CHIEF DIRECTORATE INFORMATION AND COMMUNICATION TECHNOLOGY

RETURN ON EARNINGS (ROE) UPLOAD DOCUMENTS MANUAL

- ROE New Registration Document Upload
- ROE Submission Document Upload
- Flagged for Audit Document Upload

employment & labour

Department:
Employment and Labour
REPUBLIC OF SOUTH AFRICA

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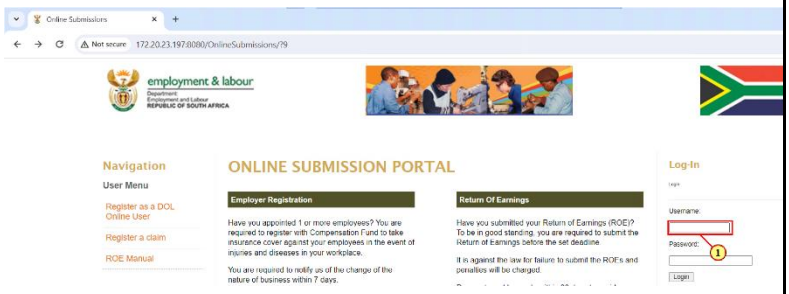
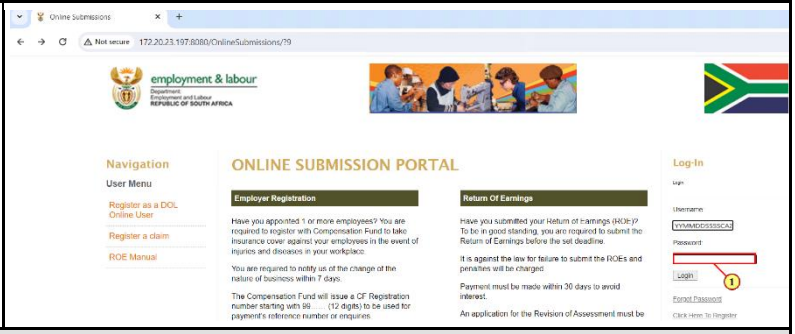
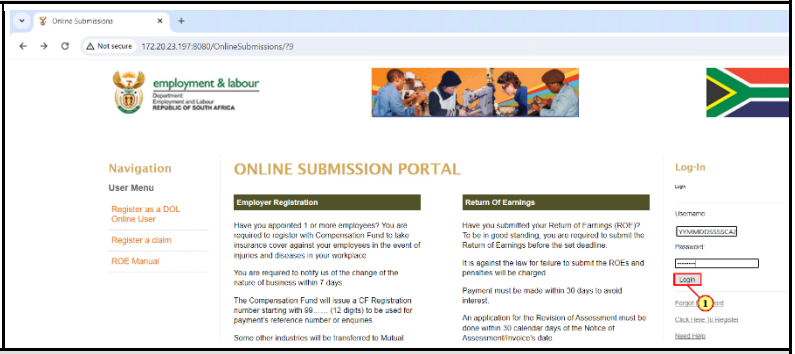
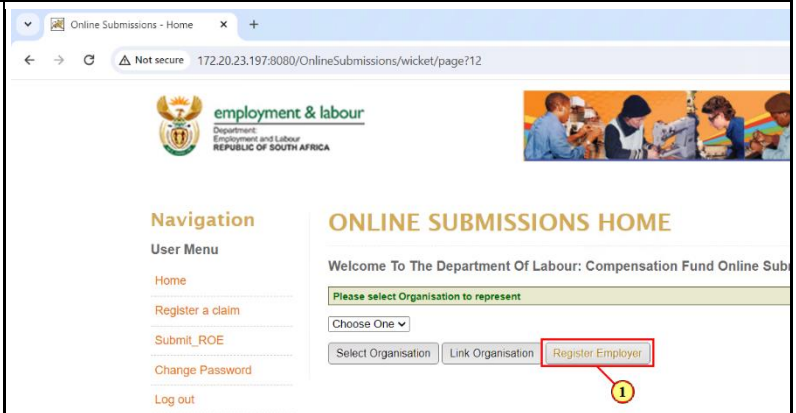
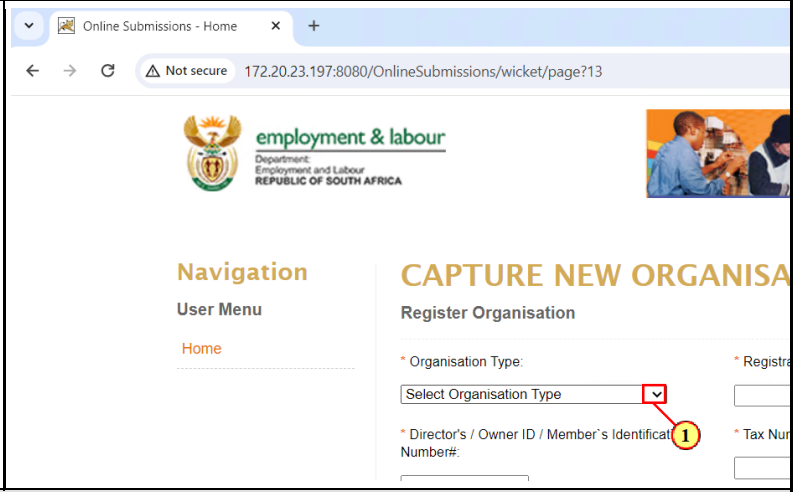
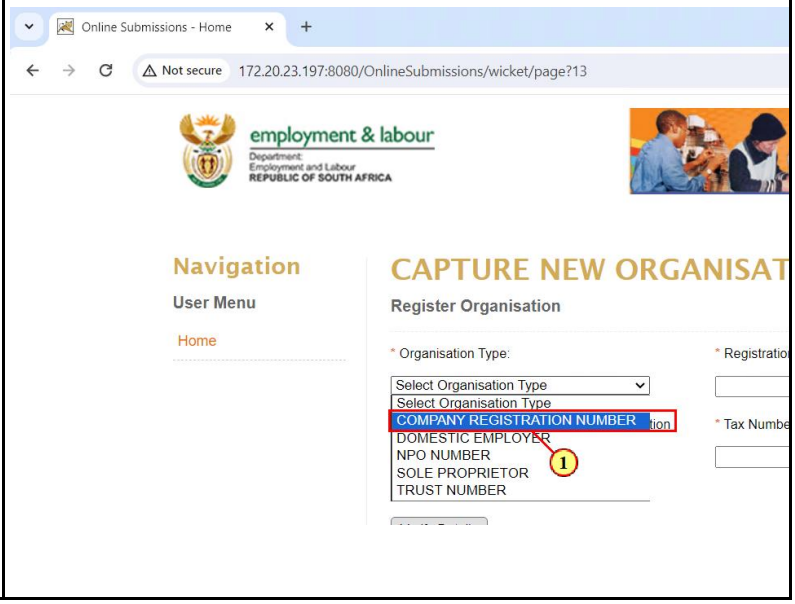
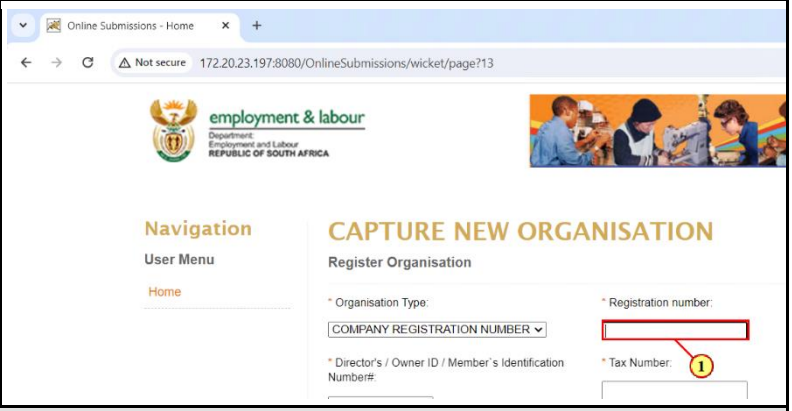
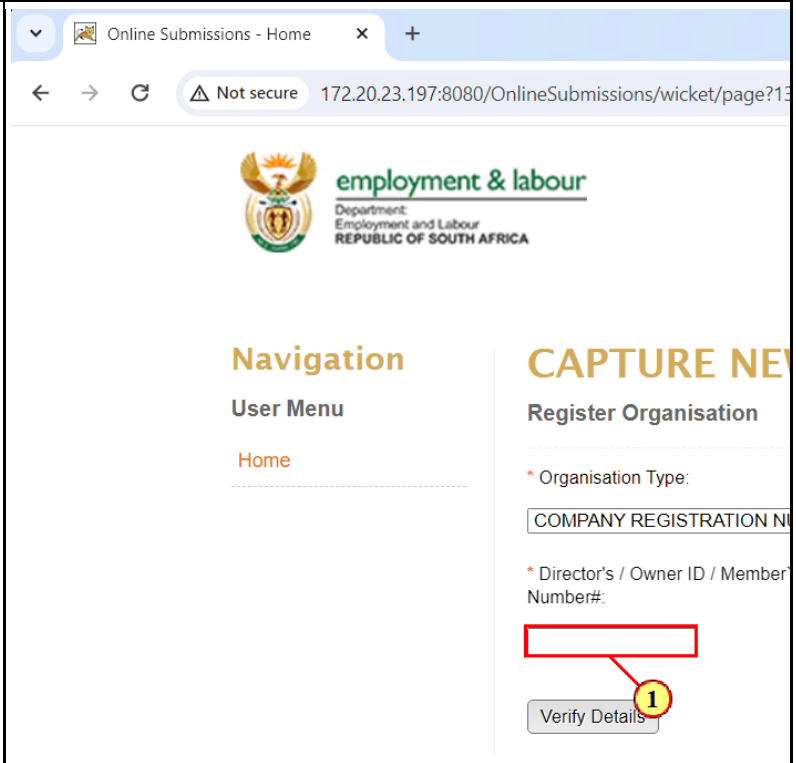
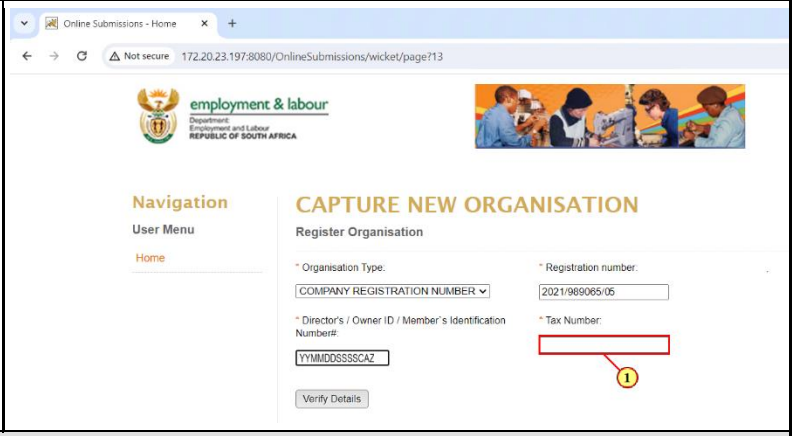
1. New Registration Upload of documents

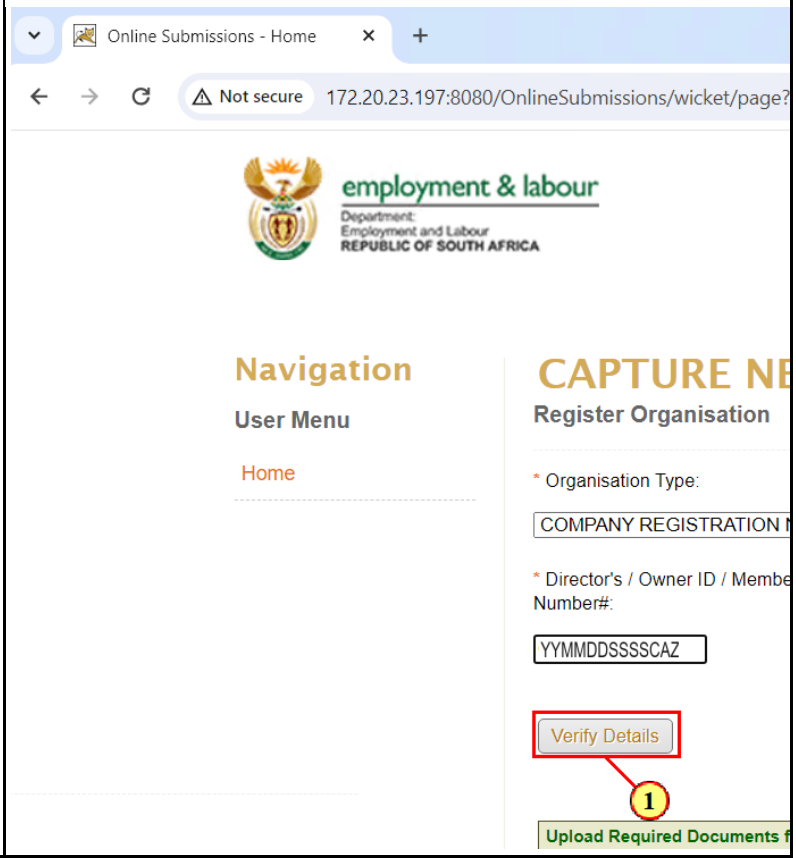
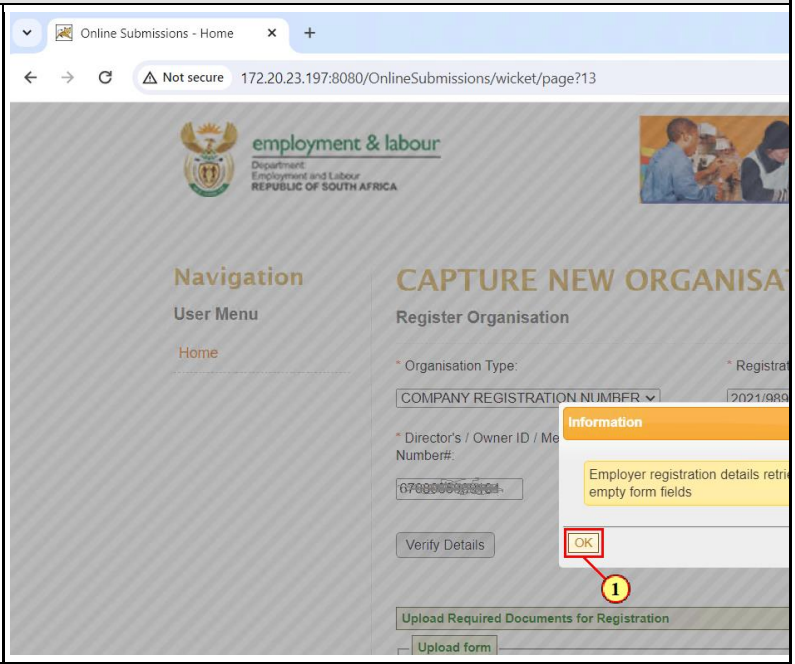
The following are the steps to be taken when uploading documents for a new registration.

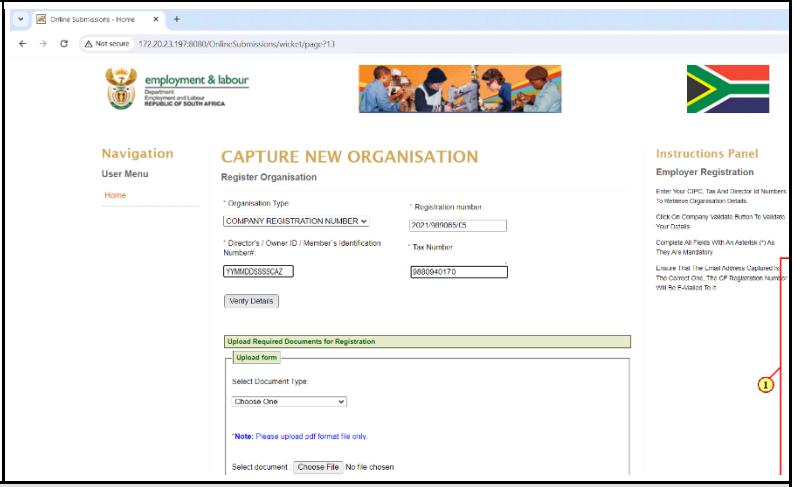
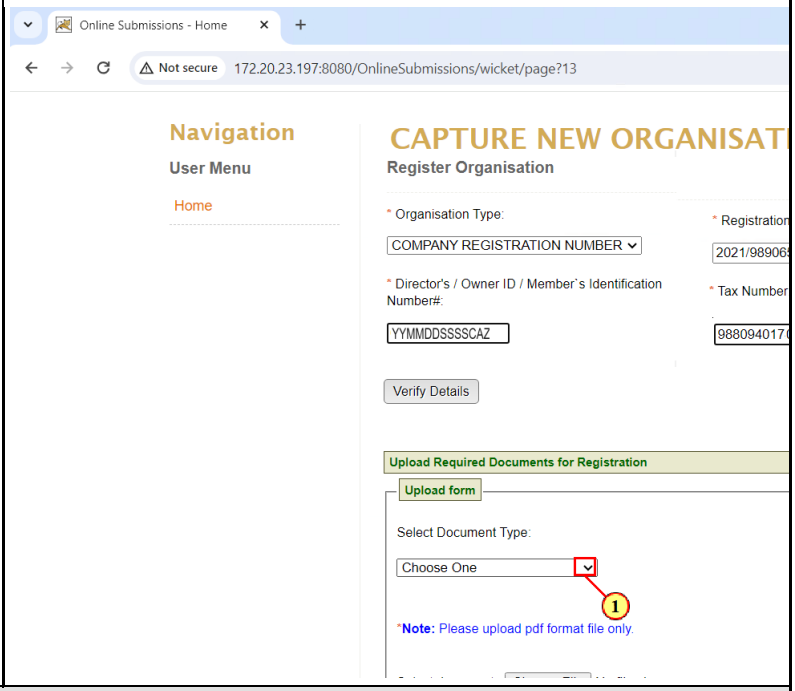
Explanation	Screenshot
Please note this step follows after you have been granted access to ROE, and you have your ***Username*** and ***password*** emailed to you by the Compensation Fund. (1) Enter your username in the **Username** field.	
(1) Enter your password in the **Password** field.	
(1) Click the Login button.	

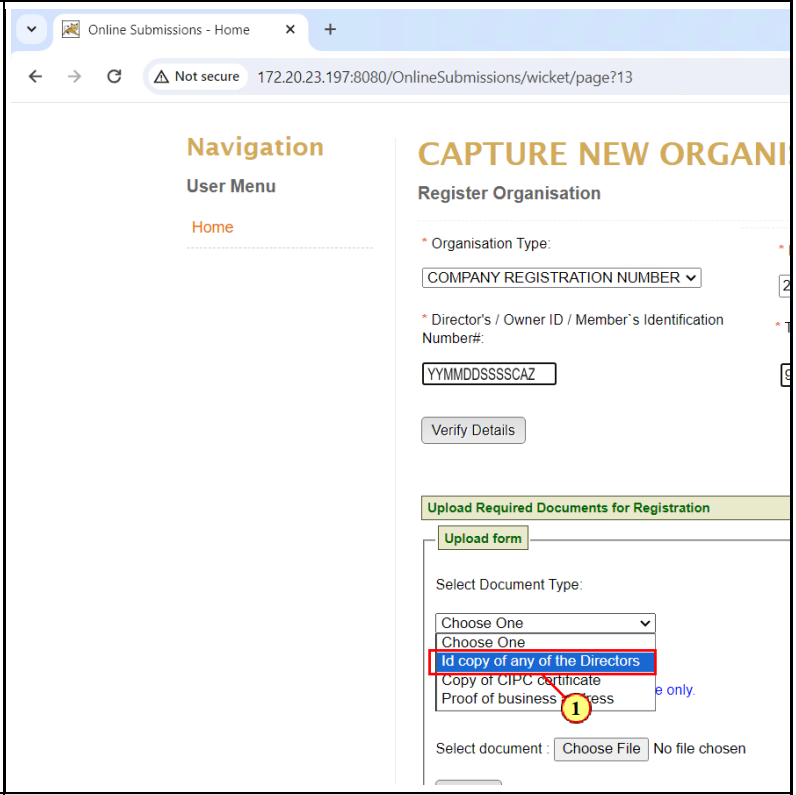
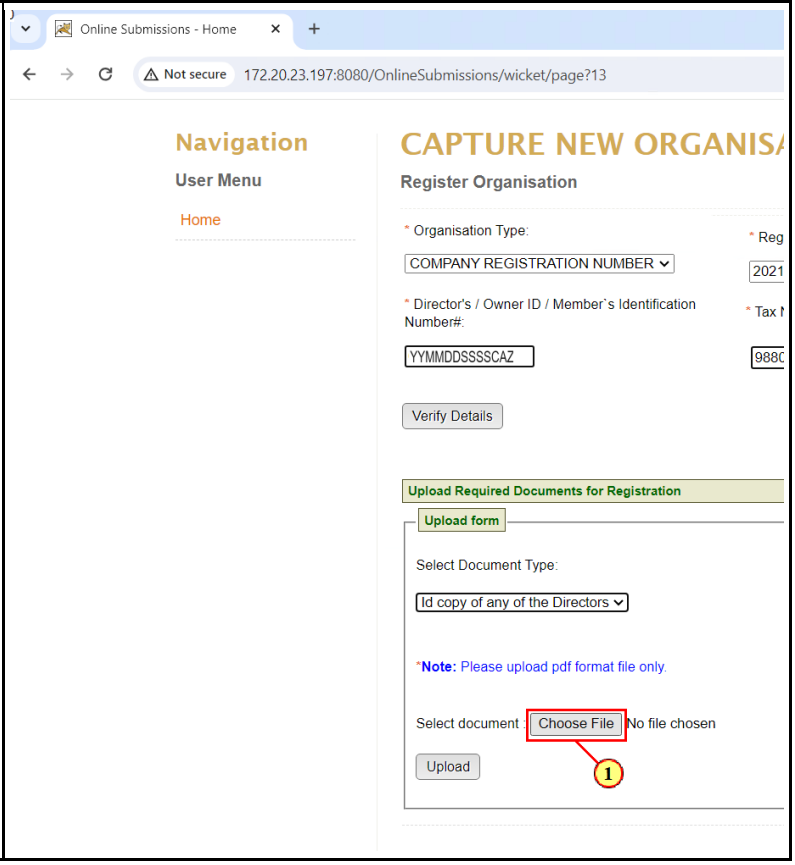
Explanation	Screenshot
(1) Click the button.	
(1) Click the Organisation Type downward arrow button.	
The **Organisation Type** will determine the documentation to be attached. The following are the available organisation types: **Formal Business:** • Id copy of any of the Directors • Copy of CIPC certificate • A proof of business address **Business/Private Domestic Employers:** • ID copy of the owner/s • A proof of business address **NPO (Non-profit Organizations)** • A proof of registration with Social Services Department • ID copy of any of the Directors • A proof of business address **Trust**	

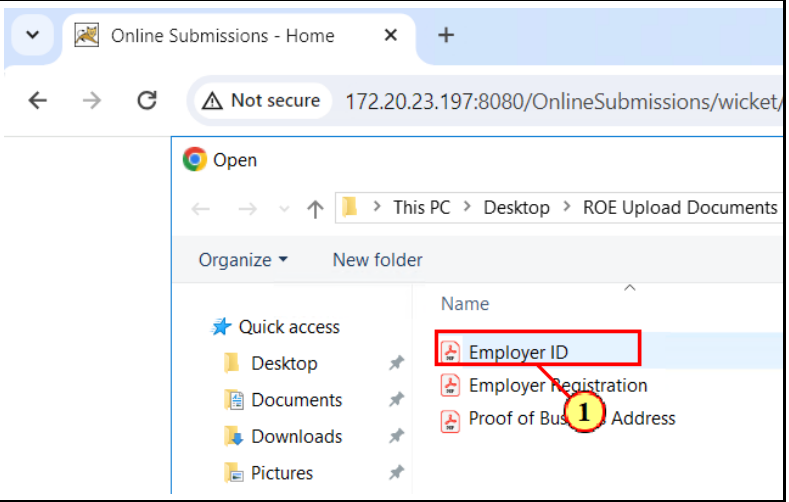
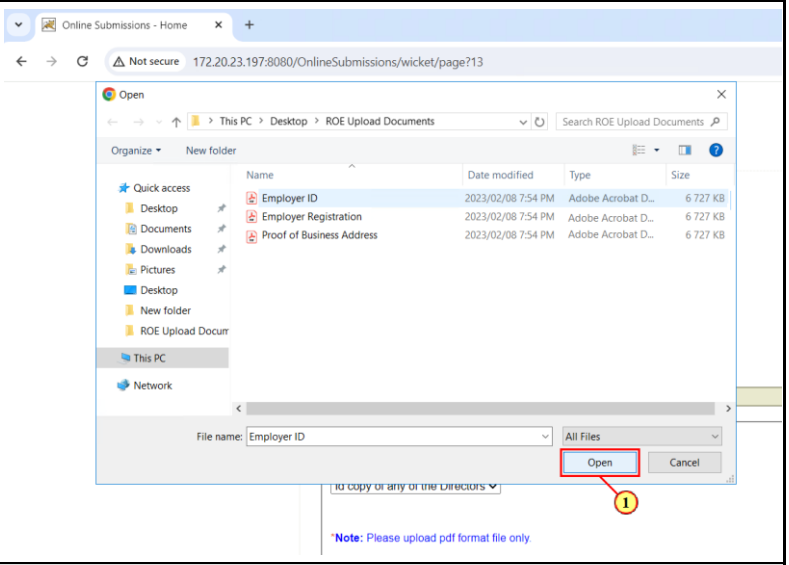
Explanation	Screenshot
• Letter of authority by the Court • ID copy of any of the Trustees • A proof of business address **Body Corporates** • Sectional Title Certificate • ID copy of any of the Title holders • A proof of business address **Partnerships / Joint Ventures** • Partnership Agreement • ID copy of all the partners • A proof of business address • CIPC certificate in case of a Joint venture **Public Entities / Local Authorities** • Cabinet memo establishing the entity / local authority • ID copy of accounting officer • Proof of business address • EMIS Certificate for Public Schools (1) Select the relevant Registration type. This is the type of registered organisation in operation.	
(1) Enter the company registration number in the **Registration number** field.	

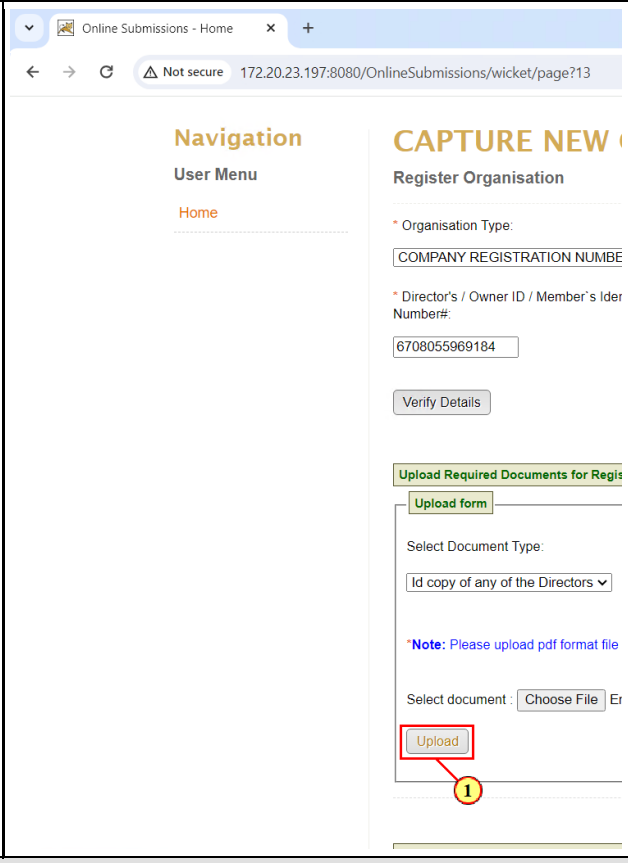
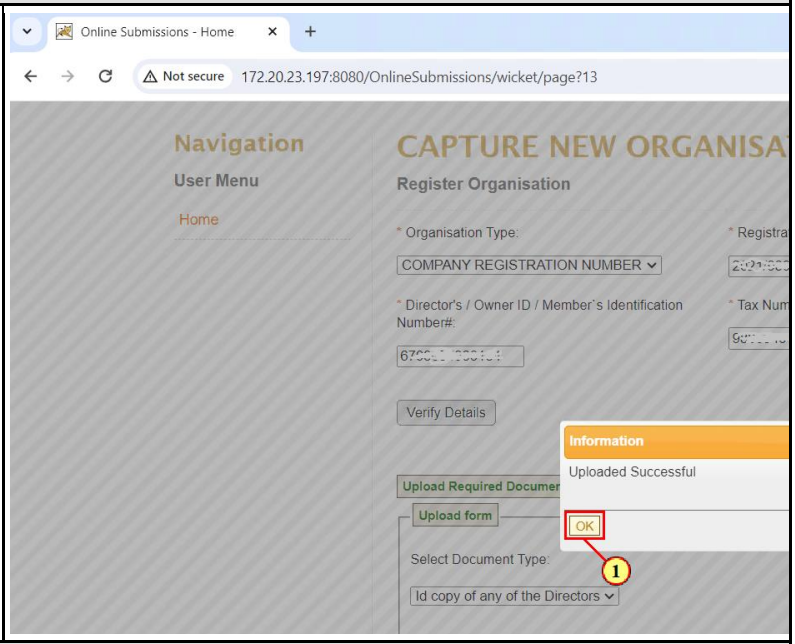
Explanation	Screenshot
(1) Enter the relevant identification number in the **Director's /Owner ID Number** field.	
(1) Enter the tax registration number in the **Tax Number** field.	

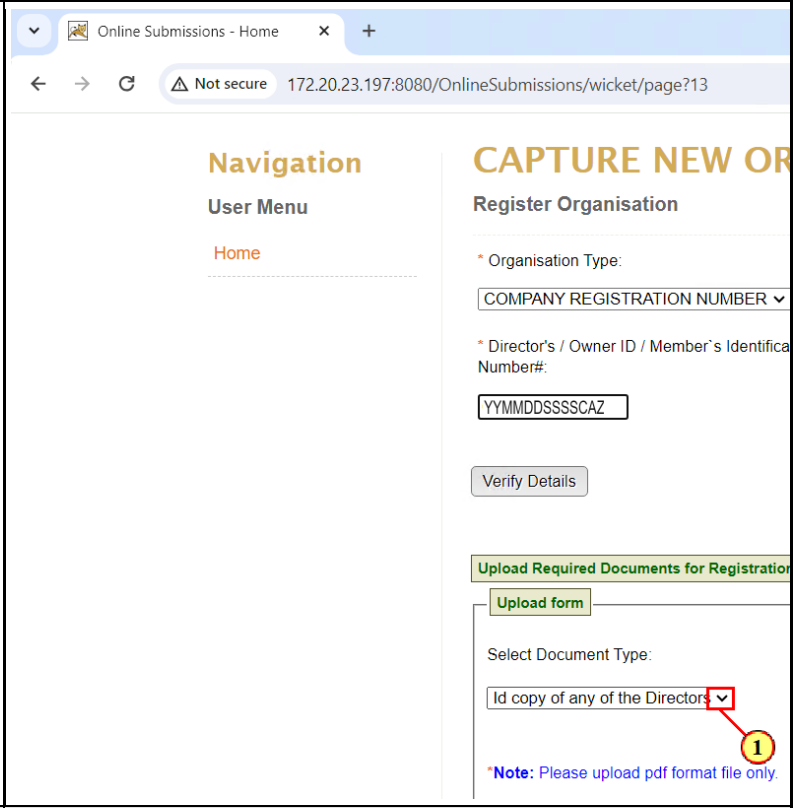
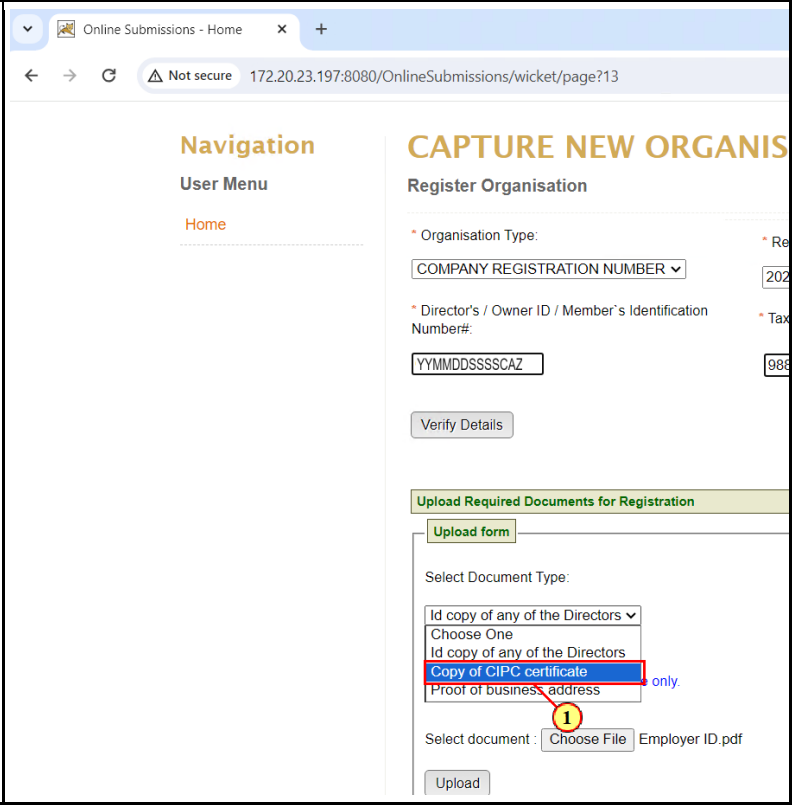
Explanation	Screenshot
(1) Click the Verify Details button to verify.	
This message is displayed if the employer registration details have been successfully retrieved from the system. (1) Click the OK button to continue.	

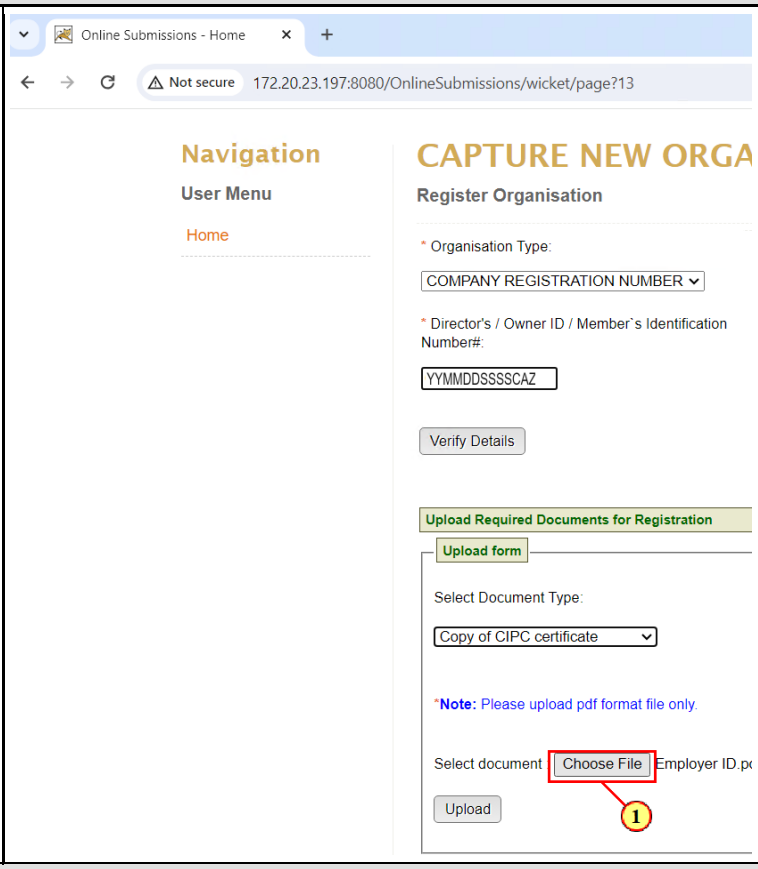
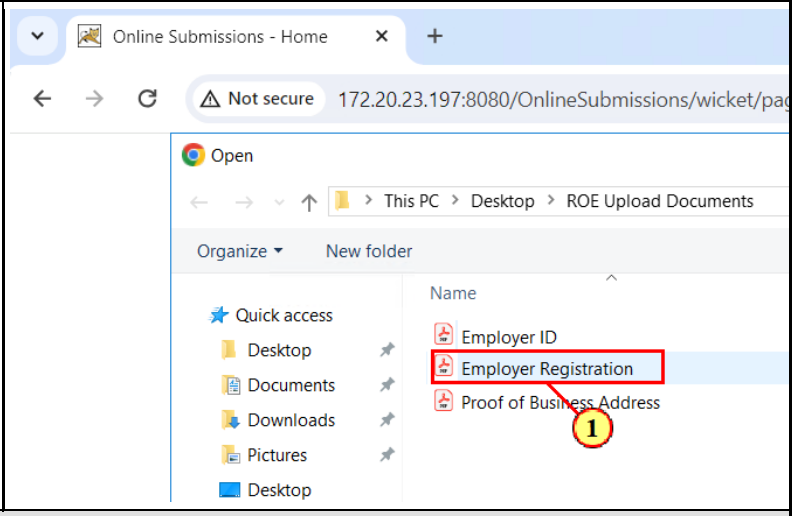
Explanation	Screenshot
(1) Scroll **down**.	
(1) Click the **Select Document Type** dropdown button to display document type options**.**	

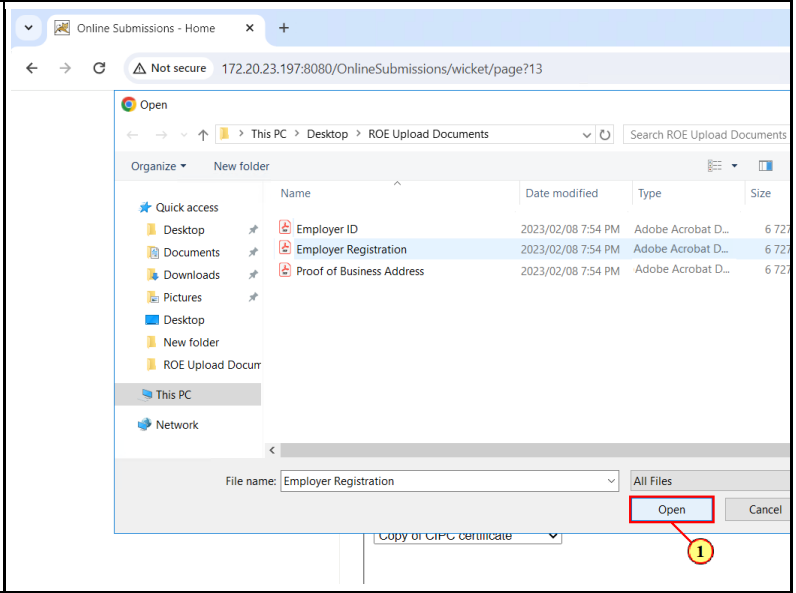
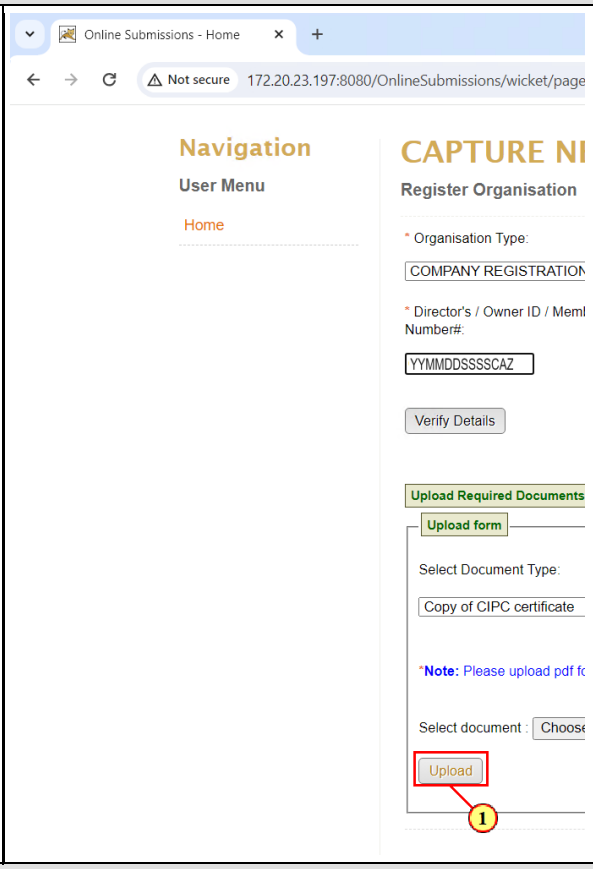
Explanation	Screenshot
(1) Select the relevant option of the **Document Type** you want to upload. The document types displayed are determined by the organisation type selected in the previous form tab.	
Please note the documents uploaded must be in ***pdf format***. (1) Click the Choose File button. The system will point to your local *machine* folders/file to allow for document upload.	

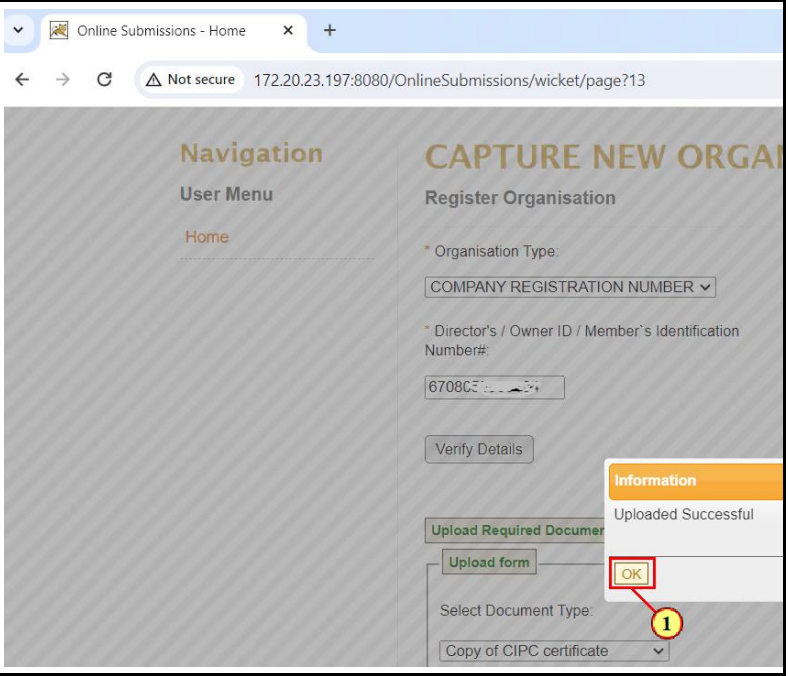
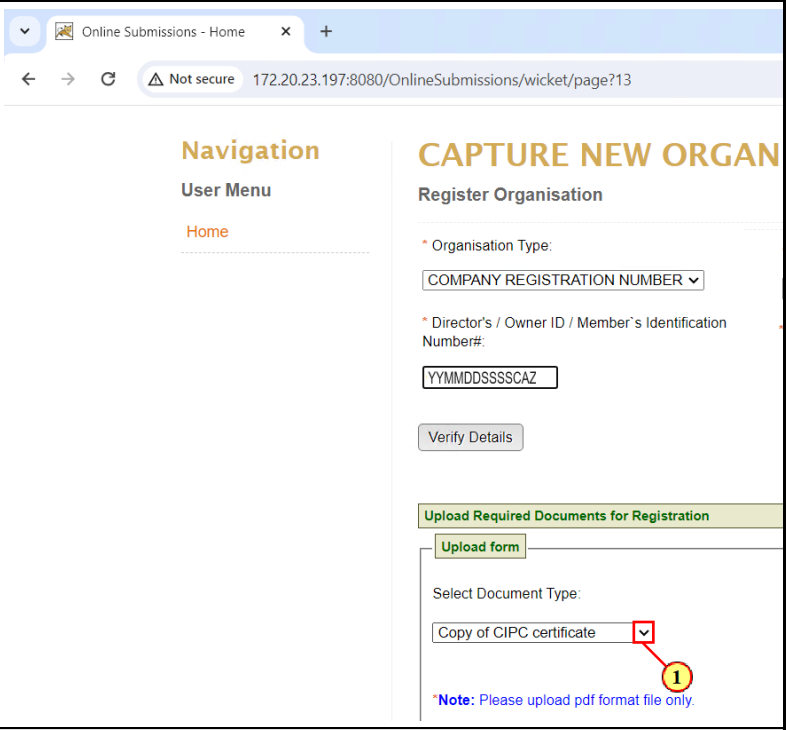
Explanation	Screenshot
The ROE system will point to your local machine. You must navigate to the file location where you have saved the ROE files for upload. (1) Select the relevant document file by clicking it to upload.	
(1) Click the Open button to upload.	

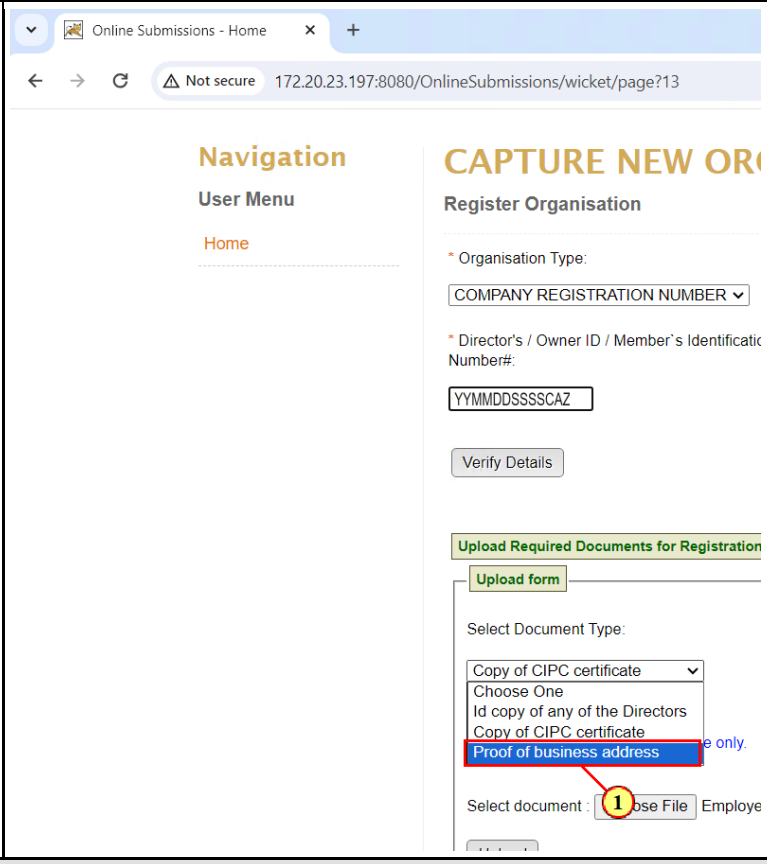
Explanation	Screenshot
(1) Click the Upload button to upload to the ROE system.	
(1) Click the OK button to continue. The message displayed shows the document has been uploaded to the ROE system successfully.	

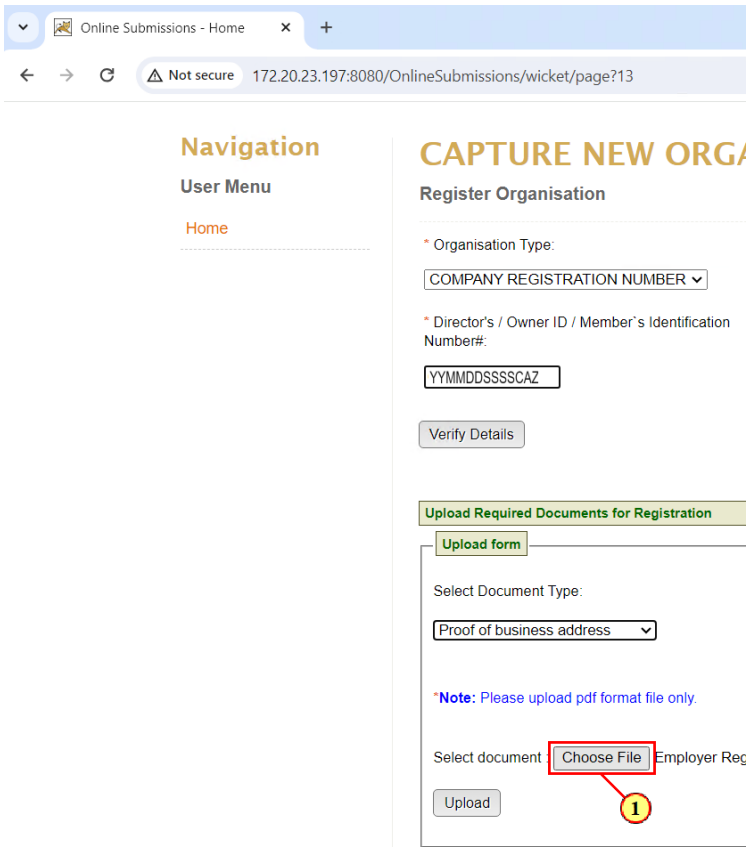
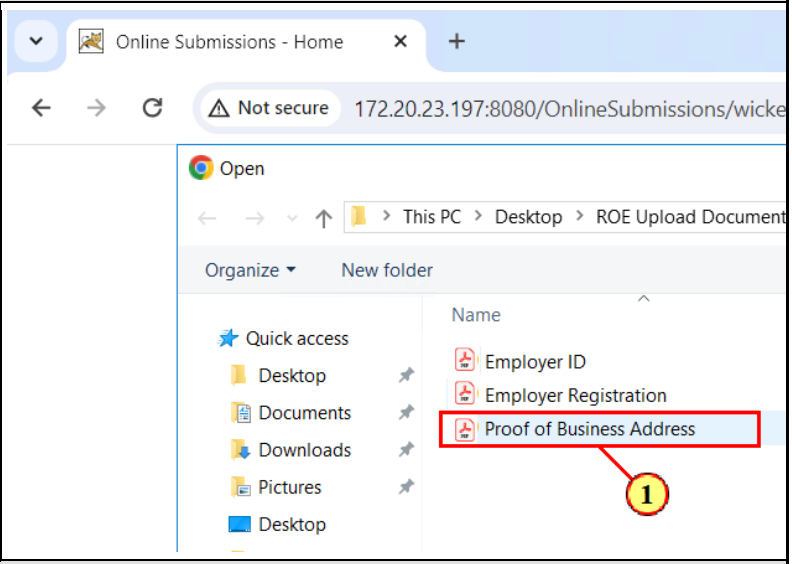
Explanation	Screenshot
(1) Click the **Select Document Type** downward arrow.	
(1) Select the relevant **document type** by clicking on it.	

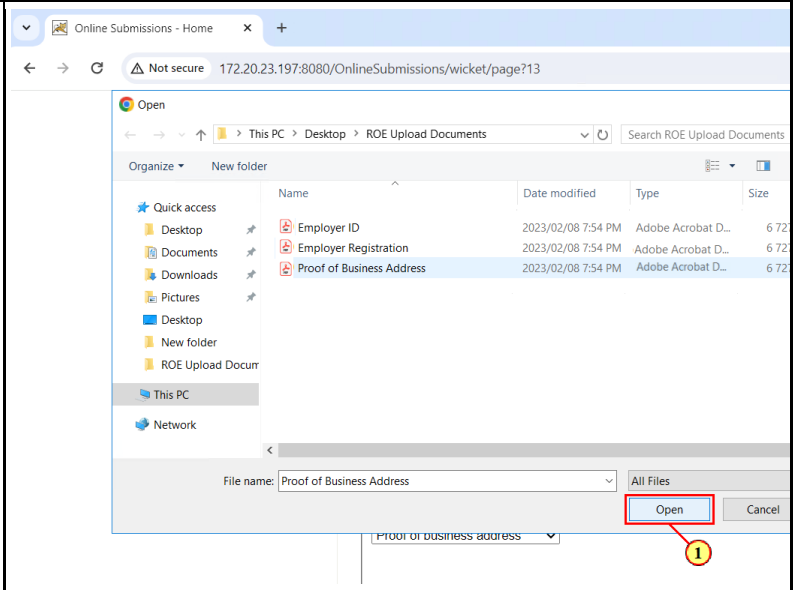
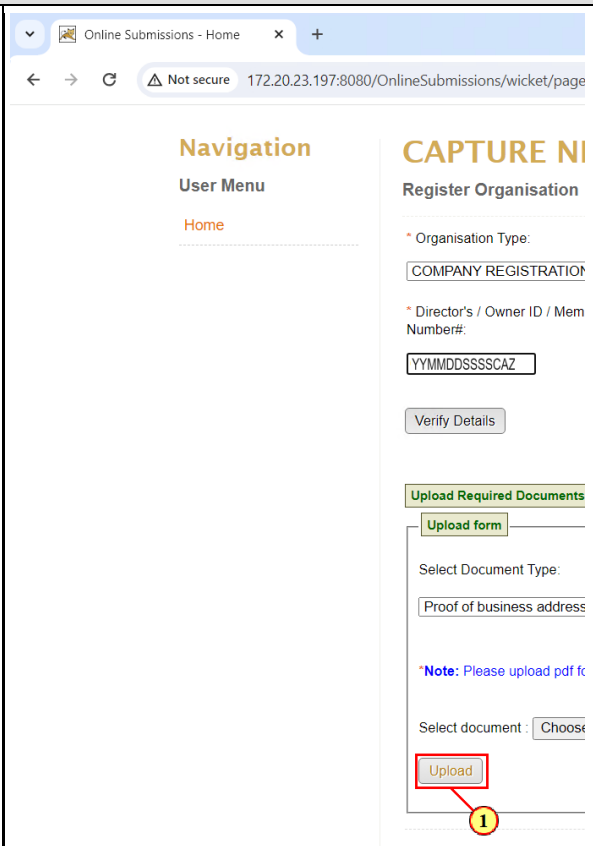
Explanation	Screenshot
(1) Click the Choose File button. Note it must be in pdf format.	
(1) Select the relevant document file by clicking it to upload.	

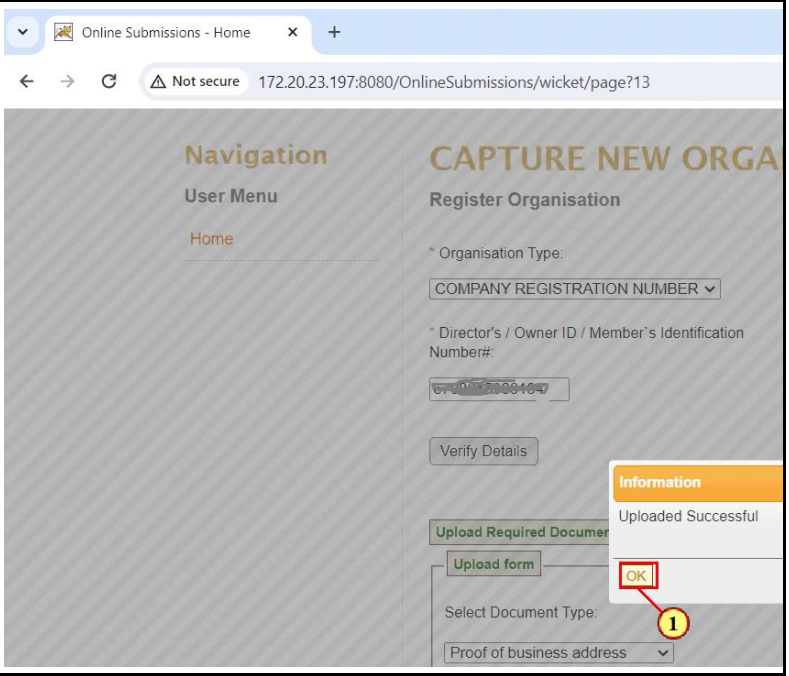
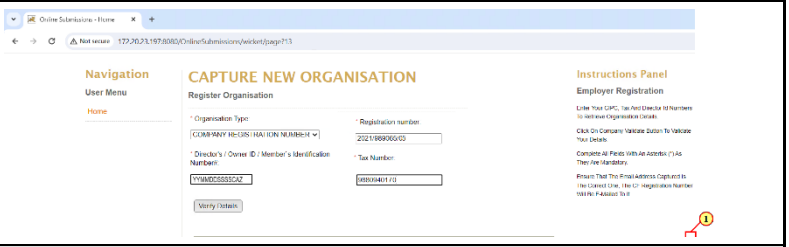
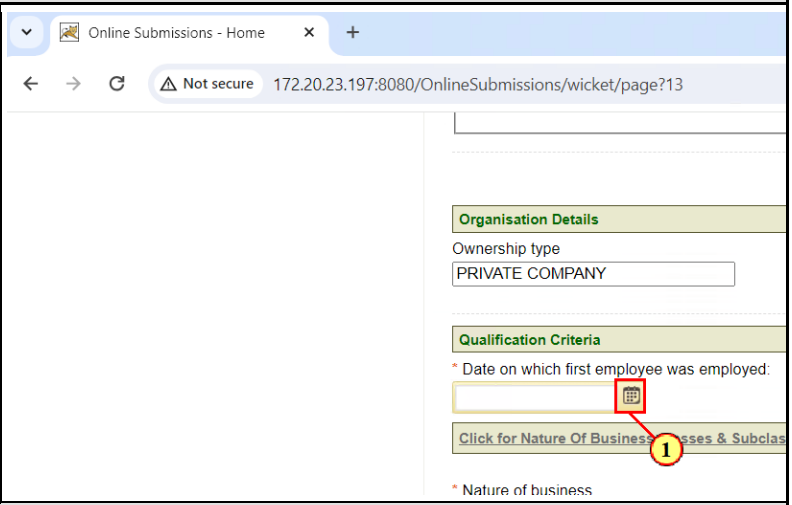
Explanation	Screenshot
(1) Click the Open button to upload.	
(1) Click the Upload button to upload to the ROE system.	

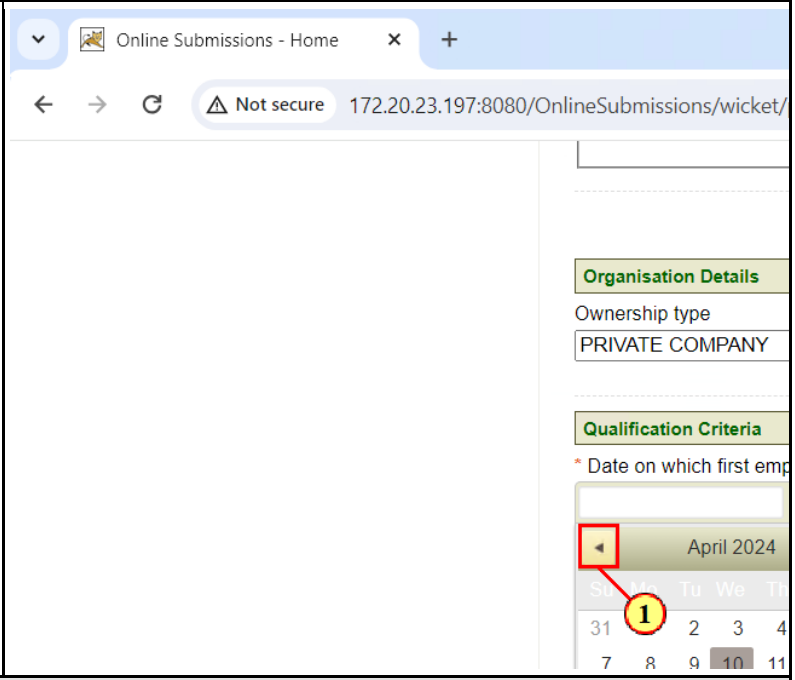
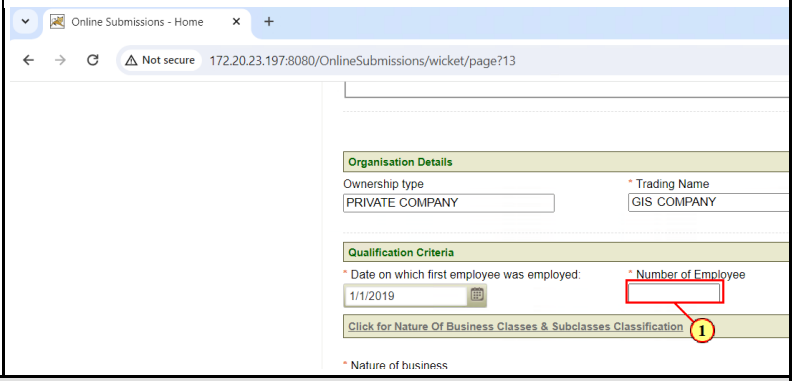
Explanation	Screenshot
The message displayed shows the document has been uploaded to the ROE system successfully. (1) Click the OK button to continue.	
(1) Click the **Select Document Type** dropdown button to display options**.**	

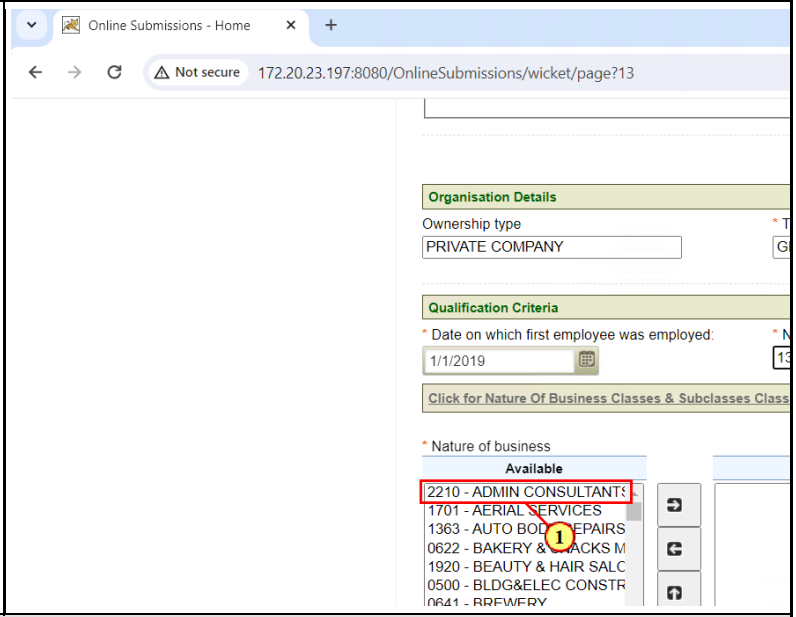
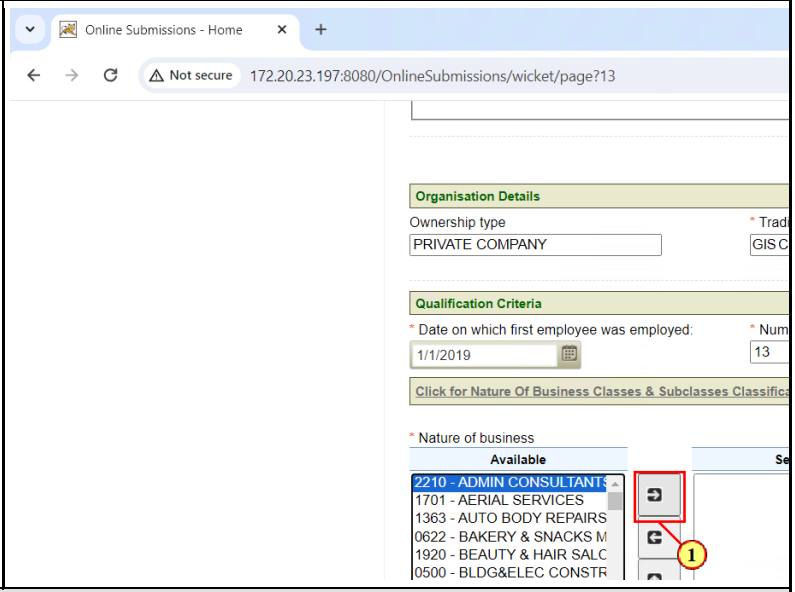
Explanation	Screenshot
(1) Select the relevant **document type** by clicking on it.	

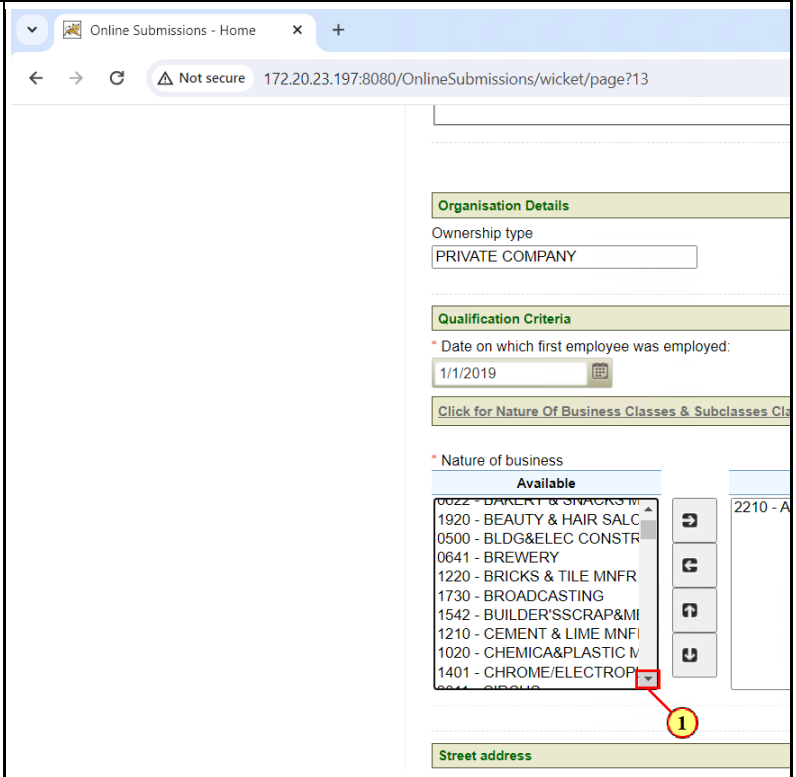
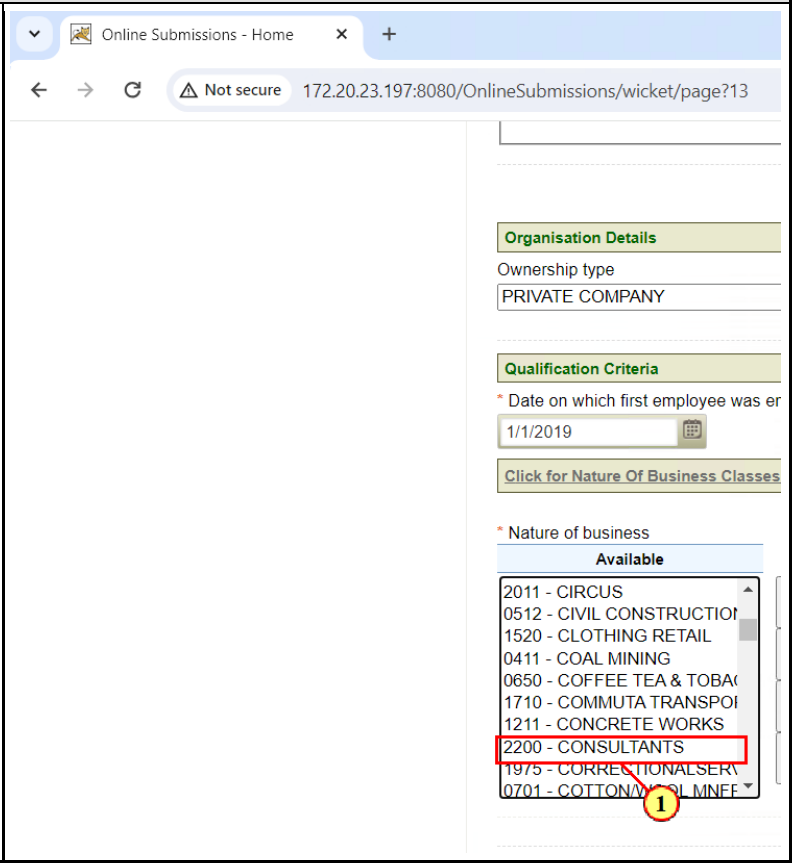
Explanation	Screenshot
(1) Click the Choose File button. The document must be in pdf.	
(1) Select the relevant document file by clicking it to upload.	

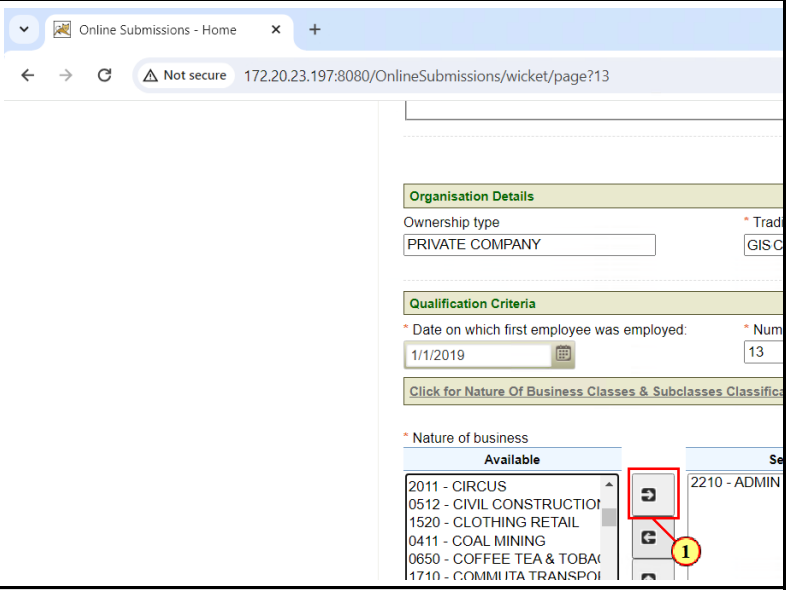
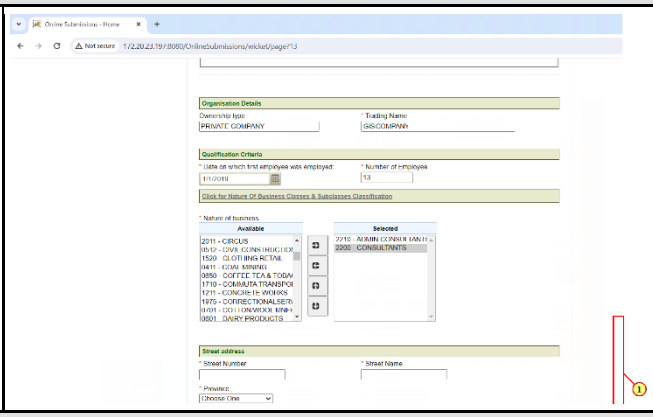
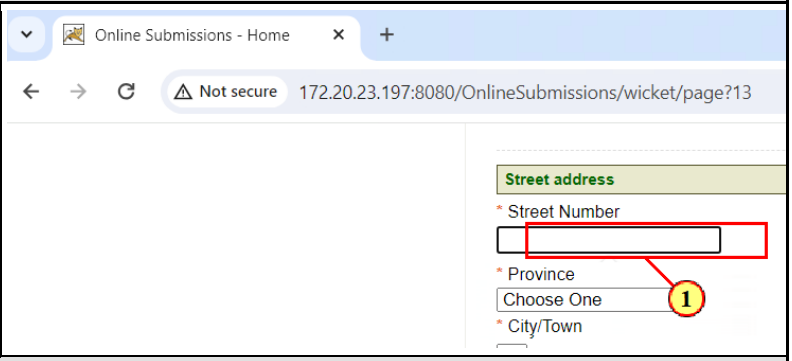
Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload button to upload to the ROE system.	

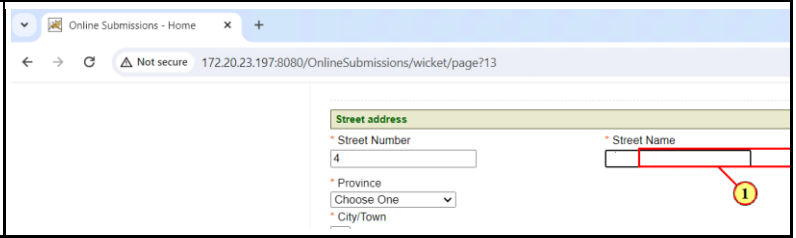
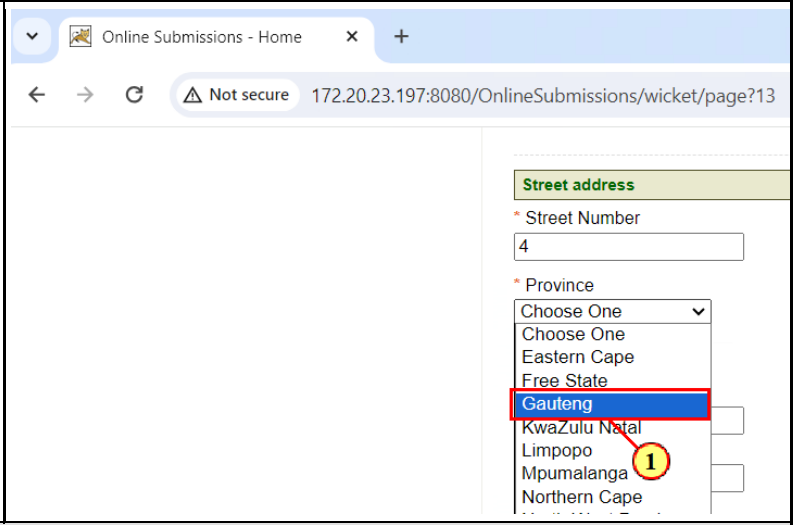
Explanation	Screenshot
The message displayed shows the document has been uploaded to the ROE system successfully. (1) Click the OK button to continue.	
(1) Scroll **down**.	
(1) Click the **Calendar icon** .	

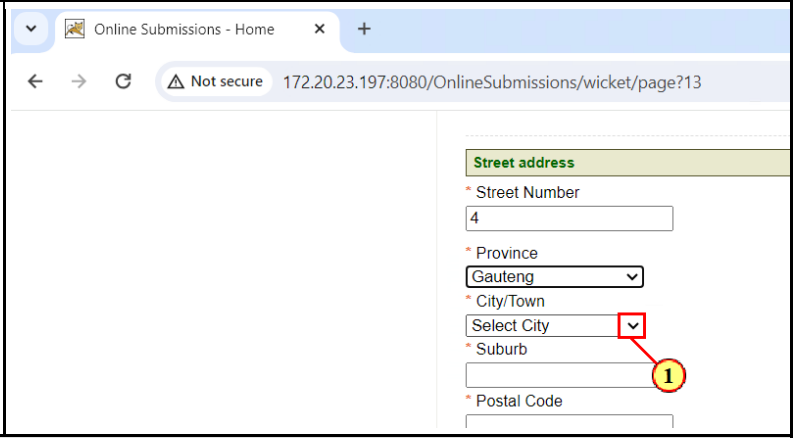
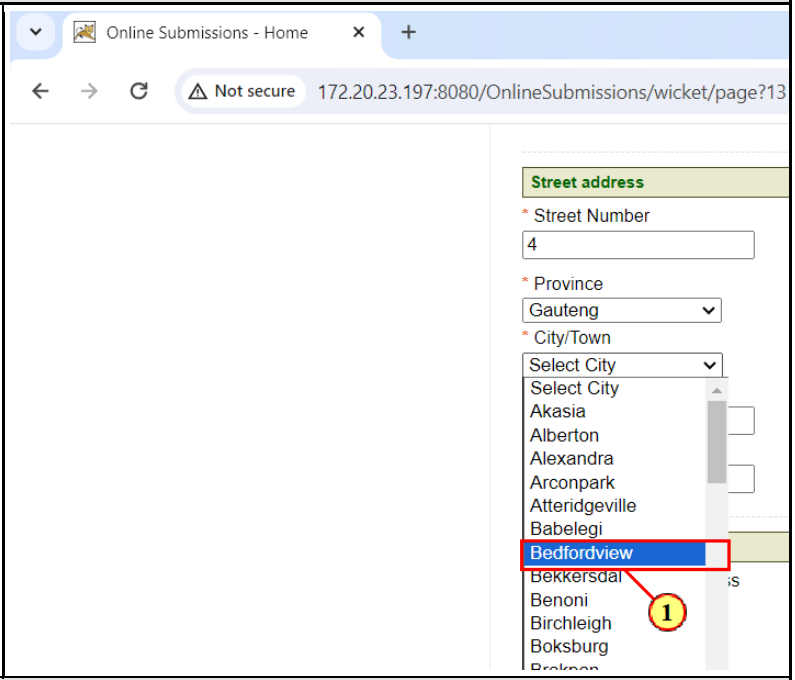
Explanation	Screenshot
(1) Click the arrow to navigate to the relevant month/year.	
(1) Enter the number of employees in the **Number of Employee** field.	

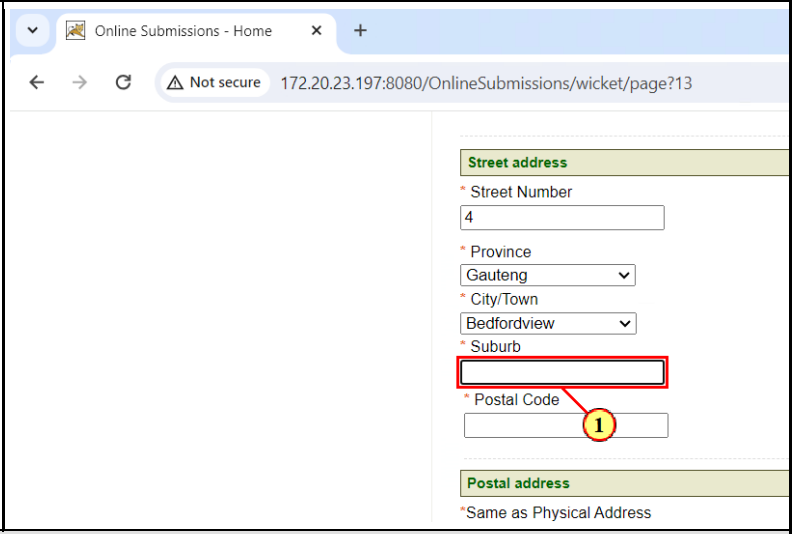
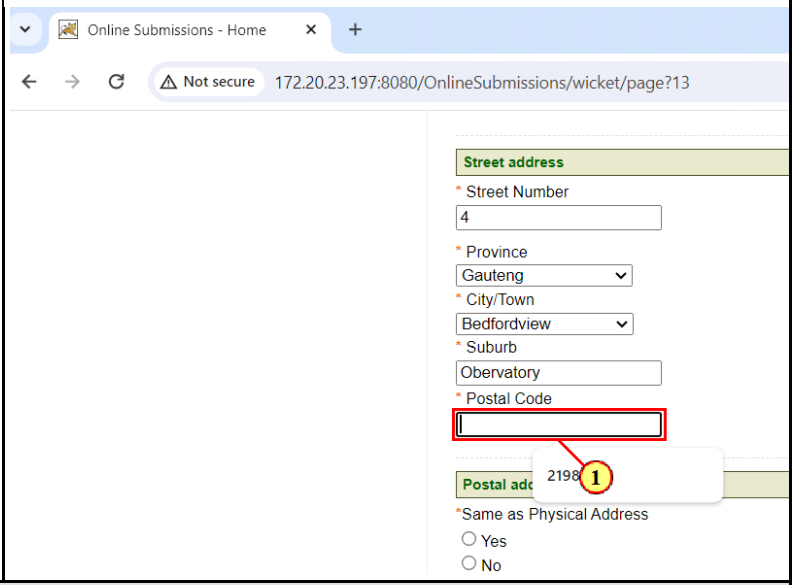
Explanation	Screenshot
(1) Select the relevant **Nature of Business** your company is engaged in.	
(1) Click the right sideways arrow to make a selection.	

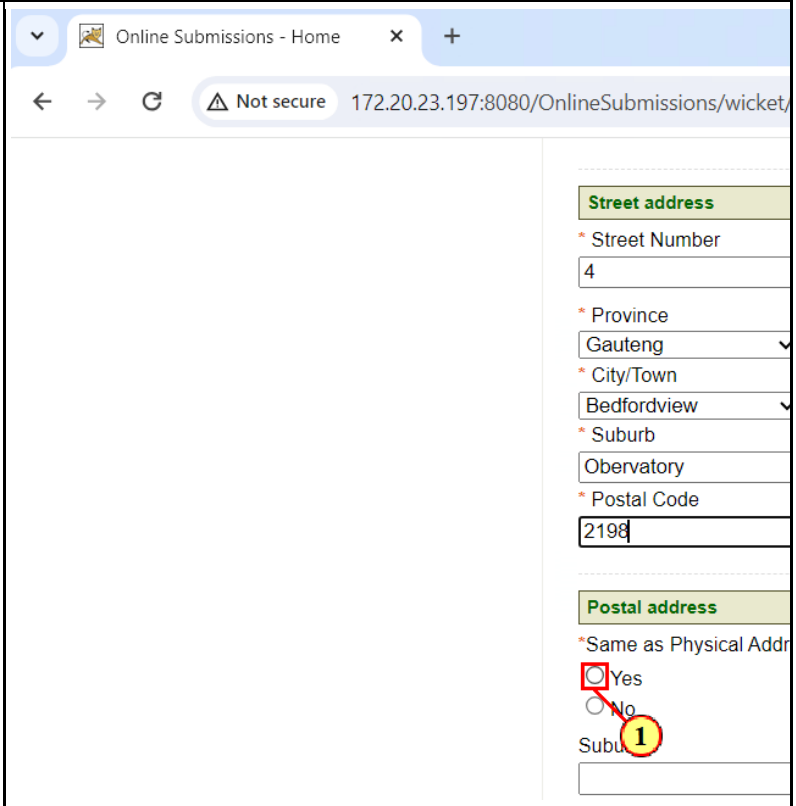
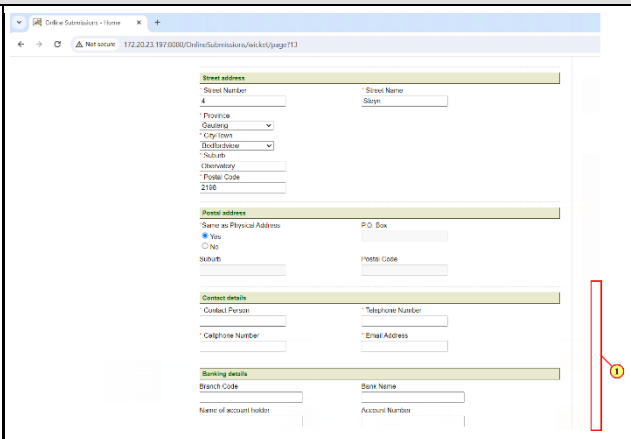
Explanation	Screenshot
(1) Scroll **down** ▼.	
(1) Select the relevant **Nature of Business** your company is engaged in.	

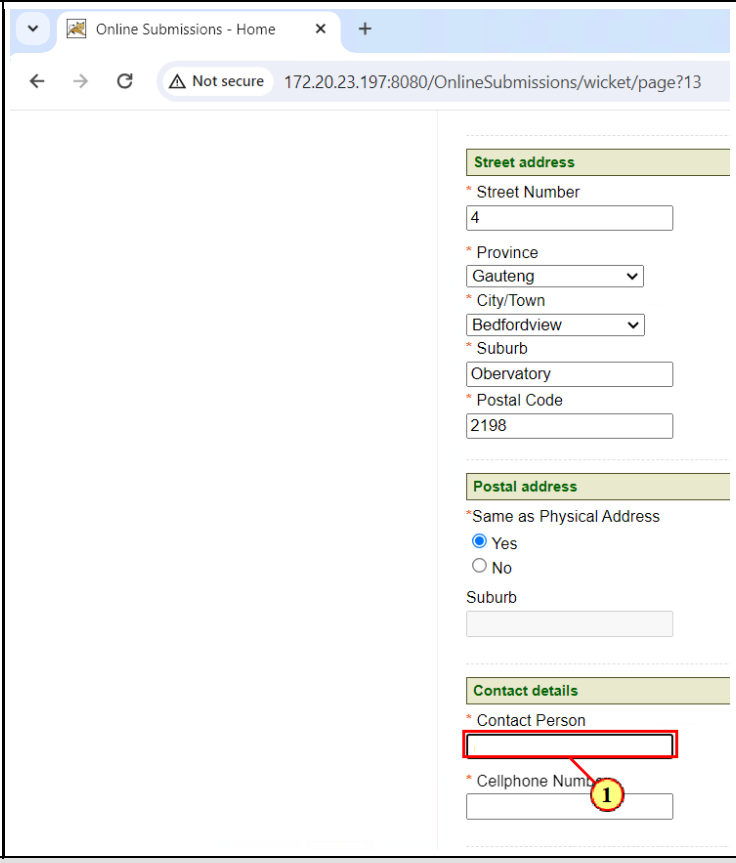
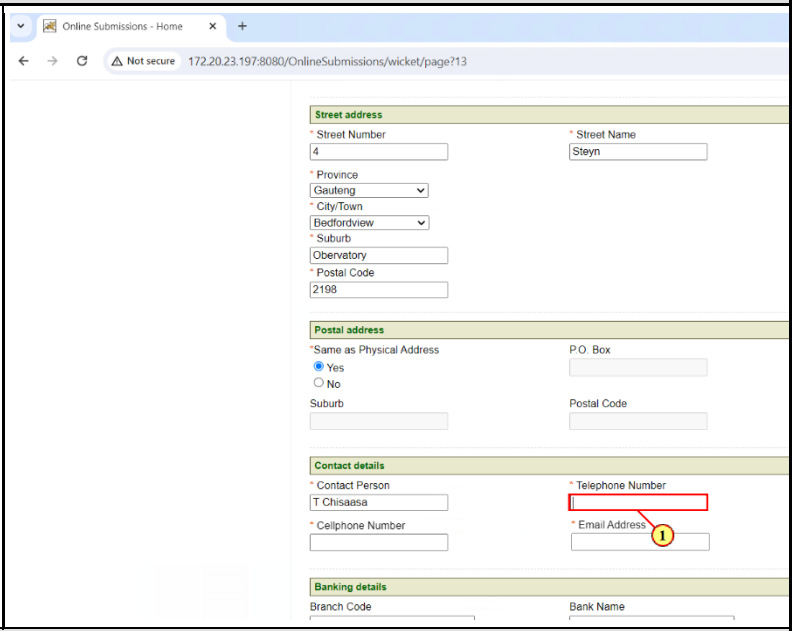
Explanation	Screenshot
(1) Click the right sideways arrow to make a selection.	
(1) Scroll **down**	
(1) Enter your street number in the **Street Number** field.	

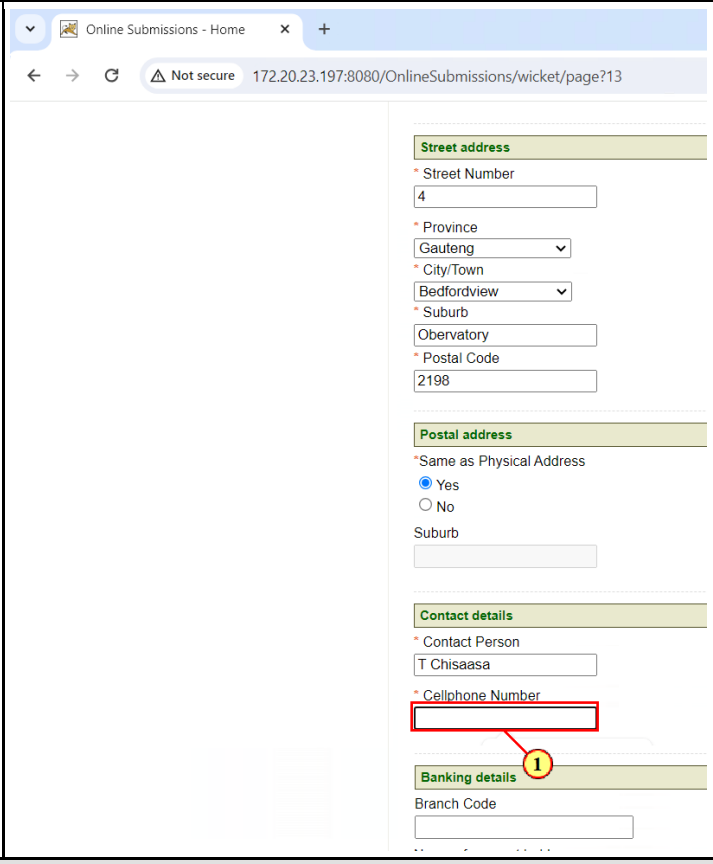
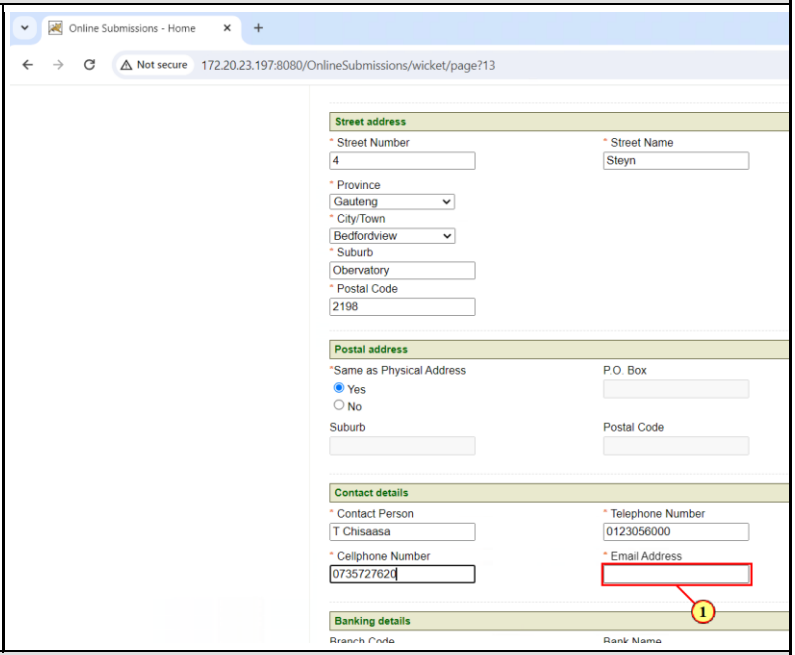
Explanation	Screenshot
(1) Enter your street name in the **Street Name** field.	
(1) Click the **Province** ⌄ downwards arrow to the province**.**	
(1) Select the relevant **Province** by clicking on it.	

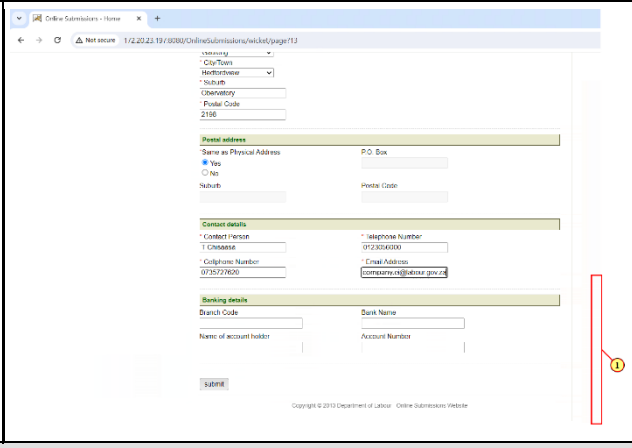
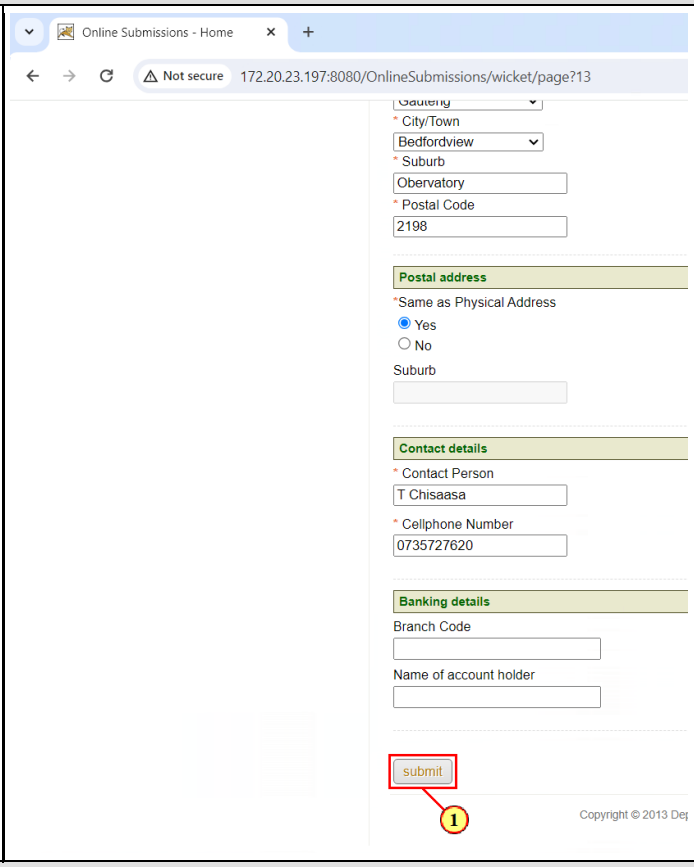
Explanation	Screenshot
(1) Click the **City/Town** ⌄ downward arrow to select city or town.	
10.120.82.148 - Remote Desktop Connection	
(1) Select the relevant city or town.	

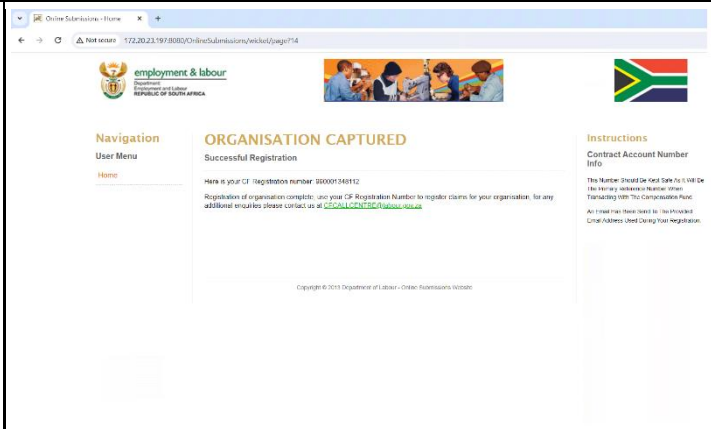
Explanation	Screenshot
(1) Enter your relevant suburb in the **Suburb** field.	
(1) Enter the area postal code in the **Postal Code** field.	

Explanation	Screenshot
(1) Click **Same as Physical Address** ○radio button if the address is the same as postal address. Alternatively, if different, enter your postal address.	
(1) Scroll **down**.	

Explanation	Screenshot
(1) Enter the contact person name in the **Contact Name** field.	
(1) Enter your landline telephone number in the **Telephone Number** field.	

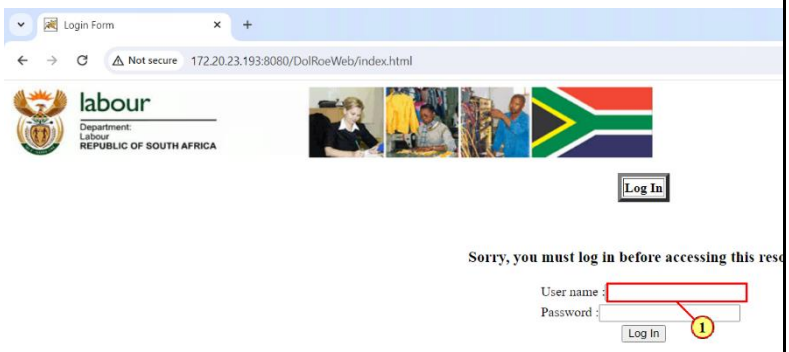
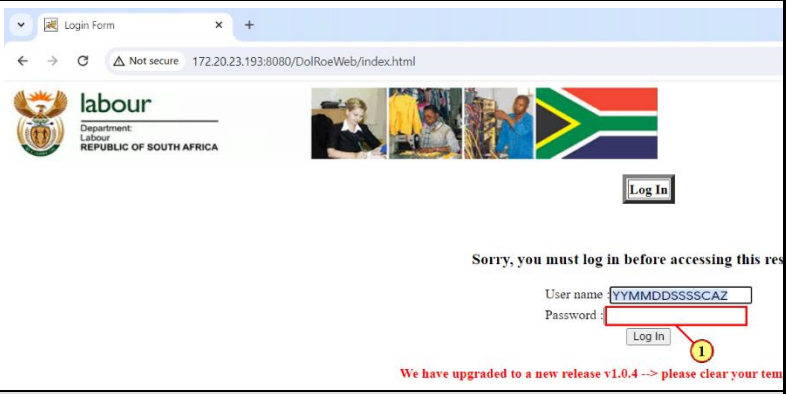
Explanation	Screenshot
(1) Enter your preferred cellphone number in the **Cellphone Number** field.	
(1) Enter your contact email in the **Email Address** field.	

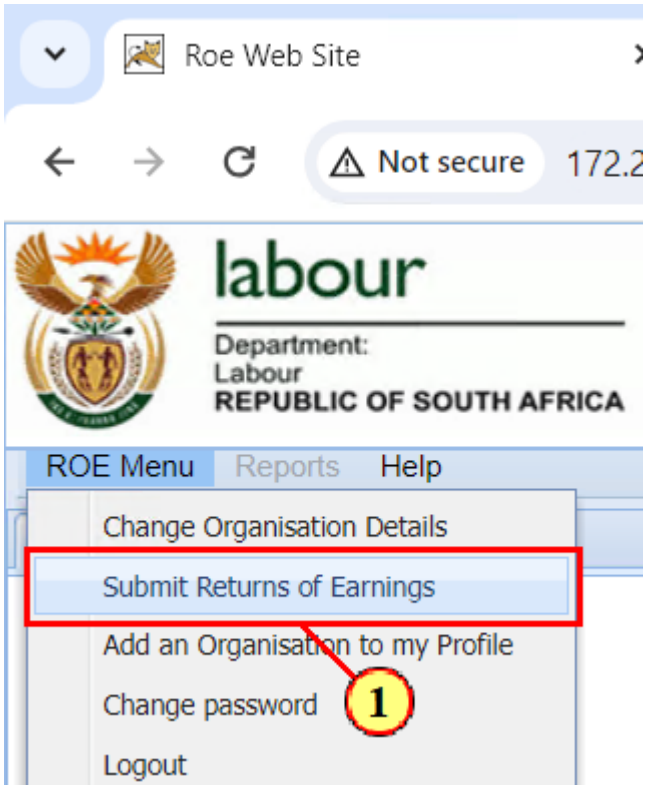
Explanation	Screenshot
(1) Scroll **down**.	
(1) Click the submit button to submit the application.	

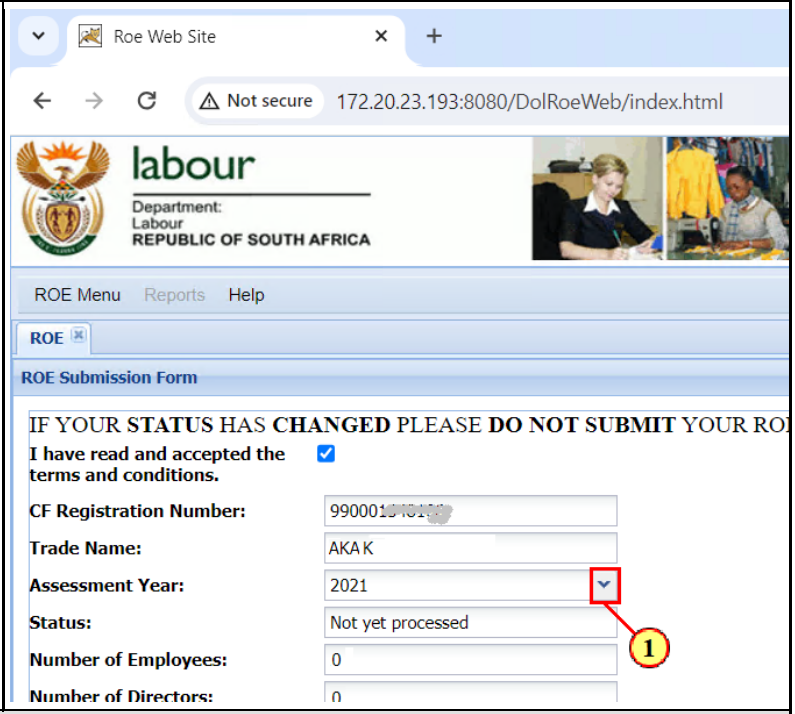
Explanation	Screenshot
The CF Registration number starting with 99... is issued and shows the registration was successful.	

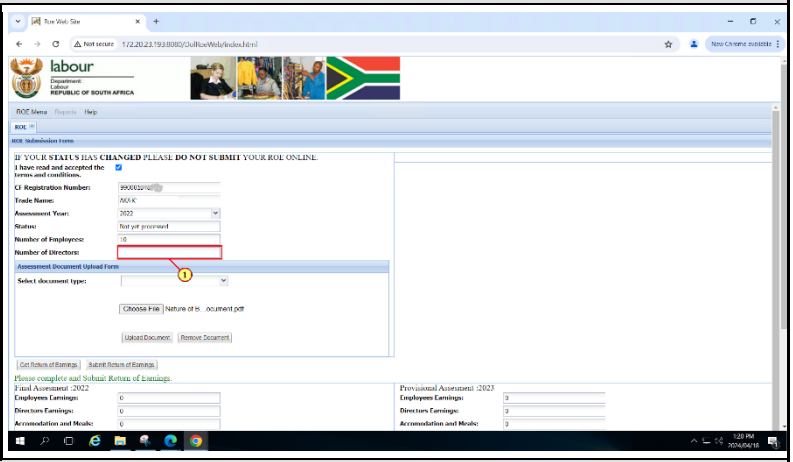
2. Submission of ROE

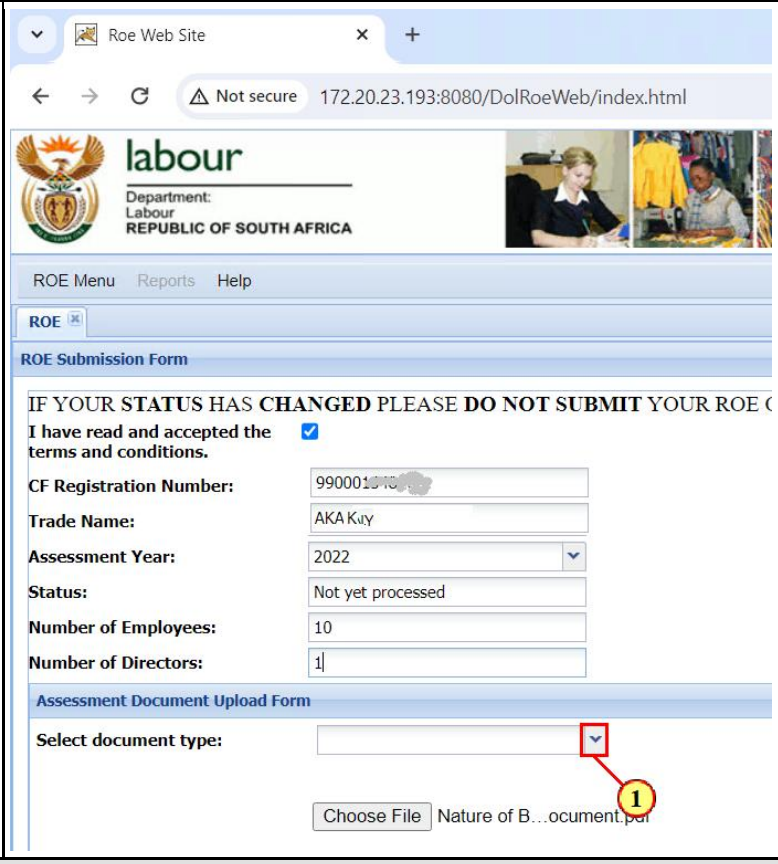
The following are the step to taken when uploading document during submission of your annual ROE for assessment.

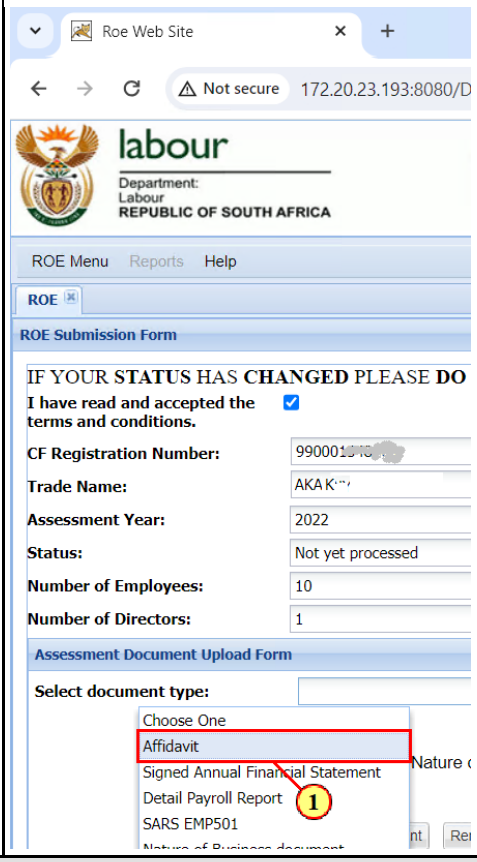
Explanation	Screenshot
Please note, before proceeding to submit your ROE, you must first apply for access and register the entity if its your first time. You will receive a **CF Registration number**. (1) Enter your username in the **Username** field.	
(1) Enter your password in the **Password** field.	

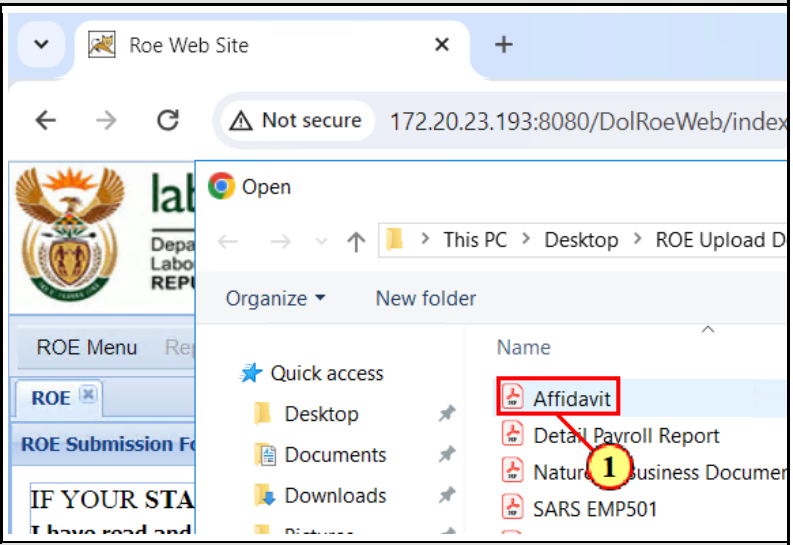
Explanation	Screenshot
Read the terms and conditions of the Compensation Fund. (1) Click the ROE Menu to submit your ROE return.	
(1) Click the Submit Returns of Earnings button.	

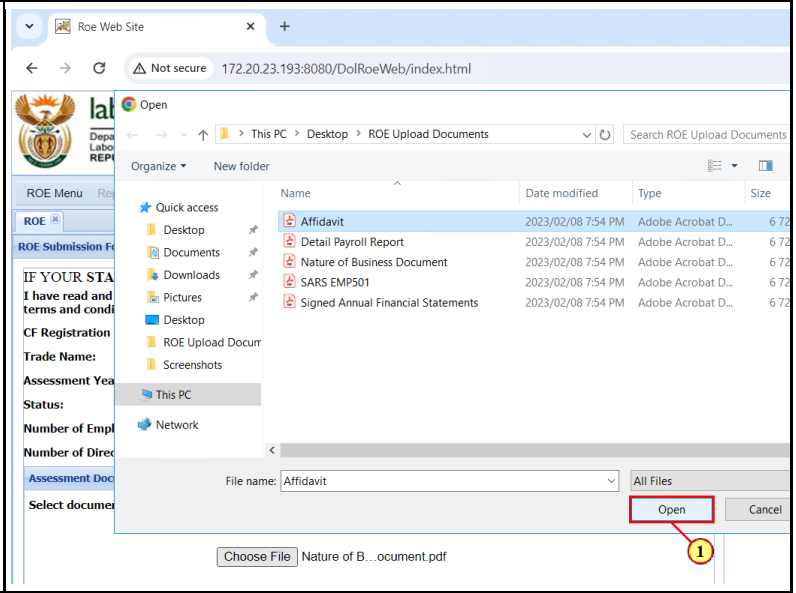
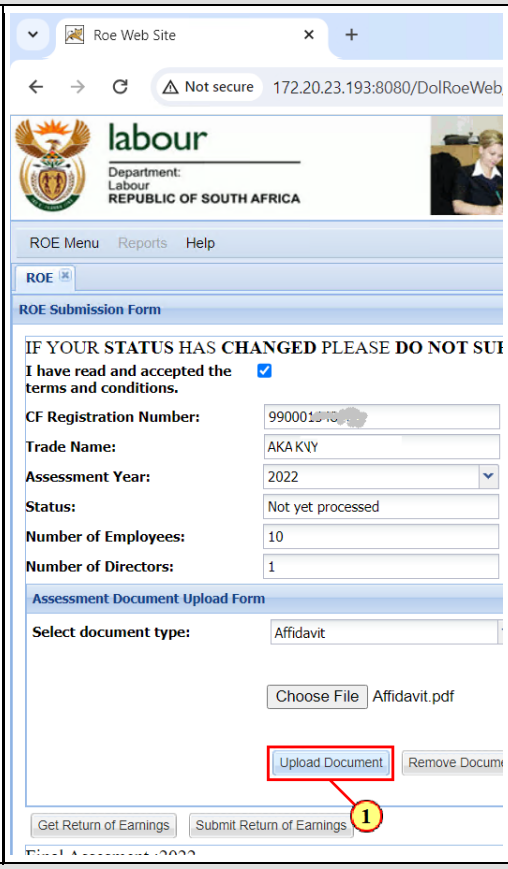
Explanation	Screenshot
(1) Click the **Assessment Year** downward arrow to select the year.	
(1) Select the **Assessment Year** for ROE submission by clicking on it.	

Explanation	Screenshot
The status displays. If the status shows **Not yet processed**, you can proceed to submit your submission. (1) Enter the total number of employees in the **Number of Employees** field.	
(1) Enter the total number of directors in the **Number of Directors** field.	

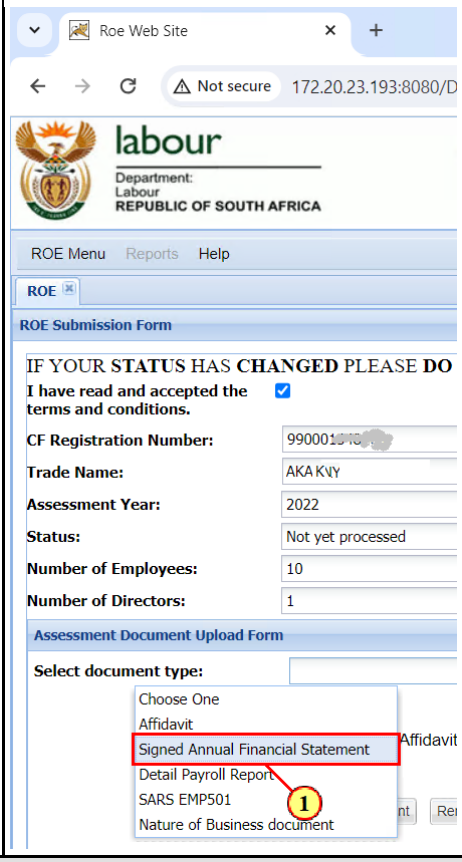
Explanation	Screenshot
You can upload different formats of documents which include word, excel, pdf, etc. (1) Click the **Select document type** downward arrow.	

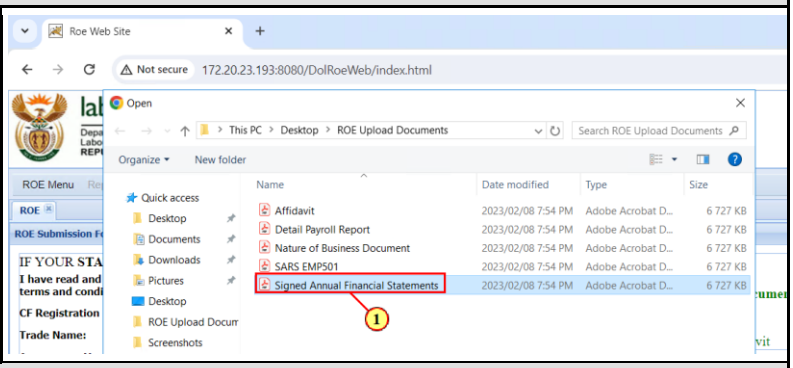
Explanation	Screenshot
For normal ROE submission the document types uploads are *not* mandatory. You may submit the documents that are relevant. (1) Select the Affidavit option by clicking on it.	

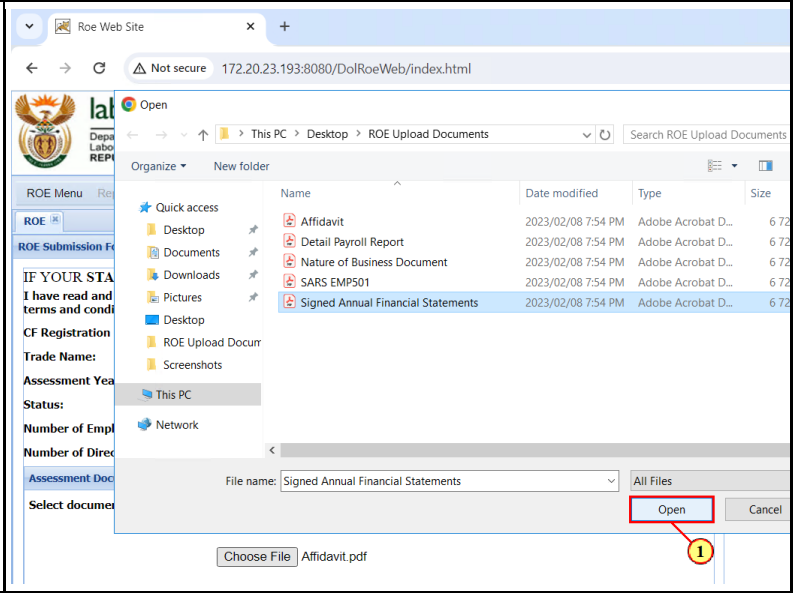
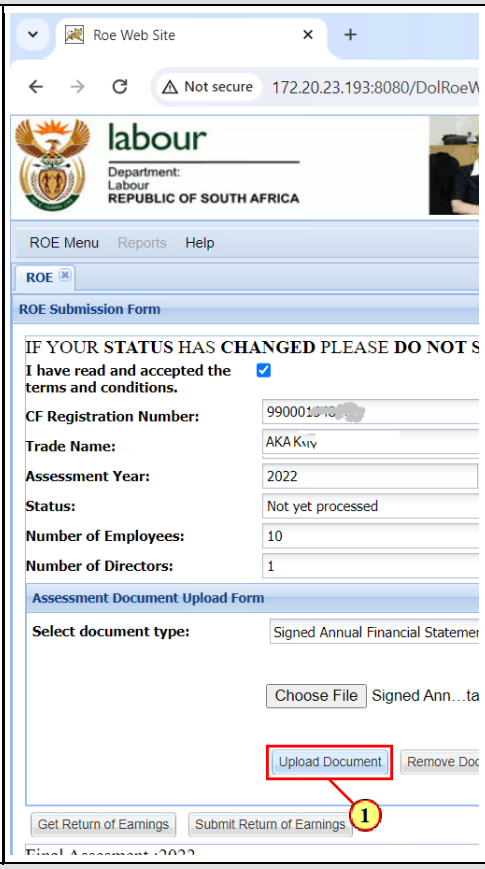
Explanation	Screenshot
(1) Click the Choose File button.	
The ROE system will point to your local machine. You must navigate to the file location where you have saved the ROE files for upload. (1) Select the Affidavit file by clicking on it.	

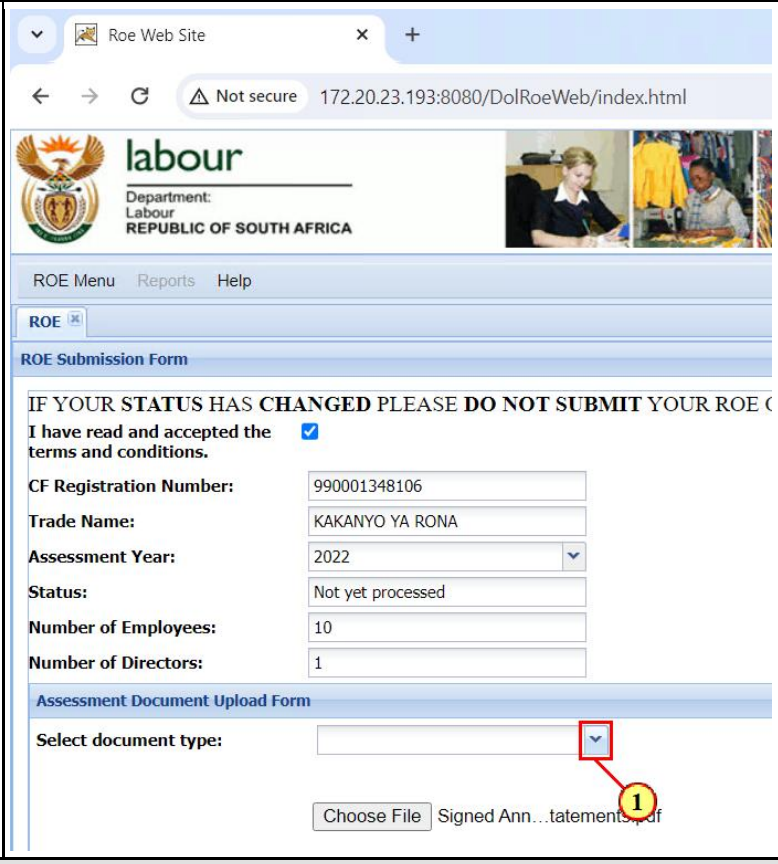
Explanation	Screenshot
(1) Click the Open button.	
You can also remove a document uploaded in error by clicking the **Remove Document** button. (1) Click the Upload Document button to upload the file.	

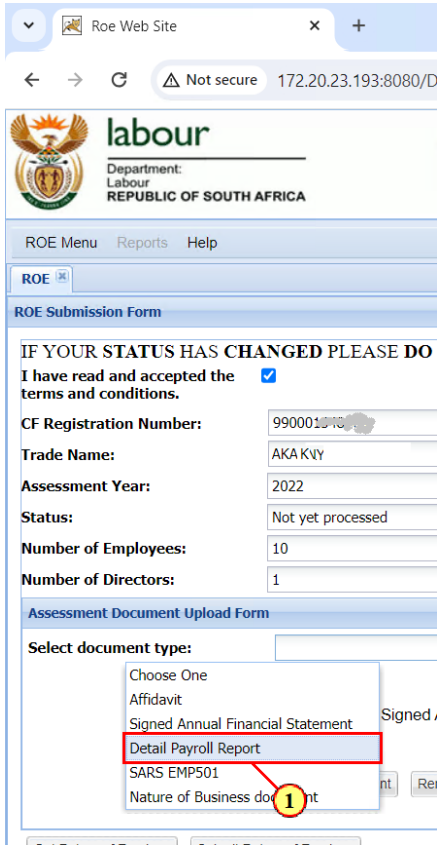
Explanation	Screenshot
Once uploaded, the documents are displayed on the right side of the screen. (1) Click the **Select document type** downward arrow.	

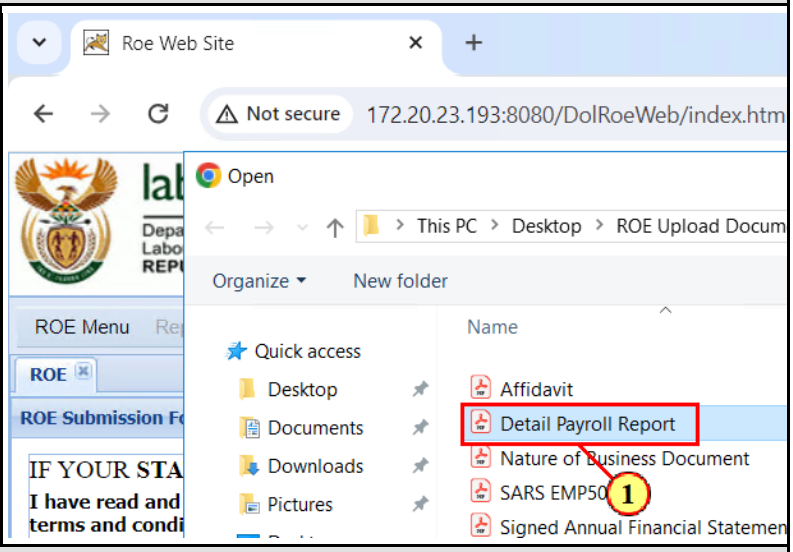
Explanation	Screenshot
(1) Select the Signed Annual Financial Statement option by clicking on it.	

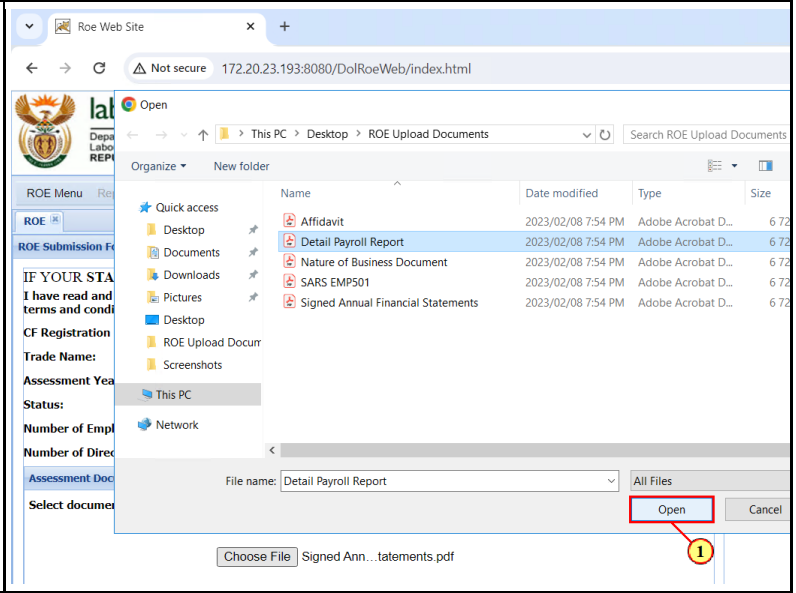
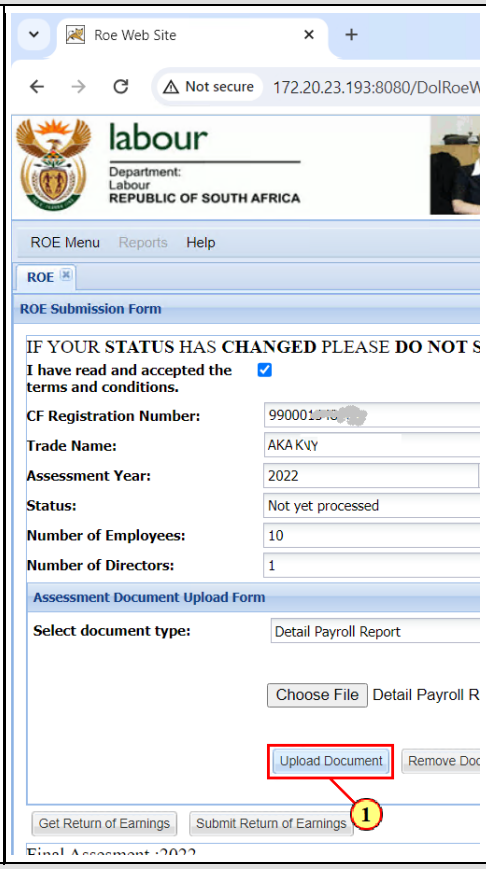
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Signed Annual Financial Statements file by clicking on it.	

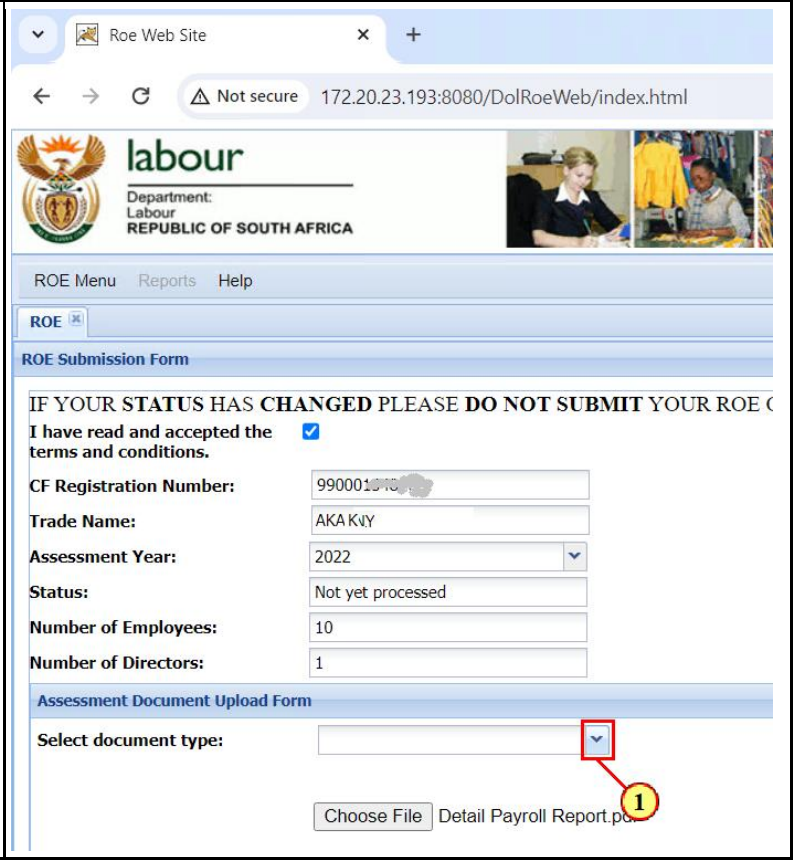
Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Document button to upload the file.	

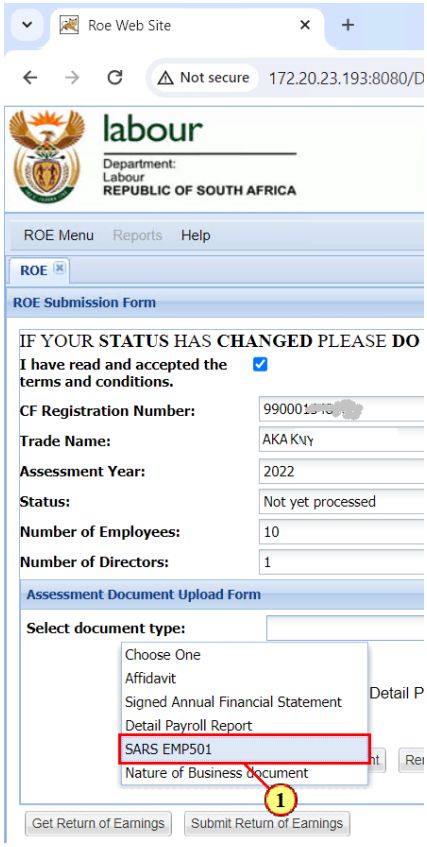
Explanation	Screenshot
(1) Click the **Select document type** downward arrow.	

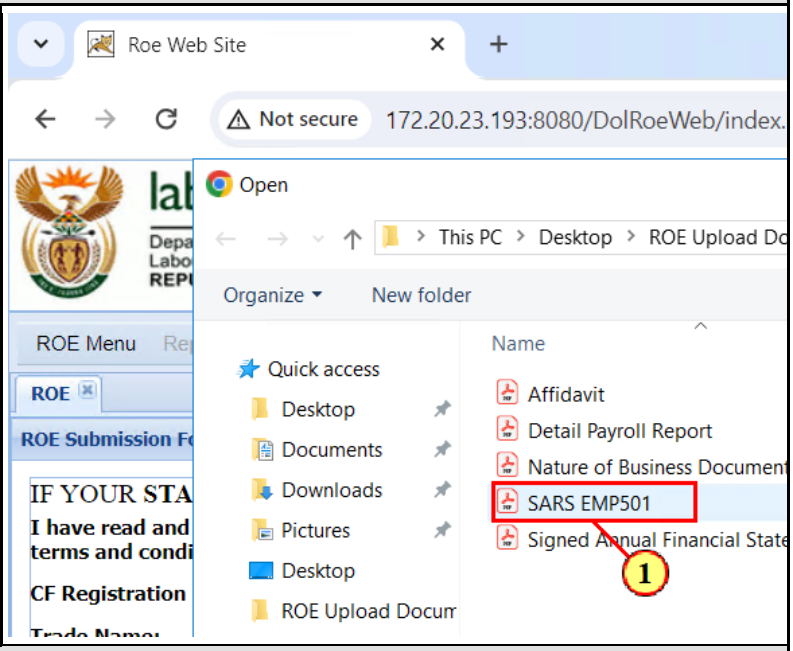
Explanation	Screenshot
(1) Select the Detail Payroll Report option by clicking on it.	

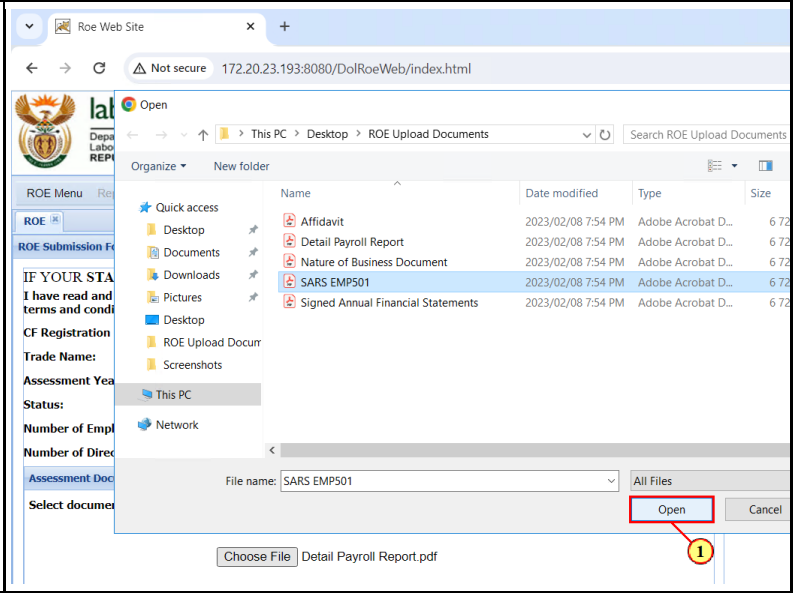
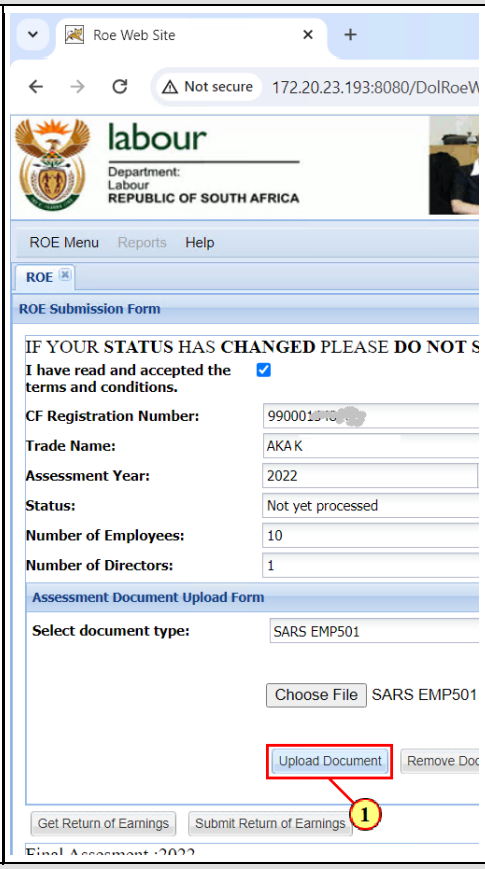
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Detail Payroll Report file by clicking on it.	

Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Document button to upload the file.	

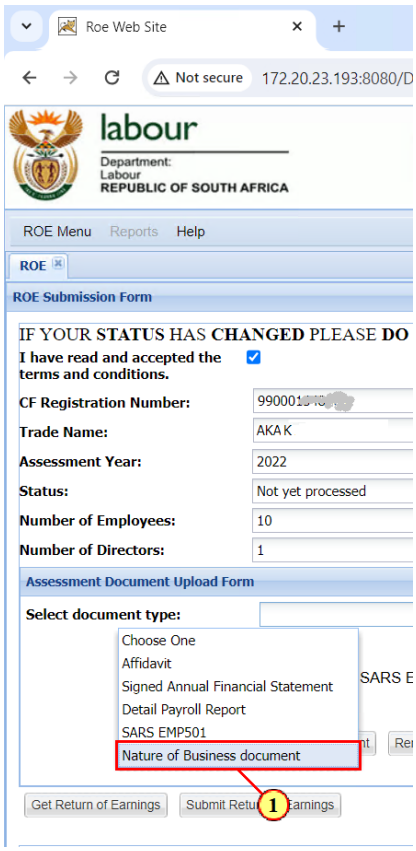
Explanation	Screenshot
(1) Click the **Select document type** downward arrow.	

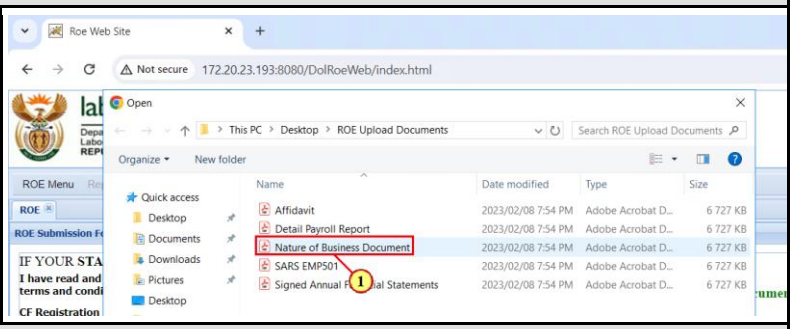
Explanation	Screenshot
(1) Select the SARS EMP501 option by clicking on it.	

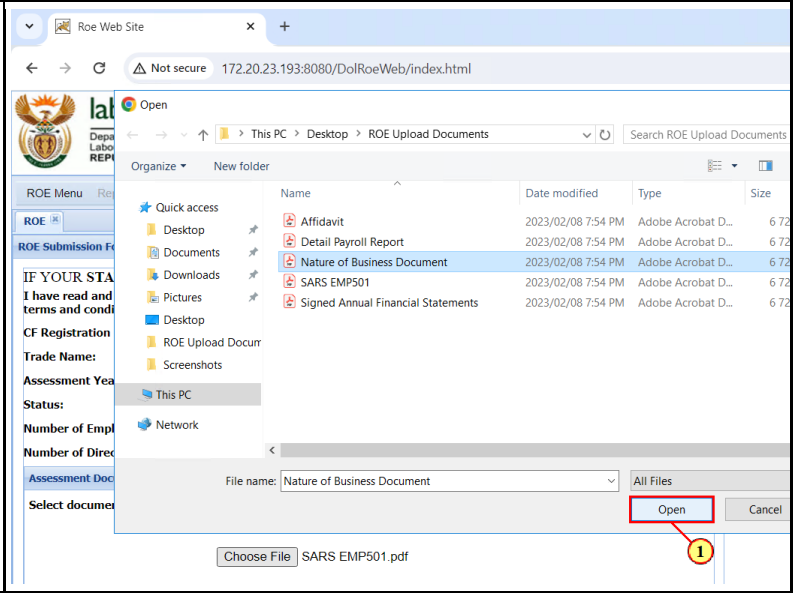
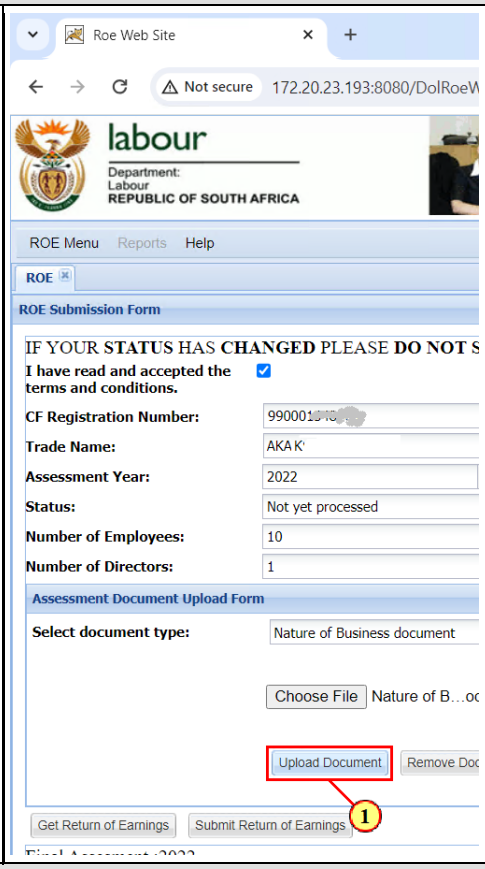
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the SARS EMP501 file by clicking on it.	

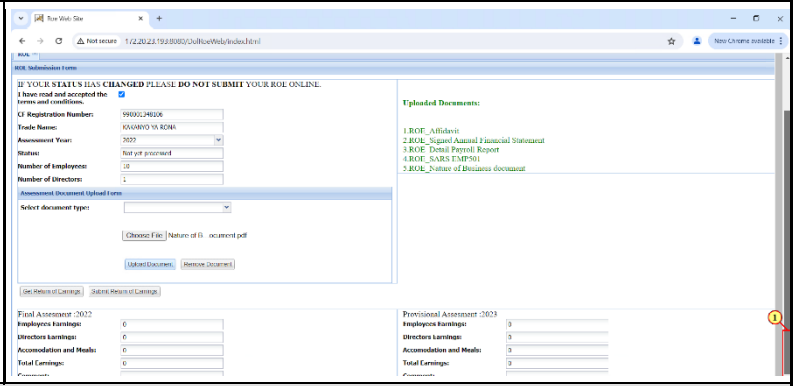
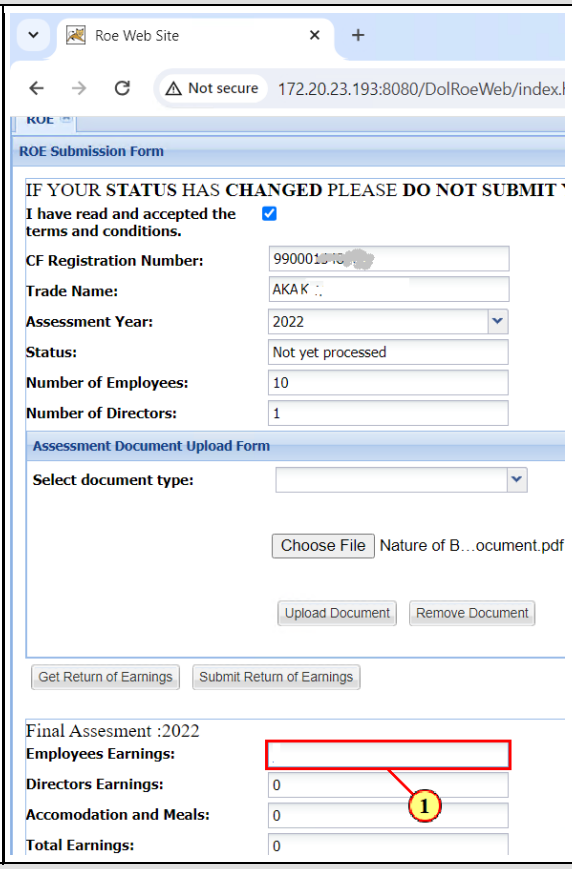
Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Document button to upload the file.	

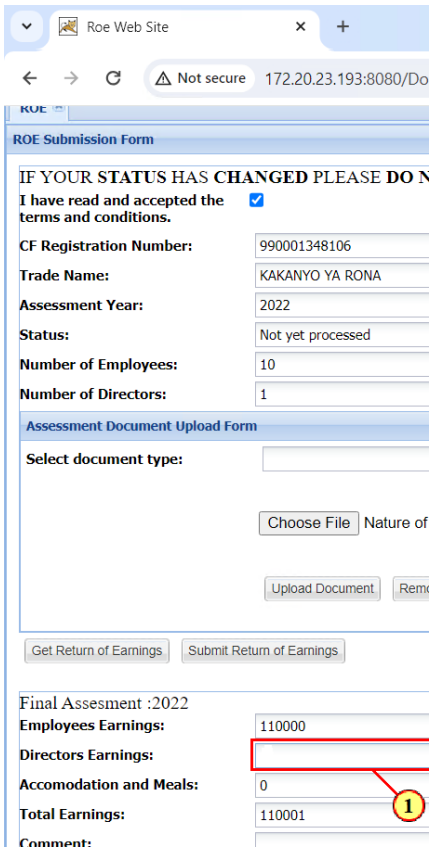
Explanation	Screenshot
(1) Click the **Select document type** downward arrow.	

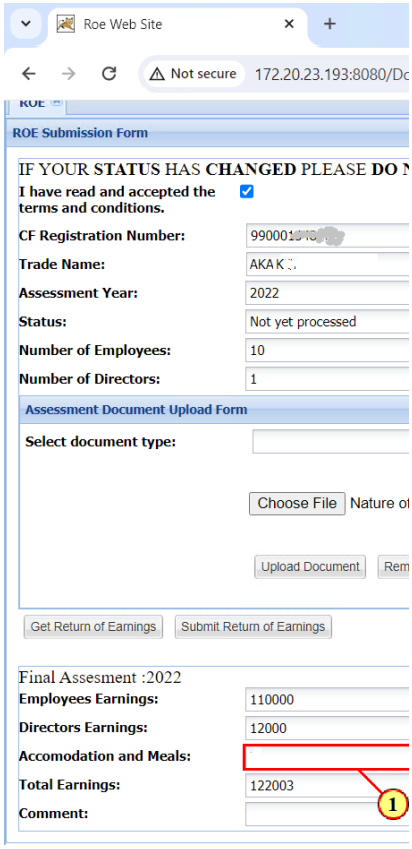
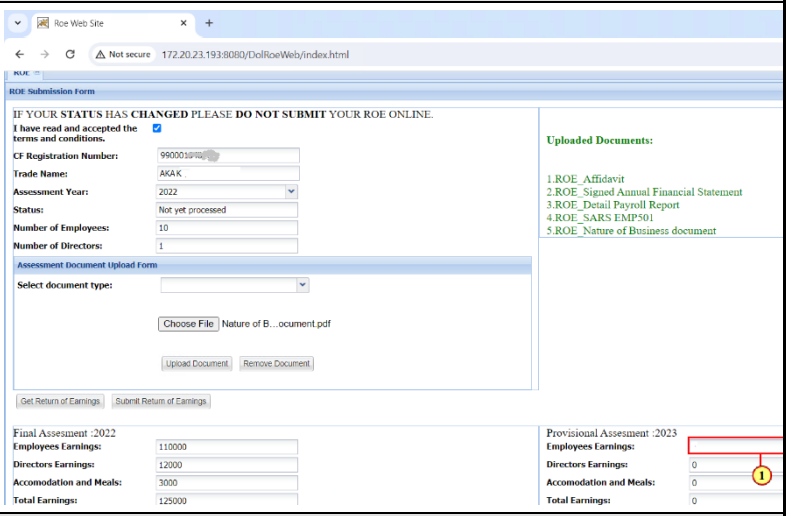
Explanation	Screenshot
(1) Select the Nature of Business document option by clicking on it.	

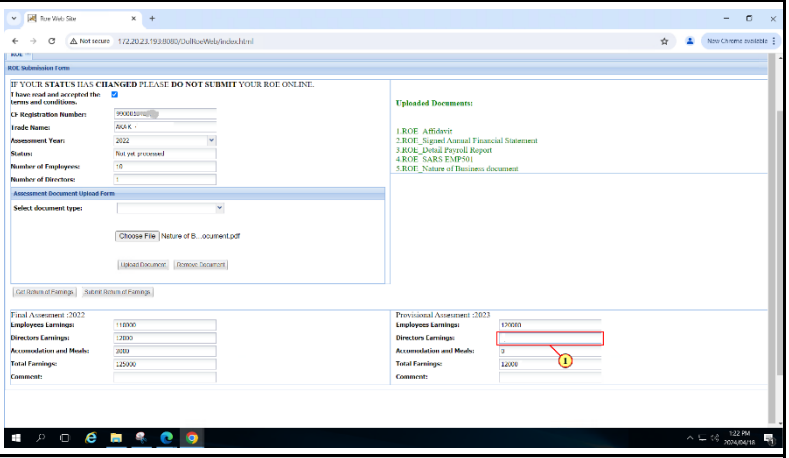
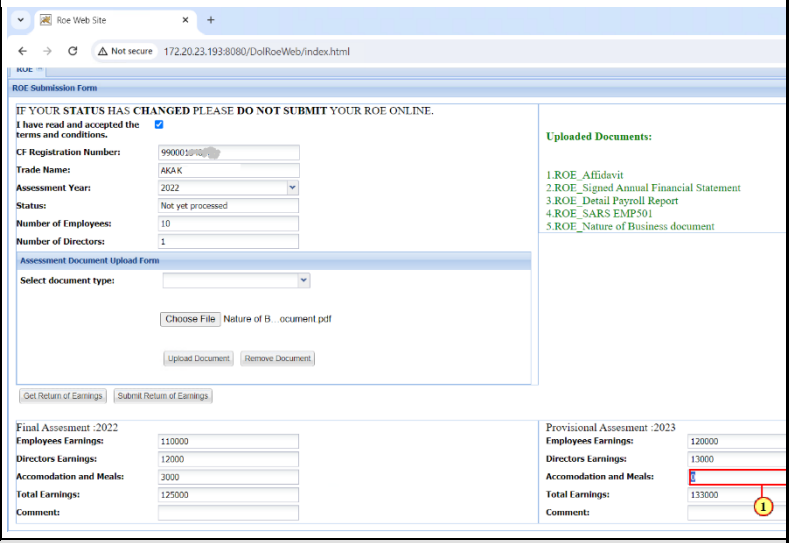
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Nature of Business Document file by clicking on it.	

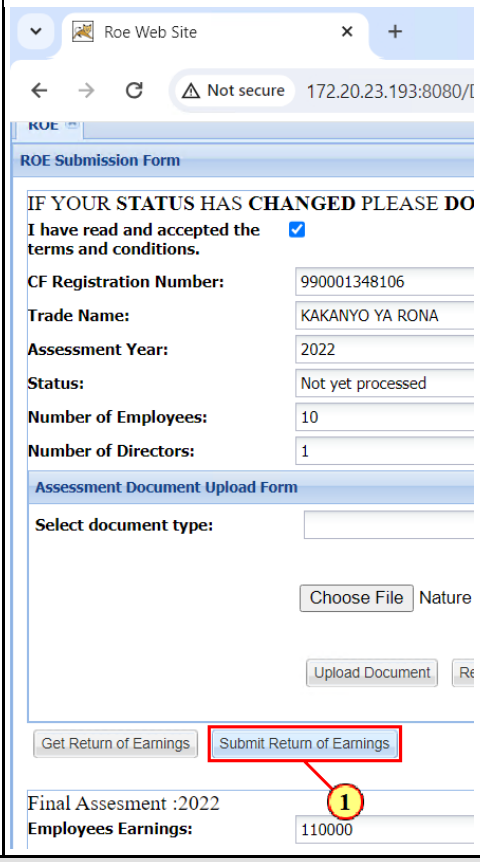
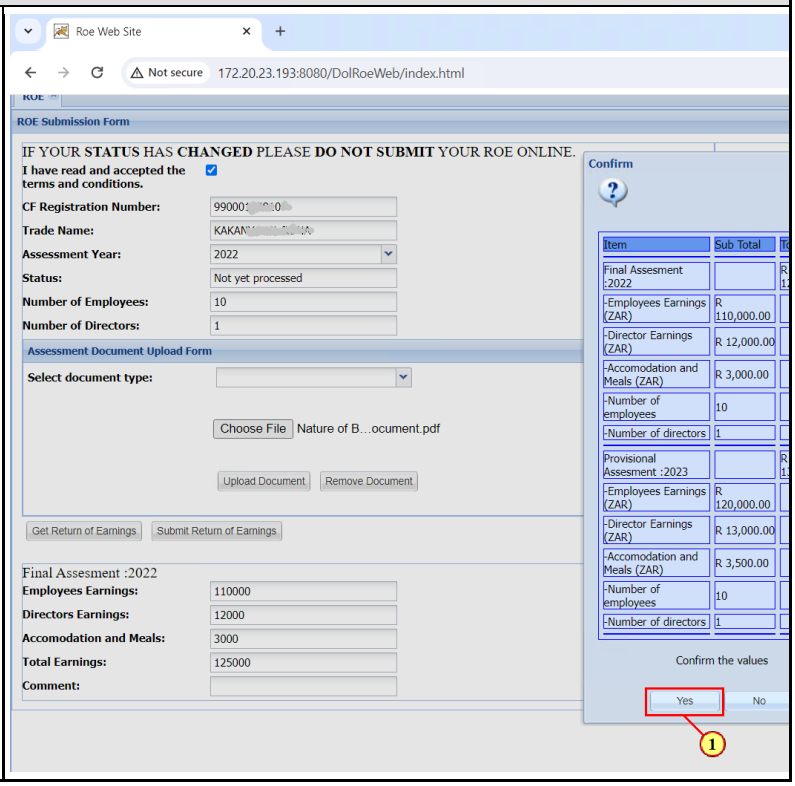
Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Document button to upload the file.	

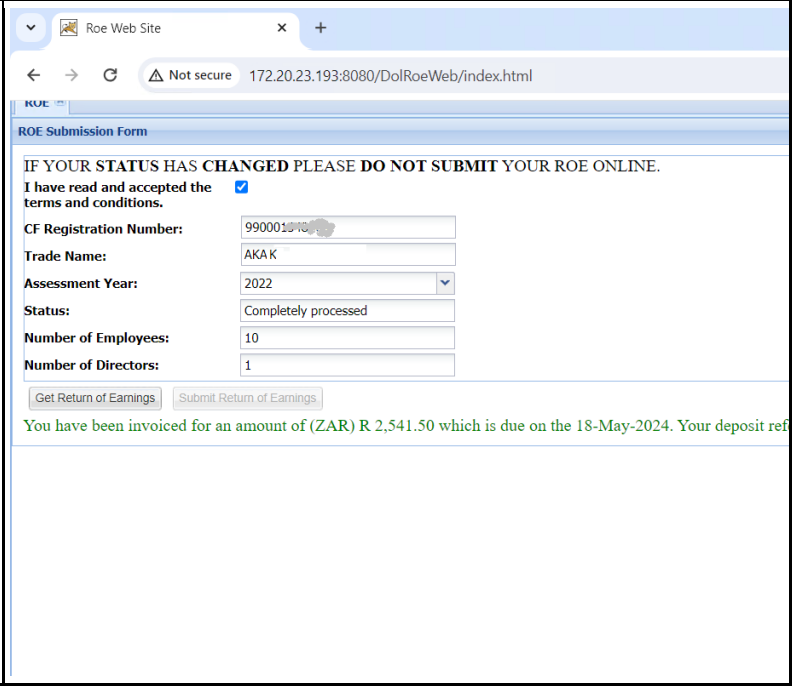
Explanation	Screenshot
(1) Scroll **down.**	
(1) Enter the employees' total annual earnings in the *Final Assessment* **Employees Earnings** field for the current year.	

Explanation	Screenshot
(1) Enter the directors' total annual earnings in the *Final Assessment* **Directors Earnings** field for the current year.	

Explanation	Screenshot
(1) Enter the total annual expense on accommodation and meals in the *Final Assessment* **Accommodation and Meals** field for the current year.	
(1) Enter the employees' total annual earnings in the *Provisional Assessment year* **Employees Earnings** field.	

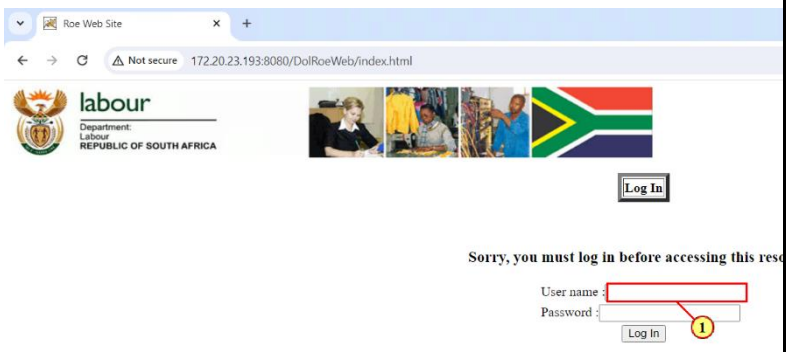
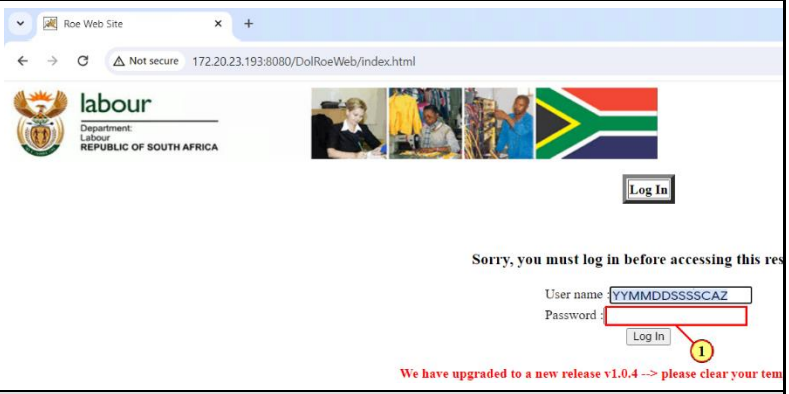
Explanation	Screenshot
(1) Enter the directors' total annual earnings in the *Provisional Assessment* **Directors Earnings** field for the next year.	
(1) Enter the total annual expense on accommodation and meals in the *Provisional Assessment* **Accommodation and Meals** field for the next year.	

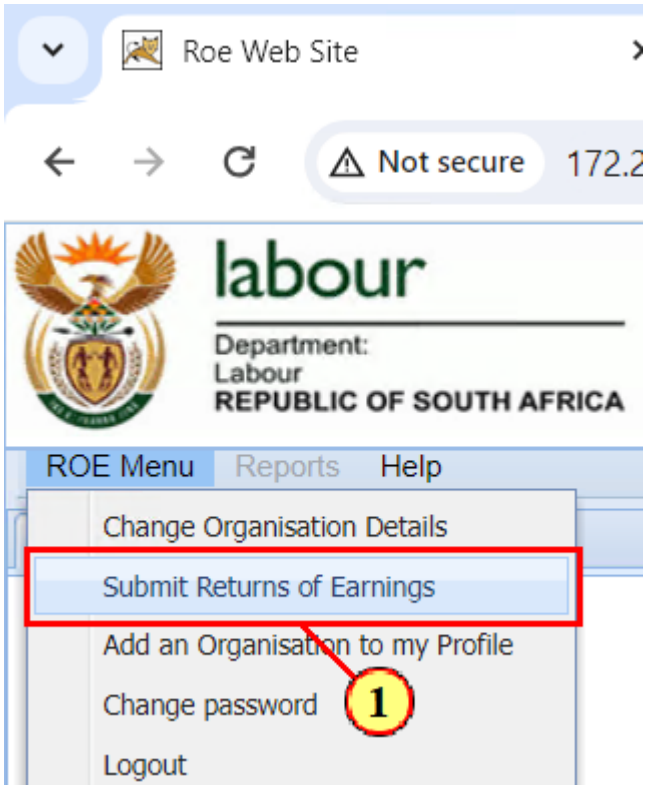
Explanation	Screenshot
You may enter a comment in the **Comment** field if the there is a big variance in your assessment for the year. (1) Click the Submit Return of Earnings button.	
(1) Click the Yes button if you agree with the figures and calculations.	

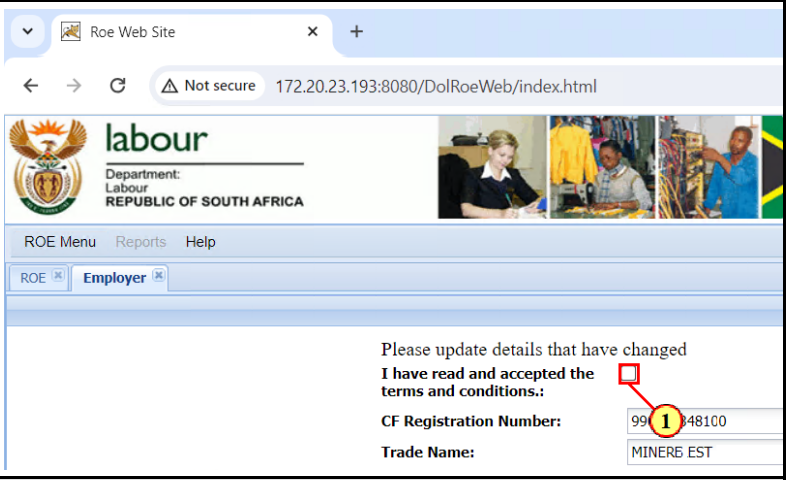
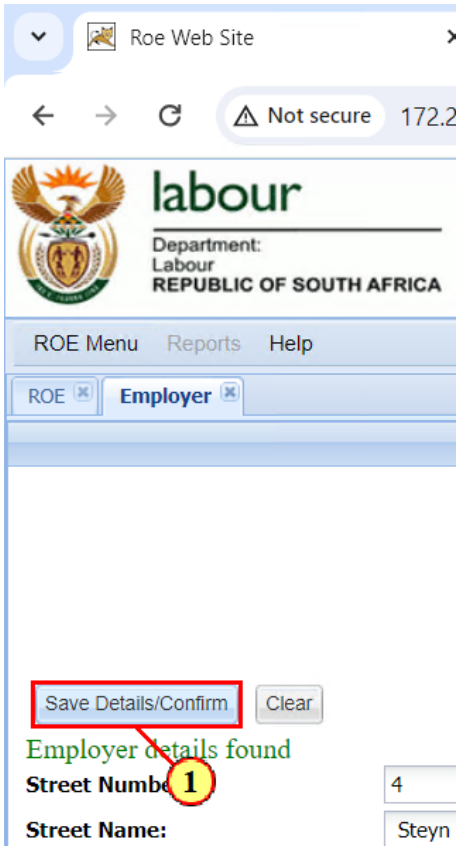
Explanation	Screenshot
Once the documents are uploaded and you finish your submission, you will get a message showing your invoice amount, due date, banking and contact details of the Compensation Fund.	

3. ROE Flagged for Audit

The following are the steps to be taken when uploading documents when your return is flagged for audit by the Compensation Fund.

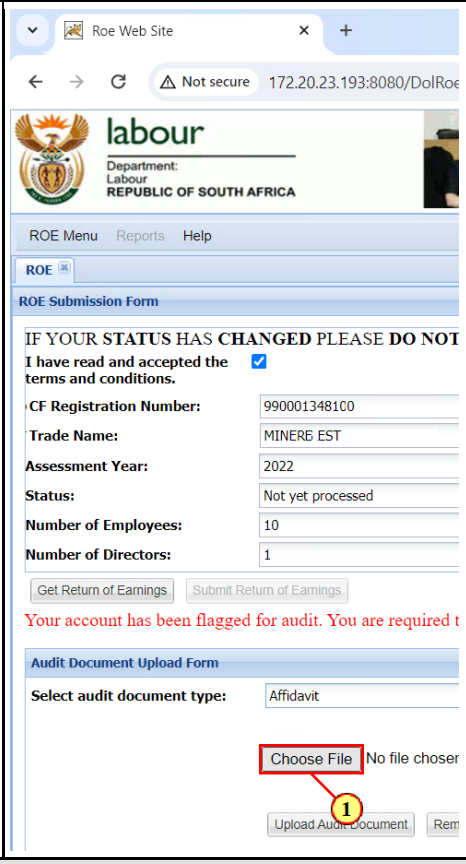
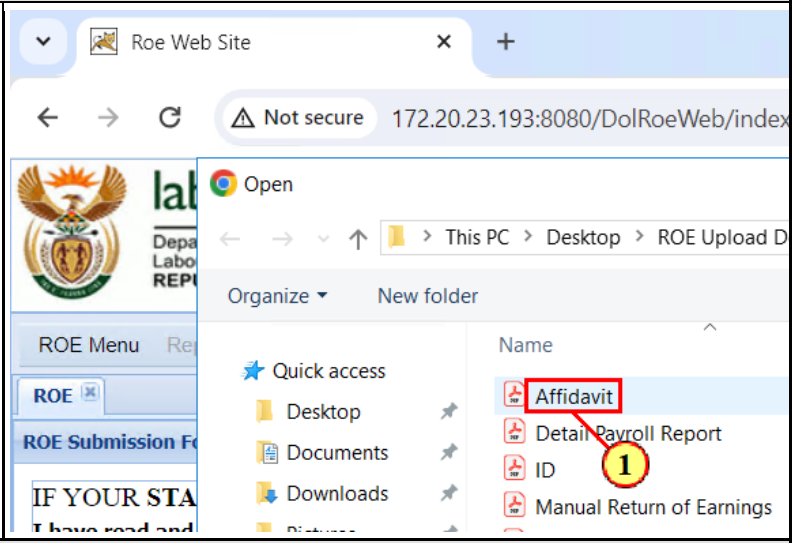
Explanation	Screenshot
Before proceeding to submit your ROE, you must first apply for access and register the entity if its your first time. You will receive a **CF Registration number**. (1) Enter your username in the **Username** field.	
(1) Enter your password in the **Password** field.	

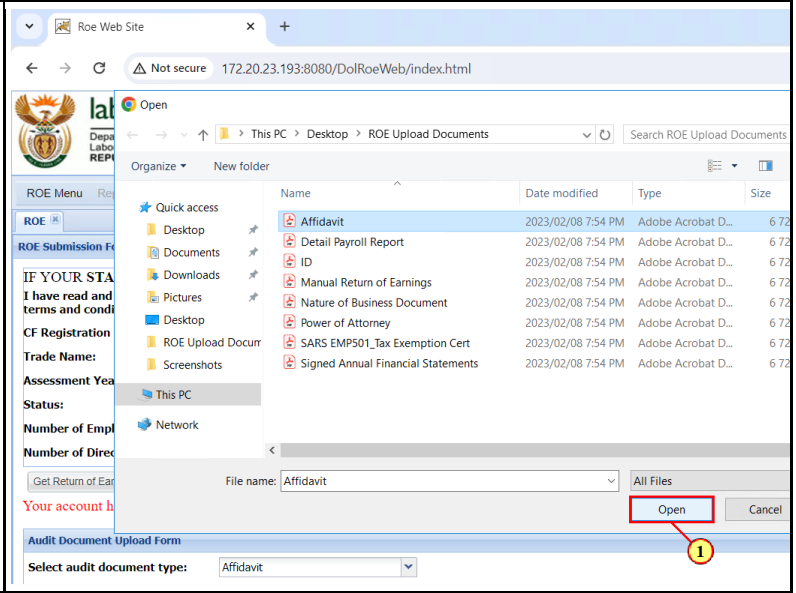
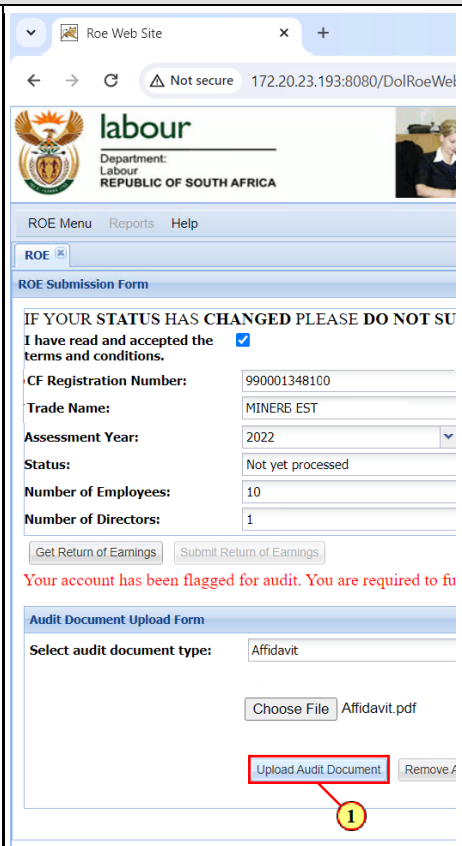
Explanation	Screenshot
Read the terms and conditions of the Compensation Fund. (1) Click the ROE Menu to submit your ROE return.	
(1) Click the Submit Returns of Earnings button.	

Explanation	Screenshot
(1) Click the **Terms and Conditions** ☑ checkbox to confirm and accept the terms and conditions.	
(1) Click the Save Details/Confirm button to confirm your details are correct.	

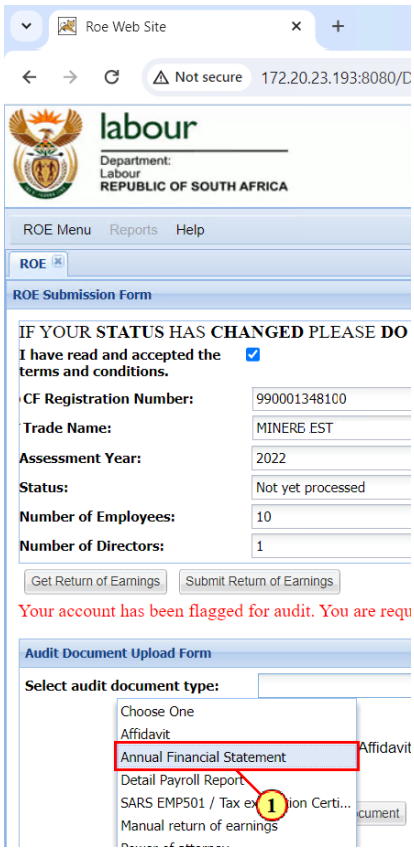
Explanation	Screenshot
You can upload different formats of documents which include word, excel, pdf, etc. (1) Click the **Select audit document type** downward arrow.	

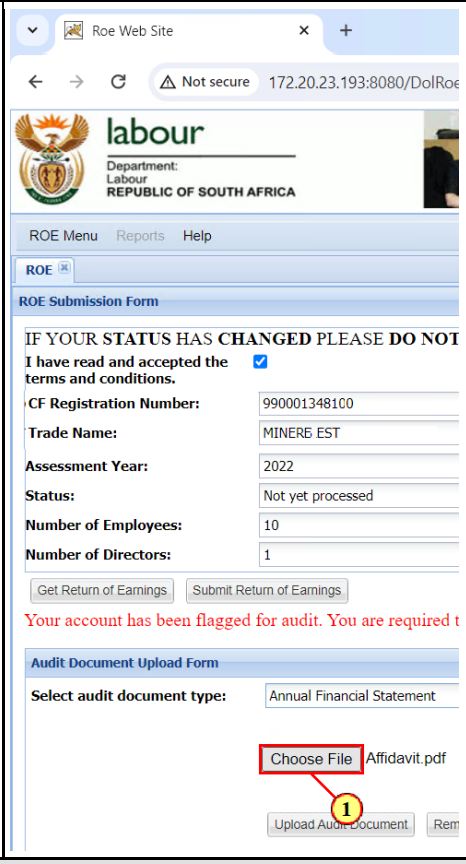
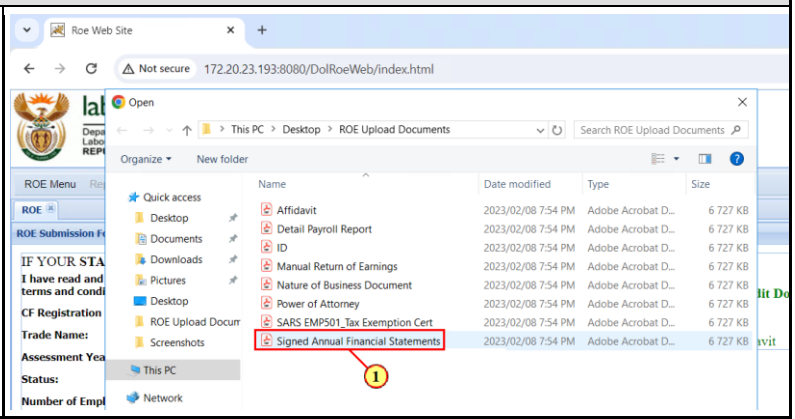
Explanation	Screenshot
For Audit purposes all the document types uploads are mandatory apart from **Other 1, Other 2, Other 3** options which are optional. (1) Select the Affidavit option by clicking on it.	

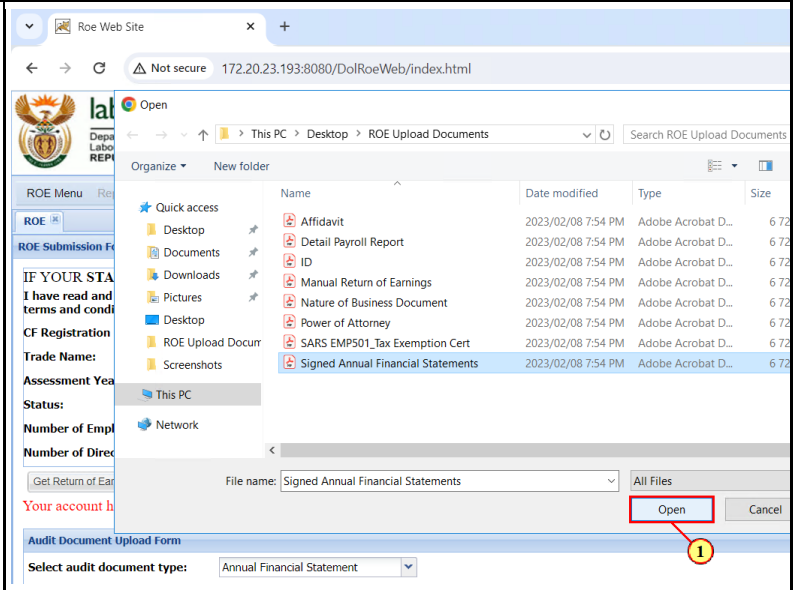
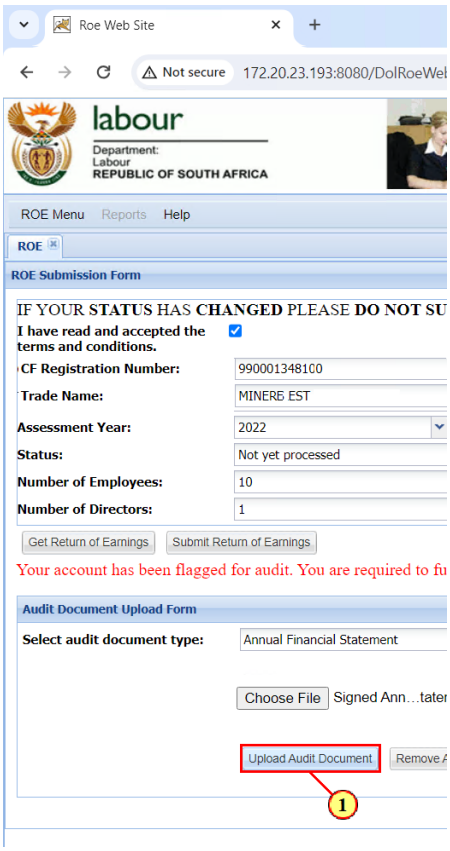
Explanation	Screenshot
(1) Click the Choose File button.	
The ROE system will point to your local machine. You must navigate to the file location where you have saved the ROE files for upload. (1) Select the Affidavit file by clicking on it.	

Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

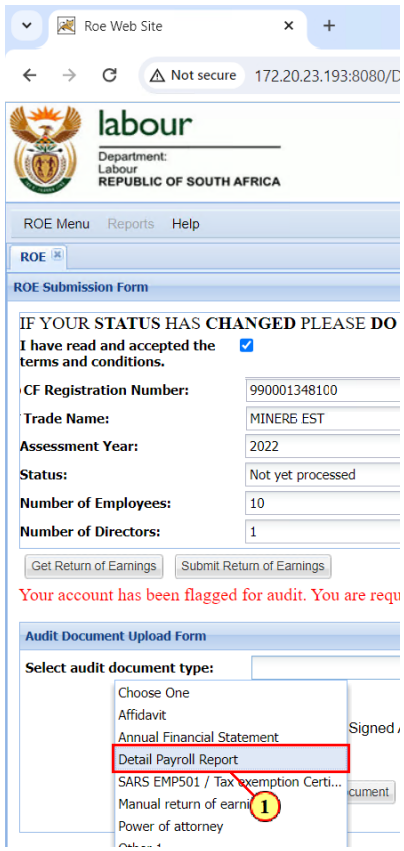
Explanation	Screenshot
(1) Click the **Select audit document type** downward arrow.	

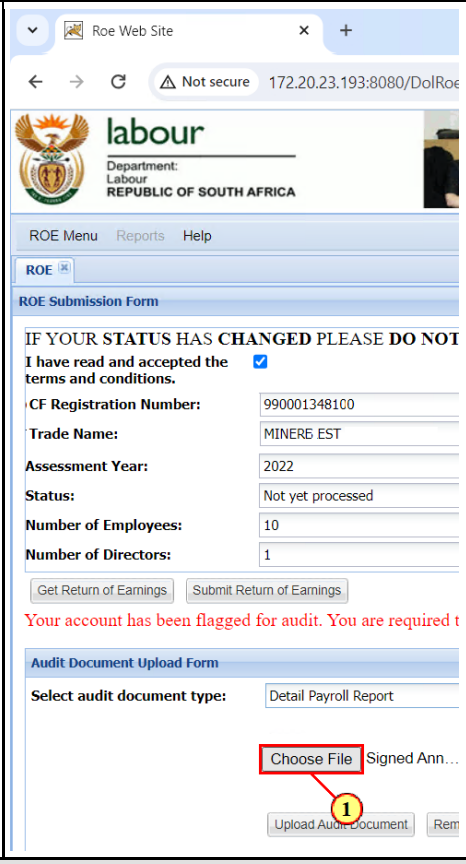
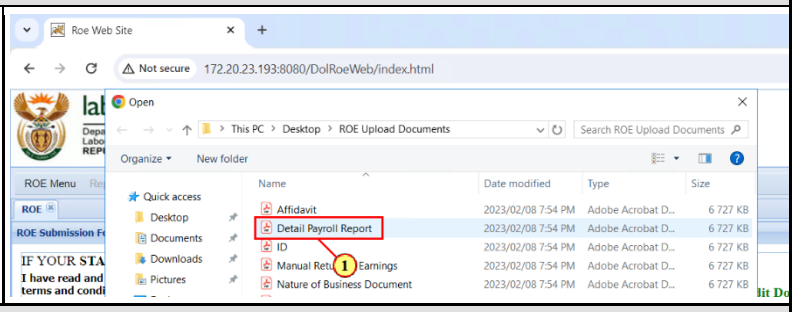
Explanation	Screenshot
(1) Click Annual Financial Statement .	

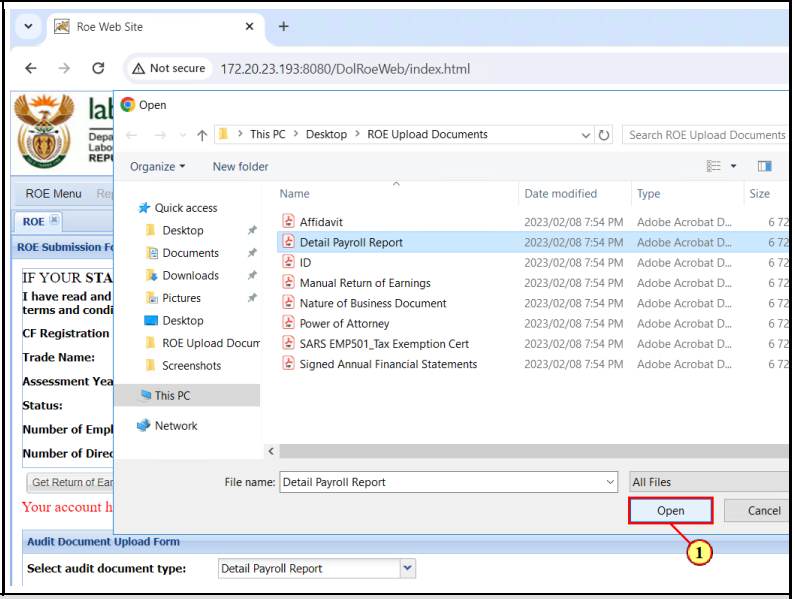
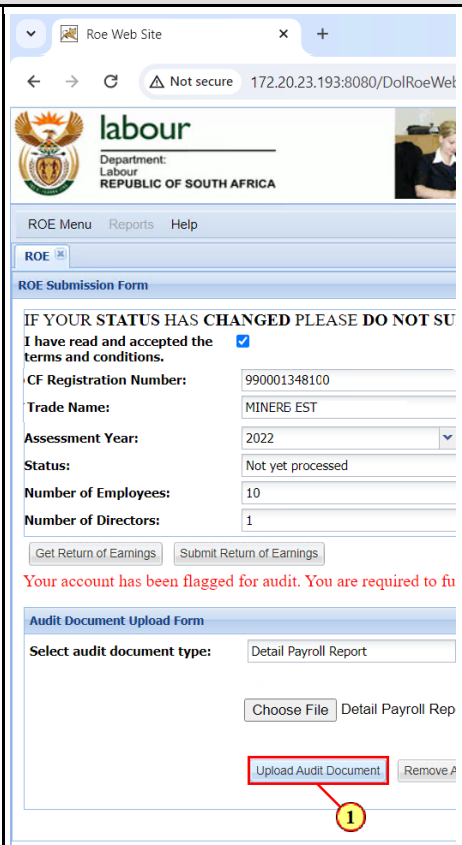
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Signed Annual Financial Statements file by clicking on it.	

Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

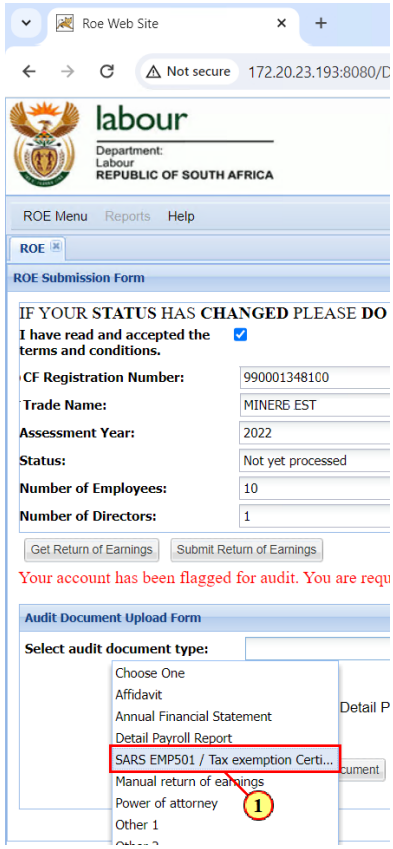
Explanation	Screenshot
(1) Click the **Select audit document type** downward arrow.	

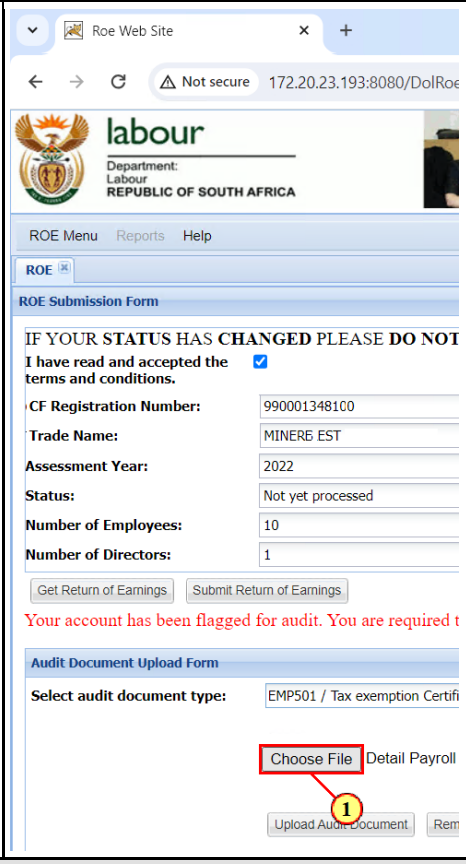
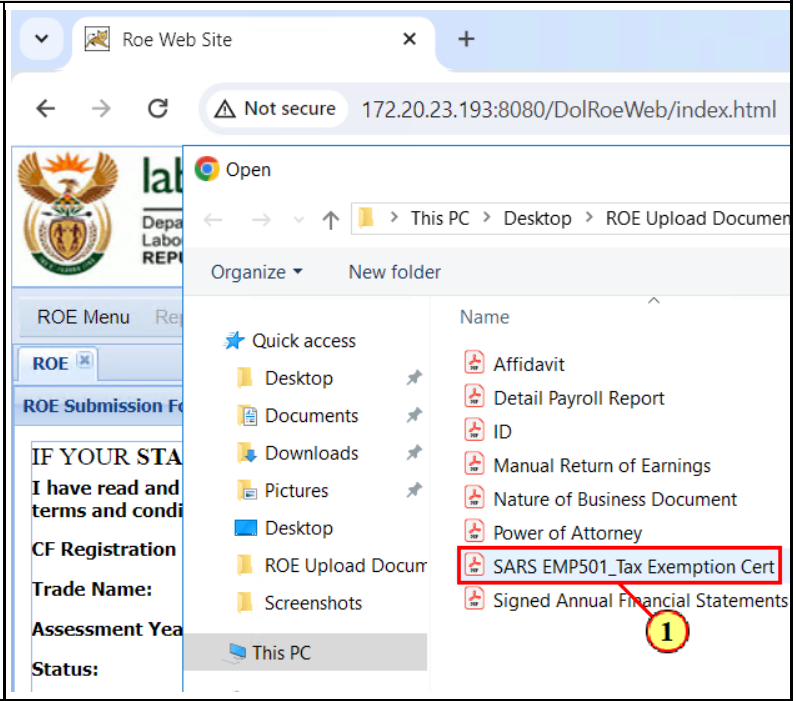
Explanation	Screenshot
(1) Select the Detail Payroll Report option by clicking on it.	

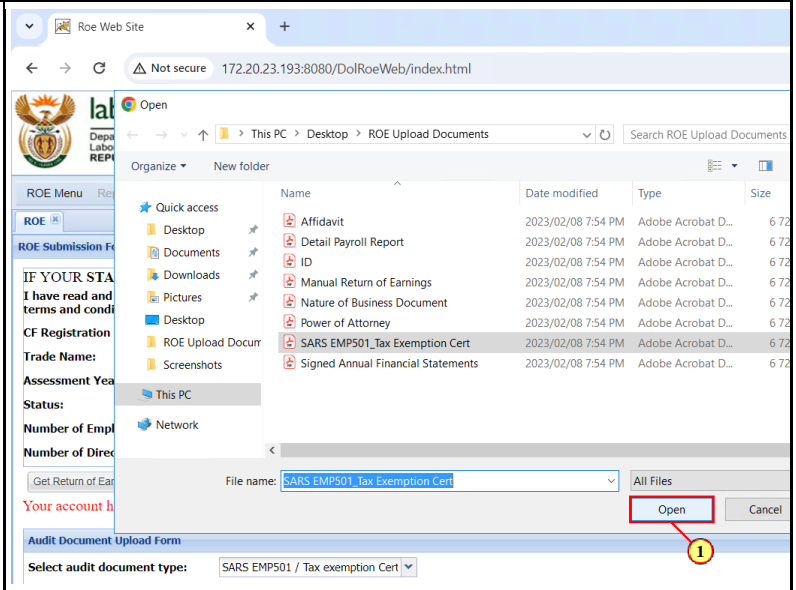
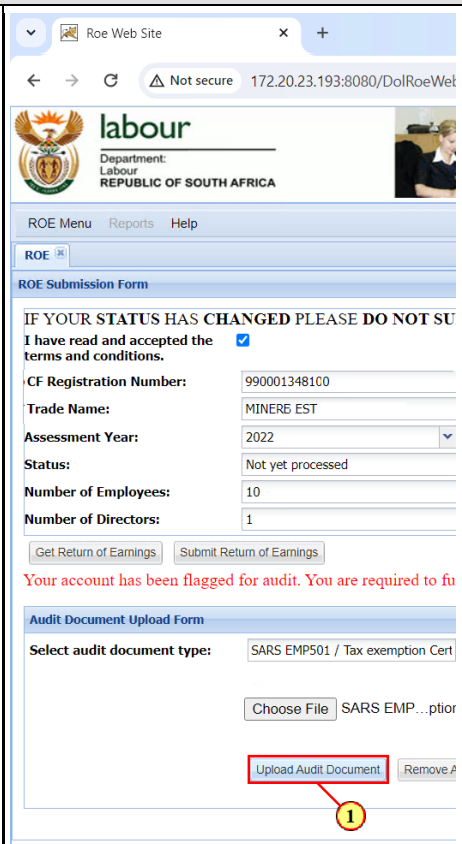
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Detail Payroll Report file by clicking on it.	

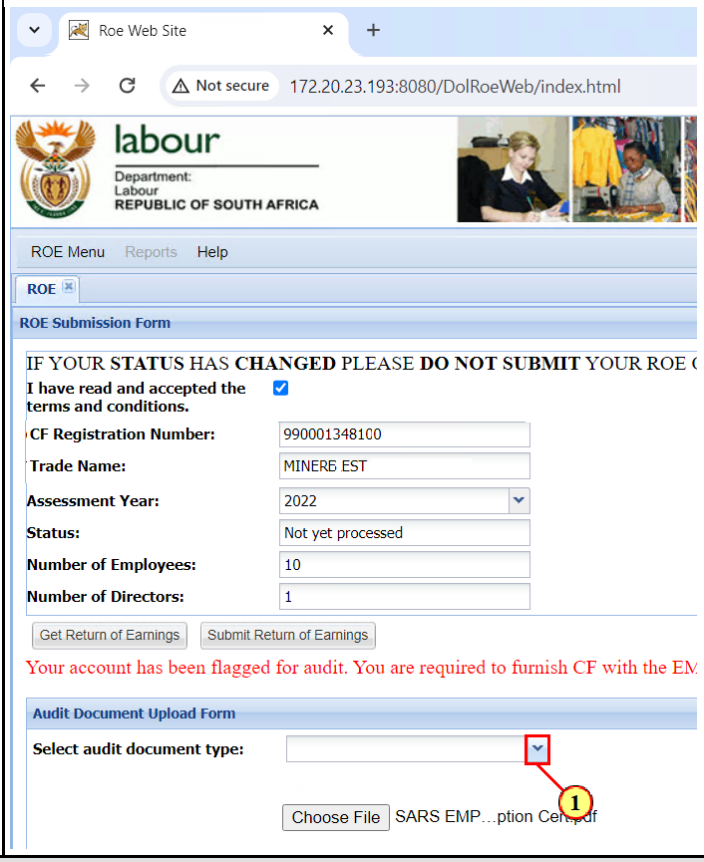
Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

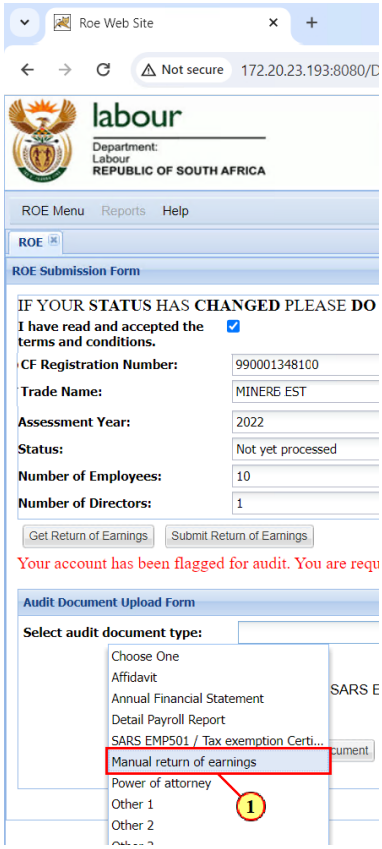
Explanation	Screenshot
(1) Click the **Select audit document type** downward arrow.	

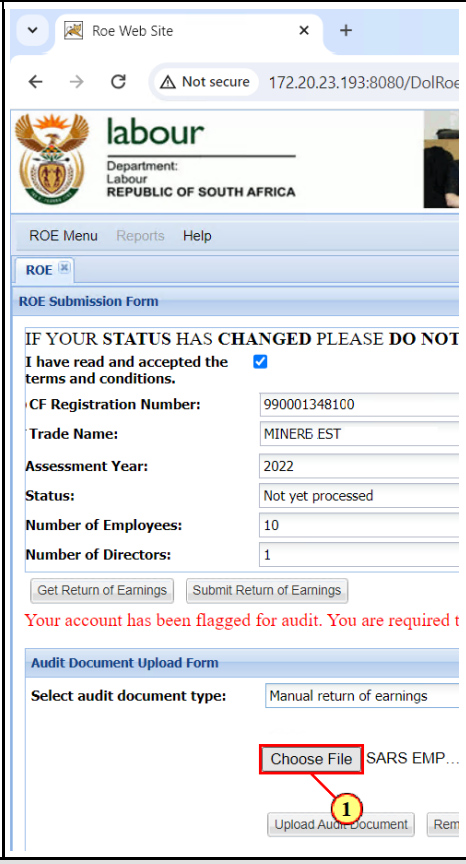
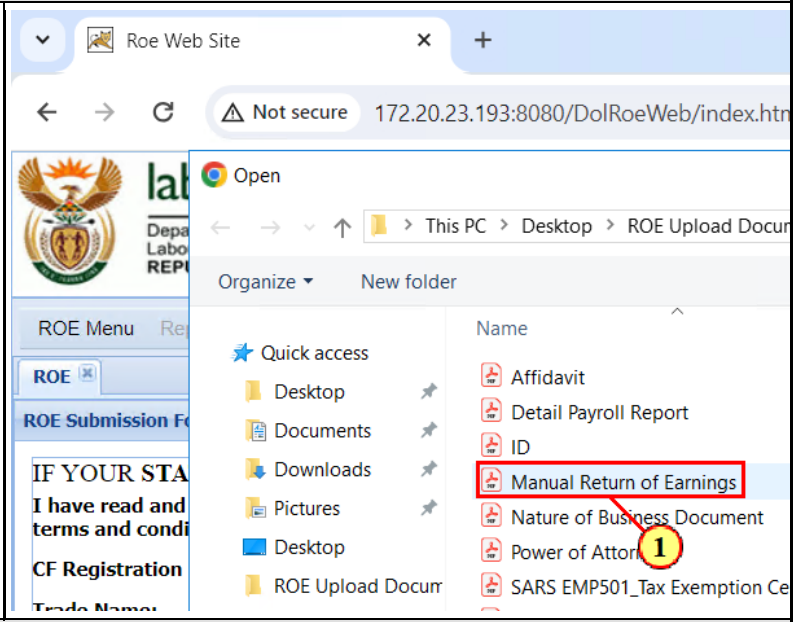
Explanation	Screenshot
(1) Select the SARS EMP501 / Tax exemption Certi... option by clicking on it.	

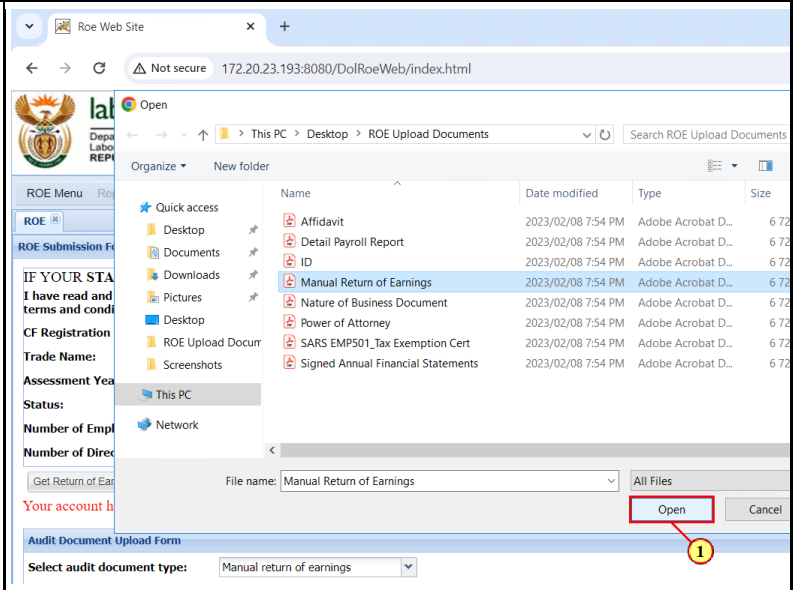
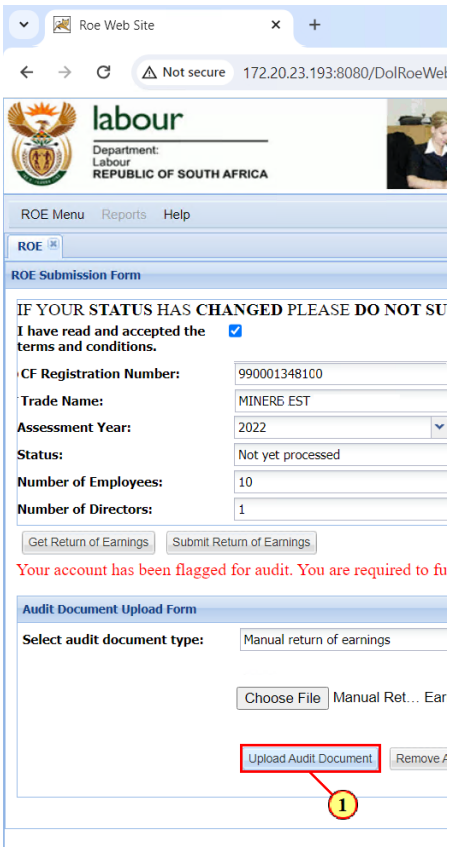
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the SARS EMP501_Tax Exemption Cert file by clicking on it.	

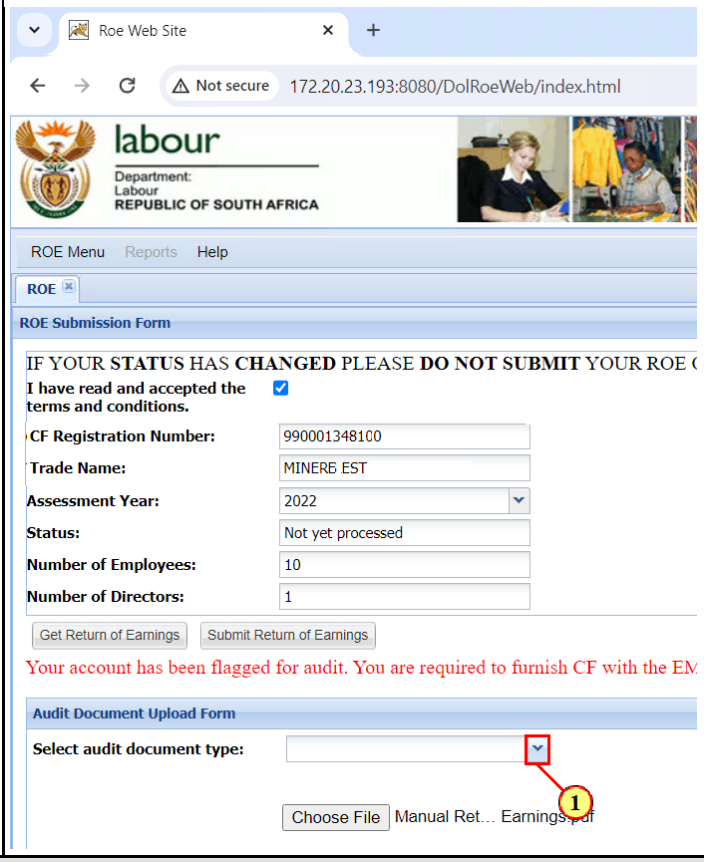
Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

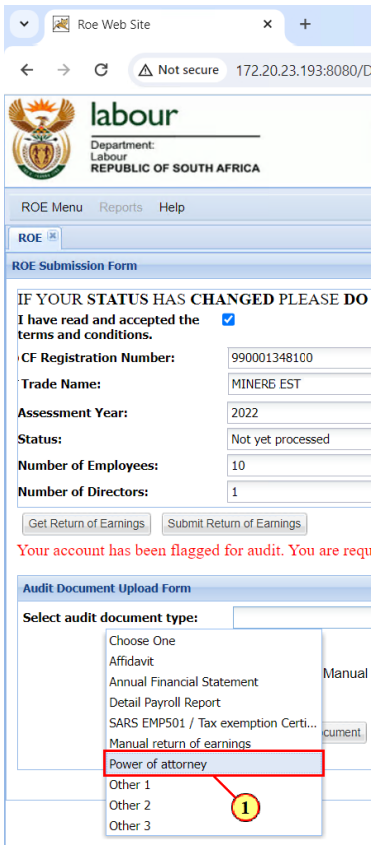
Explanation	Screenshot
(1) Click the **Select audit document type** downward arrow.	

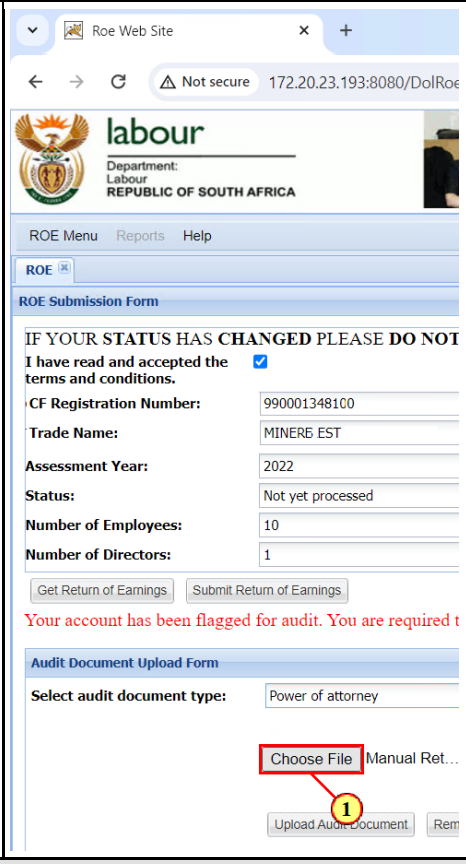
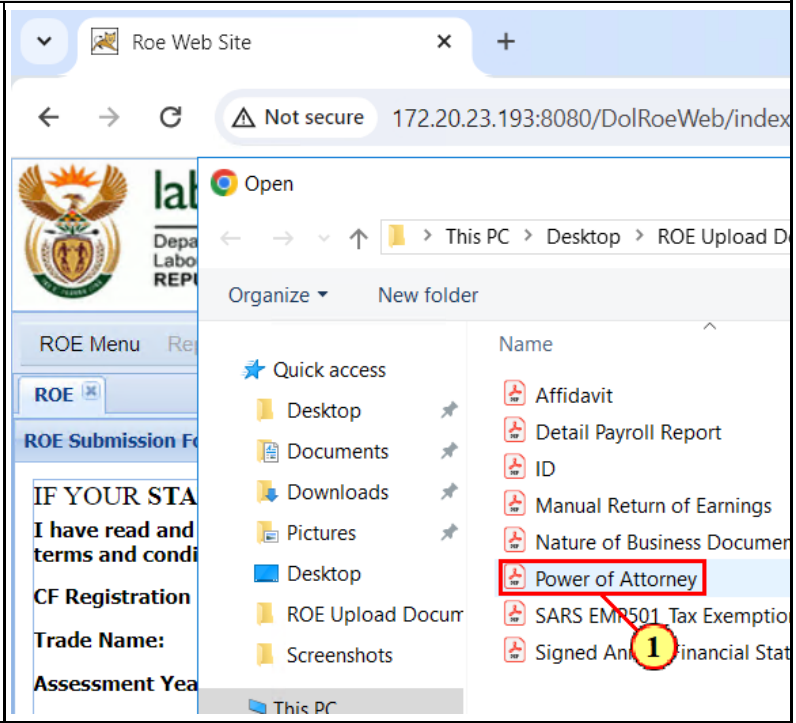
Explanation	Screenshot
(1) Select the Manual return of earnings option by clicking on it.	

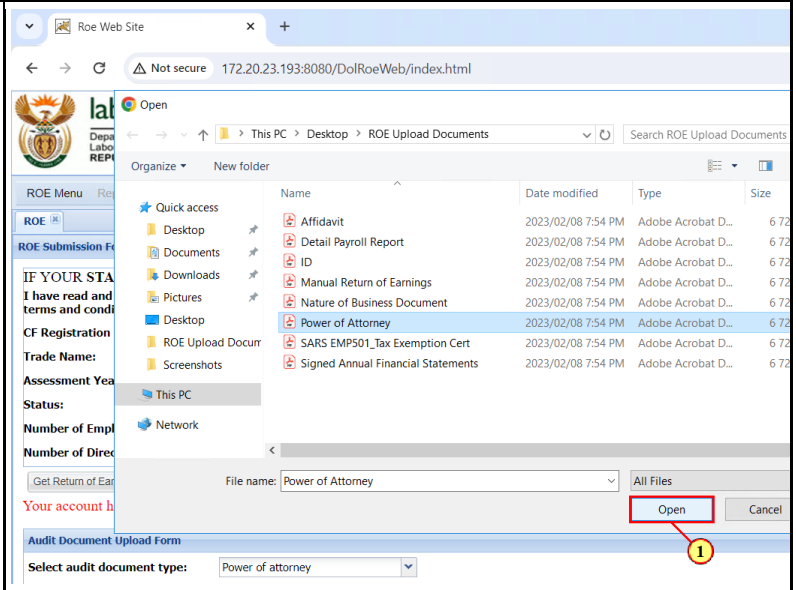
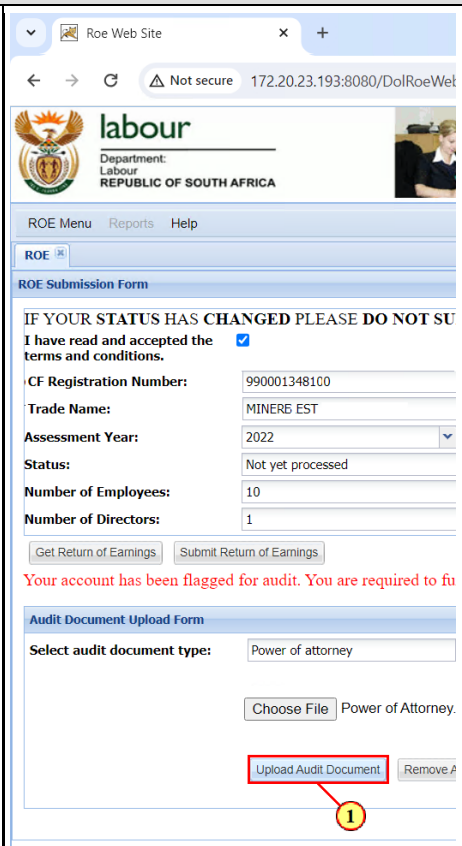
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Manual Return of Earnings file by clicking on it.	

Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

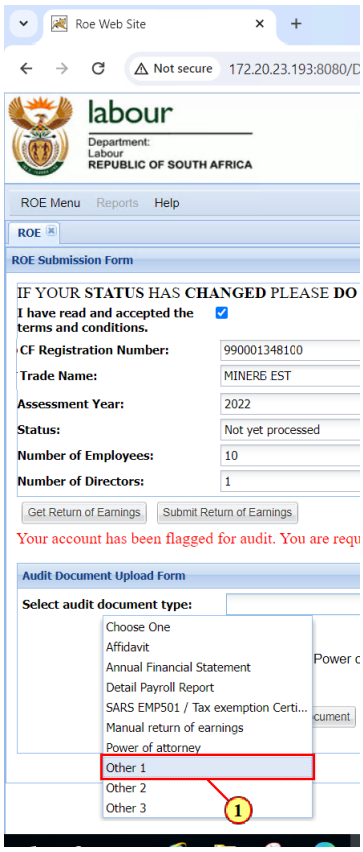
Explanation	Screenshot
(1) Click the **Select audit document type** downward arrow.	

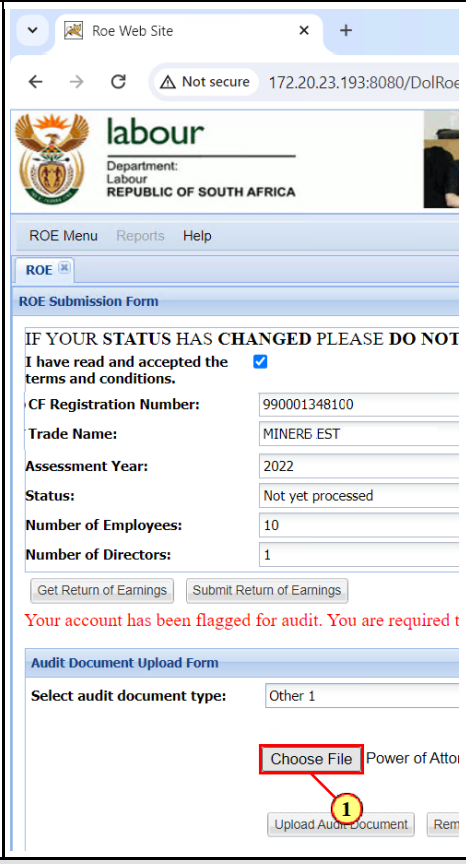
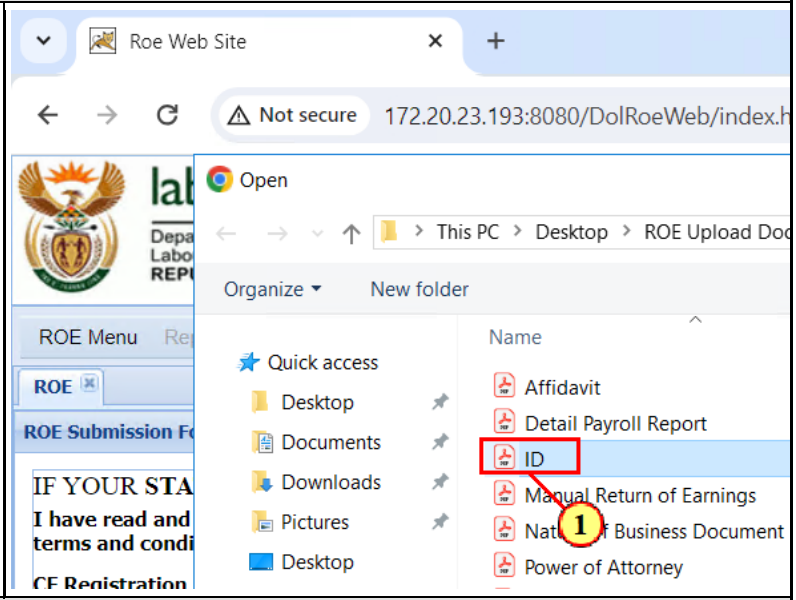
Explanation	Screenshot
(1) Select the Power of attorney option by clicking on it.	

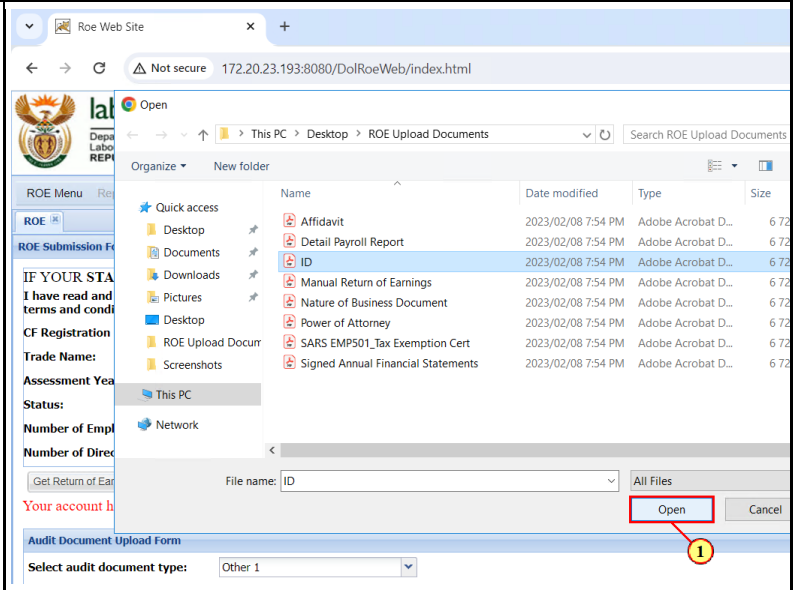
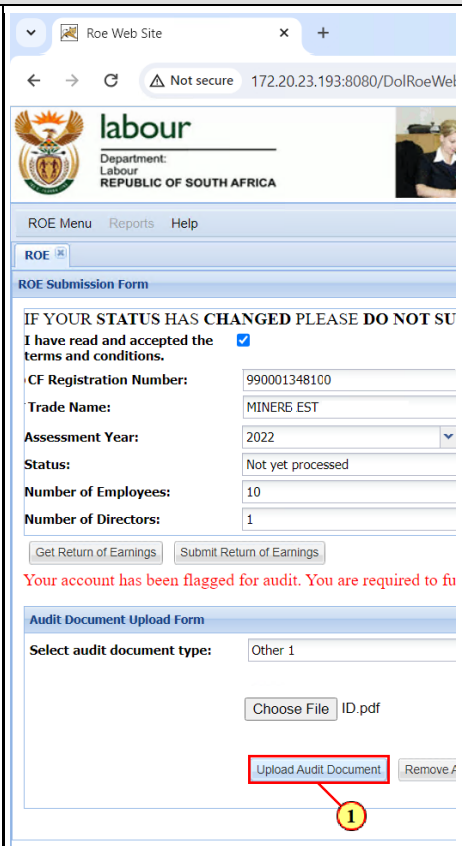
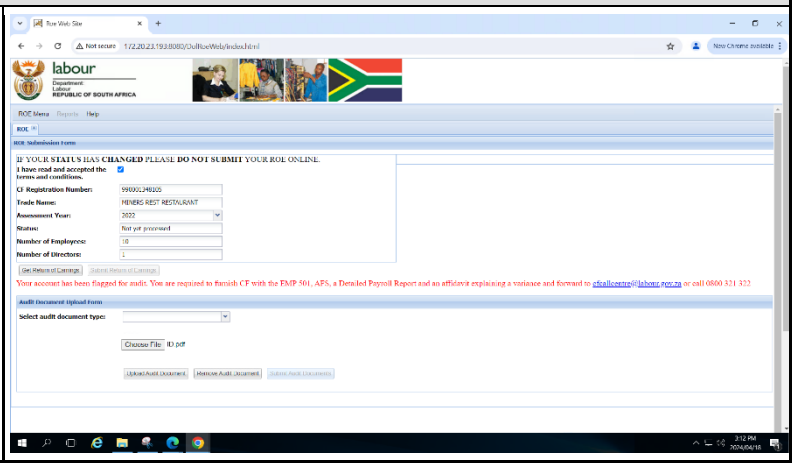
Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the Power of Attorney file by clicking on it.	

Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

Explanation	Screenshot
(1) Click the **Select audit document type** downward arrow.	

Explanation	Screenshot
The **Other 1, Other 2, Other 3** options for document upload are not mandatory. They allow you to upload any other documents you want to submit to the Compensation Fund apart from those already listed. (1) Select the Other 1 option by clicking on it.	
10.120.82.148 - Remote Desktop Connection	

Explanation	Screenshot
(1) Click the Choose File button.	
(1) Select the ID file by clicking on it.	

Explanation	Screenshot
(1) Click the Open button.	
(1) Click the Upload Audit Document button to upload the file.	

Explanation	Screenshot
(1) Click the Submit Audit Documents button.	
After submitting your ROE return and upload documents, you will get feedback from the Compensation Fund in due course after assessing your return.