OPERATIONAL CHECKLIST

Onboarding in South Africa, *in order.*

Everything that has to happen between a signed offer and a settled employee, sequenced, with the statutory requirements marked and the items that are commonly missed called out.

Edition
September 2026

Covers
Offer to first 90 days

For
International employers and HR leads

STAGE ONE

Before the offer goes out

Three decisions taken at offer stage determine most of what follows, and all three are difficult to unwind once an employee has accepted.

01

Confirm this is employment, not contracting

If the person will work set hours, use your systems, take direction on how the work is done, and depend on you economically, the arrangement is employment regardless of what the agreement is titled. Deciding this correctly now avoids a reclassification with retrospective tax and leave liability later.

02

Check the package against the earnings threshold

R269,600.90 per year from 1 May 2026. Below it, statutory working time rules apply, including the right to overtime pay. Above it, they fall away. If the role involves hours outside a standard day to cover another time zone, know which side you are on before you set the salary.

03

Establish right to work

South African citizens and permanent residents need no authorisation. A foreign national requires a valid work visa appropriate to the role. Employing someone without valid authorisation is an offence under immigration legislation, and the obligation to verify sits with the employer.

Documents to collect

- [ ] **Identity document or passport**, and proof of permanent residence or a valid work visa for foreign nationals
- [ ] **SARS tax reference number**, or registration if the employee does not yet have one
- [ ] **Banking details**, verified against a bank confirmation letter or stamped statement
- [ ] **Proof of residential address**
- [ ] **Qualifications and professional registrations**, verified where the role requires them
- [ ] **Certificate of service** from the previous employer where available
- [ ] **Next of kin and emergency contact**
- [ ] **Medical aid and retirement fund details** where these benefits are offered
- [ ] **Signed POPIA processing notice**, covering what personal information you hold and why

STAGE TWO

The contract

Section 29 of the BCEA requires written particulars of employment, supplied when the employee starts. This is a statutory list, not a template preference, and a contract missing items from it is defective. It must be kept for the duration of employment and for three years afterwards.

- [ ] Full name and address of the employer
- [ ] Name and occupation of the employee, or a brief description of the work
- [ ] Place of work, and where the employee may work at various places, an indication of that
- [ ] Date of commencement
- [ ] Ordinary hours and days of work
- [ ] Wage or rate, and the method of calculating it
- [ ] Rate for overtime
- [ ] Any other cash payments
- [ ] Any payment in kind, and its value
- [ ] How frequently remuneration will be paid
- [ ] Any deductions to be made
- [ ] Leave entitlement
- [ ] Period of notice, or the period of the contract where it is fixed term
- [ ] A description of any council or sectoral determination covering the employer's business
- [ ] Any period of employment with a previous employer that counts towards the employee's period of employment
- [ ] A list of any other documents forming part of the contract, and where copies may be obtained

Terms worth adding beyond the statutory minimum

Place of work should address remote or hybrid arrangements explicitly. Add confidentiality, intellectual property assignment, restraint of trade where genuinely justifiable, equipment and its return, data protection obligations, and a clear probation clause. For a remote role, state the connectivity and availability expectation rather than assuming it.

STAGE TWO, CONTINUED

Policies to issue and acknowledge

Issue these at start and record the acknowledgement. A disciplinary code that cannot be shown to have reached the employee is of limited use at the CCMA.

- [ ] **Disciplinary code and procedure**, aligned to Schedule 8 of the Labour Relations Act
- [ ] **Grievance procedure**
- [ ] **Leave policy**, reflecting the current parental leave position
- [ ] **Remote work and equipment policy**
- [ ] **IT acceptable use and information security policy**
- [ ] **POPIA and privacy notice**, including any monitoring that takes place
- [ ] **Anti-harassment and anti-discrimination policy**
- [ ] **Health and safety guidance**, including home workspace guidance for remote roles

STAGE THREE

Statutory registrations and payroll

These sit with the legal employer. Where you employ through an Employer of Record, they are already in place and the employee is added to existing registrations rather than triggering new ones.

REGISTRATION	WITH	DETAIL
PAYE	SARS	Required to withhold employees' tax. Declared monthly on the EMP201.
UIF	SARS and the UIF	Required where an employee works 24 hours or more per month. Contributions of 1% from the employee and 1% from the employer, capped at remuneration of R17,712 per month.
SDL	SARS	Required where total annual payroll will exceed R500,000. One percent of leviable payroll, employer only.
COIDA	Compensation Fund	Registration, an annual Return of Earnings, and a Letter of Good Standing that many clients and landlords will ask to see.
UI-19 declaration	UIF	Monthly employee declaration. It must also be filed when an employee leaves, whatever the reason.

Payroll setup

- [ ] **Employee loaded** with tax number, banking details and start date
- [ ] **Pay frequency and pay date** confirmed in writing
- [ ] **Leave balances opened**, with the correct annual and sick leave cycles set
- [ ] **Benefit deductions configured** for medical aid or retirement fund where applicable
- [ ] **Pro-rata first month calculated** where the start date falls mid-cycle
- [ ] **Payslip format checked** against section 33, which prescribes what a payslip must show
- [ ] **EMP201 submission scheduled**, due by the seventh of the following month
- [ ] **First pay run reviewed manually** before release, not after

Get the first payslip right

The first payslip is the most closely read document of the entire employment relationship. An error in it, particularly in a pro-rata calculation or a leave opening balance, generates disproportionate anxiety in a new employee who has just left a secure job for a foreign employer they have never met in person. Check it by hand.

STAGE FOUR

Day one, and the first week

Before the employee logs on

- [ ] Equipment delivered, tested and set up, with encryption and access controls active
- [ ] Accounts created across email, communication tools and any systems the role needs
- [ ] Multi-factor authentication enrolled
- [ ] Calendar invitations sent for the first week, in South African Standard Time
- [ ] A named contact identified for questions in the employee's own working hours

Day one

- [ ] Welcome and introduction to the immediate team
- [ ] Contract and policy acknowledgements signed and filed
- [ ] Payroll and benefits walkthrough, including who to contact about pay
- [ ] Health and safety and home workspace guidance issued
- [ ] Confirmation of working hours, availability expectations and any time zone overlap required

First week

- [ ] Role expectations and performance standards set out in writing
- [ ] Probation terms explained, including how performance will be evaluated and when
- [ ] Systems access confirmed complete, with nothing still pending
- [ ] Introductions across the wider organisation, not only the immediate team
- [ ] First check-in scheduled, and the manager's own availability confirmed

> **Time zone is an onboarding risk, not just a scheduling one**
>
> South Africa runs on UTC+2 with no daylight saving change. That gives close overlap with the United Kingdom and Europe, and a narrower window with the United States and Asia-Pacific. A new remote employee whose manager sits six hours behind can spend an entire first week without a real conversation. Front-load contact in the first fortnight, then settle into a normal rhythm.

STAGE FIVE

Probation, done so that it holds

Probation in South Africa reduces the procedural burden on an employer. It does not remove it, and a dismissal at the end of a probation period that was never actively managed is one of the more common losses at the CCMA.

Schedule 8 of the Labour Relations Act sets the standard. There is no statutory maximum period, but it must be reasonable in relation to the role, and a longer probation needs a reason connected to the complexity of the work.

01 **Set the standard in writing at the start**

The employee must know what they are being measured against. A standard communicated for the first time in a termination meeting is not a standard.

02 **Evaluate during the period, not at the end**

Schedule 8 contemplates evaluation, instruction, training, guidance and counselling during probation. Document each of these as they happen.

03 **Raise problems while they can still be fixed**

If performance is short, say so in writing, explain what needs to change, and give a fair opportunity to change it.

04 **Consider extension before termination**

Where performance is improving but not yet at standard, extending probation for a defined period with defined objectives is often the more defensible course.

05 **Give an opportunity to respond before deciding**

The employee must be able to make representations, and may be assisted by a fellow employee or trade union representative. Decide after hearing them, not before.

Thirty, sixty, ninety

POINT	FOCUS
Day 30	Are systems, payroll and equipment all working. Is the employee clear on what success looks like. Any early performance signals recorded in writing.
Day 60	Structured performance conversation against the standards set at the start. Documented, with any gaps and the support offered noted.
Day 90	Probation decision, or a documented extension with defined objectives. Confirm leave balances and benefit enrolments are correct.

CLOSE

The five most commonly missed items

- [ ] **The section 29 particulars are incomplete.** Most contracts drafted abroad omit the sectoral determination description and the previous employment provision entirely.
- [ ] **Policies are issued but never acknowledged.** Without a record that the disciplinary code reached the employee, it is difficult to rely on at arbitration.
- [ ] **Leave cycles are set incorrectly.** Sick leave runs on a 36-month cycle, not an annual one, and configuring it annually creates a liability that surfaces years later.
- [ ] **Probation is passive.** No standards set, no evaluation recorded, then a termination on the final day.
- [ ] **The UI-19 is filed on joining but forgotten on leaving.** It is required for every departure, whatever the reason.

Employing in South Africa without a local entity

Employer of Record South Africa acts as the legal employer for teams hiring South African talent. Registrations, compliant contracts, rand payroll and statutory submissions are already in place, and typical onboarding runs in one to three business days.

Speak to the team
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Important notice

This checklist is general information, not legal or tax advice, and it does not create an advisory relationship. It reflects the general position under national legislation and does not account for bargaining council agreements or sectoral determinations, which cover many industries and impose additional requirements.

Immigration requirements for foreign nationals are strict and change. Have contracts and policies reviewed by a South African labour law practitioner before use.

Principal sources. Basic Conditions of Employment Act 75 of 1997, in particular sections 29 and 33. Labour Relations Act 66 of 1995, Schedule 8, the Code of Good Practice on Dismissal. Unemployment Insurance Contributions Act 4 of 2002. Skills Development Levies Act 9 of 1999. Compensation for Occupational Injuries and Diseases Act 130 of 1993. Protection of Personal Information Act 4 of 2013. Determination of the earnings threshold effective 1 May 2026.