



# **SARS Tax Practitioner Readiness Programme**

## **Module 6 of 8 Use of eFiling System**

# Login to SARS eFiling

**SARS**  
South African Revenue Service

NEW LOOK  
New SARS

e FILING

Welcome, please login  
to SARS eFiling

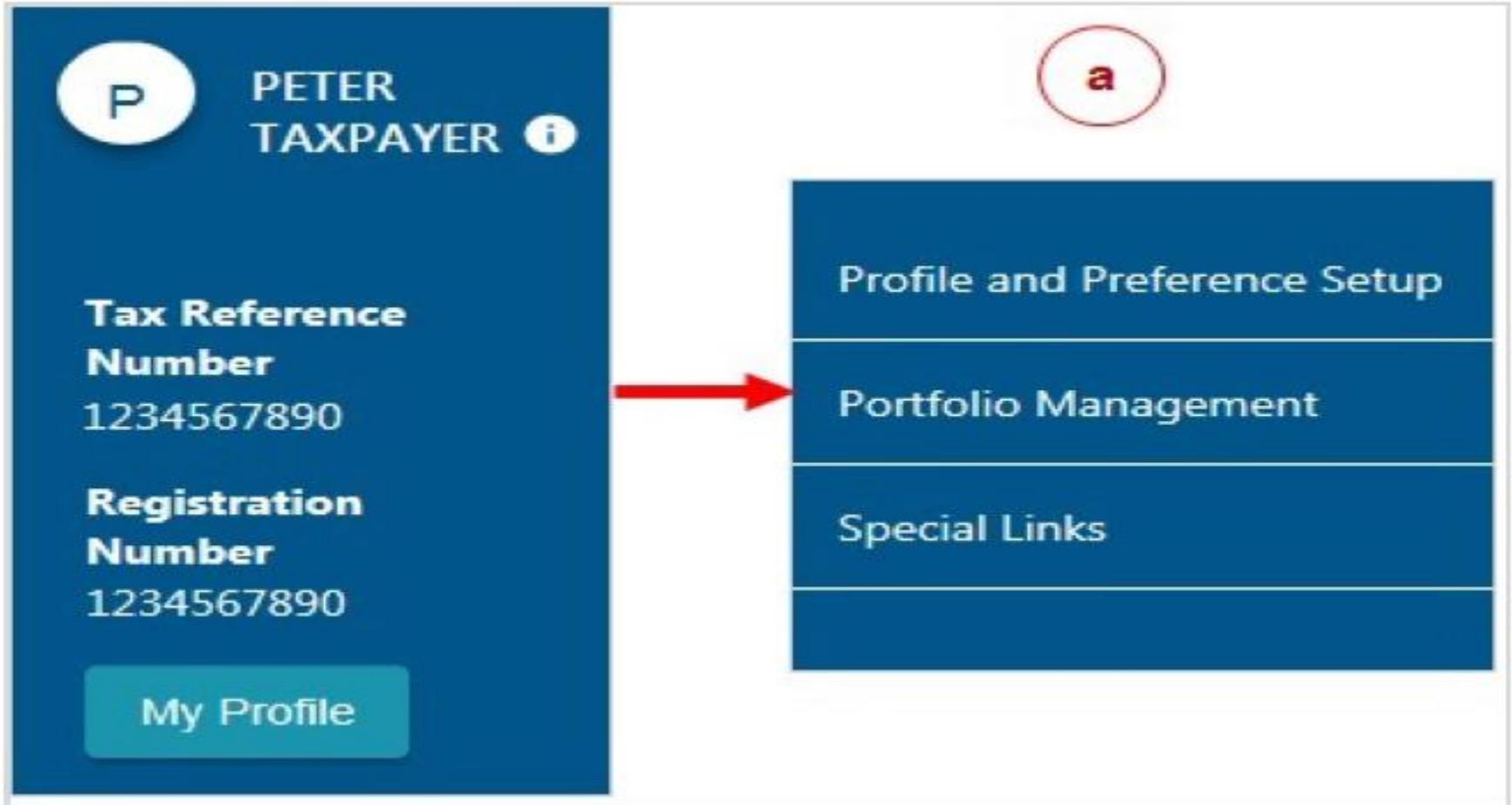
Password  
.....

[Forgot Your Username?](#)  
[Forgot Your Password?](#)

login

# Portfolio Management

Click on “My Profile”, then click on “Portfolio Management”.



# Portfolio Management

The Portfolio Management Screen will display for you to add a new portfolio.

The screenshot displays the 'Portfolio Management' interface. At the top right, there is a 'Contact' button. Below the header, there is an 'Add Portfolio' button. The main section is titled 'Linked Portfolio(s)' and contains a table with the following data:

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default
(PTY) LID	42	4092	Organisation	
Mytaxes	2	4	Organisation	
Belir	3	26	Tax Practitioner	<i>Default</i>

Each row in the table has a vertical ellipsis icon and a 'Go to Portfolio' button. Below the table is an 'Unlinked Portfolio(s)' section with a table that has columns for 'Previous Login Name', 'Portfolio Name', and 'Link'. A 'Link' button is located at the bottom right of this section.

# Portfolio Management

Click on “Add Portfolio”.

Enter the portfolio name and select the portfolio type from the drop-down menu, click on “Add Portfolio”

The image shows a screenshot of the SARS FILING web application. The top navigation bar includes the SARS logo, 'FILING', and links for 'Contact' and 'Log Out'. The main heading is 'Portfolio Management'. A blue 'Add Portfolio' button is visible. A red arrow points from this button to a detailed view of the form on the right. The form is titled 'Add Portfolio' and includes a notification icon 'g'. It prompts the user to 'Please add Portfolio Information' and contains the following fields:

- portfolioName: Test123
- Portfolio Type: Tax Practitioner (selected from a dropdown menu)

A blue 'Add Portfolio' button is located at the bottom of the form.

# Portfolio Management

The new portfolio will be successfully added.

The screenshot displays the 'Portfolio Management' page in the IRS eFiling system. A modal message box is centered on the screen, indicating that a portfolio has been added successfully. The background shows a table of linked portfolios and an 'Add Portfolio' button.

**Message**  
Your portfolio has been added successfully.  
OK

Portfolio Name	Tax User Count	Portfolio Type	Default	Go to Portfolio
CC (PTY) LTD S TRUST	42			Go to Portfolio
Mytaxes	2			Go to Portfolio
Be [redacted] itt	3	26	Tax Practitioner	Go to Portfolio
MyOrgTaxes	1	1	Tax Practitioner	Go to Portfolio

**Unlinked Portfolio(s)**

Previous Login Name	Portfolio Name	Link
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# Portfolio Management

The added portfolio will be displayed under linked portfolios.

The screenshot displays the 'Portfolio Management' interface. At the top right, there is a navigation menu with 'iRS', 'eFLING', and 'Com'. Below the header, the title 'Portfolio Management' is centered. On the right side, there is a blue button labeled 'Add Portfolio'. The main content area is divided into two sections: 'Linked Portfolio(s)' and 'Unlinked Portfolio(s)'. The 'Linked Portfolio(s)' section contains a table with the following columns: 'Portfolio Name', 'Tax User Count', 'Tax Payer Count', 'Portfolio Type', and 'Default'. There are four rows of data in this table. Each row has a vertical ellipsis icon and a 'Go to Portfolio' button. The 'Default' column for the third row is highlighted in green and labeled 'Default'. The 'Unlinked Portfolio(s)' section is currently empty, with column headers 'Previous Login Name', 'Portfolio Name', and 'Link' visible at the bottom.

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default
CC (PTY) LTD S TRUST	42	4092	Organisation	
Mytaxes	2	4	Organisation	
Be it	3	26	Tax Practitioner	Default
MyOrgTaxes	1	1	Tax Practitioner	

# Adding New Client to a Portfolio

How to add clients to a portfolio? Click “Go To Portfolio” on the portfolio where you wish to add the client.

The screenshot shows the 'Portfolio Management' interface. At the top right, there is an 'Add Portfolio' button. Below this is a section titled 'Linked Portfolio(s)' containing a table with the following columns: Portfolio Name, Tax User Count, Tax Payer Count, Portfolio Type, and Default. Each row in the table has a vertical ellipsis icon and a 'Go to Portfolio' button. The 'Default' column has the word 'Default' in green text for the 'Be [redacted] itt' portfolio.

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default
CC [redacted] S TRUST (PTY) LTD	42	4092	Organisation	
Mytaxes	2	4	Organisation	
Be [redacted] itt	3	26	Tax Practitioner	Default
MyOrgTaxe	1	1	Tax Practitioner	

Below the table is a section titled 'Unlinked Portfolio(s)' with columns for 'Previous Login Name', 'Portfolio Name', and 'Link'.

# Adding New Client to a Portfolio

Click “Organisations” on the top of the screen

The screenshot shows the SARS Filing portal interface. At the top, the navigation menu includes 'Home', 'User', 'Organisations', 'Returns', 'Duties & Levies', 'Services', 'Tax Status', and 'Contact'. The 'Organisations' menu item is highlighted with a mouse cursor. Below the navigation bar, the 'Portfolio' is set to 'MyOrgTaxes' and the 'Tax Payer' is set to 'Tax Practitioner'. A 'HELP YOU FILE' button is visible in the top right corner.

The main content area is titled 'Taxpayers' and contains a table with the following columns: 'Name of Taxpayer', 'Company/ ID Number', 'Reference Number', 'Last Return Filled', 'Last Accessed', and 'Actions'. The table currently displays one entry with a 'View Tax Payer' button in the 'Actions' column. Below the table, there are pagination controls showing 'First', 'Previous', '0', 'Next', and 'Last'.

Below the 'Taxpayers' section, there is a 'Users' section with a table that has columns for 'Name of User', 'Last Logged In', and 'Last Return Filed'.

# Adding New Client to a Portfolio

Then click “Organisations” on the left hand side of the screen

The screenshot shows the SARS Filing portal interface. The top navigation bar includes 'Home', 'User', 'Organisations', 'Returns', 'Duties & Levies', 'Services', and 'Tax Sta'. The left sidebar contains a 'My Profile' button and a list of navigation options: 'Organisation' (highlighted), 'Bulk Registration', 'Admin Reports', 'Rights Groups', 'SARS Registered Details', 'Customs Registration', and 'Special Links'. The main content area is titled 'Taxpayers' and features a table with the following data:

Name of Taxpayer	Company/ ID Number	Reference Number	Last Return Filled	Last Accessed	Action
	70000000000000		-	-	View

Below the 'Taxpayers' table is a 'Users' section with a table containing the following data:

Name of User	Last Logged In	Last Return Filed
Blitt	201 42	-

# Adding New Client to a Portfolio

Select the submenu “Register New” to register a new client. Select the Entity Type on the drop-down menu, then complete all the field and click “Add Taxpayer”

The screenshot displays the SARS FILING system interface for adding a new client. The main form is titled "Capture Entity Details" and includes the following fields:

- Select Entity Type: Individual (highlighted with a red box and arrow)
- ID Number \*
- Initials \*
- First Name
- Surname
- Tax Reference Number

At the bottom of the form is the "Add Taxpayer" button (highlighted with a red box and arrow).

To the right, a "Taxpayer Summary" panel shows the following information:

- Company Name: L LANE
- Registration Number: LL125456789
- Group Selected: System Default

The "System Default" option is selected in the group selection panel (highlighted with a red arrow).

# Adding New Client to a Portfolio

If the taxpayer you are adding already exists on your portfolio, you will get a message “The taxpayer you are trying to add already exist on this portfolio” Then click on “View Taxpayer”

The screenshot displays the SARS Filing portal interface. On the left is a dark blue sidebar with a user profile for 'Mr SQT Performance' and a list of navigation options including 'Organisation', 'Register New', 'Change Details', 'Tax Types', 'Banking Details', 'ISV Activation', 'Summary', 'VAT Vendor Search', and 'Delete Taxpayer'. The main content area has a top navigation bar with 'Home', 'User', 'Organisations', 'Returns', 'Customs', 'Duties & Levies', 'Services', 'Tax Status', 'Contact', and 'Log Out'. Below this, the 'Portfolio' is identified as 'SQTPerf86807851 - Mr Jane' and the 'Taxpayer' as 'Mr Jane'. A 'Registered Representative' section is visible. The primary focus is the 'Capture Entity Details' form, which is partially obscured by a white 'Confirm' dialog box. The dialog box contains the message: 'The taxpayer you are trying to add already exists on this portfolio.' and two buttons: 'View Taxpayer' and 'Cancel'. The form fields visible include 'Select Entity Type' (set to 'Individual'), 'ID Number \*' (9401280404089), 'Initials \*' (S), 'First Name' (SINDISWA), 'Surname' (Masondo), and 'Tax Reference Number'.

# Adding New Client to a Portfolio

If the taxpayer you are adding already exist on a different portfolio, you will get the warning message. Click “Add Taxpayer” if you wish to register the taxpayer on this portfolio.

The screenshot displays the SARS eFiling user interface. The top navigation bar includes links for Home, User, Organisations, Returns, Customs, Duties & Levies, Services, Tax Status, Contact Us, and Logout. The left sidebar shows the user profile for Mrs EM Meyer and various menu options like 'Register New' and 'Change Details'. The main content area is titled 'Capture Entity Details' and contains a form for adding a new taxpayer. The form fields include 'Select Portfolio' (David1456: Cape Foam (Pty) L), 'Select Taxpayer' (All), and 'For Organisations'. A 'Warning Message' dialog box is overlaid on the form, stating: 'The taxpayer you are trying to add already exists on one of your linked portfolios, where you have rights to maintain the taxpayer'. The dialog box has 'Cancel' and 'Add Taxpayer' buttons. The 'Add Taxpayer' button is also visible at the bottom right of the form area.

# Adding New Client to a Portfolio

After adding the taxpayer, you must add the taxpayer to the group by selecting the group name and click “Continue”

The screenshot shows the SARS eFiling portal interface. The top navigation bar includes the SARS eFiling logo and menu items: Home, User, Organisations, Returns, Duties & Levies, Services, Tax Status, Contact, and Log Out. The main content area is titled 'Portfolio' and 'Taxpayer'. Below the title, there are two dropdown menus for 'Portfolio' and 'Taxpayer', followed by a 'Tax Practitioner' label and a 'HELP YOU' icon. The main instruction reads: 'Please select the group/s the taxpayer should be added to:'. Below this instruction, there are four checkboxes, all of which are checked: 'System Default', 'Administration All', 'VAT Submissions', and 'PAYE Submissions'. A blue 'Continue' button is located at the bottom right of the form area. On the left side, there is a dark blue sidebar with a user profile icon (S) and a 'My Profile' button. Below the sidebar, there are buttons for 'Organisation', 'Register New', 'Change Details', and 'Tax Types'.

# Adding a Tax type for the New Client

Click on “Manage Tax Types” to “Activate” the tax types of the Entity.

The screenshot shows the SARS eFiling portal interface. The top navigation bar includes links for Home, User, Organisations, Returns, Customs, Duties & Levies, Services, Tax Status, Contact Us, and Logout. The user profile on the left identifies the user as Mrs EM, with a Tax Reference Number of 20 and an Identification Number of 79. The main content area is titled 'Taxpayer Summary' and displays the following information:

Company Name:	G& Properties
Registration Number:	2007/
Group Selected:	Completions - Income Tax Submissions PAYE

At the bottom of the page, there are three buttons: 'Back', 'Manage Tax Types', and 'Done'. The 'Manage Tax Types' button is highlighted in blue, indicating it is the next step in the process.

# Adding a Tax type for the New Client

The list of tax types linked to the selected taxpayer

- Reference numbers
- Activation Status
- Action that can be selected for that number (e.g. request activation, request tax type transfer, deactivate)

To activate or request transfer of tax types, tick the box under “Action” and click on “Submit” at the bottom.

IT56 - Secondary Tax On Companies (STC)	9	Not Active.	<input type="checkbox"/> Activate
Dividends Withholding Tax (DWT)	9	Successfully Activated.	<input type="checkbox"/> Deactivate
IT3	9	Successfully Activated.	<input type="checkbox"/> Deactivate
Medical Scheme Contribution	9	Not Active.	<input type="checkbox"/> Activate
Insurance Payment	9	Not Active.	<input type="checkbox"/> Activate
Foreign Tax Information (FTI)	9	Not Active.	<input type="checkbox"/> Activate

Submit

# Adding a Tax type for the New Client

Select the tick-boxes for the applicable actions required (example): “Request Activation” or “Request Tax Type Transfer” and click on “Submit” the status will change to “Requested”, then click “Continue”.

**Manage Tax Types**

Tax Type Description	Reference Number	Status	Action
Provisional Tax (ITPS)		Successfully Activated	<input type="checkbox"/> Deactivate
Individual Income Tax (ITR12)		Not Active. Active on an individual profile.	<input checked="" type="checkbox"/> Request Tax Type Transfer
Dividends Withholding Tax (DWT)		Not Active	<input checked="" type="checkbox"/> Request Activation
ITS		Not Active	<input type="checkbox"/> Request Activation
Medical Scheme Contribution		Not Active	<input type="checkbox"/> Request Activation
Insurance Payment		Not Active	<input type="checkbox"/> Request Activation
Foreign Tax Information (FTI)		Not Active	<input type="checkbox"/> Request Activation

**Tax Type Request Summary**

The following action has been taken against these tax products

Tax Type Description	Reference Number	Action
Individual Income Tax (ITR12)		Requested
Dividends Withholding Tax (DWT)		Requested

Continue

# Adding a Tax type for the New Client

The status of the request will change to awaiting authorisation and will require the current Taxpayer/Representative of the tax number to authorise the request via the SARS website in order to complete the process

The screenshot displays the SARS website interface. On the left, the 'Tax Types Details' section shows a table with the following data:

Tax Type Description	Reference Number	Status
Individual Income Tax (ITR12)		Awaiting Authorisation
Dividends Withholding Tax (DWT)		Awaiting Authorisation
IT3		Awaiting Authorisation

A red box highlights the 'Awaiting Authorisation' status for Individual Income Tax (ITR12). A red arrow points from this box to the 'Manage Tax Types' section on the right. This section contains a table with the following data:

Tax Type Description	Reference Number	Status	Action
Provisional Tax (RP6)		Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Individual Income Tax (ITR12)		Not Active. Active on an individual profile. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request
Dividends Withholding Tax (DWT)		Not Active. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request
IT3		Not Active. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request
Medical Scheme Contribution		Not Active.	<input type="checkbox"/> Request Activation

A red box highlights the status 'Not Active. Active on an individual profile. Requested by you and waiting for the owner of the tax type to approve.' for Individual Income Tax (ITR12).

# Adding a Tax type for the New Client

If the Taxpayer/Representative authorise the request to “Activate”, the status will change to “Successfully Activated”.  
If the taxpayer/representative authorise the request to transfer and there are previously submitted returns, the Status will change to “Authorised schedule to run within 24 hours” to allow the transfer of historical submissions.

## Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)		Successfully Activated.	<input type="checkbox"/> Deactivate
		Not Active. Active on an individual	
EMP201 - PAYE		Not Active. Active with scheduled to run within 24 hours.	Authorised <input type="checkbox"/> Cancel Request
EMP501 - Submission		Not Active. Active with scheduled to run within 24 hours.	Authorised <input type="checkbox"/> Cancel Request

# Invite User

In order to Invite a new user to a portfolio select the correct portfolio.

Click on **“My Profile”** on the left screen.  
Then select **“Portfolio Management”**



# Invite User

Chose the portfolio by clicking on “Go to Portfolio”

## Portfolio Management

Add Portfolio

### Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default		
Test345 - SARS Pty Ltd	2	1	Organisation		⋮	Go to Portfolio
Test123 - Mr Taxpayer	1	1	Individual	Default	⋮	Go to Portfolio

### Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
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# Invite User

Click on “User” from the top menu, then click on “User” on the left menu.

The screenshot displays the SARS eFiling user interface. At the top, a dark blue navigation bar contains the SARS eFiling logo and a menu with options: Home, User, Organisations, Returns, Customs, Duties & Levies, Services, Tax Status, Contact, and Log Out. The 'User' option is highlighted. On the left, a vertical sidebar shows the user's profile: 'Mrs' with a profile icon, 'Tax Reference Number 3', 'Identification Number 8 5', and a 'My Profile' button. Below this, 'User' and 'Special Links' are visible. The main content area shows 'Portfolio' set to 'Main Portfolio' and 'Tax User' set to 'Organisation'. A 'HELP YOU eFILE' icon is present. Below this, there are four icons representing different services. The 'Taxpayers' section is visible, featuring a table with columns for 'Name', 'Registration or ID number', and 'Tax Reference Number', and a search icon.

# Invite User

Select “Identification Type”, Enter “ID number”, Enter “Surname”, Click on “Invite”

The screenshot shows the SARS eFiling interface. In the top navigation bar, the 'User' menu item is highlighted with a red box. The left sidebar also has the 'User' menu item highlighted with a red box, and the 'Invite User' sub-item is also highlighted with a red box. The main content area is titled 'Invite a User' and contains the following form fields:

- Identification Type:** A dropdown menu with 'Passport' selected.
- Passport Number:** A text input field.
- Reference Number:** A text input field with 'Tax Reference Number' as a placeholder.
- Surname:** A text input field.
- Portfolio Name:** A text input field with a note: 'The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation.'
- My Company Portfolio:** A text input field.

An 'Invite' button is located at the bottom of the form.

# Invite User

Give the new user “Access Rights” on the next screen

## USER RIGHTS



For more information on groups and roles, please click [here](#).

## USER GROUPS

### Select User Groups

- Companies
- VAT

## USER ROLES

### Manage Transfer Duty Financial Account

This role allows users to maintain all financial detail against the Transfer Duty account

### SARS Registration

Can register taxpayers with SARS to get tax reference numbers

### RLA - View Customs Product Information

RLA.&C View Customs Product Information

### RLA - View Client Type

RLA - View Client Type

### RLA - Manage Customs Product Information

RLA.&C Manage Customs Product Information

### RLA - Manage Client Type

With this profile, users can only view and change information relating to their specific client type(s)

### Manage Users

Can create & change users and assign them to groups

### Manage Taxpayers

Can create & change taxpayers and assign them to groups

### Manage Groups

Can create & change groups and assign users and payers to groups

### Manage Excise Financial Account

This role allows users to maintain all financial detail against an Excise Account

### Manage Deferment Account

### ISV Activation

This role allows users access to the ISV activation screen

### Directives

### Perform Bulk and Additional Payments

This role allows a user without full admin rights to perform bulk and additional payments.

**Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.**

Continue

Back

# Invite User

The status will show “Awaiting Confirmation”.  
Invitation can be “cancelled” by clicking “Cancel Invitation”  
and the user can send a reminder by clicking the “Send  
Reminder”

The screenshot shows the SARS Filing portal interface. The top navigation bar includes the SARS logo, 'FILING', and links for 'Home', 'User', and 'Organisations'. The user is logged in as 'Taxpayer J'. The main content area is titled 'Change Details' and shows the following information:

- Portfolio:** My Company Portfolio
- Tax User:** (Awaiting Confirmation)
- Organisation:** Organisation (marked with a red 'd')

The 'Change Details' form includes the following fields:

- Identification Type:** South African ID
- ID Number:** [Empty text input field]
- Surname:** [Empty text input field]
- Portfolio Name:** My Company Portfolio

A note below the Portfolio Name field states: "The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation."

At the bottom of the form, there are three buttons: "Send Reminder", "Cancel Invitation", and "Update User Rights".

The left sidebar contains a menu with the following items: "My Profile", "User", "Invite User", "Change Details" (highlighted with a red box), "Change Own Password", "Change Website Profile", "Delete User", and "My Administrators".

# Invite User

## Accepting the Invitation

SMS and an email notification will be sent to the person who has been invited to be a user on an organisation or tax practitioner's portfolio.

Log on to your eFiling profile.

- Select **“My Profile”**
- Select **“Portfolio Management”**
- The User Invitation will display. Click on **“Accept”**.

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
Today7079 - Mr.	1	1	Individual	Default	Go to Portfolio

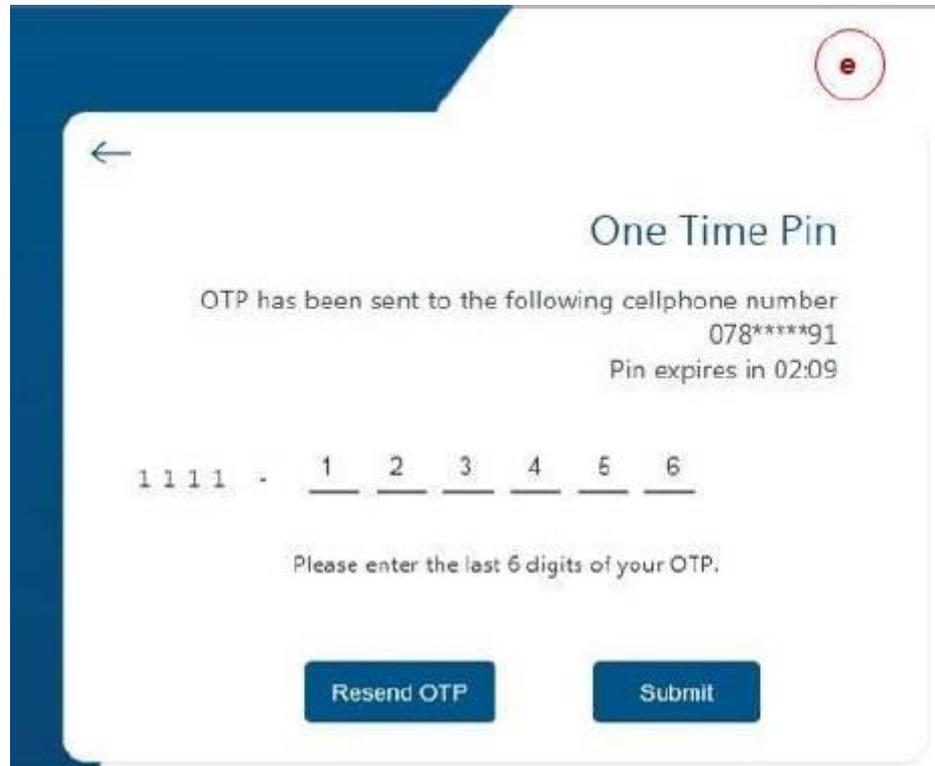
User Invitation(s) Your invitation will expire automatically if not accepted within 5 working days.

Portfolio Name	Accept
My Company Portfolio	Accept

# Invite User

## Accepting the Invitation

The new user will be sent an **OTP** (One Time Pin) via the preferred means of contact (cell phone or email)



The screenshot shows a mobile application interface for accepting a One Time Pin (OTP) invitation. At the top right, there is a red circular icon with a white 'e'. Below it, a back arrow is visible. The main heading is "One Time Pin". The text reads: "OTP has been sent to the following cellphone number 078\*\*\*\*91. Pin expires in 02:09". Below this, there is a row of six input fields, each containing a digit from 1 to 6. The first four fields are followed by a period. Below the input fields, the text says: "Please enter the last 6 digits of your OTP." At the bottom, there are two buttons: "Resend OTP" and "Submit".

# Invite User

## Accepting the Invitation

The message will come up confirming that the Portfolio has been linked. The linked portfolio will move to “**Linked Portfolio**”

The screenshot shows a web application interface. A 'Message' dialog box is open, displaying the text 'Portfolio My Company Portfolio linked.' and an 'OK' button. Below the dialog, a table titled 'Linked Portfolio(s)' is visible. The table has five columns: 'Portfolio Name', 'Tax User Count', 'Taxpayer Count', 'Portfolio Type', and 'Default'. There are two rows of data. The first row is for 'Mr DAY' with 1 tax user and 1 taxpayer, of type 'Individual', and is marked as 'Default'. The second row is for 'My Company Portfolio' with 5 tax users and 1 taxpayer, of type 'Organisation'. Both rows have a 'Go to Portfolio' button. A red arrow points from the 'OK' button in the message dialog to the 'My Company Portfolio' row in the table.

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default
Mr DAY	1	1	Individual	Default
My Company Portfolio	5	1	Organisation	

# Invite User

You have now successfully  
added your new user.

# Contact us

**We've made it easier for you**

## **Go Digital!**

- Download the SARS MobiApp via your app store
- Register for eFiling

## ▪ **Need an Individual Tax Number?**

Register for eFiling and you will be automatically registered for personal income tax and receive a tax reference number

- For more information on individual offerings, visit the:

SARS website on [www.sars.gov.za](http://www.sars.gov.za) and go to Individuals webpage



*Thank you*  
*Re a leboha*  
*Re a leboga*  
*Ndza Khensa*  
*Dankie*  
*Ndi a livhuwa*  
*Ngiyabonga*  
*Enkosi*  
*Ngiyathokoza*