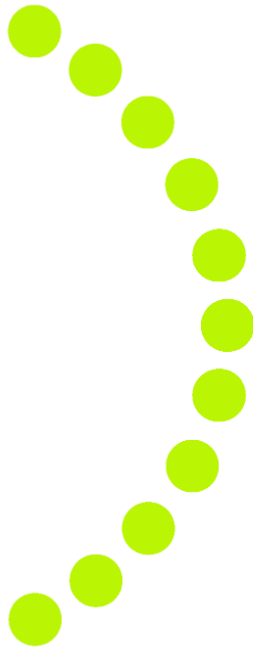


HOW TO REGISTER AS A TAX PRACTITIONER SARS ON EFILING

OCTOBER 2021

PRESENTED BY

SAIBA TECHNICAL TEAM





Please note SARS can change forms, regulations and operational functioning of their system at any given time. Content is not reviewed for technical accuracy. For technical updates, refer to the SAIBA subscriptions or email technical@saiba.org.za.

HOW TO REGISTER AS A TAX PRACTITIONER

- Go to www.sars.gov.za
- On the right-hand side of the screen, click on **Login**.

Visit the national COVID-19 Online Resource and News Portal at www.sacoronavirus.co.za or see SARS COVID-19 news items and [tax relief measures here](#).

SARS
South African Revenue Service

[Individuals](#) [Businesses and Employers](#) [Tax Practitioners](#) [Customs and Excise](#)

Your tax matters don't have to be taxing
We've made it easier for you. Join millions of taxpayers who file online. Individual/Trusts Filing Season starts 1 July 2021
#YourTaxMatters
SARS.GOV.ZA | 0800 00 7277    

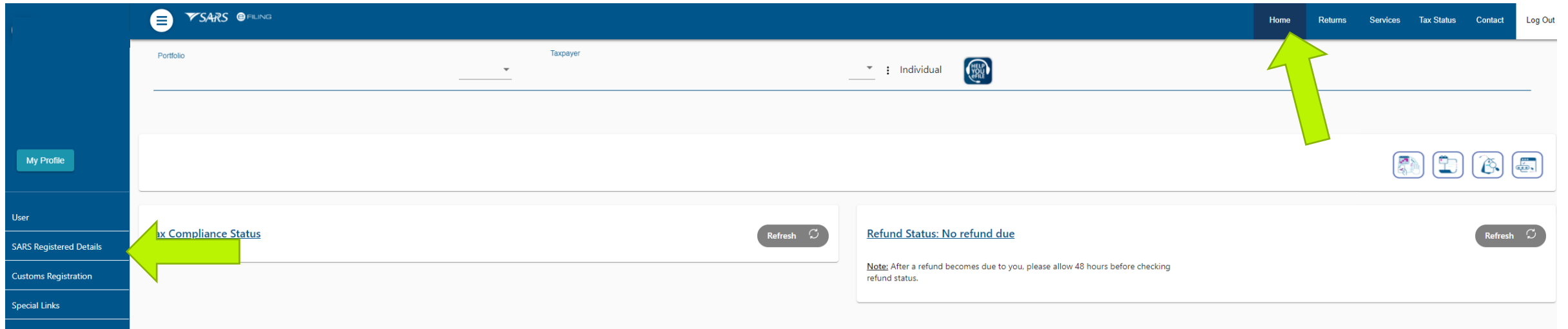
e FILING
☒ **Login** 
 [Register](#)
 [Forgot Username](#)
 [Forgot Password](#)
 [Manage Tax Type Transfer](#)

SCAM ALERT!
Beware of scams pretending to be from SARS.
Don't click on any links, please send it to phishing@sars.gov.za.
[See the latest list of scams here.](#)

SARS
At Your Service

HOW TO REGISTER AS A TAX PRACTITIONER

- Select Home on top bar.
- Select Registered Details on left bar



HOW TO REGISTER AS A TAX PRACTITIONER

- Select Maintain SARS Registered Details

The screenshot displays the SARS eFiling user interface. On the left, a dark blue sidebar contains a menu with the following items: My Profile, User, SARS Registered Details, Notice of Registration, Maintain SARS Registered Details (highlighted with a green arrow), Saved Details, Maintain Registered Details History, Merge Entities, Entity Merge History, Letters, Register Withholding Tax on Interest, Customs Registration, and Special Links. The main content area has a top navigation bar with links for Home, Returns, Services, Tax Status, Contact, and Log Out. Below this, the 'Portfolio' section shows 'Individual' as the selected entity. The central area contains two panels: 'Tax Compliance Status' and 'Refund Status: No refund due', both with 'Refresh' buttons. A 'Personal Income Tax (ITR12)' section is visible below, featuring a table with columns for Tax Period, Return Status, and Due Date. The 'Account Balance' section shows 'Not Available' with a refresh button. A 'Notification' section is at the bottom.

HOW TO REGISTER AS A TAX PRACTITIONER

- Read and Agree to the terms
- Click on Proceed

MAINTAIN SARS REGISTERED DETAILS

Maintain SARS Registered Details

This functionality allows you to view and maintain registered details of the entity selected from the 'Taxpayer List' above.
Click on 'Continue' below to obtain the existing detail from SARS. You may then view or update this information as necessary.

I hereby confirm that I am duly authorised to perform Maintenance of SARS Registered Details on behalf of the company or individual.

☐ I agree

☒ I do not agree

Continue

Tax Subscriptions

Tax Subscriptions

Based on your identity information your current profile does not include all your tax subscriptions. Please confirm your Tax Subscriptions via the eFiling Merge application or at a SARS branch before your new Tax subscription will be allowed. Amendments to your existing tax subscriptions will however be allowed.
Would you like to proceed with any amendments?

Proceed Cancel

HOW TO REGISTER AS A TAX PRACTITIONER

- Select My Tax Practitioner Details

BackSaveSubmit form

100

My Menu

My registered particulars

My Registration Details

My Addresses

My Bank Accounts

My Contact Numbers

My Email Addresses

My Trading Name Details

My Tax Products


My Representatives

Who I Represent

My Tax Practitioner Details

My Registration Details

Edit

**SARS**
South African Revenue Service

Registration Amendments And Verification form

Reference No
RAV01

Applicant Details – Individual

Nature of Entity *
INDIVIDUAL

Surname *

First Name *

Other Name

Individual *

Date of Birth (CCYYMMDD) *

ID No.

Passport No./PermitNo

Passport Country/Country of Origin (e.g. SouthAfrica=ZAF)

Passport/Permit Issue Date (CCYYMMDD)

CCYY / MM / DD

Trading Name

My trading names

HOW TO REGISTER AS A TAX PRACTITIONER

- Select Edit on top and complete the form
- Select from the drop down controlling body SAIBA

My Menu × My Tax Practitioner Details Edit

SARS
South African Revenue Service

Registration Amendments And Verification form RAV01

Applicant Details – Individual

Nature of Entity
INDIVIDUAL

First Name Last Name

Other Name

Initials Date of Birth (CCYYMMDD) ID No.

Passport No. Permit No. Passport Country/Country of Origin (e.g. South Africa-ZAF) Passport/Permit Issue Date (CCYY / MM / DD)

Trading Name My trading names

Tax Practitioner Details

Tax Practitioner Details

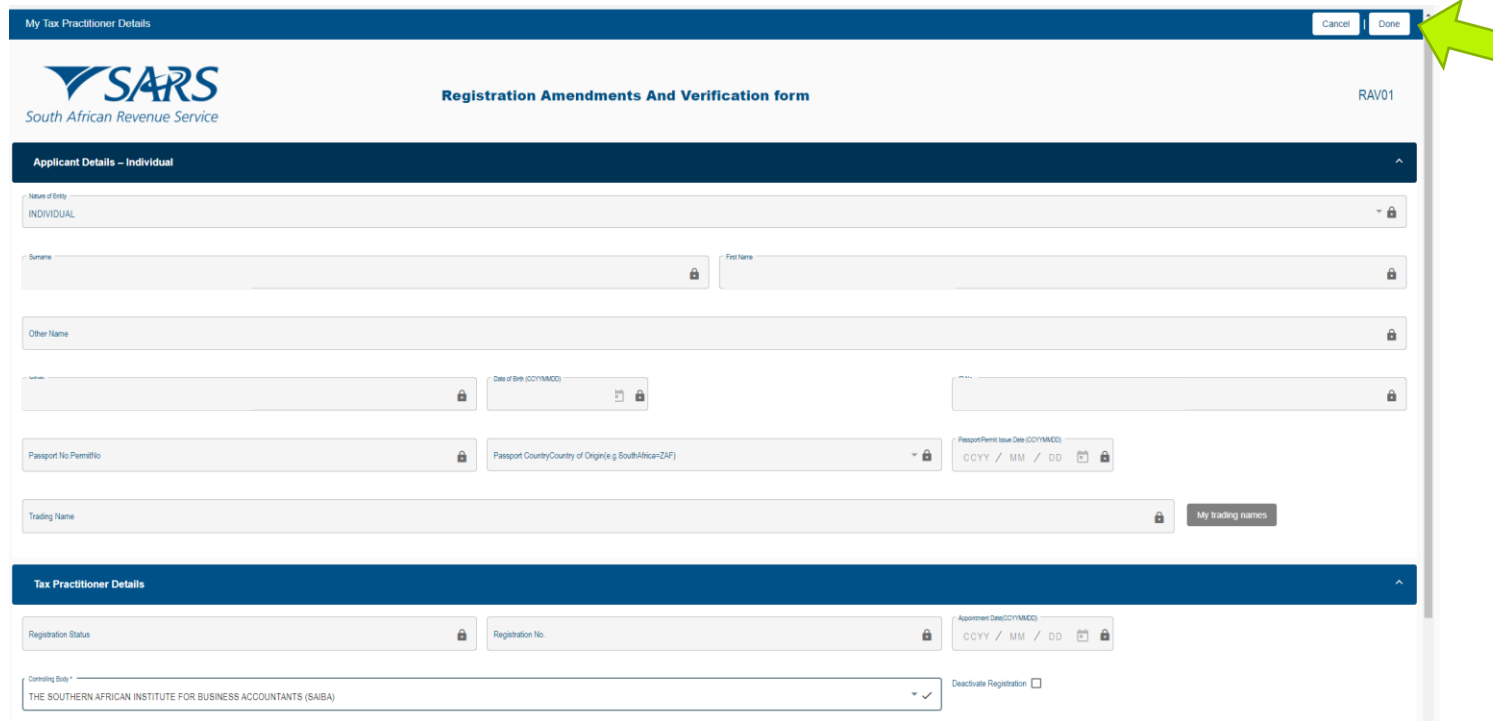
Registration Status Registration No.

Controlling Body *

- SOUTH AFRICAN INSTITUTE OF PROFESSIONAL ACCOUNTANTS (SAIPA)
- SOUTH AFRICAN INSTITUTE OF TAX PRACTITIONERS (SAIT)
- ASSOCIATION OF ACCOUNTING TECHNICIANS SOUTH AFRICA (AAT(SA))
- THE FINANCIAL PLANNING INSTITUTE (FPI)
- LEGAL PRACTICE COUNCIL (LPC)
- THE SOUTHERN AFRICAN INSTITUTE FOR BUSINESS ACCOUNTANTS (SAIBA)

HOW TO REGISTER AS A TAX PRACTITIONER

- Select Done to file the RAV01



The screenshot shows the SARS 'Registration Amendments And Verification form' (RAV01). At the top right, there are 'Cancel' and 'Done' buttons. A green arrow points to the 'Done' button. The form is divided into two main sections: 'Applicant Details - Individual' and 'Tax Practitioner Details'.

Applicant Details - Individual

- Nature of Entity: INDIVIDUAL
- Surname: [Field]
- First Name: [Field]
- Other Name: [Field]
- Gender: [Field]
- Date of Birth (CCYYMMDD): [Field]
- Passport No/Perm/Id: [Field]
- Passport Country/Country of Origin (e.g. South-African-ZAF): [Field]
- Passport/Perm Issue Date (CCYYMMDD): [Field]
- Trading Name: [Field] [My trading names](#)

Tax Practitioner Details

- Registration Status: [Field]
- Registration No.: [Field]
- Appointed Date (CCYYMMDD): [Field]
- Controlling Body*: THE SOUTHERN AFRICAN INSTITUTE FOR BUSINESS ACCOUNTANTS (SAIBA) [Field]
- Deactivate Registration: ☐

HOW TO REGISTER AS A TAX PRACTITIONER

- Select Home
- Select my Profile

The screenshot shows the SARS eFiling portal interface. The top navigation bar includes links for Home, Returns, Services, Tax Status, Contact, and Log Out. The left sidebar contains a 'My Profile' button and a list of menu items: User, SARS Registered Details, Customs Registration, and Special Links. The main content area displays the 'Tax Compliance Status' and 'Refund Status: No refund due' sections, both with 'Refresh' buttons. Below these is a section for 'Personal Income Tax (ITR12)' with a table for 'Tax Period', 'Return Status', and 'Due Date'. The 'Account Balance' is shown as 'Not Available'.

Tax Period	Return Status	Due Date
Account Balance: Not Available		

HOW TO REGISTER AS A TAX PRACTITIONER

- Select Portfolio Management

The screenshot displays the SARS eFiling user interface. The top navigation bar includes links for Home, Returns, Services, Tax Status, Contact, and Log Out. The left sidebar contains a menu with 'My Profile', 'Profile and Preference Setup', 'Portfolio Management' (highlighted with a green arrow), and 'Special Links'. The main content area shows the user's profile as 'Individual' and includes sections for 'Tax Compliance Status' and 'Refund Status: No refund due', both with 'Refresh' buttons. Below these is a section for 'Personal Income Tax (ITR12)' with a table for tracking returns. The table has columns for 'Tax Period', 'Return Status', and 'Due Date'. A row shows 'Account Balance: Not Available' with a refresh icon. A 'Notification' section is at the bottom.

Tax Period	Return Status	Due Date
Account Balance: Not Available		


HOW TO REGISTER AS A TAX PRACTITIONER

- Select the 3 dots

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
			Individual	Default	 ⋮

Go to Portfolio


Unlinked Portfolio(s)


Previous Login Name	Portfolio Name	Link
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HOW TO REGISTER AS A TAX PRACTITIONER

- Select change my Portfolio type
- Select from the drop down Tax Practitioner

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default		
			Individual	Default		Go to Portfolio




- Rename
- Change Portfolio Type
- Remove Default

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link
---------------------	----------------	------



Portfolio Type	Def
Individual	
Tax Practitioner	
Organisation	



HOW TO REGISTER AS A TAX PRACTITIONER

- Select Save
- Select go to Portfolio and you are to help taxpayers

Linked Portfolio(s)

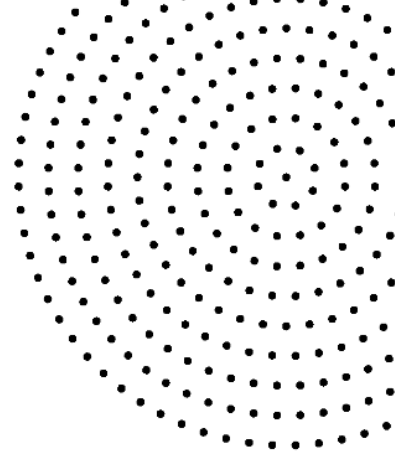
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default
				 Save <i>Default</i>  Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link
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THANK YOU

Stay In touch.



Browse

www.saiba.org.za

Visit

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and, 18th St, Hazelwood, Pretoria

Say Hello

+27 12 643 1800

