EXTERNAL GUIDE

HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE

SARS
At Your Service

REVISION HISTORY TABLE

Date	Version	Description
06-12-2019	6	Added new functionality: User invitation to a portfolio; Chatbot, SARS correspondence
26-03-2020	7	Automatic income tax registration for new eFilers (individuals with valid SA ID number)
20-04-2020	8	Enhanced functionality: Tax Type Transfer.
08-05-2020	9	Added: Passwordless login; Two-factor authentication
04-12-2020	10	Capture Registration screen: ‘Next’ button replaced with ‘Submit’; Profile and Preference Setup screen: last date and time that the profile was accessed
23-04-2021	11	New function to Manage Tax Types, Practitioner configuration
11-08-2021	12	Chatbot; Approve Tax Type Transfer request

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1 PURPOSE

The purpose of this document is to assist clients to register for eFiling and manage their eFiling profiles.

This guide in its design, development, implementation and review phases is guided and underpinned by the SARS values, code of conduct and the applicable legislation. Should any aspect of this guide be in conflict with the applicable legislation the legislation will take precedence.

2 INTRODUCTION

The vision of SARS is to be an innovative revenue and customs agency that enhances economic growth and social development. This is in line with the legislative mandate of SARS which is to collect revenue and ensure compliance with tax laws. eFiling enables SARS to achieve its mandate by being a service channel for the collection and administration of all national taxes, duties and levies.

One of the issues that emerged from the SARS customer satisfaction research is that the public often dreads standing in long queues, filling in paperwork and visiting SARS branches. The electronic filing system (eFiling) aims to address these issues and ensure that the services SARS provides are efficient and convenient for the taxpayer.

eFiling is a free electronic tool designed by SARS to offer electronic services such as filing tax returns, making payments and accessing accounts to name a few.

eFiling allows you the benefit of direct, secure and real-time electronic access to your tax profile as well as the opportunity to manage this at any time and from anywhere.

You must be linked to a tax type (e.g. income tax) in order to have full access to the services on eFiling and to transact.

SARS values you, the taxpayer. In order to protect your tax account(s), please note that not all services are offered online. Services such as change of name and surname must be done at a SARS branch.

3 SERVICES OFFERED ON EFILING

The following services are available on eFiling:

- Pay-As-You-Earn (EMP201 return)
- Skills Development Levy (included on the EMP201 and EMP501 return)
- Value Added Tax (VAT201)
- Provisional Tax (IRP6)
- Secondary Tax on Companies (IT56)
- Individual Income Tax (ITR12)
- Trusts (IT12R)
- Advanced Tax Ruling (ATR)
- Change of Personal Details
- Payments
- Request for Tax Clearance Certificate
- Request for Tax Directive
- Transfer Duty
- Stamp Duty
- Security Transfer Tax(STT)
- VAT Vendor Search
- Notification Tool
- Tax Calculators
- Complete history of eFiling usage

- Customs payments
- Air Passenger Tax payments
- Mineral and Petroleum Resource Royalty (MPRR)

4 NEW LOOK

SARS has redesigned eFiling in an effort to embrace the benefits of emerging technologies and provide an optimized and secure digital environment. The new look is also intended to help promote voluntary compliance, reduce the administrative burden and provide you, our valued client, with a more intuitive and user-friendly experience. The redesigned functionality on eFiling will be implemented using a phased in approach.

Changes for this phase include:

- New look to align to SARS' corporate identity
- Improved security to safeguard against fraud
- Implementation of a primary user-id (single login) to access all profiles
- Profile management (e.g. Organisations and Tax Practitioners)
- A dashboard providing the eFiler with a visual summary of his/her tax affairs at a glance.

4.1 MIGRATION OF USERS

All eFiling users registered prior to 1 July 2019 will be authenticated and migrated to one single user sign on. If you have multiple login profiles linked to your identity/passport number, a list of your profiles will display (after you have been authenticated). You will be required to choose a primary login from the list. All your profiles will still be accessible once you logged in with your primary credentials. You can link your other logins as "Portfolios" to your profile.

4.2 PORTFOLIOS

A registered eFiler can act in different "roles" on eFiling (e.g. tax administrator). These "roles" are referred to as Portfolio Types. For example:

- **Individual** – a person acting as himself/herself to administer his/her own individual taxes
- **Tax Practitioner** – a person registered with SARS and a Recognised Controlling Body (RCB) and has a signed power of attorney to act on behalf of another taxpayer.
- **Organisation** – a representative of a tax paying entity acting either as the representative taxpayer (e.g. Public Officer, Executor of an estate, etc.) or an appointed representative with a signed Power of Attorney in place.

eFilers with a **Tax Practitioner** and **Organisation** portfolio type can:

- Activate multiple taxpayers against that portfolio type
- Group taxpayers under the same portfolio type
- Specify a descriptive name for each group (for ease of reference).

If you registered different portfolio types prior to 1 July 2019, you would have accessed the abovementioned portfolios by using a unique username and password for each. As from 1 July 2019, you will only use one username and password (referred to as the primary login) to login to eFiling. You can then choose the portfolio that you want to access.

5 PASSWORD RULES

When creating or changing a password on eFiling please ensure that the password contains a minimum of 8 characters and has at least one of the following:

- uppercase letter
- lowercase letter
- special character
- numeric digit.

6 ONE-TIME PIN (OTP)

The OTP is a unique 6-digit security PIN and you will be required to enter this pin as confirmation when performing certain functions on eFiling.

- You can choose to receive an OTP via SMS or via an email address. Your preferred method of communication for the OTP can be maintained via your eFiling profile.
- For security reasons, the OTP is time-sensitive and you will be required to enter it within the time period indicated. If you are unable to enter the OTP within the specified time, you may request for it to be resent to you.
- For your security, you can only opt to resend an OTP twice.

7 CHATBOT - LWAZI

The chat bot icon appears on the bottom right side of your screen.

- Click on this icon and do the following to ask a question:
  - Type a question in the input text-box
  - Click on the button on your screen or press <Enter> on your keyboard to submit the question
  - Lwazi, the virtual assistant, will process your request and display the answers on your screen.
- The following personal income tax services can also be requested via the virtual assistant. Note, you will be prompted to provide certain information (e.g. ID number, email, cell number) to enable us to authenticate you for the required service:
  - Request Tax Reference Number
  - Request Statement of Account
  - Request Refunds Status
  - Request Audit Status
  - Request Notice of Assessment
  - Request Call Back

8 REGISTRATION ON EFILING

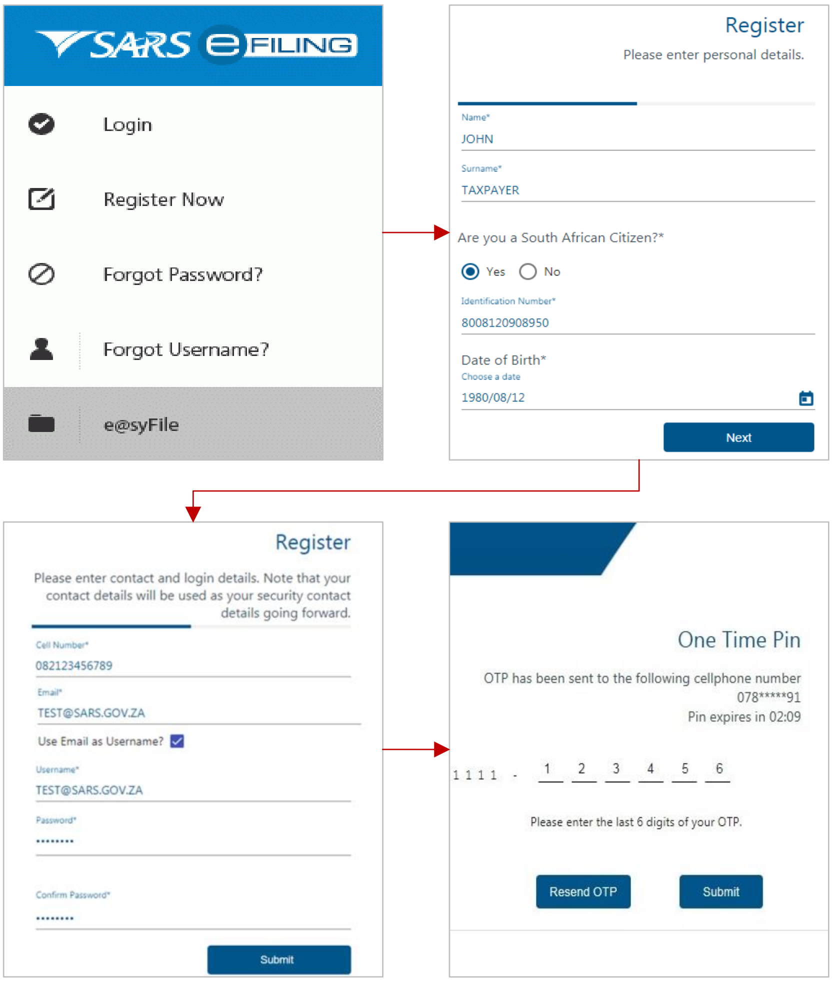
8.1 HOW TO REGISTER AS A NEW USER ON EFILING

a) Log on to the SARS website. On the top right side of the home page is a list of SARS eFiling options.

b) Select <**Register Now**>

- The eFiling Register screen will display.

- Complete your personal details and click on <**Next**>
- Complete your contact and login details and click on <**Submit**>
- If the details entered are successfully matched with the SARS records, you will be presented with the One-Time-Pin (OTP) screen
- Please enter the OTP that is sent to either your cellphone number or your email address
- If the time period to enter the OTP expires you can click on <**Resend OTP**>. Note: for your security you can only select this option twice
- If you do not complete the OTP process successfully, you will have to start the registration process again
- Once you have successfully entered the OTP, the eFiling Login Screen will display (refer to the section on 'First Time Login' below).



Please Note:

- If we cannot match the personal details that you entered, we may ask you a few random questions to authenticate you.
- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first visit your nearest SARS branch office to register for income tax or activate your income tax number.
- If our system identifies you as a registered eFiler, you will either have the option to login with your existing eFiling profile or recover your password (if you cannot remember it).

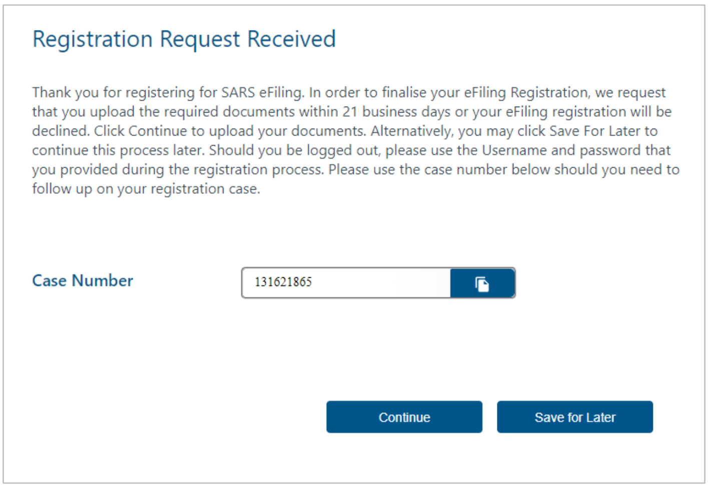
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party's access.

8.2 REQUEST FOR ADDITIONAL INFORMATION TO FINALISE REGISTRATION

If we are unable to finalise your eFiling registration immediately we may request additional information before we issue an OTP to you. Please follow the steps below in order for us to finalise your eFiling registration as soon as possible.

a) A message will display confirming your registration request and prompting you to upload supporting documents in order to finalise your eFiling registration.

- A case number will be allocated to you. Please quote this number when contacting SARS to follow up on the progress of your eFiling registration.
- If you are logged out, please use the username and password that you provided during the registration process.
- Please note: You will have 21 business days to upload the required documents.
- Click on <**Continue**>.

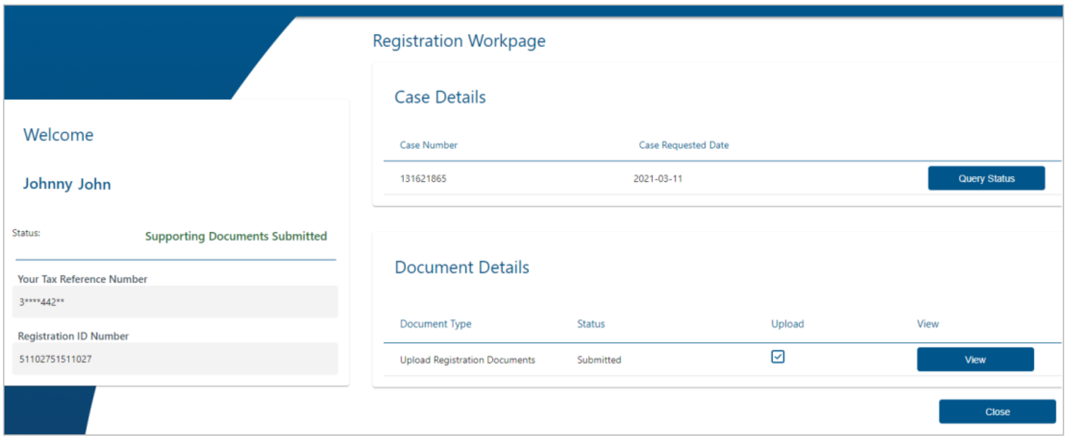


b) The Registration Workpage will display. Click on <**Upload**> to upload the required supporting documents.

- The file size may not exceed 5mb.
- The following file types will be accepted:

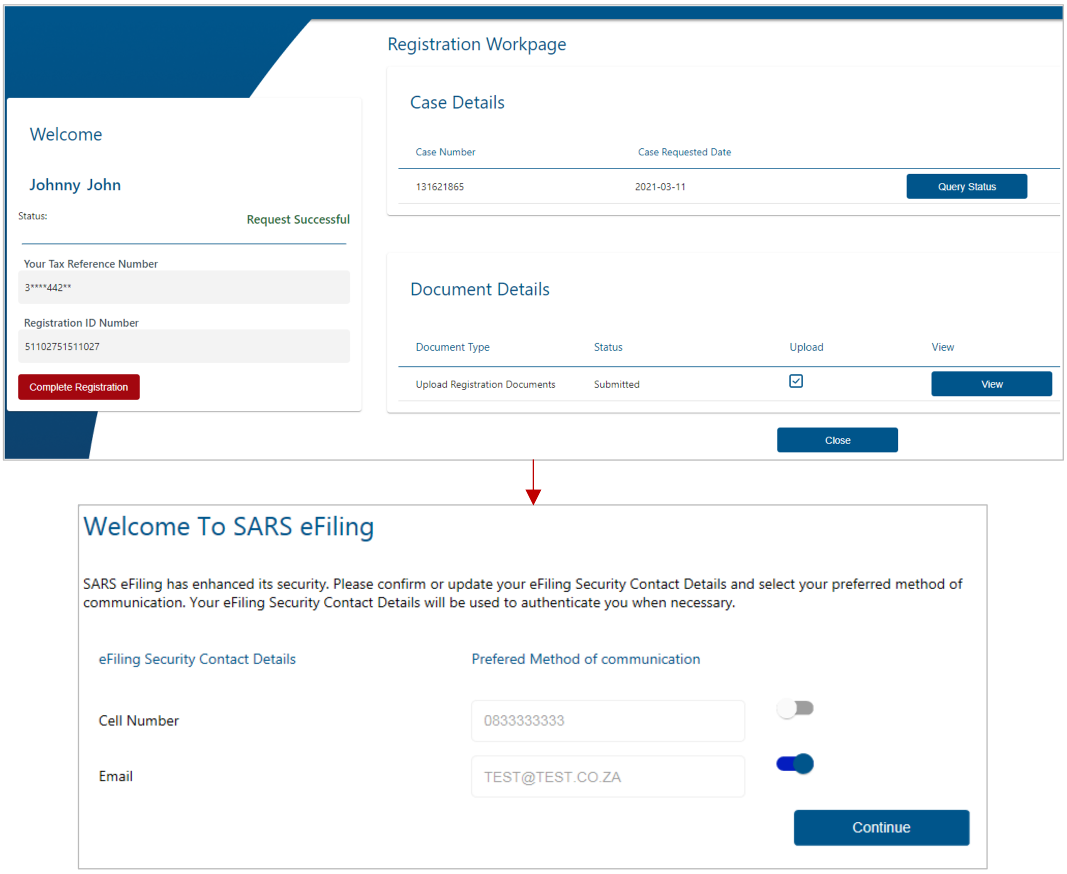
.doc	.docx	.jiff
.jpeg	.jpg	.pdf
.png	.xls	.xlsx

- Follow the screen prompts to upload the documents
- Please ensure that you upload **all** the documents requested by SARS before you click on the <**Submit**>
  - Once the documents are submitted you will not be able to add more documents unless you receive a new request from SARS
  - After you have uploaded the documents, click on <**Continue**>.
  - SARS will receive the case for review.
- You can log in with your username and password at any time to view the status of your registration (e.g. awaiting supporting document, documents submitted).



c) Once SARS has verified your details, the status will change to ‘Request Successful’ and you will be notified via email and SMS.

- Click on the <**Complete Registration**> button.
- Select your preferred method of communication and click on <**Continue**>. The method you select will serve as your eFiling security contact details and will be used to send a One-Time-Pin (OTP) to authenticate you. Please enter the OTP sent to either your cellphone number or your email address.



d) Once you have successfully entered the OTP, the eFiling Login Screen will display (refer to the section on ‘First Time Login’ below).

Please Note:

You may be requested to complete your address details in the following instances:

- To assist us to automatically register you for income tax
- If you are already registered for income tax and we cannot match the details that you have entered with the SARS records.

8.3 AUTOMATIC REGISTRATION FOR INCOME TAX

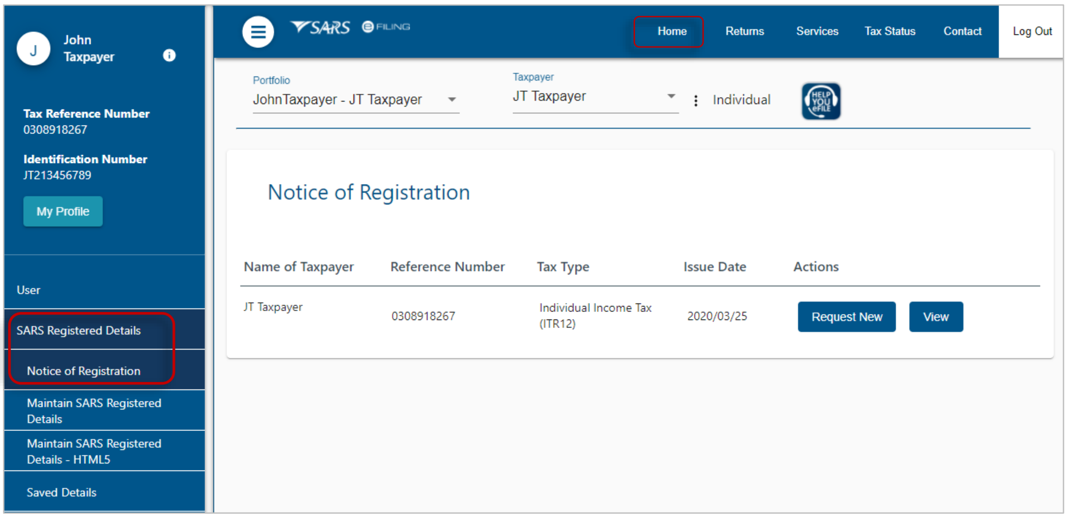
When you register as a new eFiler, SARS will do the work for you and automatically issue a personal income tax number to you if:

- You are not yet registered for income tax
- You have a valid South African ID number.

A Notice of Registration will be available to you, should you need to provide a third party (e.g. your employer) with proof of your income tax number.

After you have successfully registered for eFiling, login with your user name and password, link the tax number to your profile and follow the steps below to access your notice of registration:

- Select <**Home**> from the menu on the top
- Select <**SARS Registered Details**> from the menu on the left
- Select <**Notice of Registration**>
- Click on <**Request New**>.



SARS
South African Revenue Service

INCOME TAX
Notice of Registration

Enquiries should be addressed to SARS

Contact Detail

SARS
Alberton
1528

0800 00 7277
Website: www.sars.gov.za

JT TAXPAYER
299 BRONKHORST
BROOKLYN
PRETORIA
0001

Details

Taxpayer Reference No:	030891826	Always quote this reference number when contacting SARS
Date:	2020-03-25	

Electronic Certification
SARS
South African Revenue Service
Certified as a true copy and there is no indication that the original has been amended by any unauthorised person
2020-03-25

Dear Taxpayer

NOTICE OF REGISTRATION

The South African Revenue Service (SARS) confirms registration of the following taxpayer:

Name and Surname: JOHN TAXPAYER
Passport number: JT123456789
Taxpayer reference number: 030891826
Date of Registration: 2019-11-14

Your tax obligation

Depending on your circumstances, you may be required to submit an annual income tax return. Should you be a provisional taxpayer, returns and payments will be required every six months. More details can be obtained from the SARS website.

Any person who derives by way of income any amount which does not constitute remuneration or an allowance or advance contemplated in section 8(1) of the Income Tax Act is regarded as a Provisional Taxpayer and may be required to submit provisional returns.

Kindly notify SARS of any change to your registered particulars within 21 business days of such change.

Should you have any queries please call the SARS Contact Centre on 0800 00 7277. Remember to have your taxpayer reference number at hand when you call to enable us to assist you promptly.

Sincerely

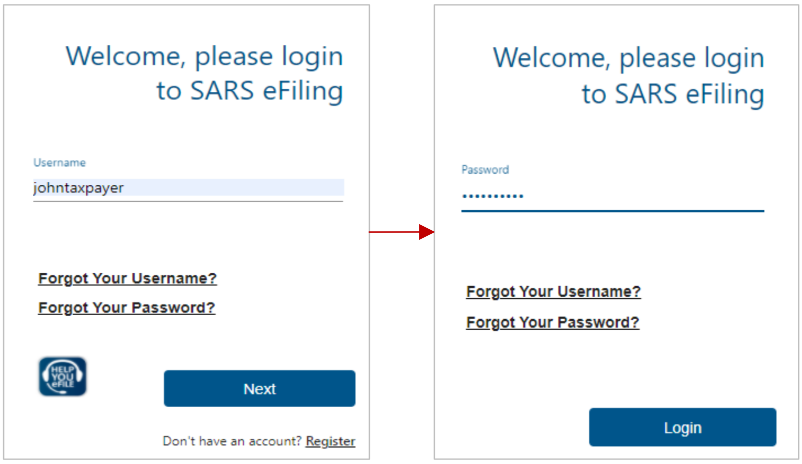
ISSUED ON BEHALF OF THE COMMISSIONER OF THE SOUTH AFRICAN REVENUE SERVICE

9 FIRST TIME LOGIN

9.1 FIRST TIME LOGIN FOR EFILING USERS REGISTERED ON/AFTER 1 JULY 2019

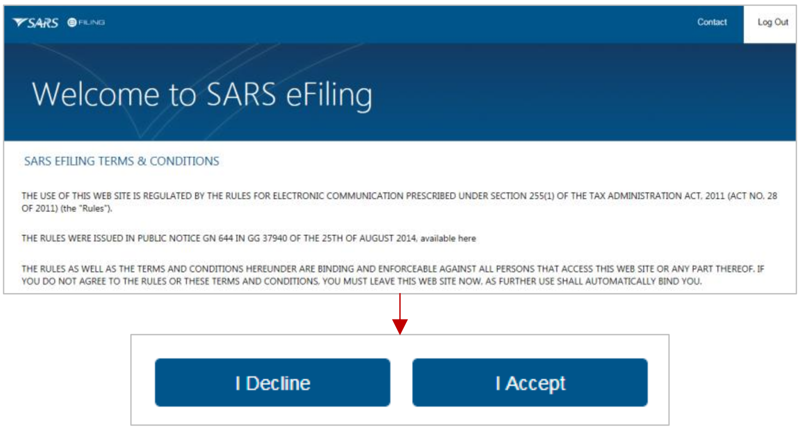
a) Log on to the SARS website. On the top right side of the home page select <**Login**> from the list of eFiling options.

- Enter your eFiling Username and click on <**Next**>
- Enter your Password and click on <**Login**>



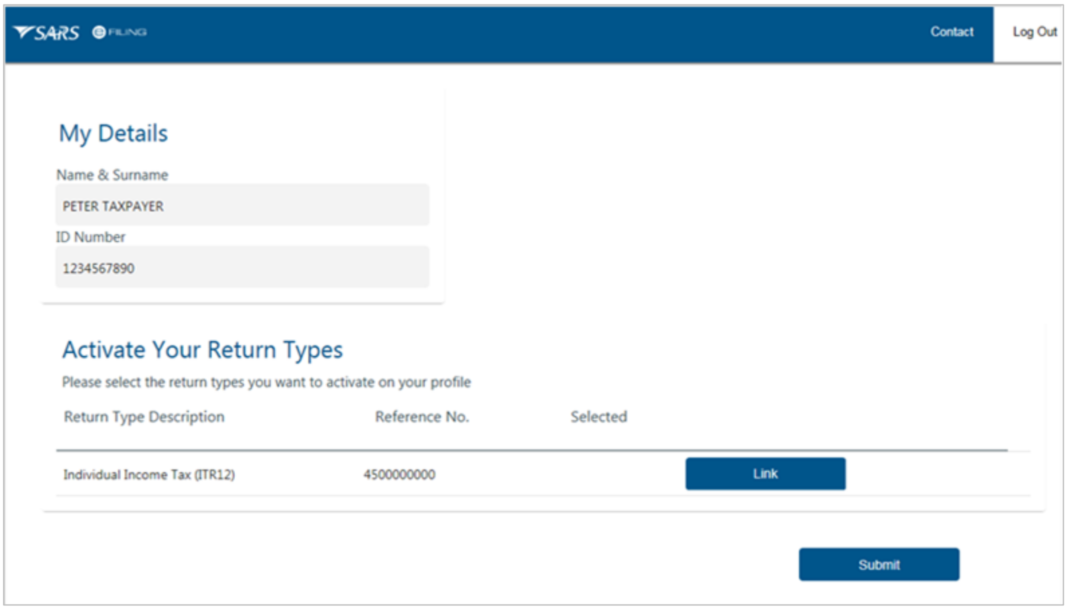
b) The eFiling welcome screen will display.

- Please read the terms and conditions. At the bottom of the screen click on <**I Accept**> to continue with the log in process.

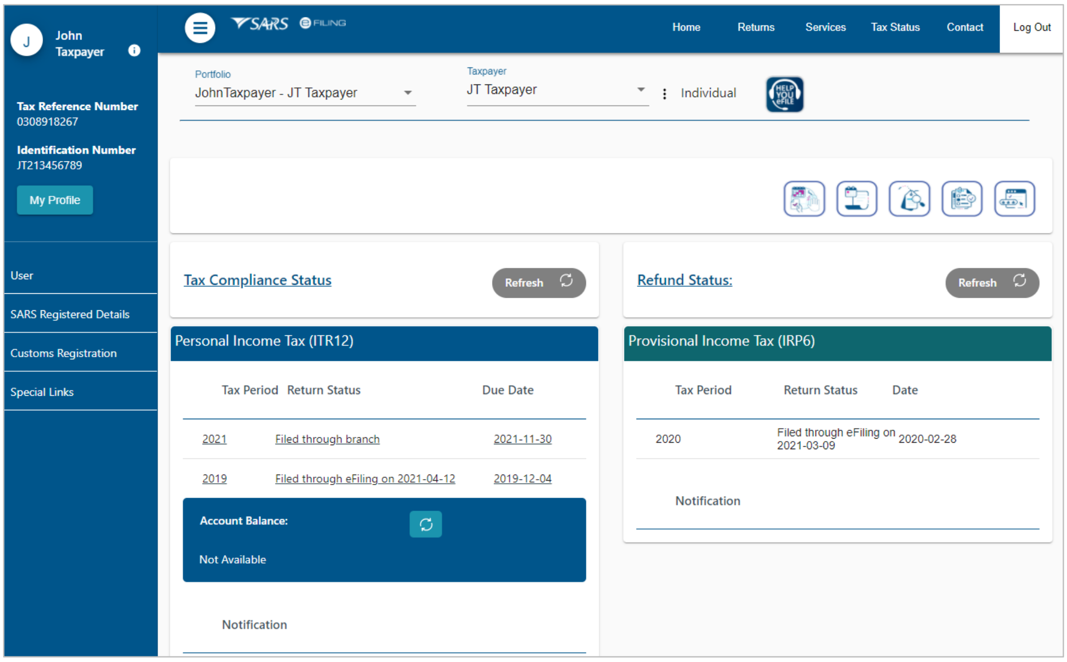


c) You will be presented with a list of returns types as per SARS records.

- Please click on the <**Link**> button for each return type that you want to activate on your profile
- Click on <**Remove**> to remove a return type from your profile
- After you have selected the return type(s), click on <**Submit**>.



d) The eFiling home page will display. This screen is also referred to as the **eFiling Dashboard** and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notifications sent by SARS.



Please Note:

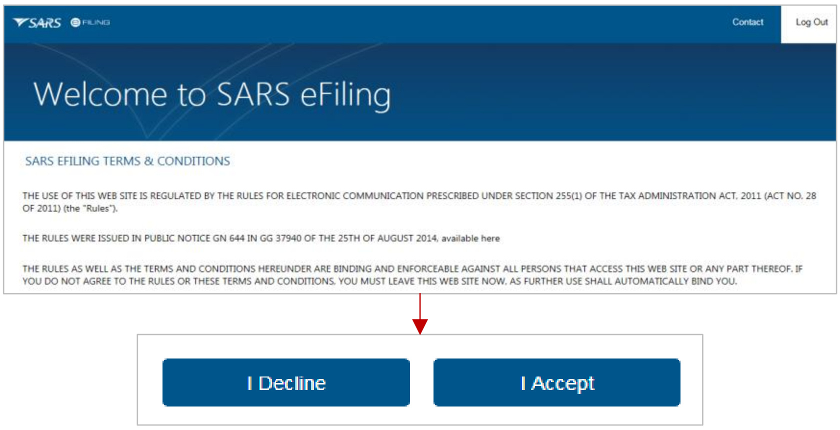
- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first contact a SARS branch office to register for income tax or activate your income tax number.
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party's access.

9.2 FIRST TIME LOGIN FOR EFILING USER REGISTERED <u>BEFORE</u> 1 JULY 2019

9.2.1 USER WITH SINGLE LOGIN PROFILE

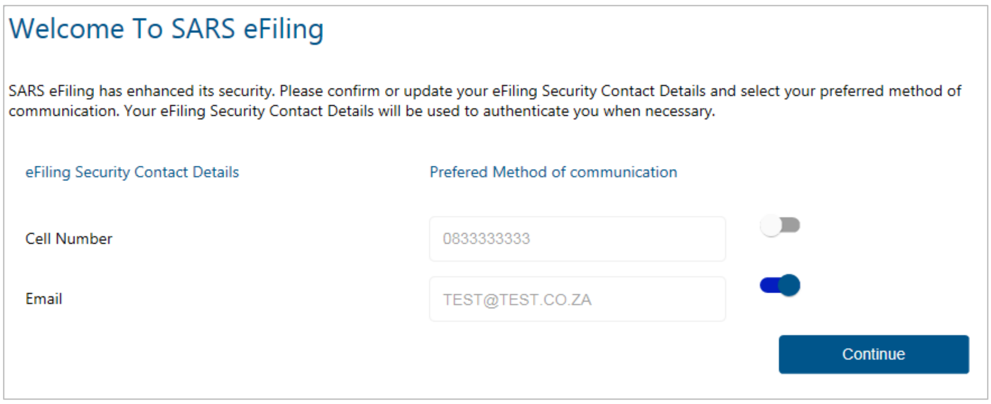
a) Log on to the [SARS website](). On the top right side of the home page select <**Login**> from the list of eFiling options.

- Enter your eFiling Username and click on <**Next**>
- Enter your Password and click on <**Login**>.
- The eFiling welcome screen will display.
- Please read the terms and conditions. At the bottom of the screen click on <**I Accept**> to continue with the log in process.



b) Select your preferred method of communication and click on <**Continue**>.

- This will serve as your eFiling security contact details. We will send a One-Time-Pin ([OTP]()) to your preferred method of communication in order to authenticate you
- You can edit your contact details on this screen.



c) Please enter the OTP sent to either your cellphone number or your email address.

- Once the correct OTP is entered, the eFiling home page will display.
- This screen is also referred to as the eFiling Dashboard and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notifications sent by SARS.

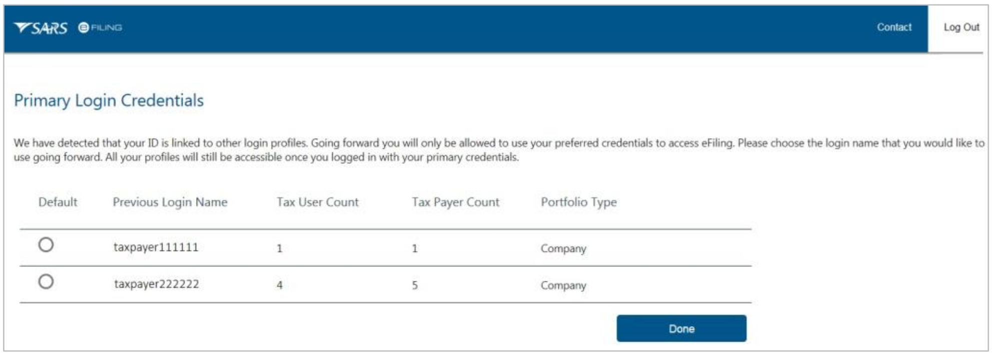
9.2.2 USER WITH MULTIPLE LOGIN PROFILES

a) Log on to the SARS website. On the top right side of the home page select <**Login**> from the list of eFiling options.

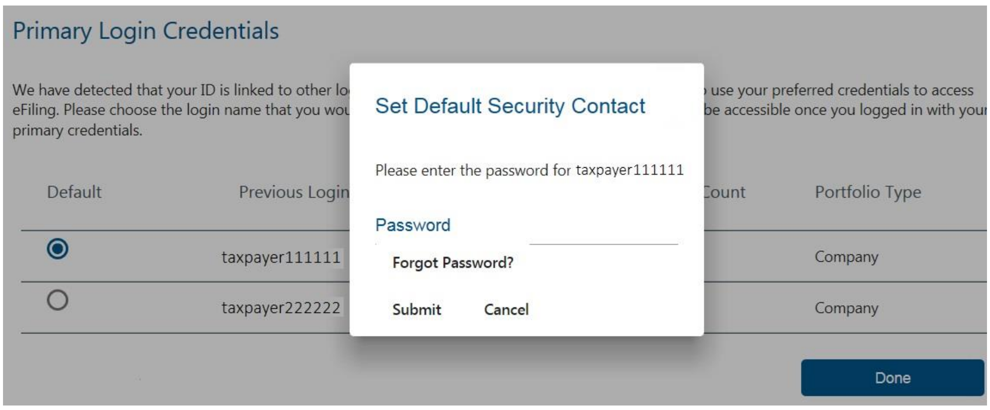
- Enter your eFiling Username and click on <**Next**>
- Enter your Password and click on <**Login**>
- Please read and accept the terms and conditions (refer to the section above).

b) After you have accepted the terms and conditions, a screen will display with a list of all the login profiles linked to your identity/passport number prior to 1 July 2019.

- Please select the primary login name that you would prefer to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

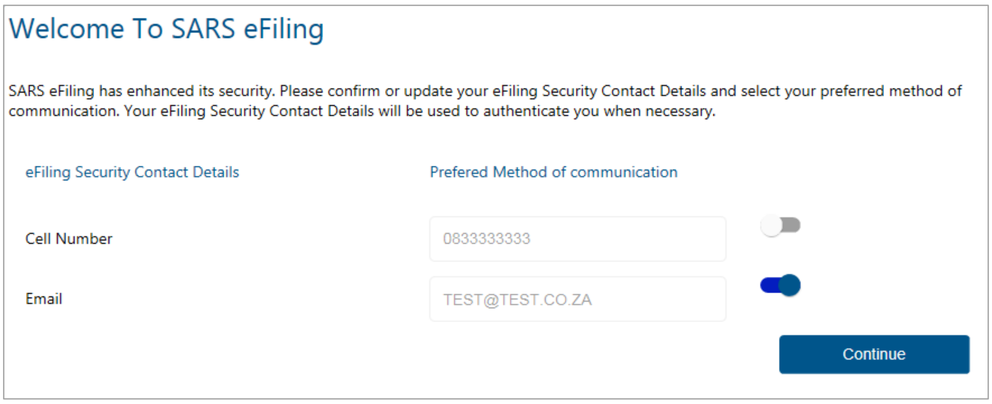


c) If you select a primary login (e.g taxpayer111111 as illustrated in the screen below) that is different to the profile that you are currently logged in with (e.g. taxpayer222222), you will be prompted to enter the password for the primary login you select (i.e taxpayer111111). If you do not remember the password, click on <**Forgot Password**> to reset it.

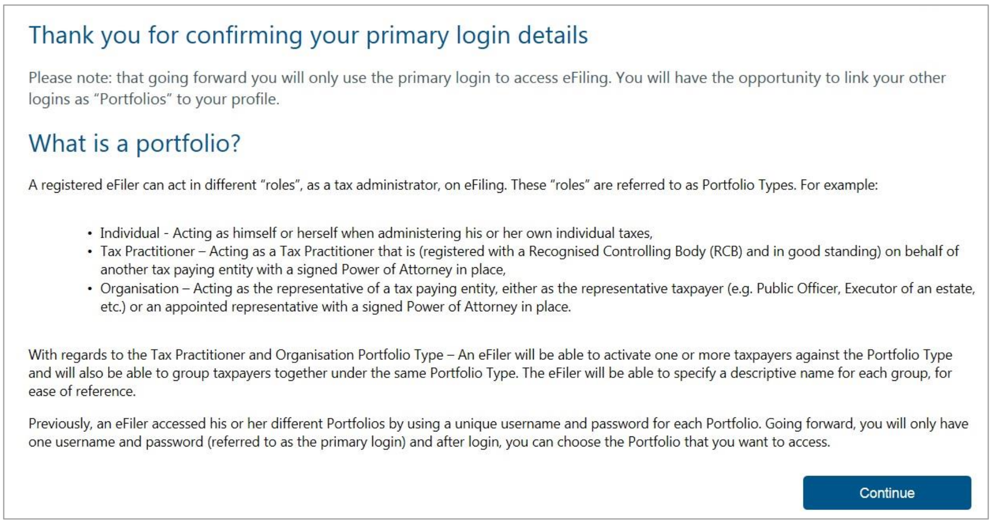


d) Once you have selected the primary login, click on <**Done**>. On the next screen select your preferred method of communication and click on <**Continue**>.

- This will serve as your eFiling security contact details. We will send a One-Time-Pin (OTP) to your preferred method of communication in order to authenticate you
- You can edit your contact details on this screen.



e) Please enter the OTP sent to either your cellphone number or your email address. A message will display confirming that your primary login has been sucessfully set-up. Click on <**Continue**>.



f) The Portfolio Management screen will display for you to link, unlink or add portfolios. For more information please refer to the Portfolio Management section below.

Please Note:

- After you have selected and confirmed your primary login, you must only use that login to access eFiling. If you attempt to login with any other portfolio that is linked to your identity/passport number, the following error message will display:

“According to our records you have already chosen your Primary Login. Please Login with your Primary Login details and then activate your other profiles in the Portfolio Management section on eFiling.”

- If you are an individual with multiple logins and you try to login with the username that is not linked to your personal income tax number, the following message will display:

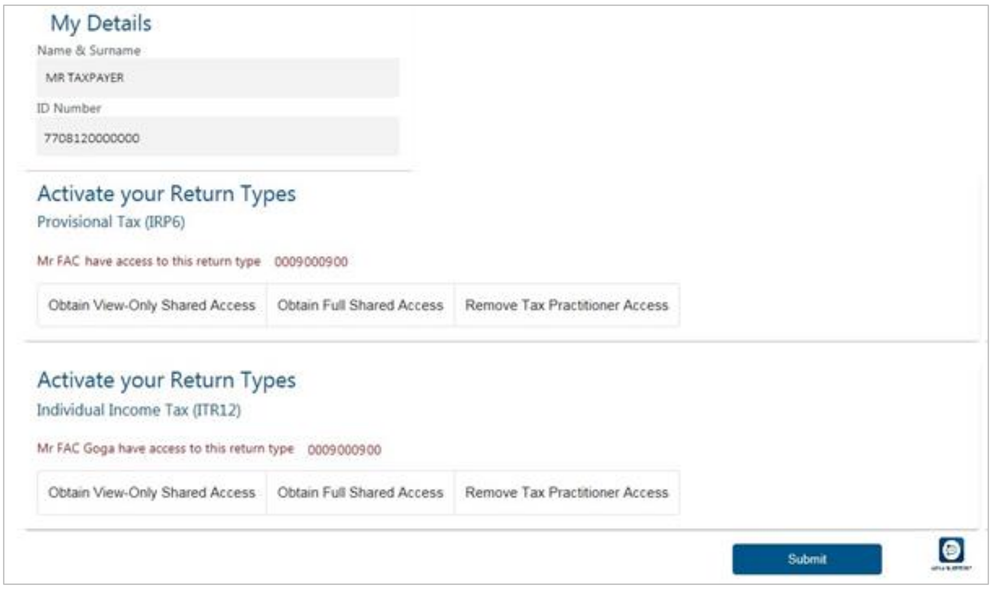
  “Our records indicate that your own personal income tax is associated to one of your other existing Login details. Due to improved security measures implemented, please authenticate this profile by providing the applicable password below. Note – should you not be able to authenticate this profile now, you may be required to do so at a later stage to gain access to certain online transactions.”

9.3 ACCESS TO MY PROFILE

When you log in for the **first time** and your tax number(s) is already registered against another party’s eFiling profile (e.g. a tax practitioner), the system will display the name of the party who has access to the tax type. You have the option to obtain shared access or revoke the other party’s access.

a) Select the type of access you require (see below) and click on <**Submit**>:

- <**Obtain View Only Shared Access**> **-** this option will only allow you to view transactions done on your behalf on eFiling
- <**Obtain Full Shared Access**> **-** this option will allow you to have full shared access and the other party will still retain access rights to the tax type
- <**Remove Tax Practitioner Access**>
- <**Remove My Access**> - This option will display if you currently have shared access with your tax practitioner
- <**Deactivate Tax Type**>



10 PROFILE AND PREFERENCE SETUP

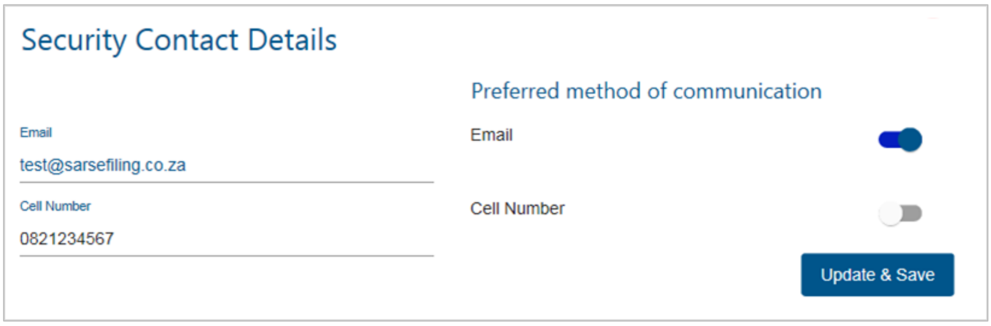
This function is used to manage your primary login details, security contact details, two-factor authentication and passwordless login (each item is discussed in the sub-sections below).

You cannot change your tax reference number and identity/passport number on this screen.

10.1 CHANGE SECURITY CONTACT DETAILS:

a) Select <**My Profile**> from the menu on the left and click on <**Profile and Preference Setup**>

- Scroll to the section <**Security Contact Details**>
- Insert your new email address and/or your new cell number
- Select your preferred method of communication
- Click on <**Update & Save**>
- On the pop-up screen that displays, select your preferred method of communication to receive the One-Time-Pin number
- After you have entered the correct OTP, a message will display confirming that your security contact details have been updated successfully.



10.2 CHANGE USER NAME AND PASSWORD:

a) Select <**My Profile**> from the menu on the left and click on <**Profile and Preference Setup**>

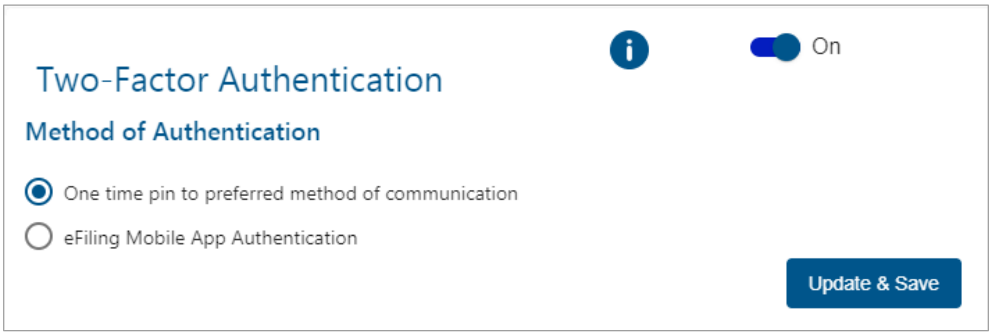
- Scroll to the section <**Your Login Details**>
- Insert your new username (you may user your email address as your username)
- Insert your new password
- Insert your new password again to confirm it
- Click on <**Update & Save**>
- An OTP will be sent to your preferred method of communication
- After you have entered the correct OTP, a message will display confirming that your username and password have been updated successfully.

10.3 TWO-FACTOR AUTHENTICATION USING ONE TIME PIN

Two-factor authentication is an additional security measure and requires you to provide your password as well as a second factor of authentication to login to eFiling. If you prefer to use the OTP method for additional authentication follow the steps below:

a) Select <**My Profile**> from the menu on the left and click on <**Profile and Preference Setup**>

- Select the button to switch 'two-factor authentication' on
- Select <**One time pin to preferred method of communication**>
- Click on <**Update and Save**>
- An OTP will be sent to your preferred method of communication
- After you have entered the correct OTP, a pop-up message will display confirming that your two-factor authentication has been successfully activated.
- Going forward, you will be required to do the following each time you log on to your profile via the eFiling website:
  - Enter username
  - Enter password
  - Enter OTP.

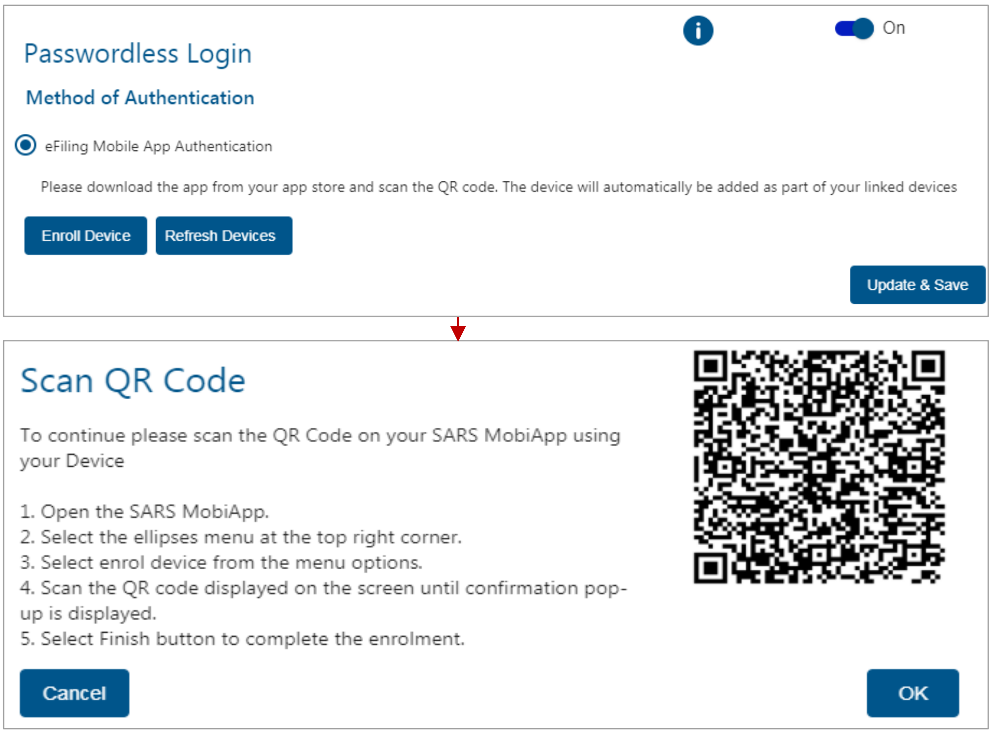


10.4 TWO-FACTOR AUTHENTICATION USING THE EFILING MOBILE APP

a) If you prefer to use the mobile app for additional authentication, please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.

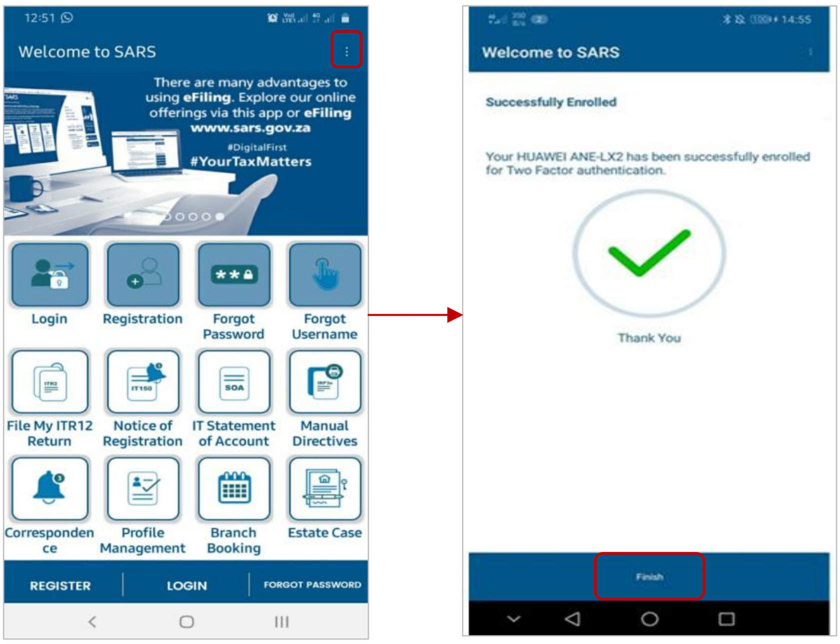
b) Log on to the eFiling website:

- Select <**My Profile**> from the menu on the left and click on <**Profile and Preference Setup**>
- Select the button to switch 'two-factor authentication' on
- Select <**eFiling Mobile App Authentication**>
- Click on the <**Enrol Device**> button
- You will be issued with an OTP to confirm the device you want to enrol
- A pop-up screen will display with a **QR Code** and instructions. Please ensure that you only click the <**OK**> button on this screen after the device enrolment is completed (*refer to step c below*) else the device will not be added to your eFiling profile.



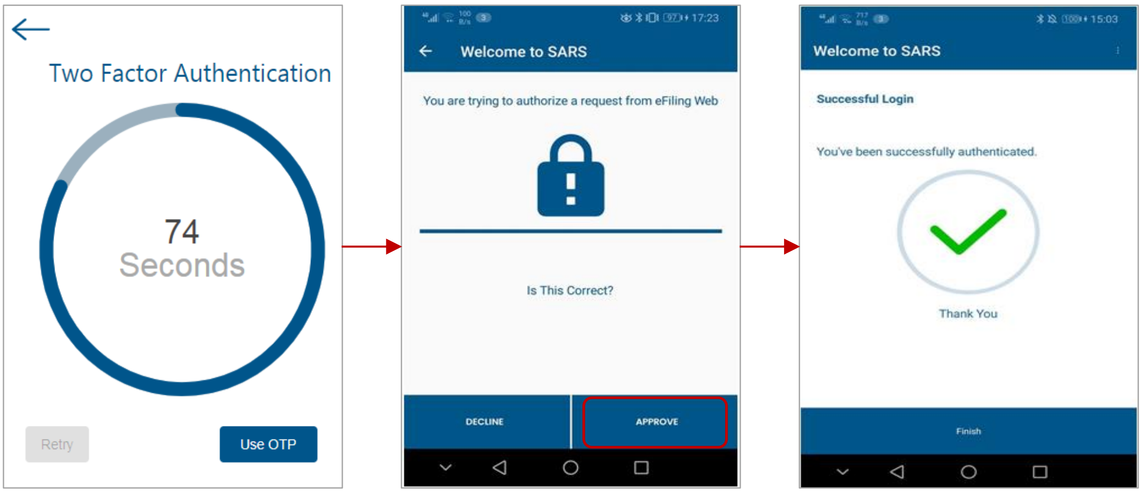
c) Launch the mobile app on your device:

- Click on the ellipses (⋮) on the top right corner of the screen to display the menu
- Select <**Enrol Device**>
- Use your device to scan the QR code displayed on the eFiling website
- Once the QR Code is scanned successfully, a message will display to confirm that your device has been enrolled
- Click on the <**Finish**> button to complete the enrolment
- The device will automatically be added as part of your linked devices on eFiling
- For more information on how to use the app please refer to the 'Guide to the SARS MobiApp' which is available on the SARS website.



d) After the device has been enrolled, you will be required to do the following each time you log on to the eFiling website:

- Enter username
- Enter password (the "*Two Factor Authentication*" timer will display)
- Click on <**Approve**> on your mobile device to authorise the request before the timer expires. You will be logged in to the eFiling website.



Please Note:

- A device can only be enrolled on one eFiling profile at a time. If you try to enrol a device that is already linked to another eFiling profile, an error message with display. If you would like to enrol the device on a another eFiling profile:
  - Logon to the existing eFiling profile > Navigate to the Two Factor Authentication function > click on the ellipses (⋮) menu and select the option to **remove** the device.
  - Logon to the new eFiling profile > Navigate to the Two Factor Authentication function > Follow the steps above to **enrol** the device.

- If two factor authentication is activated on your eFiling profile and you uninstall the mobile app or clear the app data, you will no longer receive the authorisation notification on your mobile device (even though the eFiling website will display the two factor authentication "timer"). In this instance:
  - Select <**Use OTP**> on the two factor authentication timer screen to log on
  - Remove the device from your profile
  - Reinstall the mobile app and enrol the device again.

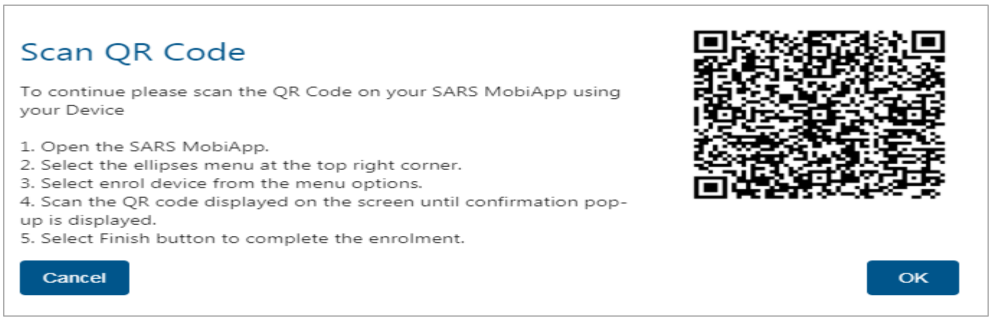
10.5 PASSWORDLESS LOGIN

Passwordless Login enables you to use your mobile device to approve the eFiling login request instead of typing in your password.

a) Please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.

e) Log on to the eFiling website:

- Click on <**My Profile**> on the menu on the left and select <**Profile and Preference Setup**>
- Select the button to switch on <**Passwordless Login**>
- Select <**eFiling Mobile App Authentication**>
- Click on the <**Enrol Device**> button. A pop-up screen will display with a QR Code and instructions.



f) Launch the mobile app on your device. Follow the steps described in the section "Two-Factor Authentication Using the Efiling Mobile App" to enrol your device.

Please Note:

- You can either switch on Passwordless Login or Two-factor Authentication on your profile, however both can never be switched on at the same time.

11 PORTFOLIO MANAGEMENT

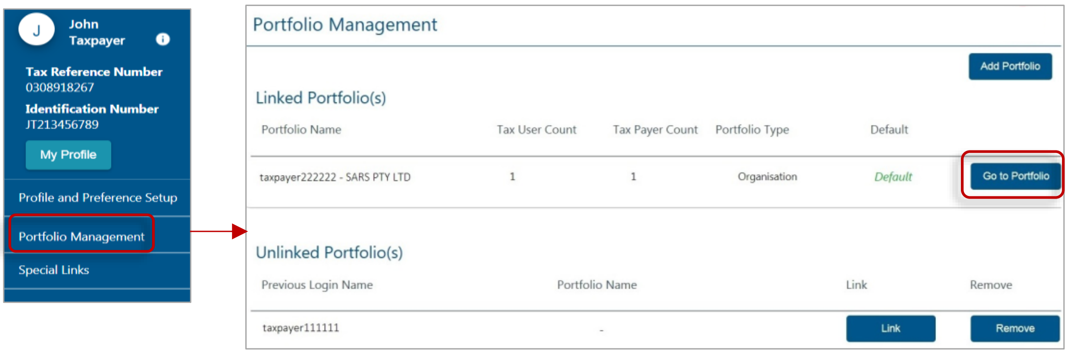
The Portfolio Management function is used to link, and add various portfolios (roles) on your eFiling profile, such as:

- Your individual portfolio to manage your own personal taxes
- Multiple company portfolios where you are the registered representative (e.g. public officer) or employee and you manage the taxes of those companies
- Multiple tax practitioner portfolios where you manage the taxes of multiple individuals/entities as a tax practitioner.

You can also opt to have all your roles merged into one company or tax practitioner profile if you so wish.

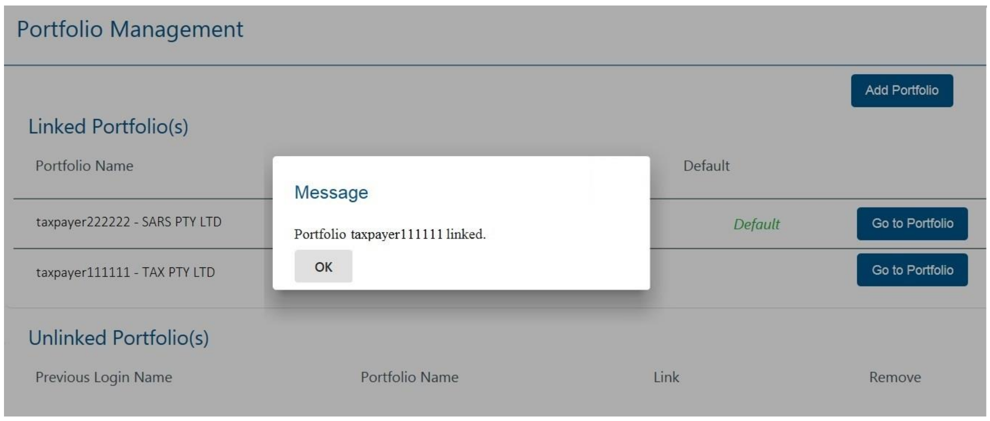
a) Once you have logged on to eFiling:

- Select <**My Profile**> from the menu on the left
- Select <**Portfolio Management**>.
- The Portfolio Management screen will display for you to link, unlink, or add portfolios.



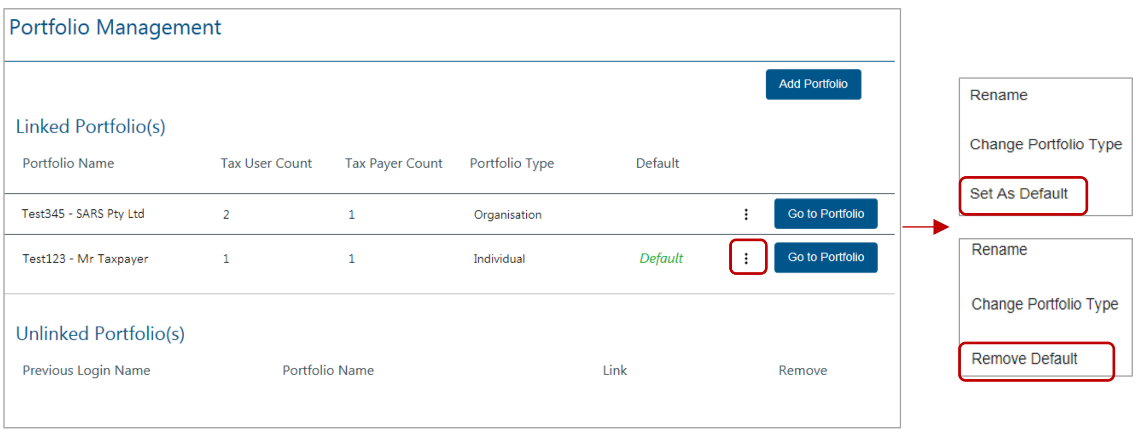
b) You will be prompted to enter the password for each portfolio that you want to link.

- If you do not remember the password, click on <[Forgot Password]> to reset it
- After you enter the correct password, a message will display to confirm that the portfolio has been linked.



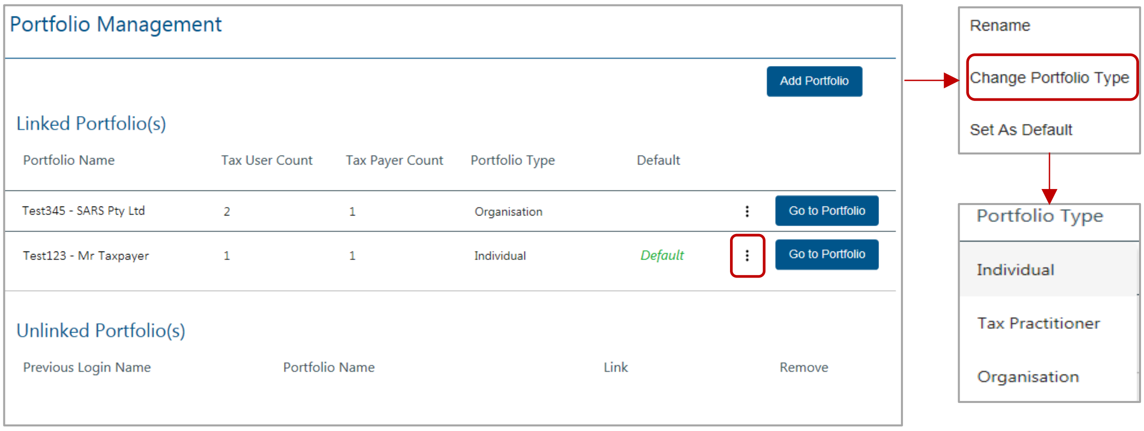
c) You can set a <u>default portfolio</u> so that the sytem automatically displays this portfolio when you login instead of you having to select it each time. To change the default portfolio, click on the ellipses (⋮) menu icon and then either select <**Set as Default**> or <**Remove Default**>.

- You cannot have more than one default portfolio
- Portfolios that are not linked cannot be set as a default profile.

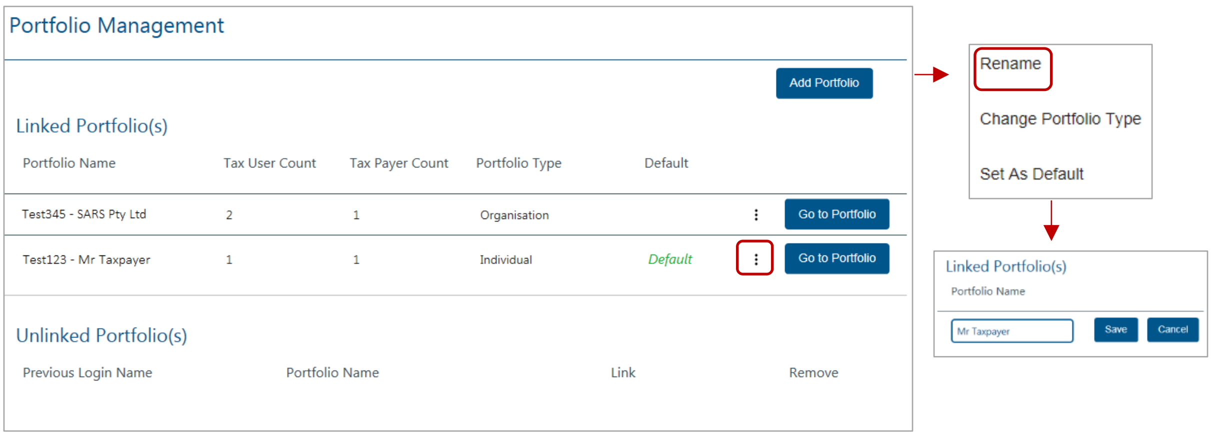


d) To change the <u>portfolio type</u>, click on the ellipses (⋮) menu icon and select <**Change Portfolio Type**>.

- Select the portfolio type (i.e. Individual / Tax Practitioner / Organisation) from the drop down menu and click on <**Save**>
- You can have multiple Tax Practitioner and Organisation portfolios on your profile
- You can only have one Individual portfolio linked to your profile.

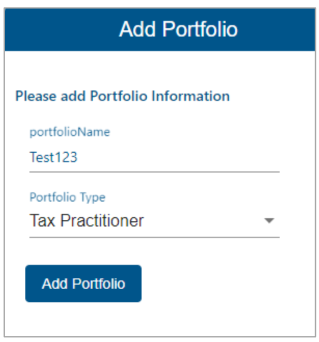


e) You can rename your portfolios for your ease of reference. Click on the ellipses (⋮) menu icon and select **<Rename>.** Insert the new description for the portfolio and click on <**Save**>.



f) To link a new portfolio to your profile, click on the <**Add Portfolio**> button. On the pop-up screen, insert the portfolio name, select the <**Portfolio Type**> and click on <**Add Portfolio**>

- You can choose to set the new portfolio as your default
- You can add taxpayers and users to this portfolio.



12 MANAGE USERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

12.1 INVITE, EDIT AND DELETE A USER ON A PORTFOLIO

This function is used to add new users to a portfolio, grant access to tax types, set the required levels of authorisation for each user and delete users.

To successfully **add** users to portfolios, actions are required from both the following parties:

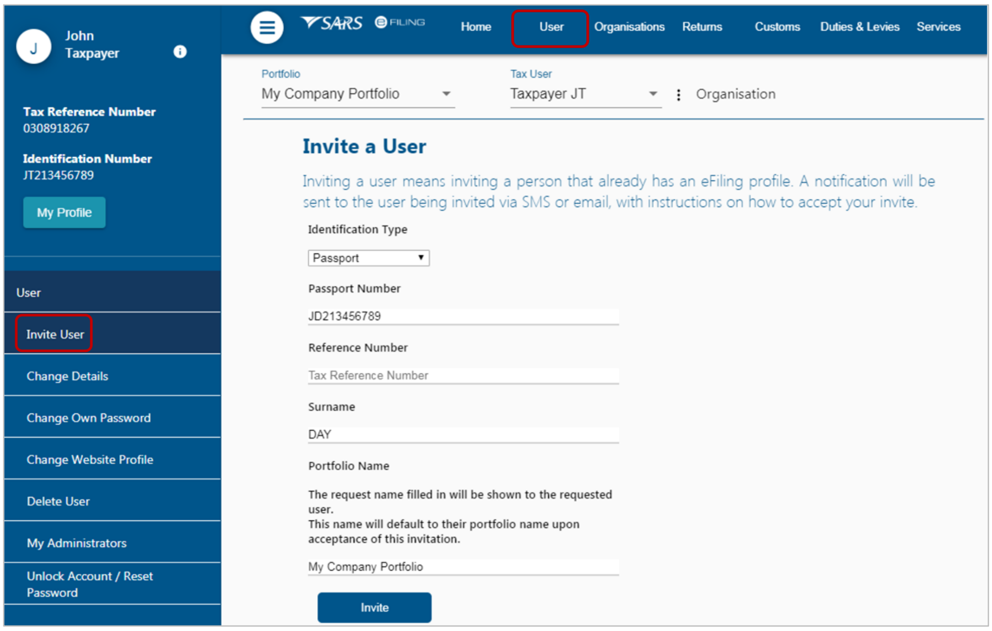
- **The Requestor** – this refers to an existing user that has the ‘Manage User’ role assigned to him/her and wants to invite another person to be a user and have access to the organisation or tax practitioner portfolio.
- **The User** – this is the person (e.g. a tax practitioner’s employee) who has been invited to have access to one or more taxpayers that are managed by the requestor.

a) To access the required Organisation or Tax Practitioner portfolio:

- Select <**My Profile**> and <**Portfolio Management**> from the menu on the left
- Click on <**Go to Portfolio**>.

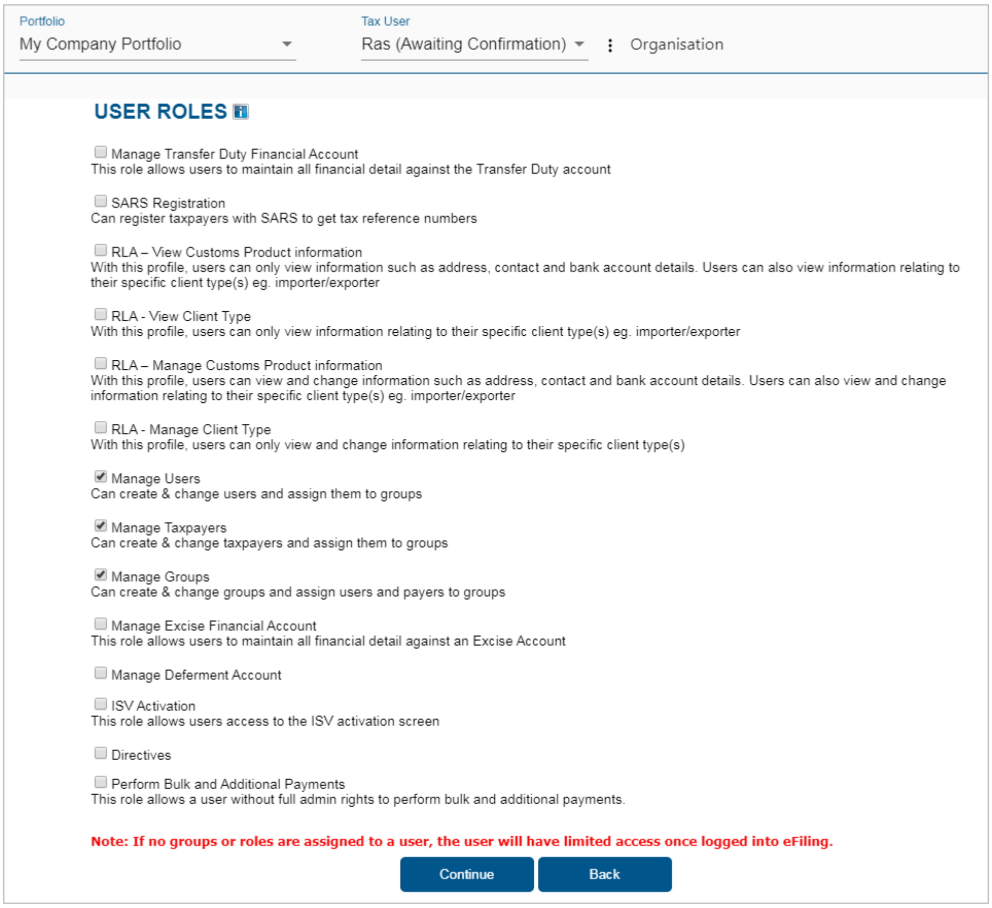
b) Once you have selected the required Portfolio:

- Select <**User**> from the menu on the top
- Select <**User**> again from menu on the left
- Select <**Invite User**>
- Complete the following information for the user you are inviting
  - Identification Type
  - Passport or ID Number
  - Tax Reference Number (only applicable if identification type is passport)
  - Surname
  - The default Organisation or Tax Practitioner Portfolio name that you want the user to view on his/her portfolio upon accepting your invite
- Click on <**Invite**>.



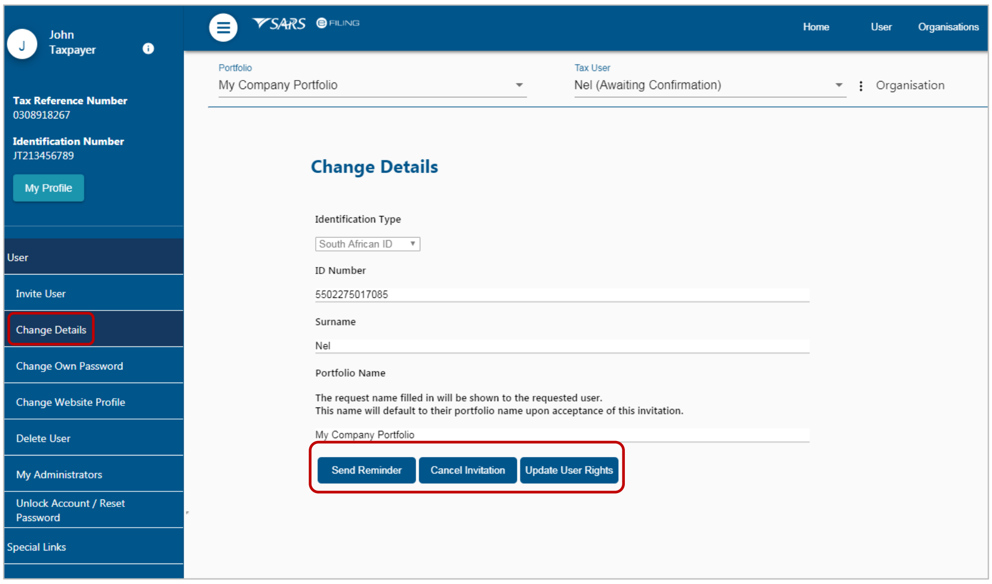
c) Select the roles (i.e. permissions) that you want to assign to the user.

- Examples of roles:
  - ‘Manage Transfer Duty Financial Account’ *(allows users to maintain all financial detail against the Transfer Duty account)*
  - ‘SARS Registration’ *(allows users to register taxpayers with SARS to obtain tax reference numbers)*
  - ‘RLA – View Customs Product information’ *(allows users to only view information such as address, contact and bank account details and information relating to their specific client type(s) e.g. importer/exporter)*
  - ‘RLA - View Client Type *(allows users to only view information relating to their specific client type(s) e.g. importer/exporter)*
  - ‘RLA – Manage Customs Product information’ *(allows users to view and change information such as address, contact and bank account details and also change information relating to their specific client type(s) e.g. importer/exporter)*
  - ‘RLA - Manage Client Type’ *(allows users to only view and change information relating to their specific client type(s))*
  - ‘Manage Users’ *(allows users to add & change users and assign them to groups)*
  - ‘Manage Taxpayers’ *(allows users to add & change taxpayers and assign them to groups)*
  - ‘Manage Groups’ *(allows users to create & change groups and assign users and payers to groups)*
  - ‘Manage Excise Financial Account’ *(allows users to maintain all financial detail against an Excise Account)*
  - ‘Manage Deferment Account’
  - ‘ISV Activation’ *(allows users access to the ISV activation screen)*
  - ‘Directives’ *(allows users to access the tax directives functionality)*
  - ‘Perform Bulk and Additional Payments’ *(allows users without full admin rights access to perform bulk and additional payments).*
- Click on <**Continue**>
- A summary of the roles selected will display. Click on <**Continue**>.
- The invite will be sent to the user. You will be notified via email or SMS once the user accepts the invite.



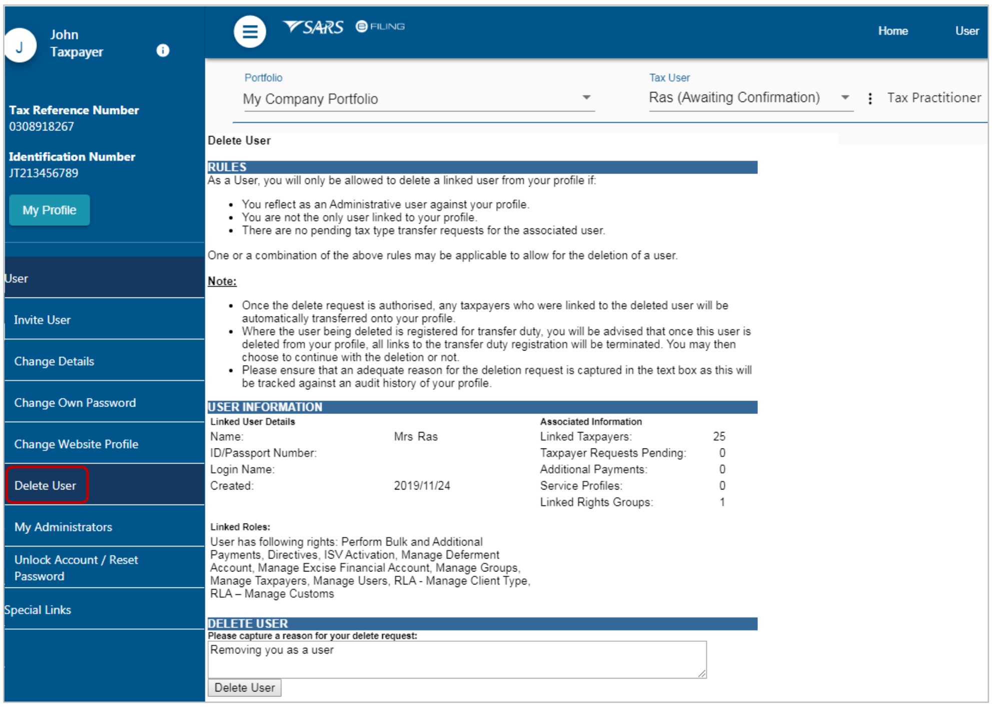
d) Select <**Change Details**> from the menu on the left to do any of the following:

- **Send Reminder** – this option will resend the notification to the user to remind him/her to accept the invite.
- **Cancel Invitation** – this option will delete the invite, remove the user on the requestor's portfolio and also remove the requestor's profile from the user's portfolio management screen.
- **Update User Rights** – use this option to edit roles (permissions) assigned to the user.



e) Select <**Delete User**> from the menu on the left to remove a user from an existing portfolio.

- Insert a reason for deleting the user
- Click on <**Delete User**>
- On the pop-up message click on <**OK**> to confirm your request.



<u>Please Note</u>:

- Only a person with an existing eFiling profile can be added as a user on a portfolio. Once an invite is sent by the requestor, the user will receive an SMS and email notification with instructions on how to accept the invite.

- A requestor will not be allowed to invite a user should any of the following conditions apply:

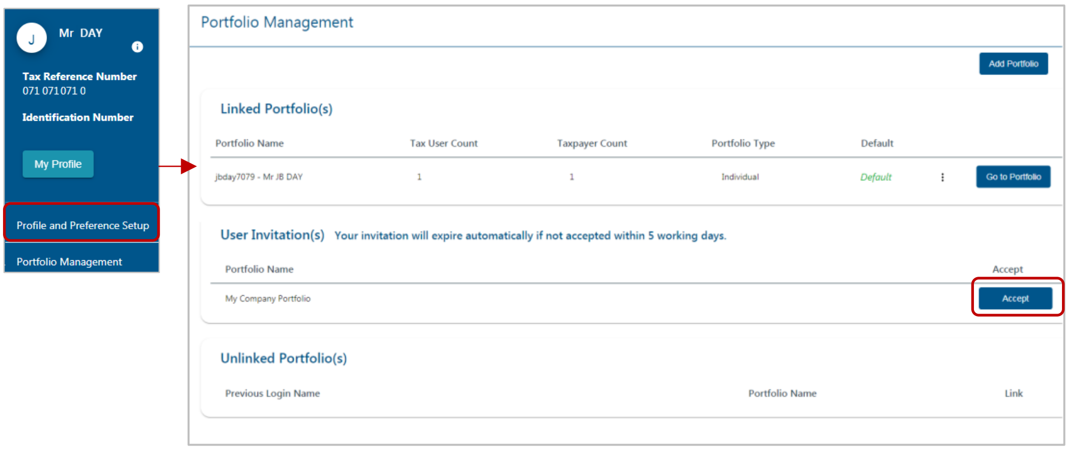
  - SARS cannot find a match for the user details entered
  - The user [registered for eFiling prior to 1 July 2019] and has not yet logged in to set up his/her profile on the new eFiling website
  - The user has not yet [completed his/her eFiling registration]
  - The user already exists on the portfolio he/she is being invited to.

12.2 ACCEPT INVITE TO BE A USER ON A PORTFOLIO

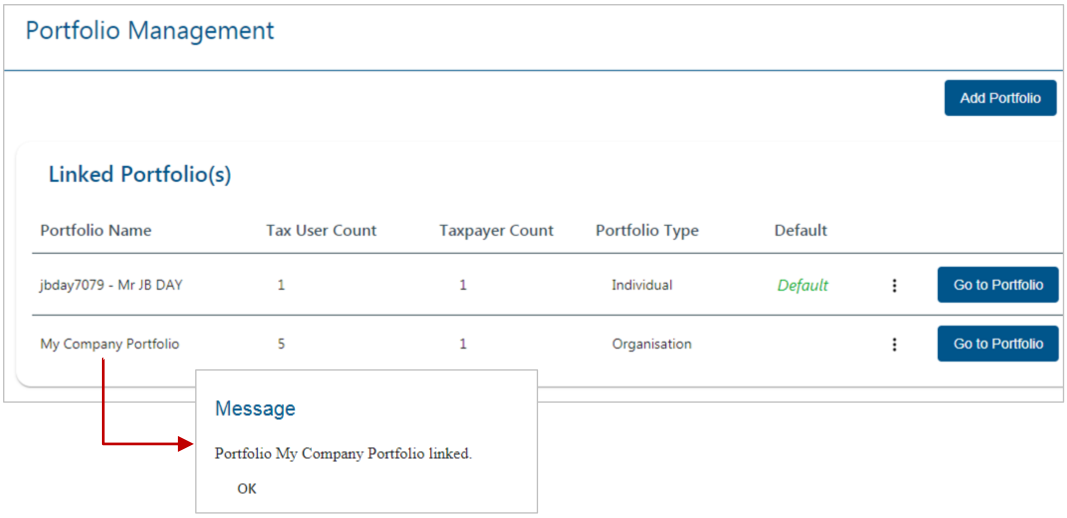
SMS and email notifications will be sent to the person who has been invited to be a user on an organisation or tax practitioner's portfolio.

a) Log on to your eFiling profile.

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



b) As part of the authentication process, you will be prompted to enter the One-Time-Pin (OTP) sent to your preferred method of contact. Once the OTP is successfully entered, a pop message will display to confirm that the organisation/tax practitioner profile will be linked to your profile.



Please Note:

- The invite from the requestor will automatically expire if not accepted by the user within 5 working days.
- If the invite expires, the record will be deleted on both the requestor's and user's portfolio.
- A notification will be sent to the requestor to notify him/her that the invite has expired. The requestor can opt to send a new invite.

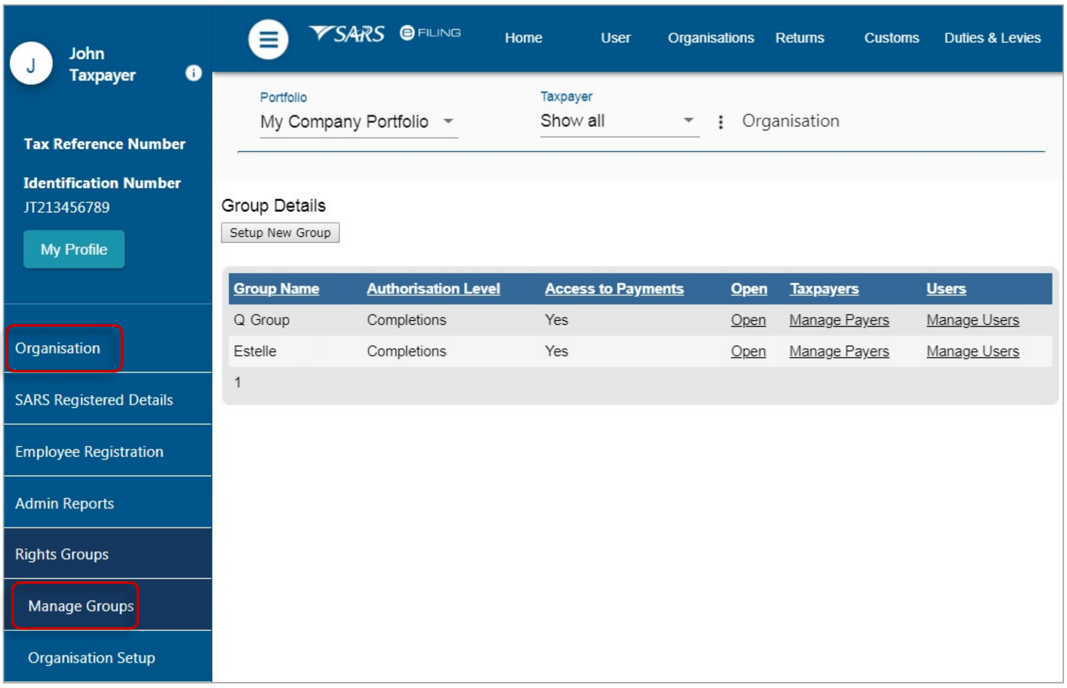
13 MANAGE GROUPS

In order to activate the tax type functions and services on eFiling (e.g. Tax Directives, Tax Compliance Status, etc) you must ensure that the correct rights and authorisation levels have been allocated to users on your organisation's portfolio.

a) To activate the tax type functions and services:

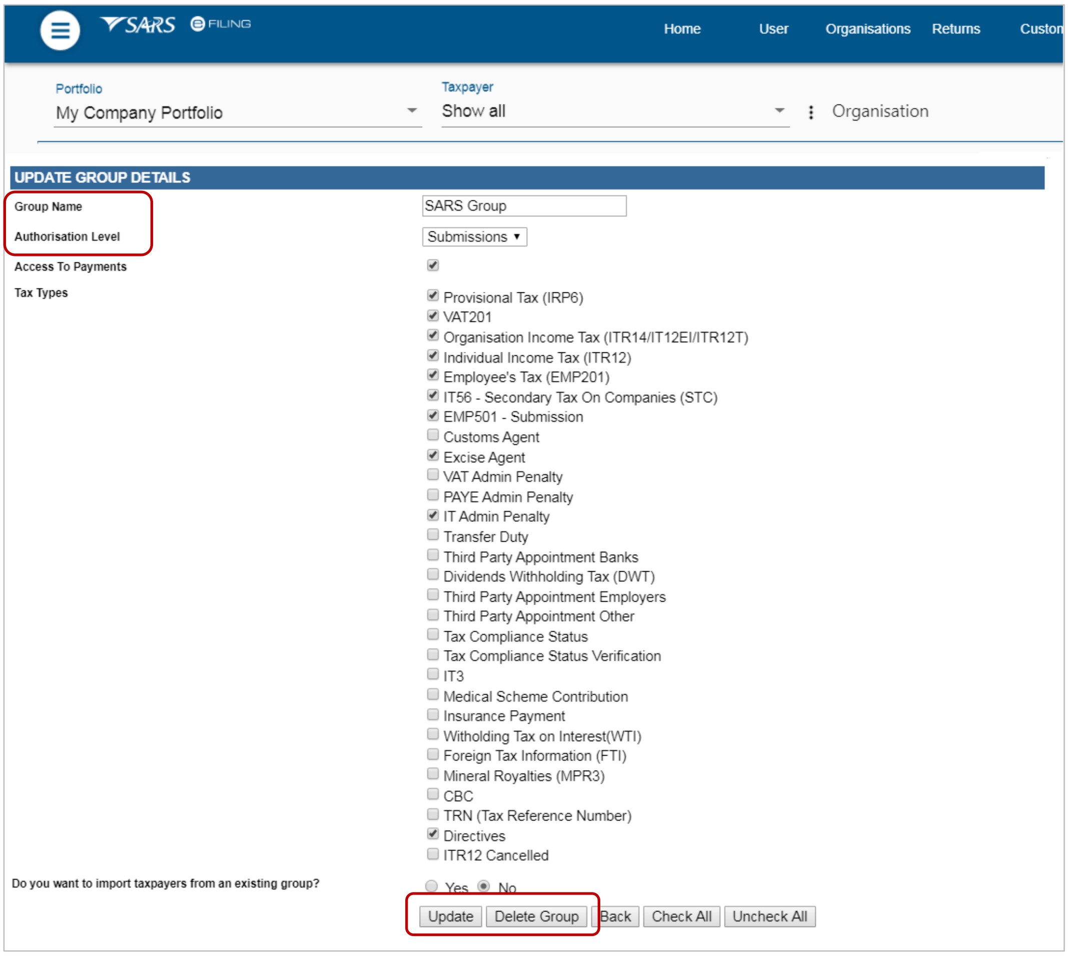
- Select <**Organisations**> from the menu on the top
- Select <**Organisation**> again from menu on the left

- Click on <**Rights Group**>
- Click on <**Manage Groups**>
- The <**Group Details**> screen will display.
  - Click on the <**Setup New Group>** button to create a new group (e.g. Return Submissions)
  - Click on the **<Manage Payers>** hyperlink to add Taxpayers (activated on your organisation's portfolio) to a specific group
  - Click on the **<Manage Users>** hyperlink to add users on your organisation's portfolio to a specific group (for more information refer to the section on manage users).



b) To amend the details of an existing group click on the <**Open**> hyperlink:

- Edit the **<Group Name>** where applicable
- Select the applicable <**Authorisation Level>**:
  - **View Only**: This will allow you to only have view access
  - **Completions**: You will only be able to view and complete forms or applications
  - **Submissions**: You will be allowed to view, complete and submit forms (e.g tax directive applications)
- Select the applicable tax types to be activated (e.g. Directives, Tax Reference Number, Tax Compliance Status, etc.)
- Click <**Update**> to activate the specific tax type functionality required. You also have the option to <**Delete Group**>.



14 MANAGE TAXPAYERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

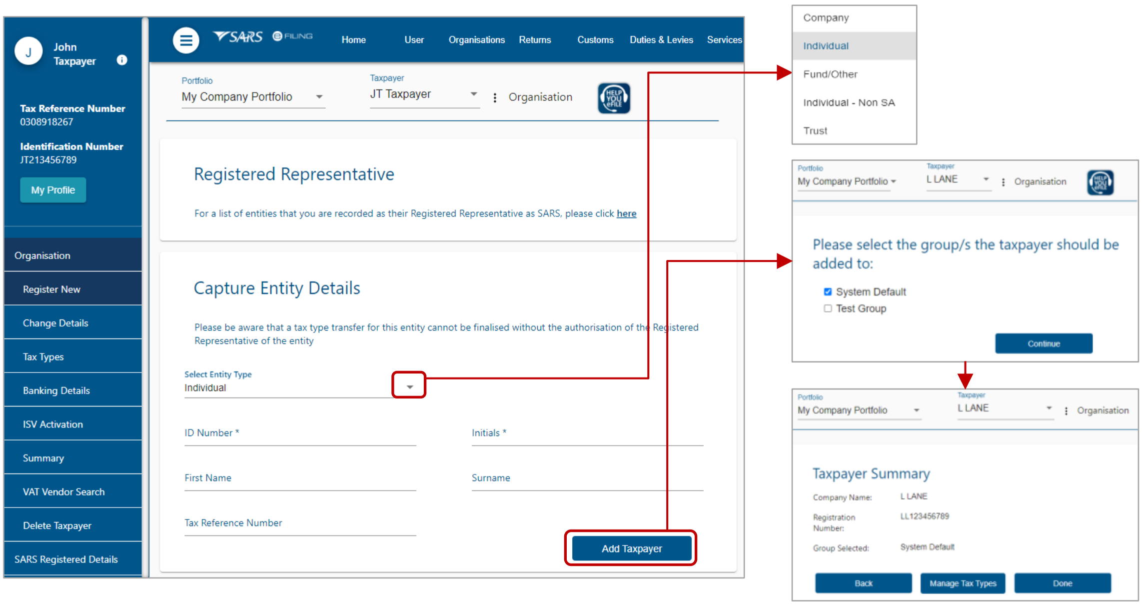
a) To manage taxpayer types linked to a portfolio:

- Select <**Organisations**> from the menu on the top
- Select <**Organisation**> from menu on the left.

b) To amend details of an existing taxpayer on your portfolio select <**Change Details**> from the menu on the left.

c) To add a new taxpayer/entity type to your portfolio:

- Select <**Register New**> from the menu on the left
- Select the **<Entity Type>** from the drop down list (e.g. individual, company, trust, fund)
  - The registration fields displayed will differ according to the type of entity selected
- Complete the applicable fields and click on <**Add Taxpayer**>
- On the pop-up screen select the group(s) to which the taxpayer should be added (for more information refer to the section on Manage Groups)
- A summary of the new taxpayer's details will display. Click on <**Done**>
- Refer to the section on Manage Tax Types for more information on how to activate return/tax types for a taxpayer.



<u>Please Note</u>:

- You will only have access to the 'Register New' function if the Manage Taxpayer rights have been assigned to you
- The system will display a message if the taxpayer you want to add already exists on another portfolio where you also have manage taxpayer rights. You will have the option to add the taxpayer to the current portfolio

15 MANAGE TAX TYPES

The purpose of this function is to enable the following:

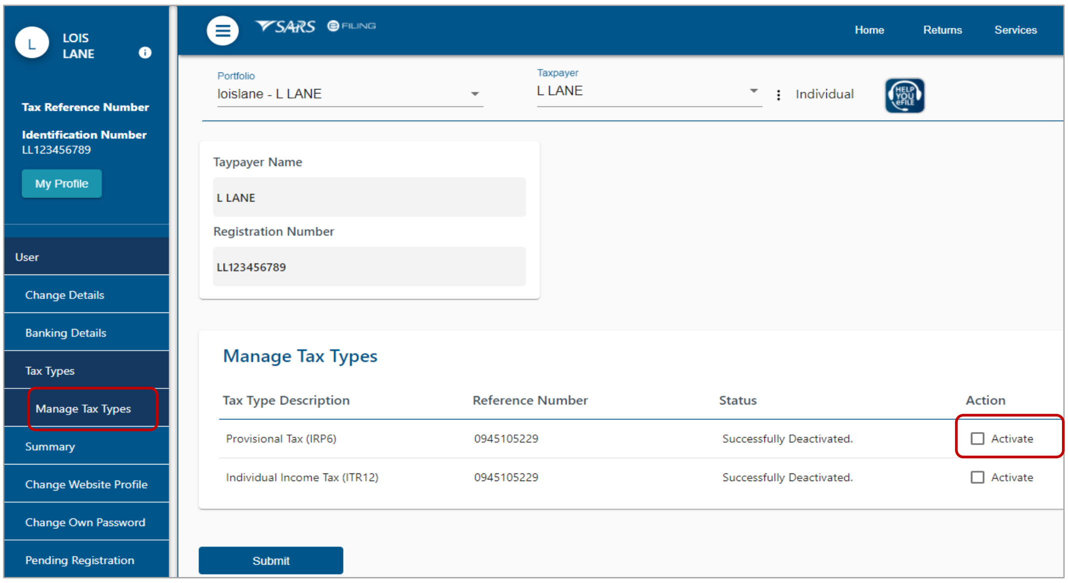
- **Activation/Deactivation** of specific tax types – In order to transact on eFiling (e.g. submit returns, make payments, request statement of account) the applicable tax type must be activated on your profile
- **Transfer of tax types** (personal income tax and provisional tax) between taxpayers, tax practitioners and registered representatives on eFiling.

The owner/registered representative of that tax number must approve the transfer in order to complete the process.

15.1 INDIVIDUALS

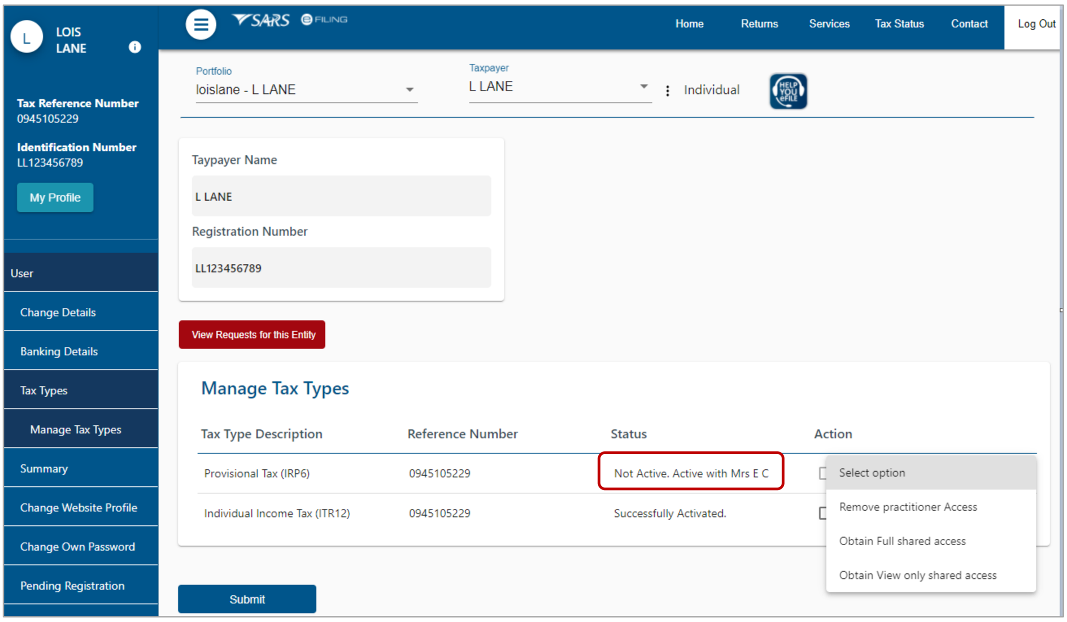
a) To activate/deactivate tax types on your individual portfolio:

- Click on **<Home>**
- Select **<User>** from the menu on the left
- Select **<Tax Types>** and then click on **<Manage Tax Types>**
- A list of taxes you are registered for will display.
- Select the items that you want to activate/deactivate. Click on **<Submit>.**
- A summary of the actions will display. Click on **<Continue>** to confirm the action.



b) If your tax type is activated with another party (e.g. tax practitioner), you can navigate to the <**Manage Tax Types>** function and select one of the following options at any time:

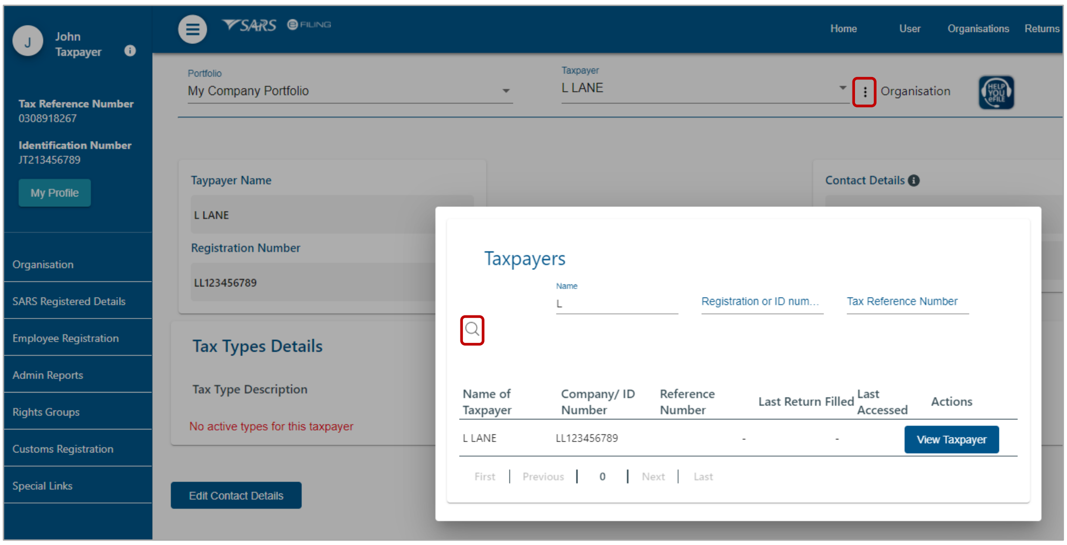
- <Remove Tax Practitioner Access>
- <Obtain Full Shared Access>
- <Obtain View Only Shared Access>



15.2 ORGANISATIONS AND TAX PRACTITIONERS

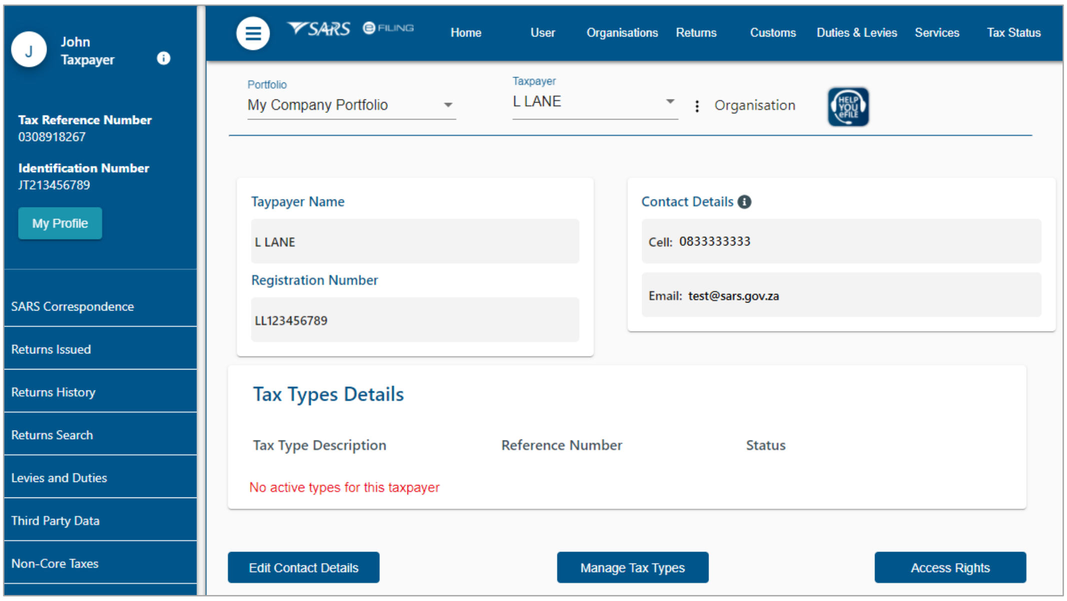
a) To activate/deactivate tax types for taxpayers on your portfolio, click on the ellipses (⋮) menu icon

- Search for the specific taxpayer using the name, registration number, ID number or tax reference number
- Click on the **<View Taxpayer>** button. This option will load the existing taxpayer details.



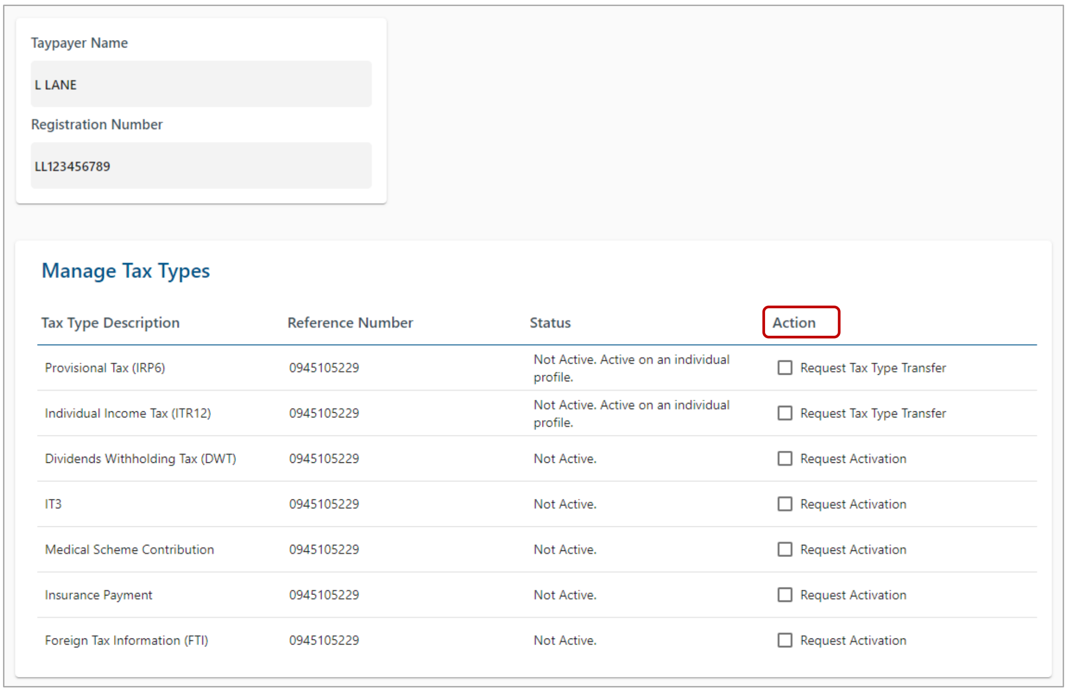
c) The 'Tax Types Details' screen will display with the following buttons:

- **<Edit contact details>** – used to update eFiling correspondence details <u>only</u>. To update your security contact details please use the <Profile and preference setup> function
- **<Manage Tax Types>** – used to activate/deactivate specific taxes that you represent the client for
- **<Access Rights>** – used to add the taxpayer to a group if you have the manage taxpayer rights.



d) Click on **<Manage Tax Types>**

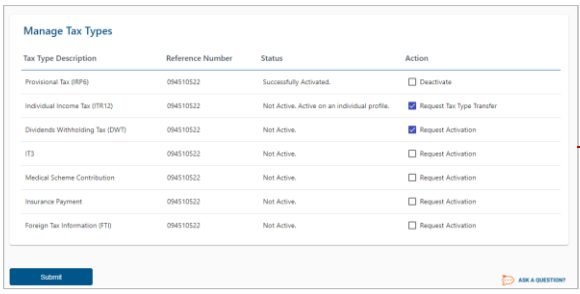
- A table will display with the following information:
  - List of tax types linked to the selected taxpayer
  - Reference numbers
  - Activation Status
  - Action that can be selected for that number (e.g. request activation, request tax type transfer, deactivate)

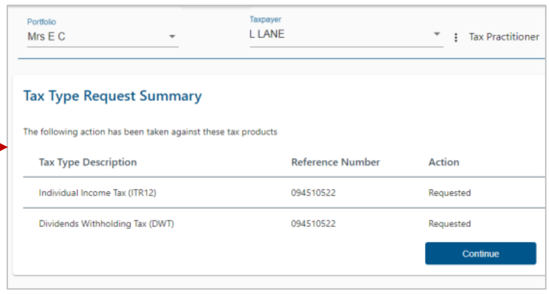


15.2.1 Request Activation or Transfer of Tax Type

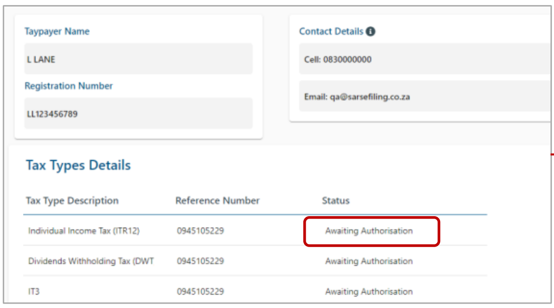
a) Select the tick-boxes for the applicable actions required (example: "Request Activation" or "Request Tax Type Transfer

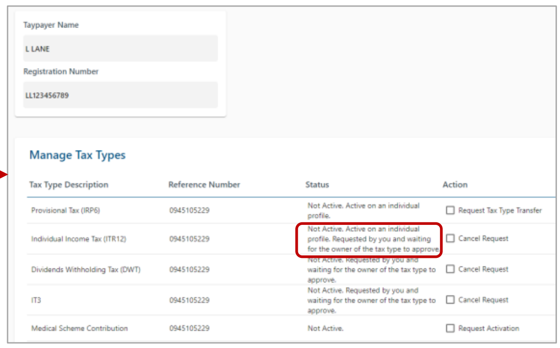
- Click on the **<Submit>** button.
- A screen will display with the summary of the actions you selected. Click on **<Continue>**



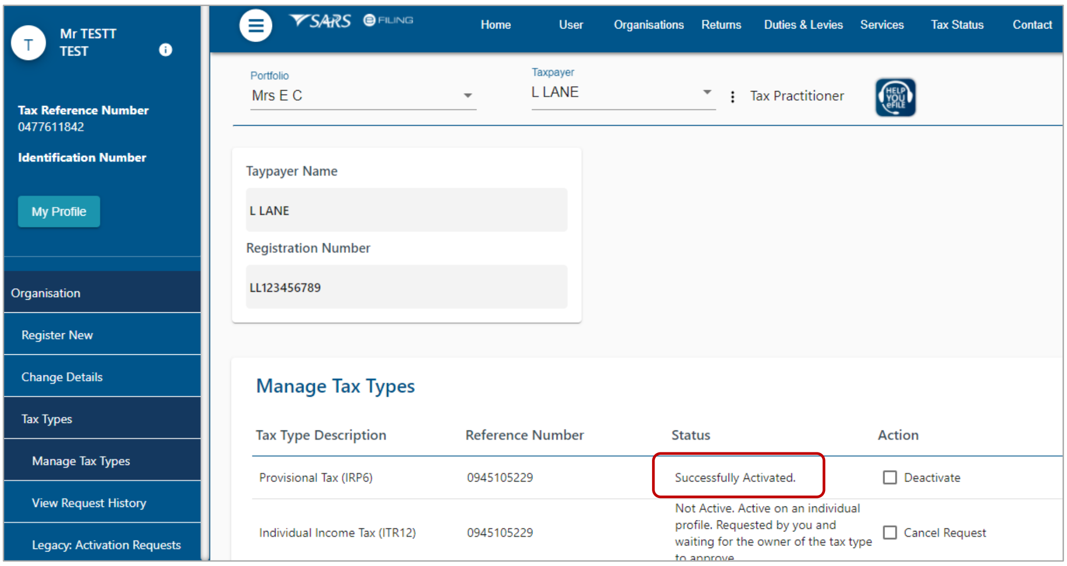


b) The status of the request will change to awaiting authorisation and will require the current owner/representative of the tax number to approve the request in order to complete the process.





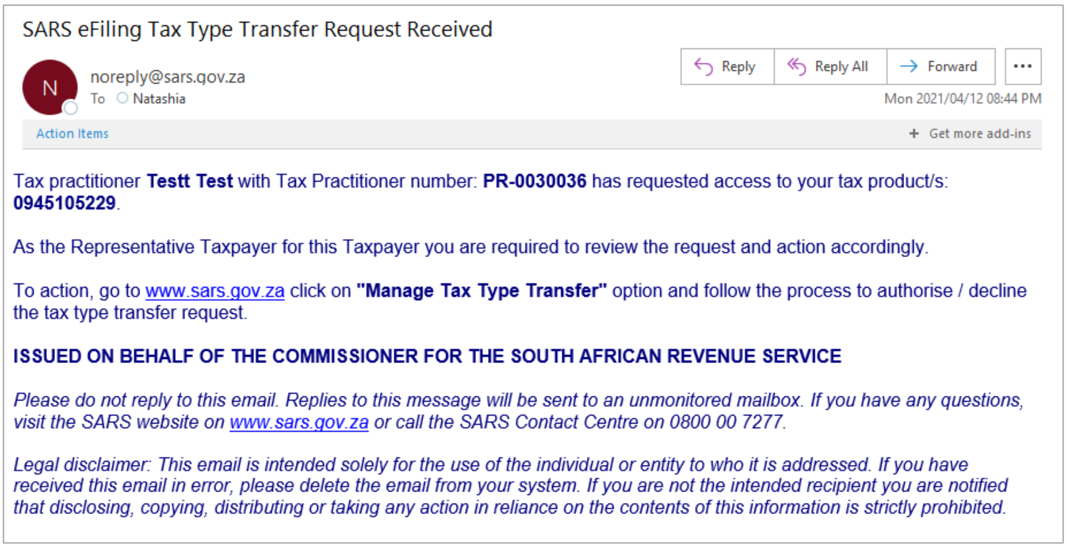
c) If the owner/representative approves the request, the status will change to "Successfully Activated".



15.2.2 Approve Request for Tax Type Activation or Transfer

a) A notification will be sent to the current owner/representative to inform him/her:

- Of the transfer request, and
- The steps to follow to action the request



SARS eFiling Tax Type Transfer Request Received

noreply@sars.gov.za
To Natashia

Reply | Reply All | Forward | ...

Mon 2021/04/12 08:44 PM

Action Items
+ Get more add-ins

Tax practitioner **Testt Test** with Tax Practitioner number: **PR-0030036** has requested access to your tax product/s: **0945105229**.

As the Representative Taxpayer for this Taxpayer you are required to review the request and action accordingly.

To action, go to www.sars.gov.za click on **"Manage Tax Type Transfer"** option and follow the process to authorise / decline the tax type transfer request.

ISSUED ON BEHALF OF THE COMMISSIONER FOR THE SOUTH AFRICAN REVENUE SERVICE

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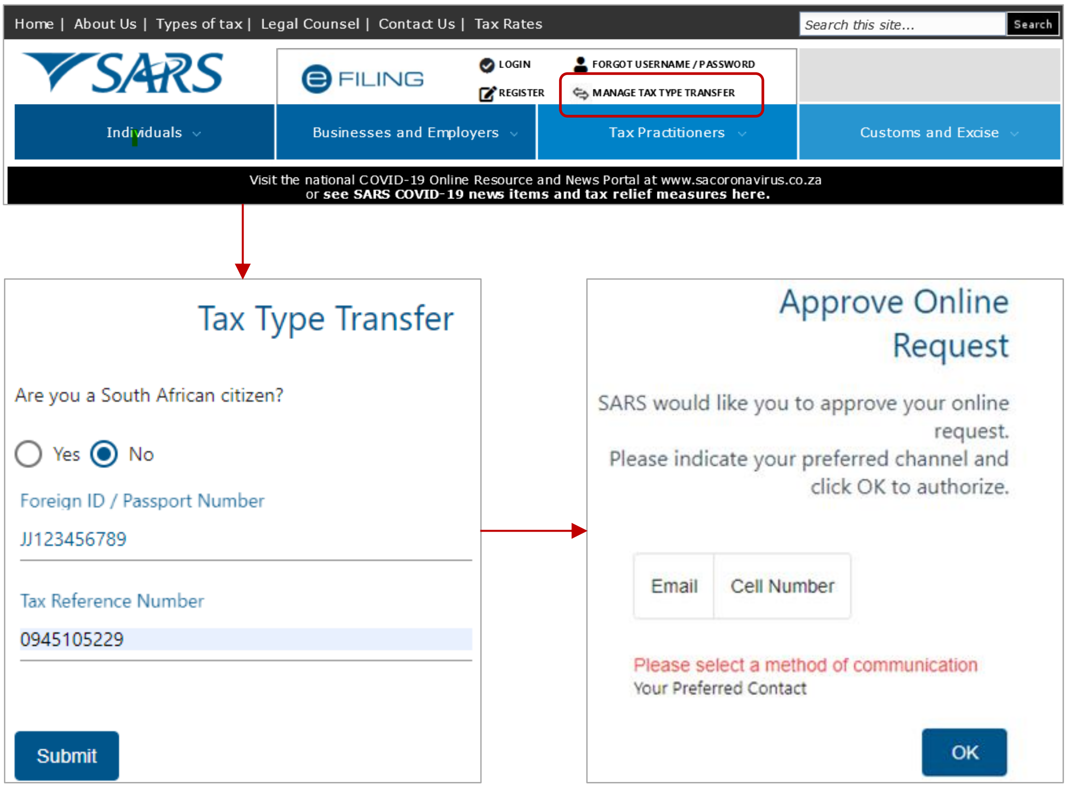
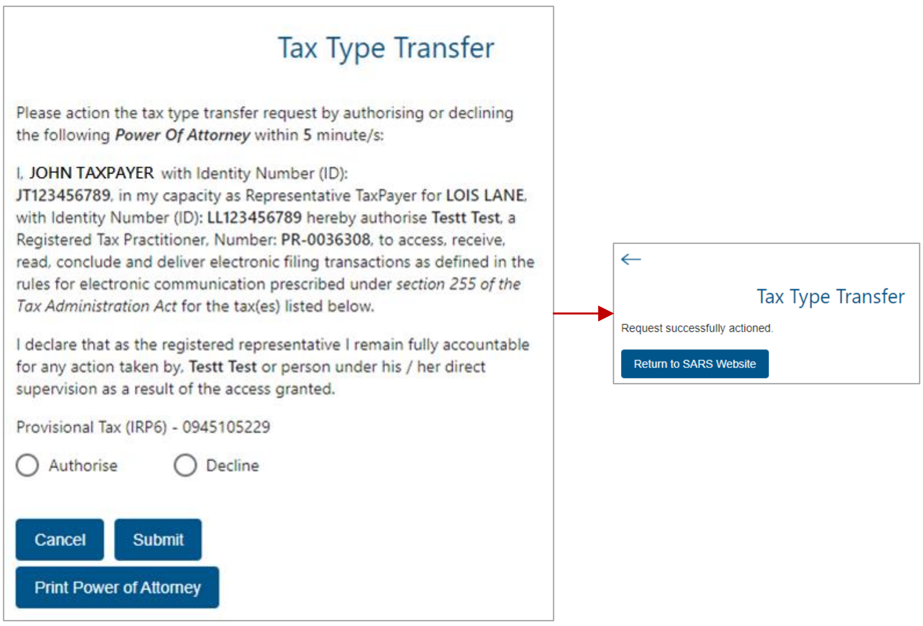
b) The owner/registered representative must follow the steps below to action the request and complete the process.

- Log on to the SARS website and select on <**Manage Tax Type Transfer**>
- On the Tax Type Transfer screen select yes or no to indicate if you are a South Africa Citizen
- Insert your own identification number and the tax number for which the transfer is requested. Click on <**Submit**>
- As part of the authentication process, you will be required to enter a One-Time-Pin (OTP).
- Insert the OTP sent to your email or cell number and click on <**Submit**>.



b) Read the declaration and the details of the party requesting the tax type transfer and print the Power of Attorney

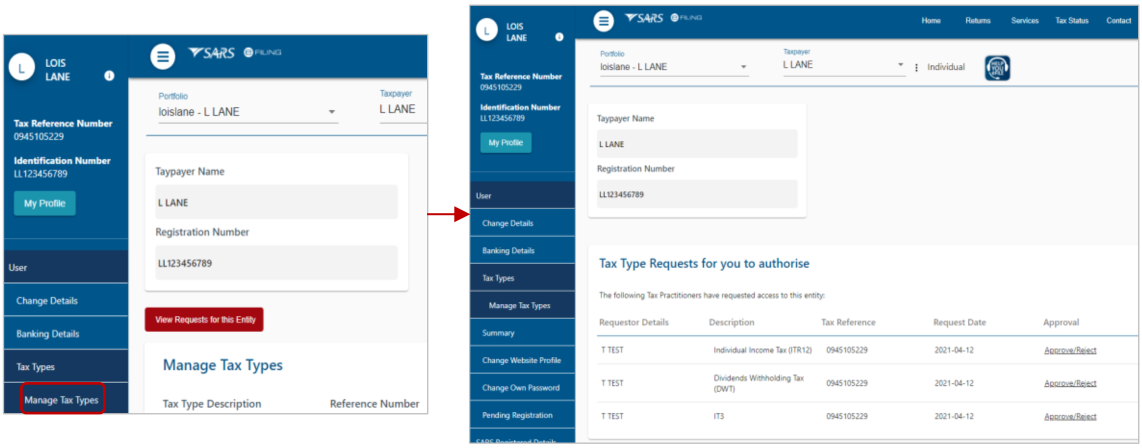
- Select **<Authorise>** or **<Decline>**
- Click on **<Submit>**
- After you have authorised or declined the request, click on <**Return to SARS Website**>.



c) If you are a registered eFiler, you can log on to eFiling to view a list of tax type requests that require your authorisation:

- Navigate to the **<Manage Tax Types>** function

- Click on **<View Requests for this Entity>**



Please Note:

- When a taxpayer or registered representative authorises the transfer request, the tax type will move from the holding party (e.g. old tax practitioner) to the requesting party (e.g. new tax practitioner). If the taxpayer or registered representative has shared access with the holding party, shared access will be established with the requesting party.

- When a taxpayer or registered representative rejects the initial transfer request the requesting tax practitioner will be allowed up to two more retry options to request the tax type transfer.
  If the two retries are exhausted, the tax practitioner will not be allowed to submit any further tax type transfer requests for that particular taxpayer for a period of 21 business days

- If you have multiple portfolios, you can transfer tax types between portfolios:

  - We will check if the portfolio/profile has ‘Manage Payer Rights’ on both the requesting and holding portfolio. Once verified the tax type will be transferred immediately.

- Where the owner or registered representative does not approve the request for tax type transfer after 5 working days, 3 reminders will be sent. If there is no action from the owner or registered representative after the last reminder is sent, the request to transfer the tax type will expire.

- A tax type transfer will be disallowed if:

  - You are not a registered tax practitioner
  - You are not the registered representative for that taxpayer
  - You are a user with the ‘Manage Payer Rights’ but you are not the registered representative/valid tax practitioner of the individual whose provisional tax or personal income tax type is being requested.

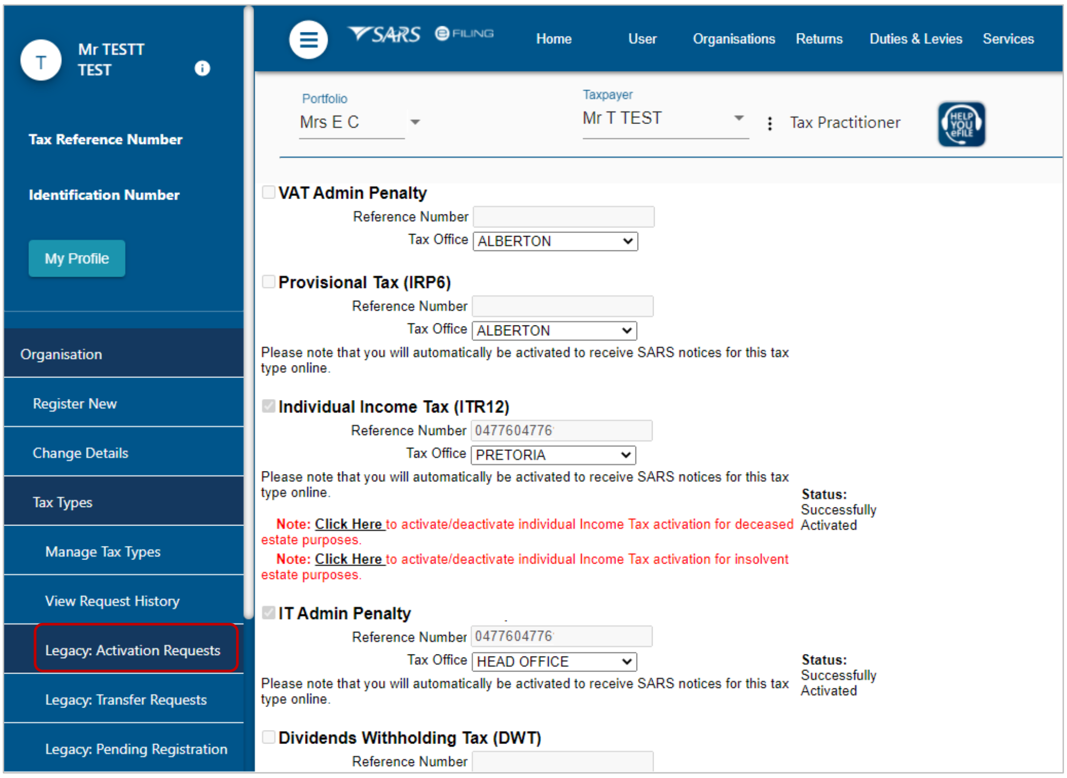
15.2.3 Tax Types Legacy

a) The legacy menu items will be available for a temporary period and is intended to allow users to view/monitor requests made via the previous Tax Type Transfer functionality (prior to the implementation of the Manage Tax Type function).

b) To access the legacy requests

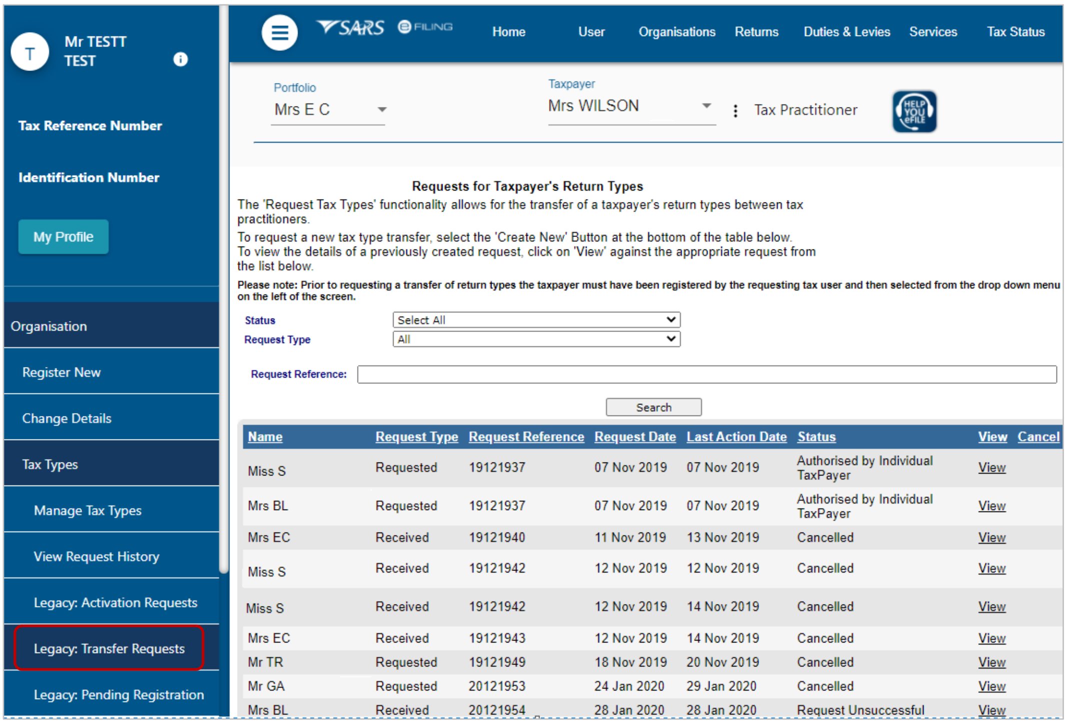
- Select <**Organisations** > from the menu on the top.
- Select <**Organisation**> from the menu on the left
- Select <**Tax Types**> from the menu on the left

c) **<Legacy Activation Requests>** - this function is read-only and allows you to view tax types previously activated for a particular taxpayer



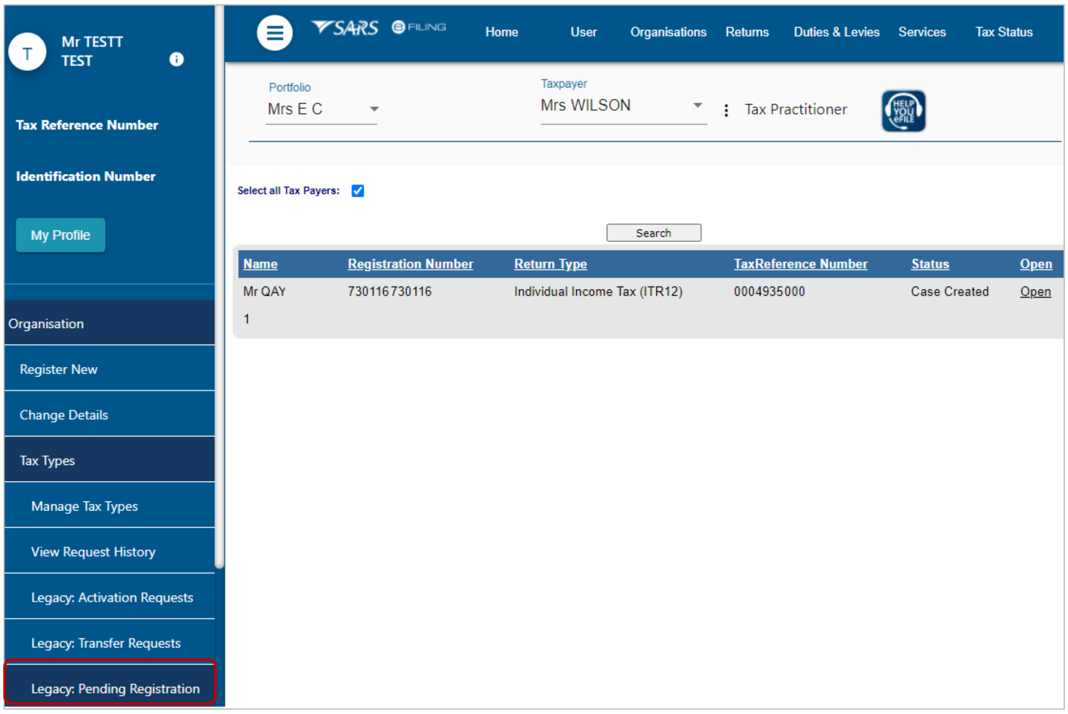
d) **<Legacy Transfer Requests>** - this function allows you to access the list of previous tax type transfer requests.

- You can open individual requests
- Where applicable you can capture an override code that was sent for a legacy request (prior to the implementation of the Manage Tax Types function)
- You will not be able to create any new tax type transfer requests.



e) **<Legacy Pending Registration> -** There may be cases where SARS needs to review a request before activating the particular tax type for eFiling. In this instance the status of the tax type activation will be "Awaiting Registration Verification" and a case number will be allocated to you. You can use this function to view the pending registration requests.

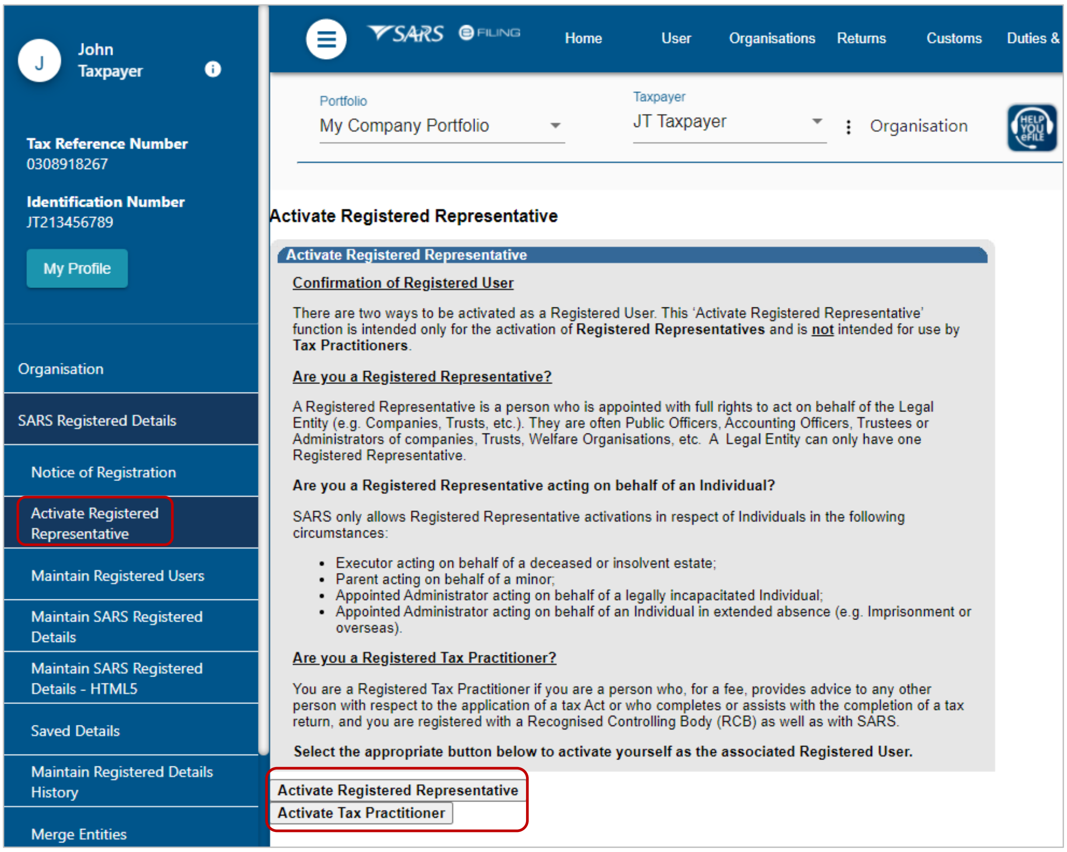
- Select the option for all taxpayers
- Click on the **<Open>** hyperlink
- You can view the taxpayer's details and click on **<Query Status>** to view the progress of the eFiling registration.



16 ACTIVATE REGISTERED REPRESENTATIVE

a) If you are the appointed registered representative for an entity, you must activate the status on eFiling in order to transact on behalf of your client.

- Select **<Organisations >** from the menu on the top.
- Select **<SARS Registered Details>** from the menu on the left
- Select **<Activate Registered Representative>**
- Select the applicable option (i.e. Tax Practitioner or Registered Representative)
- Agree to the declaration confirming that you are the authorised representative for the taxpayer and click on **<Continue>**
- Complete the applicable fields and select the representative capacity (e.g. accounting officer, curator, public officer, parent guardian, etc.)
- Click the on the activate button at the bottom of the screen



17 TAX PRACTITIONER CONFIGURATION

This functionality enables tax practitioners to confirm their tax practitioner status at SARS and allow tax practitioners to link practitioner users to other activated practitioner user profiles.

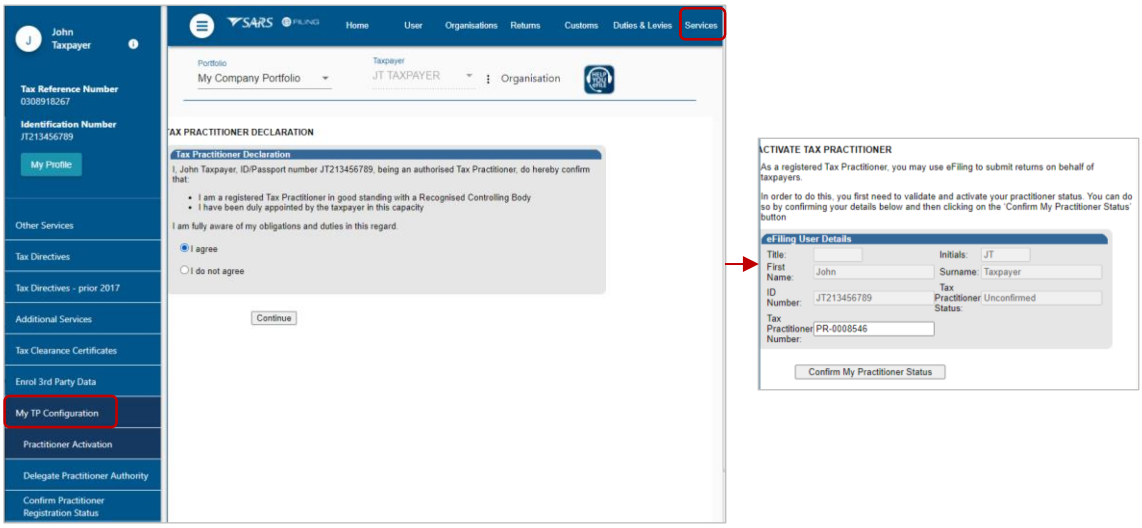
If a user is not a confirmed practitioner or has not been linked to a practitioner user, access to ITR12 returns will be limited to only a “SAVE” functionality. This means that the tax practitioner or practitioner user will not be able to submit the ITR12 returns to SARS and the taxpayer will have to either submit the return via eFiling (if he/she has got shared access to the ITR12 with the tax practitioner) or the taxpayer will have to contact a SARS branch office for assistance to submit the return.

a) To access this functionality, click on <**Services>** on the menu on the top and select <**My TP Configuration>** from the menu on the left.

17.1 PRACTITIONER ACTIVATION

a) Select **<Practitioner Activation>** from the menu on the left

- The **Tax Practitioner Declaration** will display. Read the declaration, select **<I agree>** click on the <**Continue>** button
- On the <**Activate Tax Practitioner**> screen enter a valid practitioner number in the tax practitioner number field and click on the <**Confirm My Tax Practitioner Status**> button.



Please Note:

- If the tax practitioner number is inactive and does not match with SARS, the status field will be indicated as "**Unconfirmed**". Tax practitioners are encouraged to register with RCB's and ensure that they are registered as a tax practitioner with SARS.
- If the tax practitioner number is valid and matches with SARS, the status field will be indicated as "**Registered**".
- If you wish to validate the status of an existing PR number on the profile, select the "**Reconfirm Status**" button. A message will display that indicating that you have been successfully confirmed as a registered tax practitioner.

17.2 DELEGATE PRACTITIONER AUTHORITY

Tax practitioners are allowed to link practitioner users to other activated practitioner users and thereby delegate authority. This is typically in cases whereby staff members of an organisation are performing functions on eFiling on behalf of the tax practitioner.

a) Select **< Delegate Practitioner Authority >** from the menu on the left

b) If the tax practitioner has not been activated against the eFiling profile, the following message will be displayed. To activate, refer to "Practitioner Activation" step above.

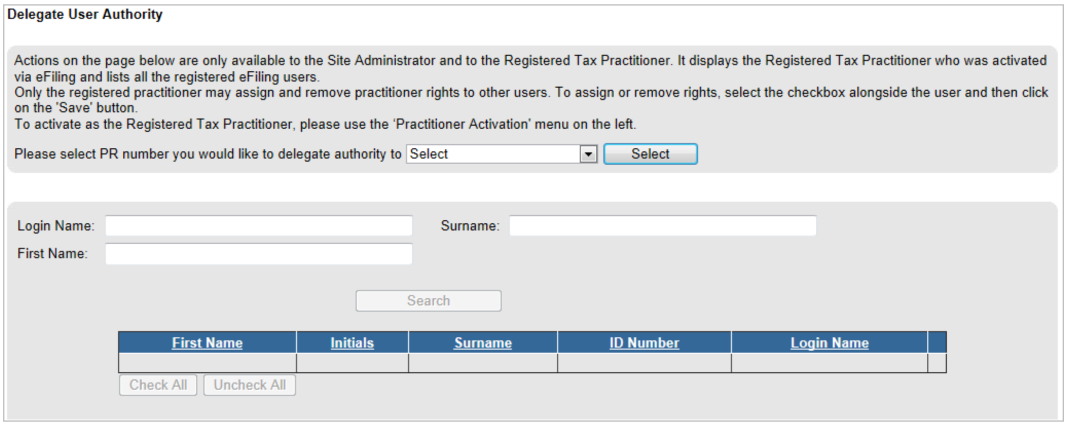

Delegate User Authority

Our records indicate that a Registered Tax Practitioner has not been activated against this eFiling profile.

To assign additional registered users, you must first activate as the Registered Tax Practitioner using the 'Practitioner Activation' menu alongside.

Alternatively, please visit a SARS branch office for assistance.

c) If the tax practitioner has been activated and the status is indicated as "**Registered**", the **<Delegate User Authority>** page will be displayed.


Delegate User Authority

Actions on the page below are only available to the Site Administrator and to the Registered Tax Practitioner. It displays the Registered Tax Practitioner who was activated via eFiling and lists all the registered eFiling users.
Only the registered practitioner may assign and remove practitioner rights to other users. To assign or remove rights, select the checkbox alongside the user and then click on the 'Save' button.
To activate as the Registered Tax Practitioner, please use the 'Practitioner Activation' menu on the left.

Please select PR number you would like to delegate authority to Select | Select

Login Name: | Surname:
First Name:

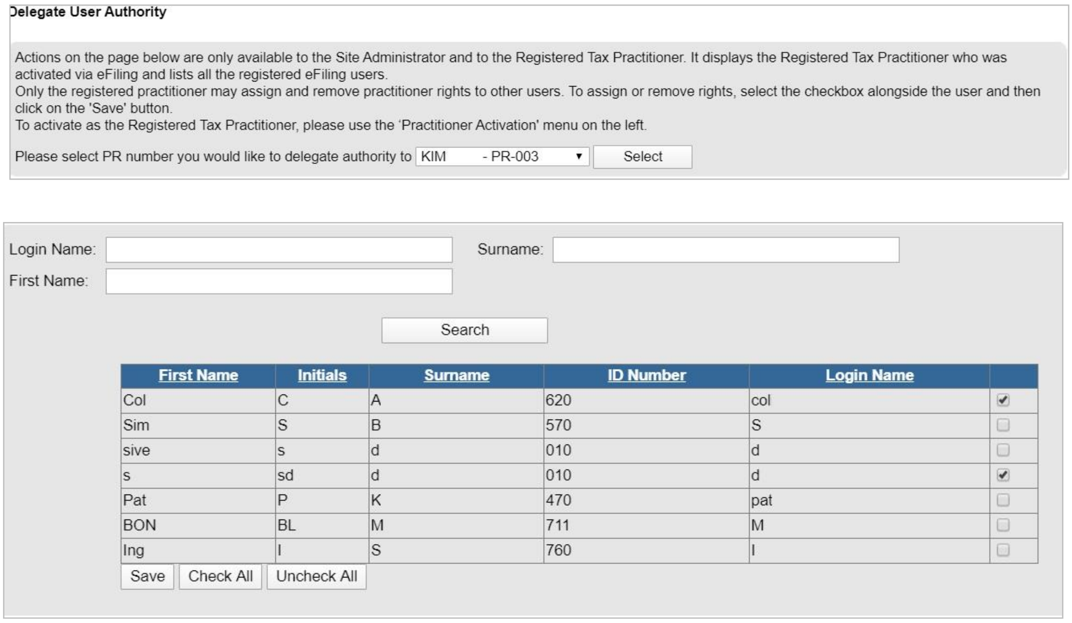
Search

First Name	Initials	Surname	ID Number	Login Name	

Check All | Uncheck All

d) Choose the "PR number" that you want to delegate authority to:

- Administrators or the registered tax practitioner may perform actions on this page
  - The admin user on eFiling will be able to view <u>all</u> linked practitioners in the dropdown.
  - If it is the user on eFiling, only his/her practitioner (PR) number will display on the dropdown list for selection.
- Once the PR number has been chosen click on <**Select>**
- A list of users will display. Select the users and click on the <**Save>** button to continue
- Click on **<OK>** to confirm the selection. A message will display to indicate that the users have been successfully updated.


Delegate User Authority

Actions on the page below are only available to the Site Administrator and to the Registered Tax Practitioner. It displays the Registered Tax Practitioner who was activated via eFiling and lists all the registered eFiling users.
Only the registered practitioner may assign and remove practitioner rights to other users. To assign or remove rights, select the checkbox alongside the user and then click on the 'Save' button.
To activate as the Registered Tax Practitioner, please use the 'Practitioner Activation' menu on the left.

Please select PR number you would like to delegate authority to KIM - PR-003 | Select

Login Name: | Surname:
First Name:

Search

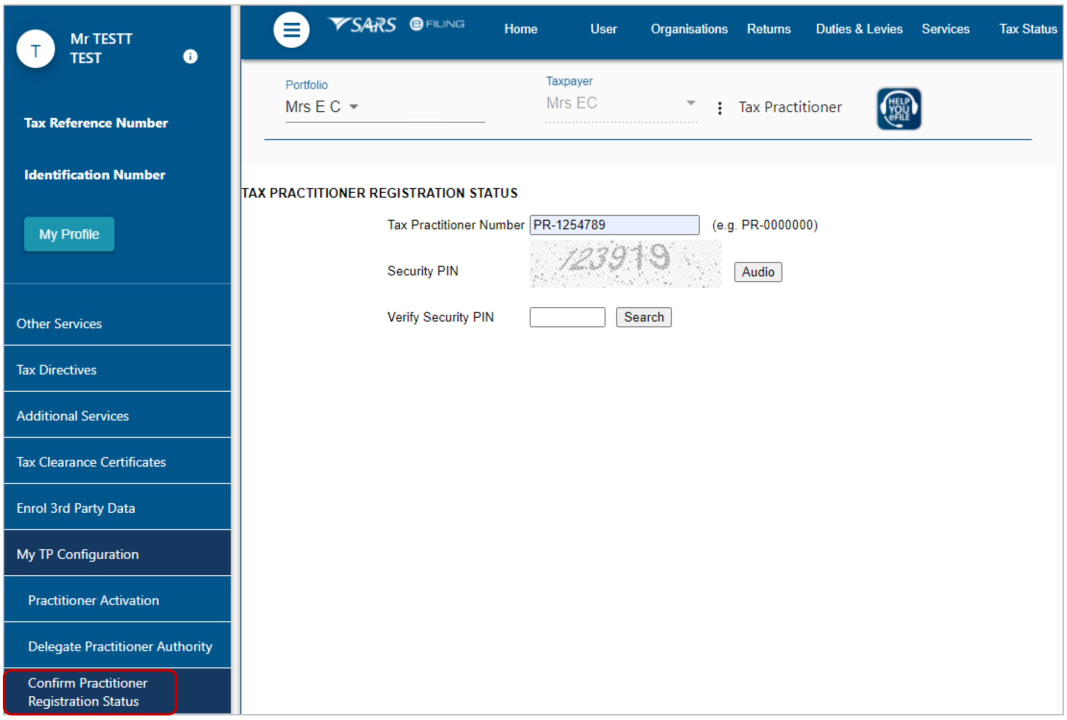
First Name	Initials	Surname	ID Number	Login Name	
Col	C	A	620	col	☑
Sim	S	B	570	S	☐
sive	s	d	010	d	☐
s	sd	d	010	d	☑
Pat	P	K	470	pat	☐
BON	BL	M	711	M	☐
Ing	I	S	760	I	☐

Save | Check All | Uncheck All

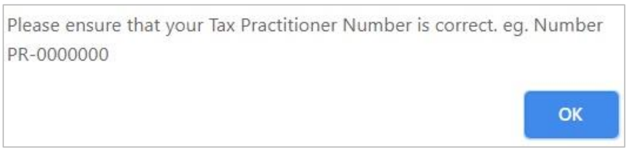
17.3 CONFIRM PRACTITIONER REGISTRATION STATUS

a) Select **<Confirm Practitioner Registration Status>** from the menu on the left

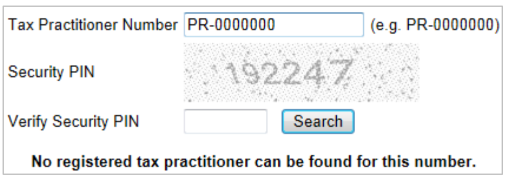
- The tax practitioner registration status page will display.
- Enter the tax practitioner number. Complete and verify the security pin displayed on the screen
- Click the "**Search**" button to continue.



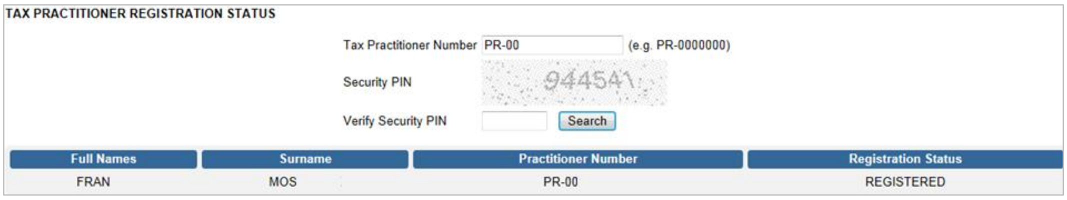
b) If the tax practitioner number is incorrect, the following error message will be displayed.



c) If no registered tax practitioner can be found, a message will be displayed on the screen.



d) If the tax practitioner is registered, the practitioner's name, surname, practitioner number and registration status indicated as "**Registered**" will be displayed.

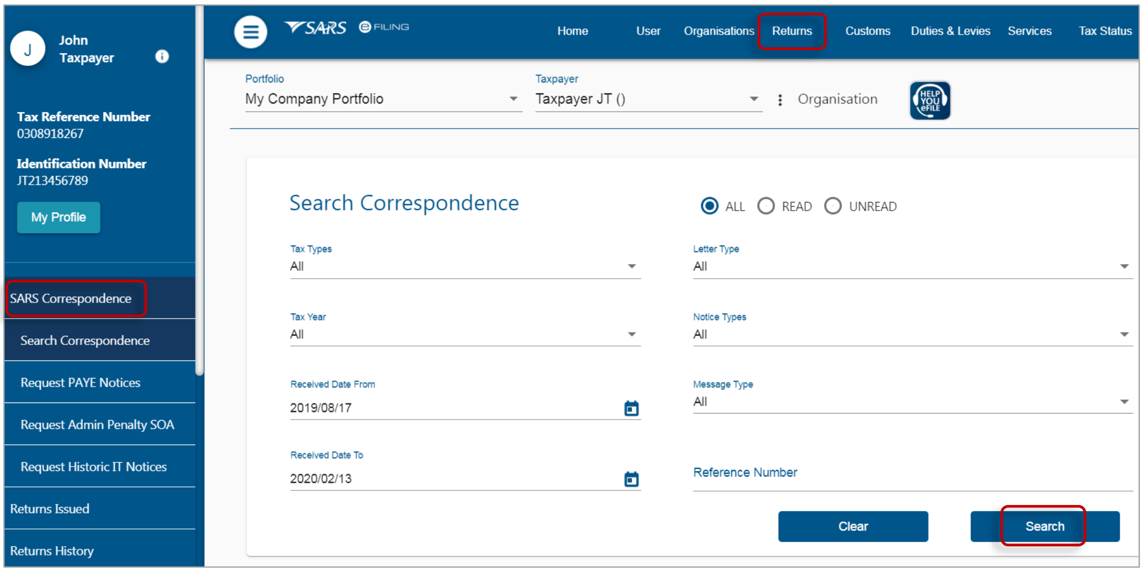


18 SARS CORRESPONDENCE

For your convenience all letters, notices and messages issued by SARS is available in one place under 'SARS Correspondence'.

d) To search for correspondence:

- Log on to eFiling and select <**SARS Correspondence**> from the menu on the left
- Click on <**Search Correspondence**>
- The correspondence grid will display
- You can use one or more of the following filters to search for correspondence:
  - Tax type
  - Tax year
  - Received from date (i.e. start date)
  - Received to date (i.e. end date)
  - Correspondence Type (such as Letters, Notices and Text Messages issued by SARS)
- Click on <**Search**>.

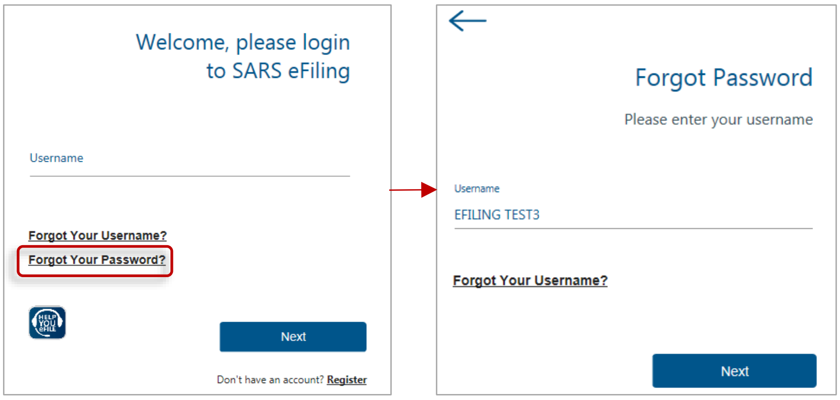


<u>Please Note:</u>

If you navigate to other eFiling pages after logging on, you will no longer see <**SARS Correspondence**> on the menu on the left. To navigate back to <**SARS Correspondence**> select <**Returns**> from the menu on the top.

19 FORGOT PASSWORD

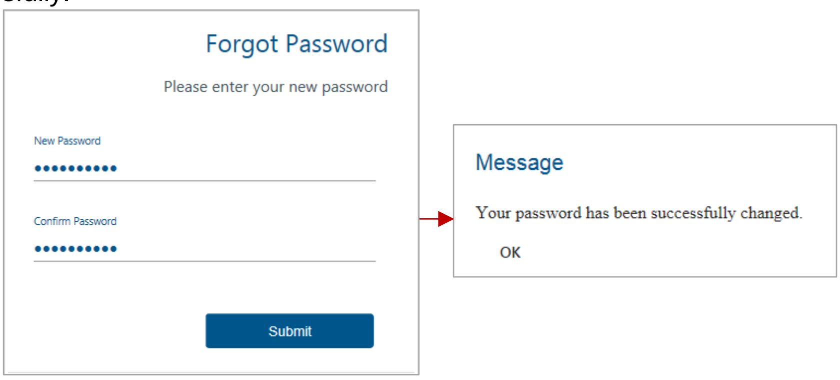
a) On the eFiling login in screen click on <**Forgot Password**> and then enter your user name.



b) Indicate if you want your OTP to be sent to your email or your cell number. Click on <**Send OTP**>.

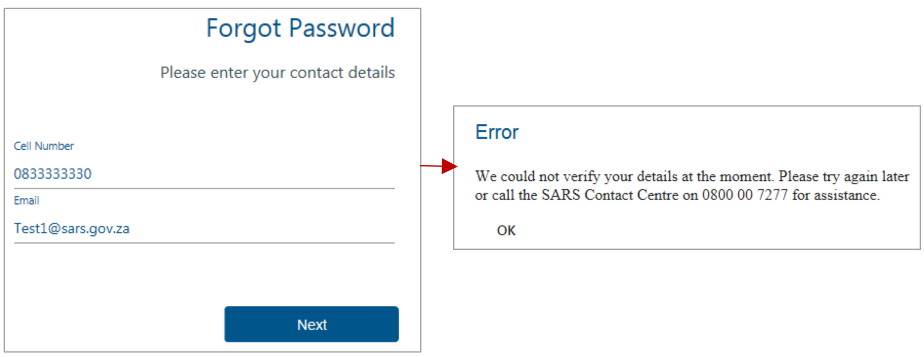
c) Insert your new password and retype it to confirm.

- Click on <**Submit**>
- A pop-up message will display confirming that your password has been changed sucessfully.



d) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be required to enter your cell number and email address.

- If we can match your details with our records, an OTP will be sent to you
- If we cannot match your details, we will ask you a few questions to authenticate you
- If we are still unable to match your details, please call the SARS Contact Centre for further assistance.

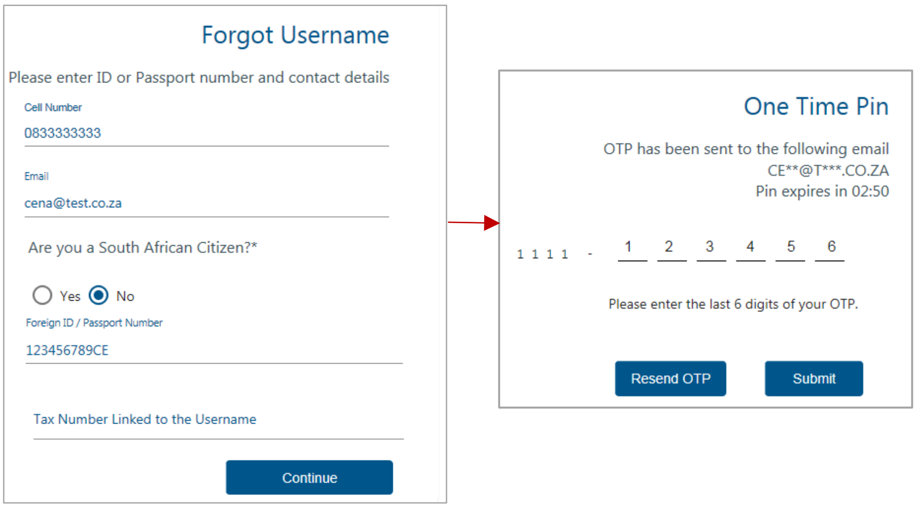


20 FORGOT USERNAME

a) On the eFiling login in screen click on <**Forgot Your Username**>. Insert the following particulars:

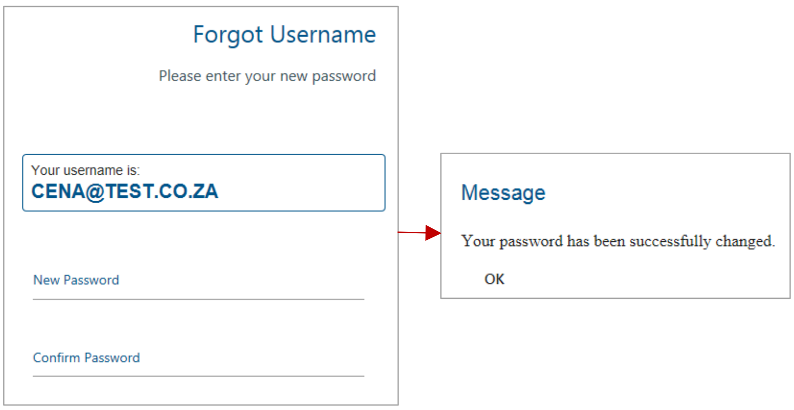
- Cell number
- Email
- Indicate if you are a South African citizen
- ID number (or Passport number if you are not a South African citizen)
- Tax number (if you have one).

b) If we can match your personal particulars, an OTP will be sent to your email address or your cell number. Insert the OTP and click on <**Submit**>.



c) Once you have entered the correct OTP, your username will display. You will be prompted to insert a password and retype it to confirm.

- Click on <**Submit**>
- A pop-up message will display confirming that your password has been changed sucessfully.



d) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be prompted to select a preferred channel to receive your OTP.

- If we can match your details with our records, an OTP will be sent to you
- If we cannot match your details, we will ask you a few questions to authenticate you
- If we are still unable to match your details, please call the SARS Contact Centre for further assistance.

21 CONCLUSION

Please contact SARS should you require any further information which might not be addressed in this guide.

DISCLAIMER

The information contained in this guide is intended as guidance only and is not considered to be a legal reference, nor is it a binding ruling. The information does not take the place of legislation and readers who are in doubt regarding any aspect of the information displayed in the guide should refer to the relevant legislation, or seek a formal opinion from a suitably qualified individual.

For more information about the contents of this publication you may:

- Visit the SARS website at www.sars.gov.za
- Visit your nearest SARS branch
- Contact your own tax advisor/tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277)
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).