U-Filing button below to activate your account:



Your U-Filing Username is: TALITA

Your Temporary Password is: P#pce3b3d81

You are now able to securely manage your UIF accounts.

Should you have any queries or require any assistance please contact our Call Centre on 012 337 1680 / 0800 843 843.

Best Regards,

The U-Filing Team

Use the username and temporary password provided in the email or SMS to log in to your new uFiling account.



Your account has been registered.

Please view the correspondence sent to you by your preferred means of contact.



### Step 5

After your first login, the system will prompt you to change your password.

### Password Change Required

Temporary Password \* New Password \* I Password Hint \*

The password should have a length of at least 8 characters, contain upper and lower case alphabet characters, at least 1 number and at least 1 special character.

Apply

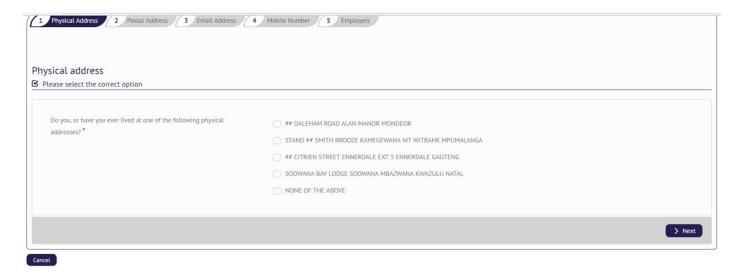
### Step 6

For security reasons, you will then have to complete a vetting process by confirming demographic information about yourself, which will be compared to the data available to the Department of Labour.

In order to continue to use the system you are required to answer a few questions so that we know you are who you say you are.

1 The next step will take you through this process.

Continue Logout



If any of the questions are answered incorrectly, a message will appear to indicate that you failed the vetting process. Please contact uFiling Support through the "UIF Services Support".



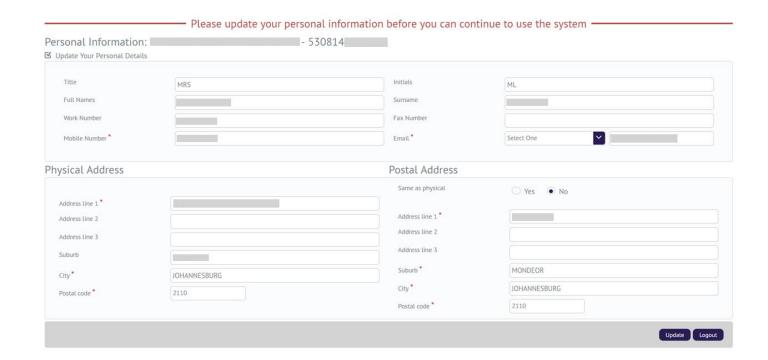
### Vetting Failed

Some or all of the answers provided do not correspond with the information as provided to the UIF. The account could not be registered and has been suspended. Please submit the following required documentation to the e-mail address below:



### Step 7

Once you successfully completed vetting, you will be directed to a page where you can update your personal details before you can proceed to the uFiling website.



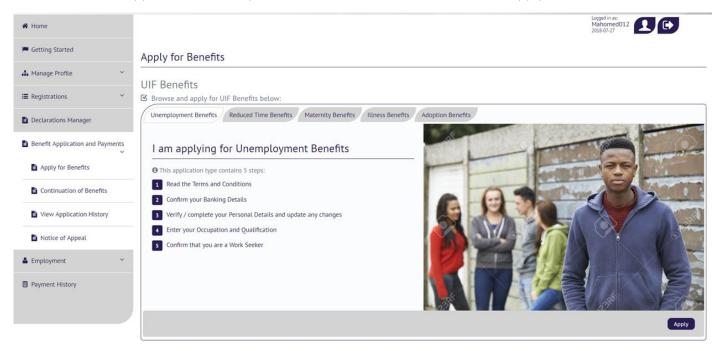
### Chapter 2: Benefit Application and Payments

Individuals can apply online for the following UIF benefits on the uFiling website:

- Unemployment Benefits
- Reduced Time Benefits
- Maternity Benefits
- Illness Benefits
- Adoption Benefits

### Step 1

Click on "Benefit Application and Payments" on the left, and then click on "Apply for Benefits".



### Step 2

Select which type of Benefit you want to apply for, and click on "Apply" in the bottom right corner.

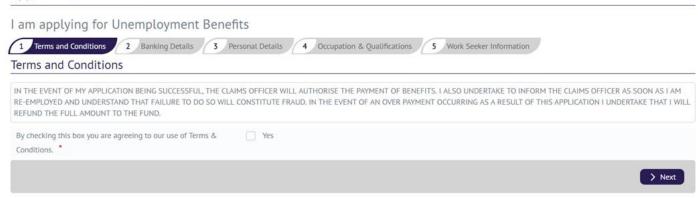
You must accept the terms and conditions to proceed: check the tick box and click on "Next".

### Application for Benefits

Application for Benefits

Branch Code

⟨ Back



### Step 4

Verify your bank details and click on "Next" to continue or click on "Banking Details Incorrect?".

Bank details may only be captured once on the uFiling system, to update new bank details, download the UI2.8 Form from the <u>Department of Labour</u> website (<u>www.labour.gov.za</u>).

One portion of the UI2.8 Form must be completed by your bank and the other portion by you. Email the completed UI2.8 Form and your contact details to <a href="https://www.vousenstance.com/VOsupport@labour.gov.za">VOsupport@labour.gov.za</a>

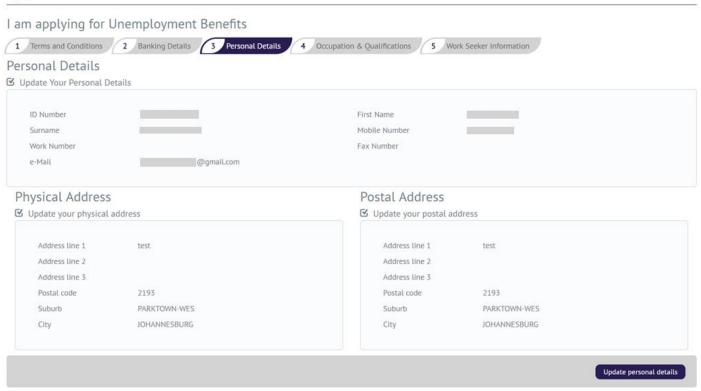
### I am applying for Unemployment Benefits 1 Terms and Conditions 2 Banking Details 3 Personal Details 4 Occupation & Qualifications 5 Work Seeker Information Banking Details 3 To change your banking details, download the UI2.8 Form from the Department of Labour Website: www.labour.gov.za. One portion of the UI2.8 Form must be completed by your bank and the other portion by you. E-mail the completed UI2.8 Form and your contact details to VOsupport@labour.gov.za Account Holder Bank Name Bank Name COMMISSIONERSTRAAT\*

Bank Account Number

### Step 5

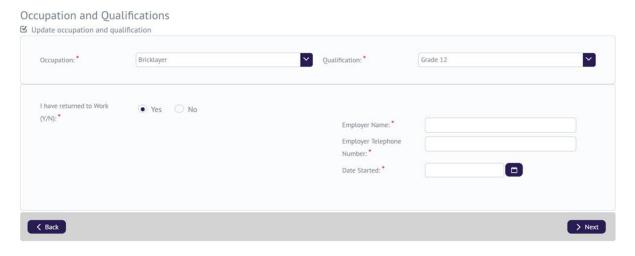
Confirm or update your personal details, including physical and postal addresses and click on "Next".

### Application for Benefits



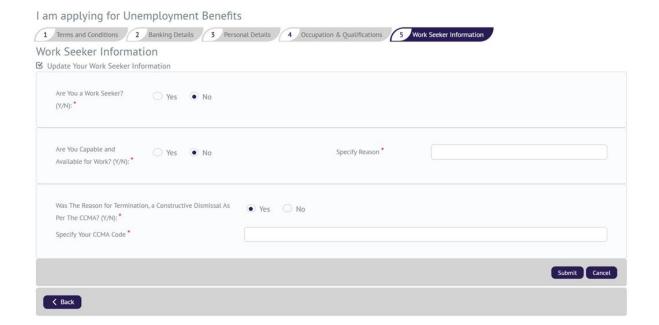
### Step 6

Complete the information related to your occupation and qualifications, and click on "Next".



### Step 7

Update your work seeker information and click on "Submit" when you are done to send your application to the UIF. You will receive a confirmation message if your application was successfully submitted.



Application for benefits submitted successfully



Your Application for Benefits has been submitted to the Unemployment Insurance Fund.

### Step 8

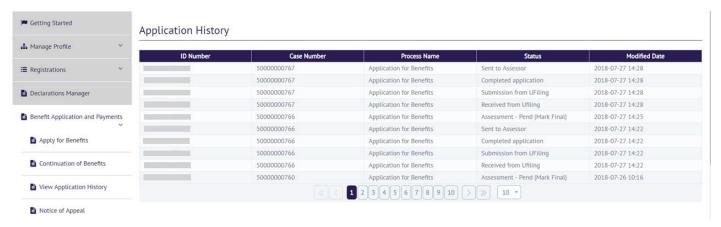
The processes to apply for other Benefit types are the same:

- Select the type of benefit you wish to apply for
- Confirm banking details
- Confirm personal details
- Complete occupation and qualification information
- Confirm employment status
- Submit application to the UIF

### **UIF** Benefits

### I am applying for Maternity Benefits 1 Terms and Conditions 2 Banking Details 2 Personal Details 4 Occupation & Qualifications 5 Employment Confirmation **Employment Confirmation** ☑ Confirm your Employment status I have returned to Work Yes No (Y/N):\* Employer Name: Employer Telephone Number: Date Started: Are You Still Employed Whilst on Maternity Leave? (Y/N): \*

A full record of your application history is available on the uFiling website, click on "Benefit Application and Payments" on the left-hand side, and select "View Application History".



### Step 10

You can lodge a notice of appeal if your application for benefits was declined. Click on "Benefit Application and Payments" on the left-hand side and select "Notice of Appeal" and click on "Next".

## Notice of Appeal Notice of Appeal Complete your Notice of Appeal Notice 2 Personal Details 3 Decision Appealed Against NOTICE OF APPEAL AGAINST A DECISION OF A CLAIMS OFFICER A person entitled to benefits in terms of the Act may appeal against a decision of a claims officer relating to the payment or non-payment of benefits. The notice of appeal must be sent to: The Regional Appeals Committee c/o The Office of the Chief Director at the Department of Labour. Kindly note that the appeal must be lodged in writing within 90 days of receiving the refusal / suspension notice.

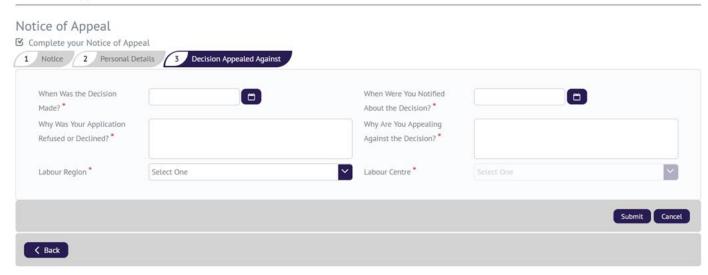
### Step 11

Verify or update Personal details if needed.

### Step 12

Complete required information related to the declined application.

### Notice of Appeal



### Step 13

Click on Submit to lodge your Notice of Appeal.

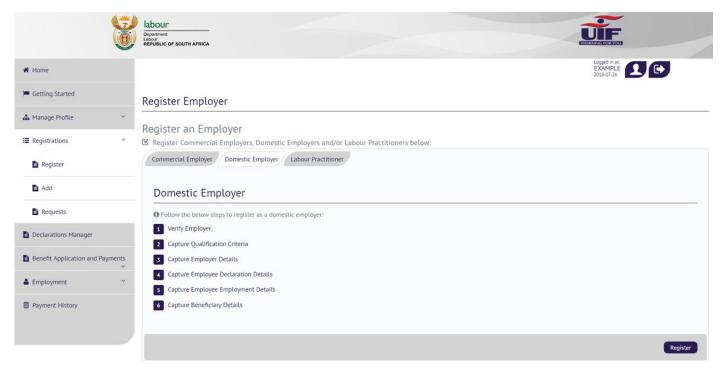
### Chapter 3: Registrations

Users can register new Employers with the UIF on the new uFiling website or add existing UIF reference numbers or employers to your uFiling profile to submit and pay declarations. You can register as a domestic employer, a commercial employer or a labour practitioner with the UIF.

### 3.1 Register a new Employer

### Step 1

Select which type of Employer you want to register and uFiling will display the steps to follow to complete registration. In this example we selected a Domestic employer. Click on "Register" at the bottom on the right once you've made your selection.

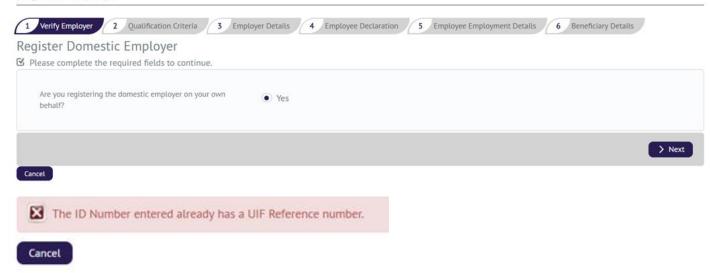


### Step 2

Verify the domestic employer details that you wish to register. If you are not completing the registration for yourself, you need to be a registered Labour Practitioner. You will also be asked to complete a vetting process, verifying historical contact details below to complete the registration as Domestic Employer on behalf of another individual. The information you may need to verify includes:

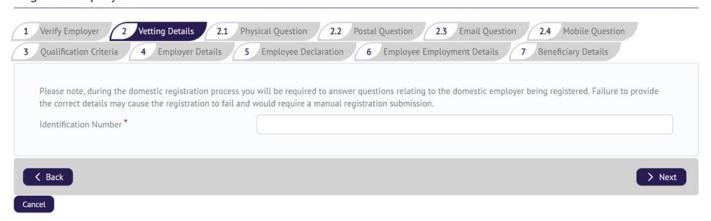
- Physical Address
- Postal Address
- Email
- Mobile number

### Register Employer



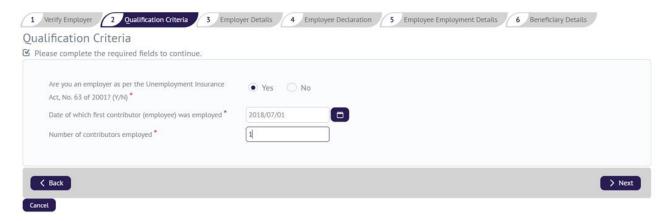
You can only register as a Domestic employer once with your ID number.

### Register Employer

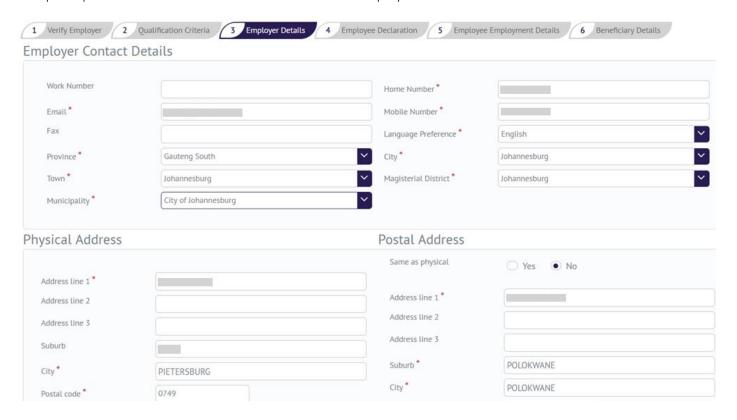


### Step 3

Qualification Criteria: confirm employer status by selecting the "Yes" radio button and complete the required information, then click "Next" to continue.



Complete personal and contact details for the new Employer.



### Step 5

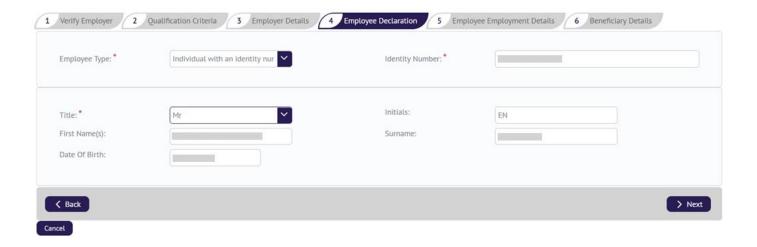
Add at least one employee as part of the registration process, starting with their identity number and then click on "Retrieve". This will send a request for the information available for that ID number at the UIF and populate this on the next screen.

### Register Employer

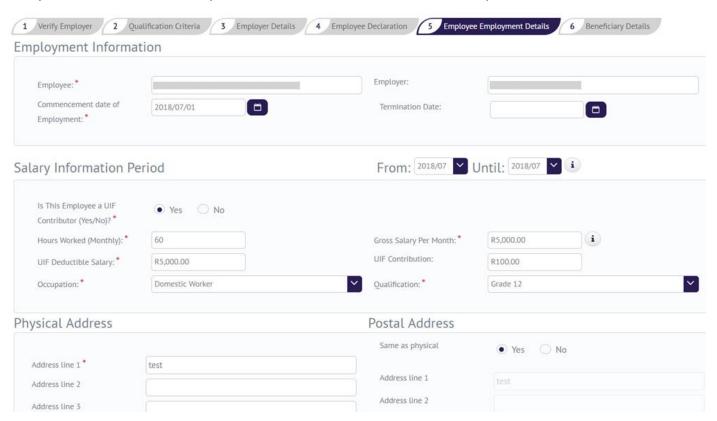


### Step 6

Confirm the name and date of birth for the employee, and click on "Next" to continue.

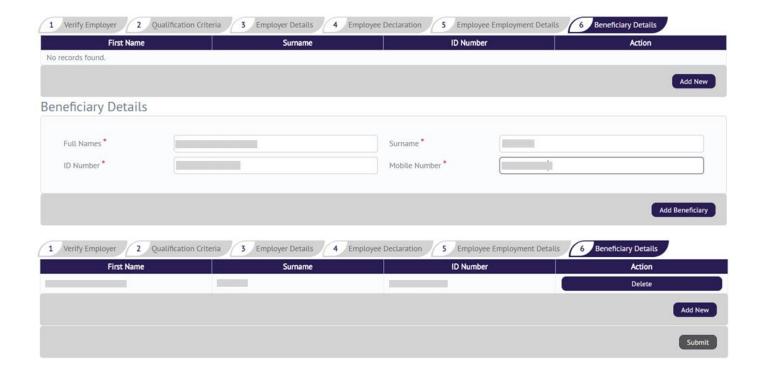


Complete all required fields related to the individual's employment, including demographic details and salary information. Click on "Up" or on "Next" to continue to the last step.



### Step 8

Add details of at least one beneficiary for your employee and click on "Add Beneficiary". Repeat this step to load more than one beneficiary, and then click on "Submit" to finalise the new Domestic Employer registration.



You will receive an email from the Department of Labour with the UI number for the new employer once the registration application was processed successfully.





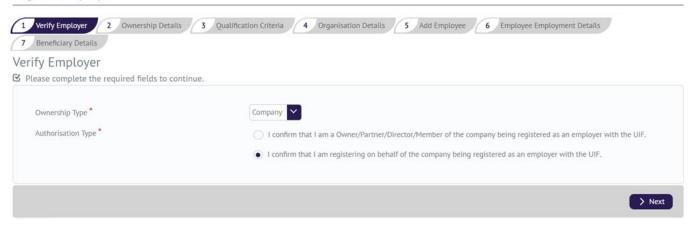
Repeat this process for all new domestic employer registrations.

### Step 10

To register a new Commercial Employer, select this option on the "Registrations – Register" page and click on "Register" to continue.

Select Ownership type:

### Register Employer

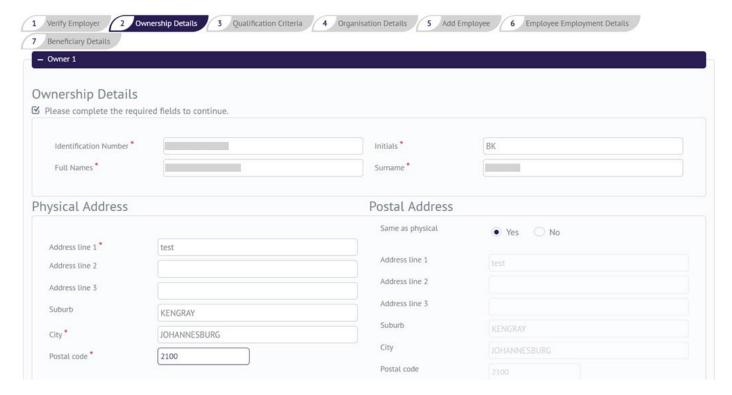


### Step 12

Select an "Authorisation Type" from the options listed for the ownership type you picked. Click "Next" to continue.

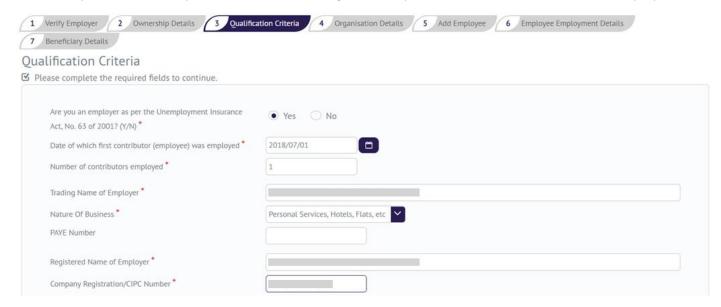
### Step 13

Complete Ownership details and verify or complete address fields, then click "Next" to continue.



Qualification Criteria: Complete the required information and click on "Next" to continue.

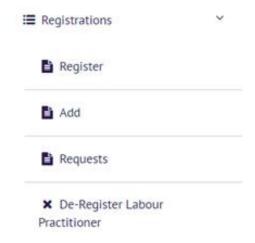
Follow Steps 4 – 9 to complete the rest of the registration process for a new Commercial Employer.



### 3.2 Add an existing Employer

### Step 1

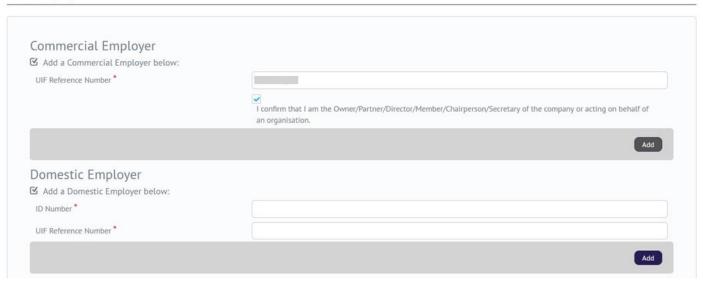
Select "Registrations" on the right-hand menu pane and click on "Add".



### Step 2

Select "Commercial Employer" if applicable, and complete the UI reference number for the employer before clicking on the "Add" button; Or Select "Domestic Employer"; complete the employer's ID number and UI reference before clicking on the "Add" button.

### Add Employer



### Step 3

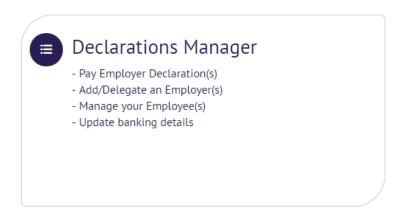
A system generated email will be sent to the Owner/ Director/ Member of the organisation for approval. To track progress, click on "Registrations" on the right and select "Requests", this will display a list of all requests. The status next to a request will reflect as "Pending" until approved, when the status will update to "Accepted".

1 An email has been sent to the Owner(s)/Director(s)/Member(s) of the organisation. You can check the status of these requests under Registrations - Requests.

| Employer Name | Status   | Recipient Email |
|---------------|----------|-----------------|
|               | ACCEPTED |                 |
|               | ACCEPTED |                 |
|               | PENDING  |                 |

| Employer Name | Status   | Recipient Email |
|---------------|----------|-----------------|
|               | ACCEPTED |                 |
|               | ACCEPTED |                 |
|               | ACCEPTED |                 |

### Chapter 4: Declarations Manager (Manage Employees and Declarations)



Through uFiling, Employers (Commercial and Domestic), Agents or Tax Practitioners can easily declare and pay UIF contributions online, view all previous declarations and contributions made, and receive notifications about future declarations.

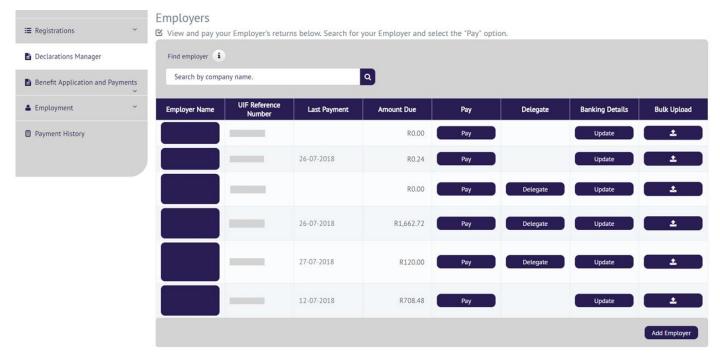
Simply capture or update employer and employee details when needed, including salary and employment details, uFiling will automatically prepare and populate your monthly declarations for review before you submit.

Please note: All information populated on the UI declarations are retrieved from the information you captured for employer and/or employee(s). Declarations can't be modified or edited, you need to update or correct employer or employee details which will update the declaration in turn.

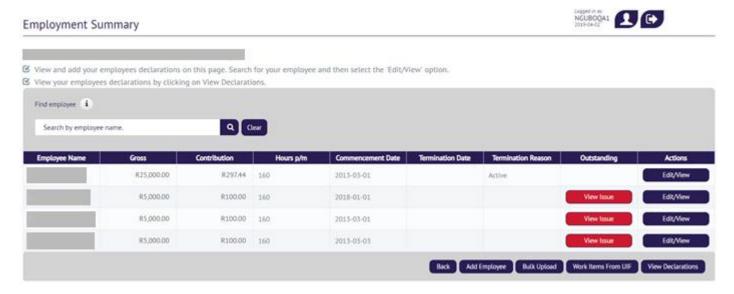
### 4.1 Manage Employees and Historical Declarations

### Step 1

Click on "Declarations Manager" on the right, this will display a list of the Employers linked to your uFiling profile.

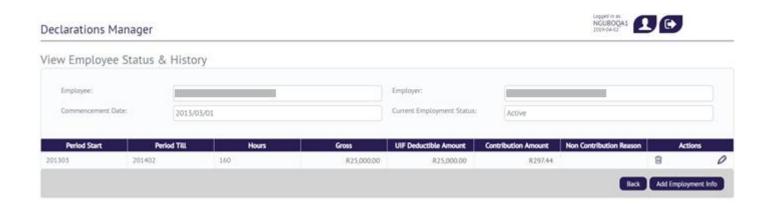


To view or retrieve active employees for an existing employer, click on the name of that employer on the left. This will display the Employment Summary for that employer, including an employee list and declaration summary.



### Step 3

To manage or update employee information, scroll through the employee list or use the search function to find the relevant employee record. Click on the 'Edit/View' button on the right to view the employment status and history for that individual.



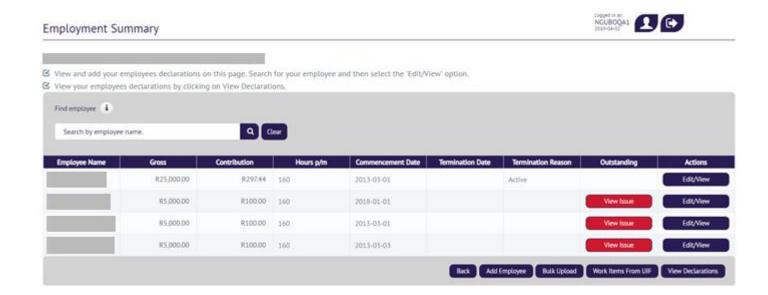
- Click on the pencil icon on the right to edit employment and salary information
- Click on the trashcan icon to delete the selected employment information
- Click on Add employment Info if it was not captured previously
- Click on the Back button at the bottom to return to the employee list for the employer

To capture new employees, click on "Add Employee" below the employee list on the Employment Summary page and follow the remaining steps detailed in Chapter 4.2

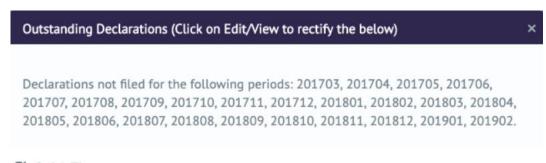


### Step 5

Existing users may need to complete a few additional steps to retrieve historical declaration data before processing current declarations on the new uFiling website. Click on "Declarations Manager" on the left and click on the relevant Employer to open the Employment Summary. Click on "View Declarations" below the table on the right.



Tip: Click on "View Issue" for a summary of possible issues with declarations. Click on View/Edit to rectify the relevant declaration(s)



### ☑ Quick Tips:

Click Edit/View to add a new Declaration.

Click View Declaration to show a graphical view of your consolidated Employees status.

Click View Issue to View outstanding declarations

Click on "Calculate Declarations" to view a grid displaying a five year history of prior declarations.



### View Employer Declarations:

The details displayed in the grid may be out of date. Please 'click' on the Calculate Declarations button in order to display the latest status.

If no results are displayed immediately, click on Calculate Declarations again.

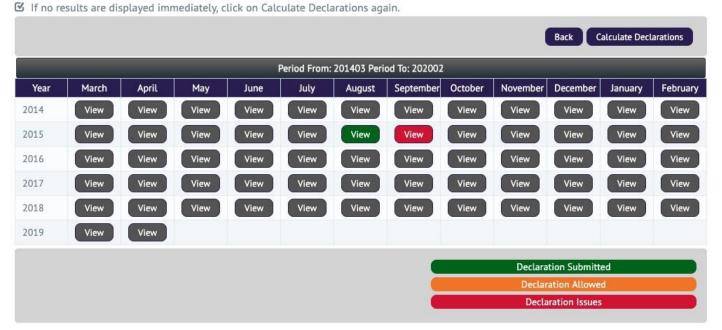


If no results are displayed immediately, click on "Calculate Declarations" again.



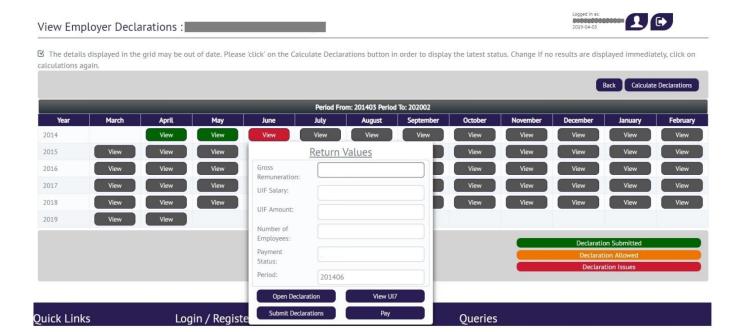
### View Employer Declarations:

The details displayed in the grid may be out of date. Please 'click' on the Calculate Declarations button in order to display the latest status.

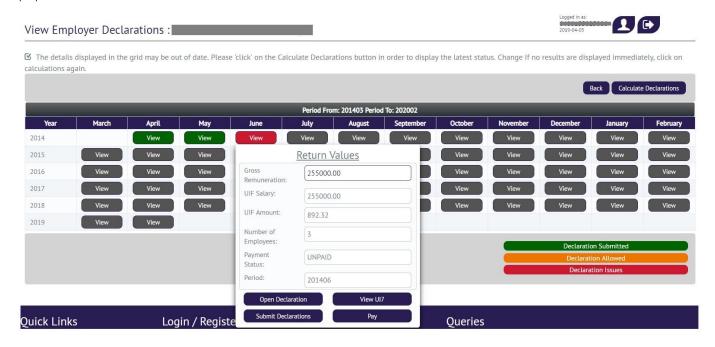


### Step 7

On the Employer Declaration screen, select the month displayed in red on the grid (click on View), and click on Open Declaration



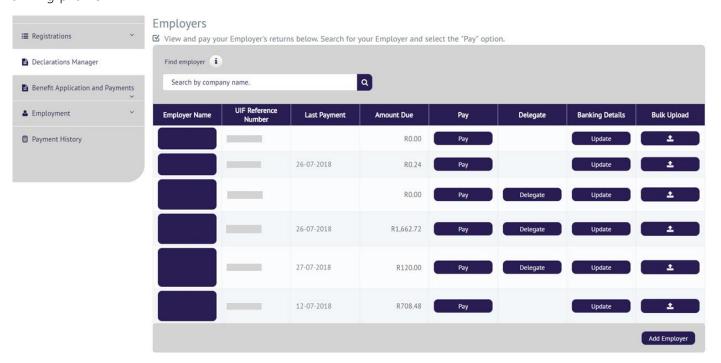
Repeat Steps 5 and 6 and select the same period as before, the Declaration values should now be populated for the user to review.



### 4.2 Manage Declarations

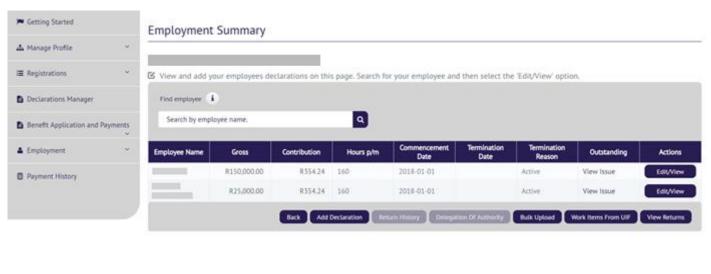
### Step 1

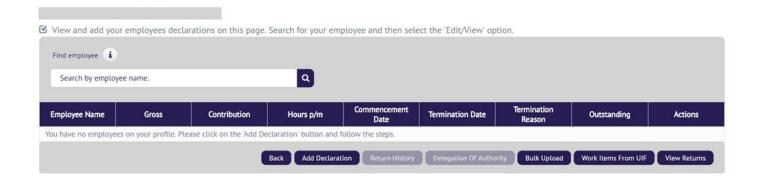
Click on "Declarations Manager" on the right, this will display a list of the Employers linked to your uFiling profile.



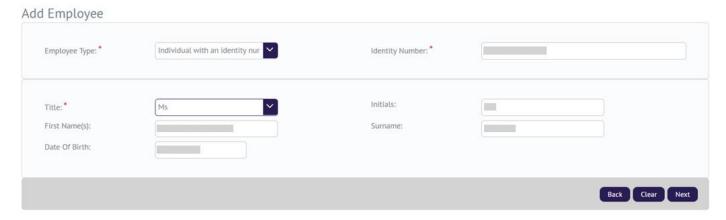
### Step 2

To view details for a specific employer, click on the name of that employer on the left. This will display the employee and declaration summary. On new Domestic Employer profiles, it may be necessary to add one employee before you can view, submit, pay or amend a declaration.





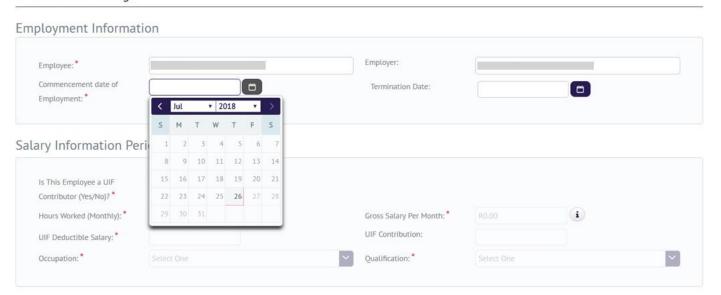
Add full names and ID number for an employee and click on "Next".



### Step 4

Capture employment and salary information and click on "Next".

### **Declarations Manager**



You must add at least one beneficiary for each employee. Click on "Add New" to capture more.

Beneficiary Details First Name Action Add New Physical Address Postal Address Same as physical Yes Address line 1 Address line 1 Address line 2 Address line 2 Address line 3 Address line 3 Suburb RAYTON City \* RAYTON Postal code \* 1001 Postal code Back Save

### Step 6

Capture or update demographics, including physical and postal addresses for the employee and click on "Save" to add the employee details for the employer.

A confirmation message will display when the employee record and declaration is saved.



### Step 7

From the Declarations Manager and by selecting an employer, you can:

- Add another employee by clicking on "Add Declaration"
- Review declarations before submission and payment by clicking on "View Returns" or "Edit/View"
- Add multiple employees in bulk by uploading a payroll file with additional employee information
- Pay a declaration or capture details of a Manual Payment
- Add extra bank details
- Delegate specific responsibility(ies) for an employer to a third party

View Returns – click on "Calculate Returns" to display a history of declarations for 5 years, with a status reflected for each period.

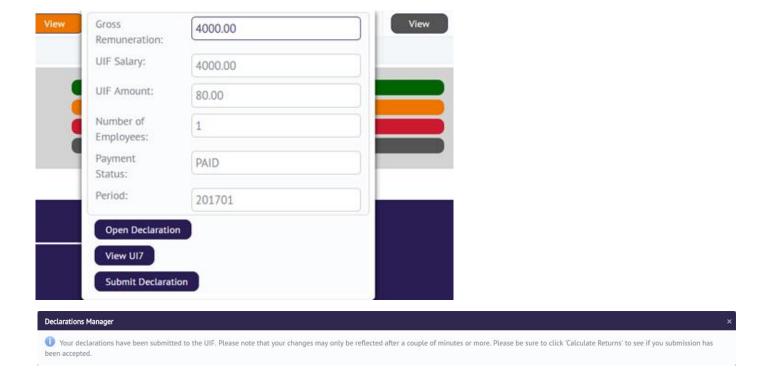
### **Employment Summary** 🗹 View and add your employees declarations on this page. Search for your employee and then select the 'Edit/View' option. Find employee i a Search by employee name. Employee Name Gross Contribution Hours p/m Termination Date Outstanding Actions HENDRINA FRANCINA R4,000.00 R80.00 80 2017-01-01 View Issue Edit/View rity Bulk Upload Work Items From UIF

If you click on "View" for any period, it will open a summary of the declaration for that period and list options to allow you to open, view or submit the declaration.

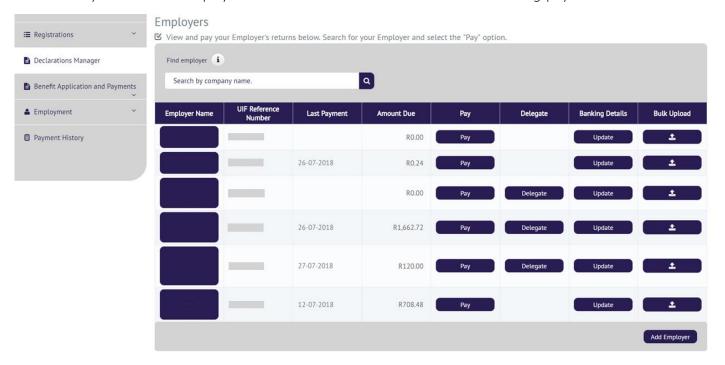


### Step 9

Once all employees and related employment and salary information is added, you are ready to submit. Click on "Submit" to send a declaration to the UIF. A confirmation message will display after successful submission, and the status on your declaration dashboard will update to "Submitted".



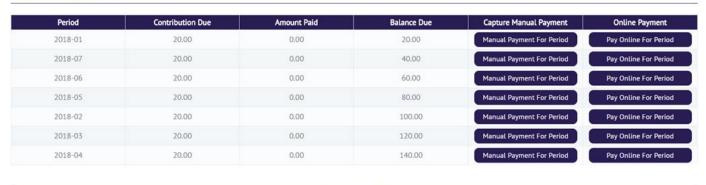
Click on "Pay" next to an employer and declaration to view a list of outstanding payments.



### Step 11

Click on "Pay Online For Period" to create a payment instruction or click on "Manual Payment For Period" to capture details of alternative payment via another channel.

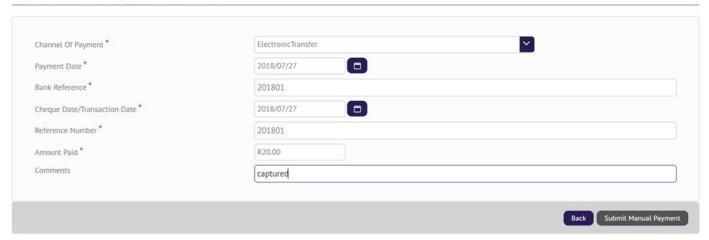
### Capture Payments



Total Balance Due

In Example 1 below, "Manual Payment for Period" was selected. Capture all details of the external payment and then click on "Submit Manual Payment".

### Capture Manual Payment for Period



### Step 12

In Example 2 below, "Pay Online For Period" was selected. Select a bank account from the drop-down list and click on "Continue".

### Payment from selected Employer

 $f \Xi$  Enter the amount you wish to pay and then select your payment method below

| UIF Reference Number | Employer Name                   | Amount Due   | Amount To Pay                       |
|----------------------|---------------------------------|--|-------------------------------------|
|                      |                                 | R354.24  | R354.24                             |
|                      |                                 | R 354.24   | R 354.24                            |
|                      |                                 |  |                                     |
| Payment Type *       | Absa Internet Banking / AOL     |  | ✓ (i)                               |
|                      |                                 | step process and requires you to login into your ABSA In | nternet Banking Profile and release |
|                      | the payment before it is deemed | successful.  |                                     |
|                      |                                 |  |                                     |
|                      |                                 |  | Cancel Continue                     |

### Step 13

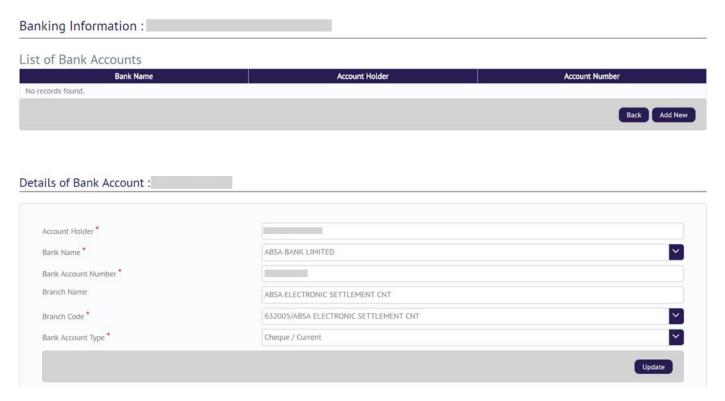
Double check the details displayed of the payment you're about to create and click on "Pay".

Remember to log on to your banking application to approve the payment within the allowed time limit.

# Absa Internet Banking / AOL These transactions will be listed in your Internet Banking for you to authorise the payment release. Use Access Number\* Bank Account\* User Number\* UIF Reference Number Employer Name Amount Due Amount To Pay R354.24 R354.24 Pay Cancel You're almost there! X This payment must be released before 11:30 pm tonight. Please login to ABSA Internet Banking and release this payment under Authorisations >> Bills and Municipalities.

### Step 14

If no banking details are listed, or if a new account must be added you will need to capture this before you can finalise online payments. Click on "Add New" on the List of Bank Accounts and capture the details of the employer's (new) bank account. Click on "Update" to save the captured information.



### Step 15

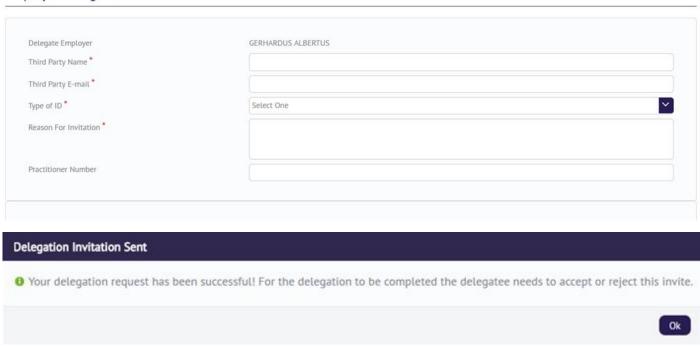
When needed, responsibility for an employer's declaration(s) can be delegated to a third party. Complete all the required fields, and remember to assign permissions for this delegate:

Administrator

- View Only
- Pay
- Capture Declarations
- View Reports
- Submit Declarations
- Capture Declaration Adjustments

Click on "Send Invitation".

### **Employer Delegation**



A system generated message will be sent to the delegate with an option to accept or decline the invitation.



| Dear,                                     |                                |  |
|---|--------------------------------|--|
| ou have been invited to access            | U-Filing profile, by           |  |
| To.                                       |                                |  |
|   |                                |  |
| Ise the below buttons to register/login t | accept, or decline the invite: |  |

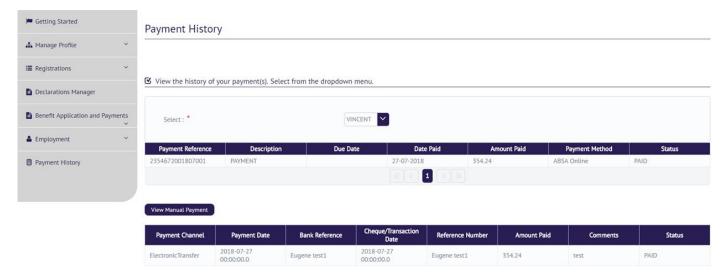
Should you have any queries or require any assistance please contact our U-Filing Call Centre on 0860-345-464 or 012-3371680 option 3.

Best Regards,

The U-Filing Team

### Chapter 5: Payment History

The details of all electronic and manual payments are reflected on the Payment History Page. The status listed next to each payment will update to "PAID" once the transaction is cleared.



### Chapter 6: Employment

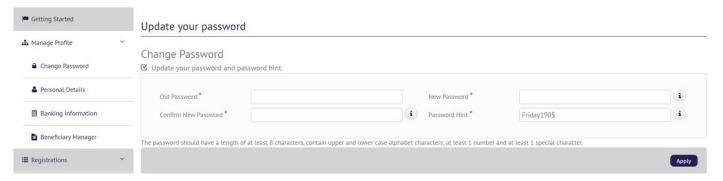
Select "Employment" on the left and click on "Employee Declaration Status" to view detail of all your historical contributions.



### Chapter 7: Manage Profile

### 7.1 Change Password

Click on "Manage Profile" and then on "Change Password" to update your uFiling password when needed. Complete all the mandatory fields and click on "Apply".



### 7.2 Banking Information

Your own banking information may only be captured once. If you need to change or add another bank account, refer to Chapter 2, Step 4. Bank details may only be captured once on the uFiling system.

To update new bank details, download the UI2.8 Form from the <u>Department of Labour</u> website (<u>www.labour.gov.za</u>).

One portion of the UI2.8 Form must be completed by your bank and the other portion by you. Email the completed UI2.8 Form and your contact details to <a href="https://www.vounder.gov.za">VOsupport@labour.gov.za</a>



### 7.3 Beneficiary Manager

More Beneficiaries (up to a maximum of 4) can be added by clicking on the "Add New" button and completing the name and ID number in the required fields and then clicking on "Add beneficiary".

## Beneficiary Details First Name Surname ID Number Action Add New Beneficiary Details Full Names ID Number Mobile Number Add Beneficiary

### 7.4 Personal Details

Click on "Personal Details" to update contact and demographic information on your profile, including physical and postal addresses.

