

TAX
SEASON
2018

NO
SWEAT!



Opens 1 July closes 31 October

eFiling
for Individuals

sarsefiling.co.za

 **SARS**
At Your Service

TAX SEASON 2018 NO SWEAT!

We know Tax Season can be a stressful time, that's why this year we're making eFiling easier and more convenient than ever! Submit your tax return from your laptop at a time that suits you and we will help you every step of the way. Later in Tax Season, you will also be able to file from your phone or tablet.

Create your profile and get started, no sweat!



NOT SURE IF YOU NEED TO FILE? LET'S CHECK

You **DO NOT** need to submit a return if **ALL** of these apply to you:

- Your total salary for the year before tax is not more than R350 000; **and**
- You have only one employer; **and**
- You have no car allowance/company car/travel allowance or other income (e.g. interest or rental income); **and**
- You are not claiming tax-related deductions/rebates (e.g. medical expenses, travel and retirement annuity contributions, other than pension contributions made by your employer)

REGISTER FOR eFILING IN 7 QUICK STEPS

You must be a registered taxpayer with a tax reference number to register for eFiling.



Go to sarsefiling.co.za > click **REGISTER** > follow our **7 easy steps**.

Remember, SARS may need 48 hours to verify and approve your registration before you can eFile.

If you need to submit documents for your registration, you have 21 business days to do so.

NEED TO RETRIEVE YOUR eFILING LOGIN DETAILS AND RESET YOUR PASSWORD? NO WORRIES



Go to www.sarsefiling.co.za > click the **green LOGIN button** and **follow the prompts**.

Forgot both your login name and password? First complete the **I forgot my login name** and we will send you your details in an email or SMS.

Use this login name to then complete the **I forgot my password** process.

If you have forgotten the answers to your security questions, call the SARS Contact Centre on **0800 00 7277** and choose Self Service – Option 0. Make sure you have your ID and taxpayer reference number handy.

UPDATE YOUR PERSONAL AND CONTACT DETAILS IN MINUTES

You can change your name, surname, address and contact details on eFiling. Login to **eFiling** > under the **HOME** tab > **Maintain SARS Registered Details** > click **I agree** to confirm you are authorised to make changes > click **Display Latest Form** > **Continue** > the **Registration, Amendments and Verification form (RAV01)** will be displayed. From the **My registered details** menu, choose the relevant sub-category and complete the fields you need to change. Click **File** on the taskbar and confirm your changes.



You can change your banking details while completing your return via eFiling. However, any changes that you make will be verified before updating your bank account details with SARS. As part of this verification, you will have to visit a SARS branch in person to verify your banking details. Any refunds due to you (if applicable) will only be processed once we've verified your banking details.

DON'T FORGET THESE SUBMISSION DEADLINES



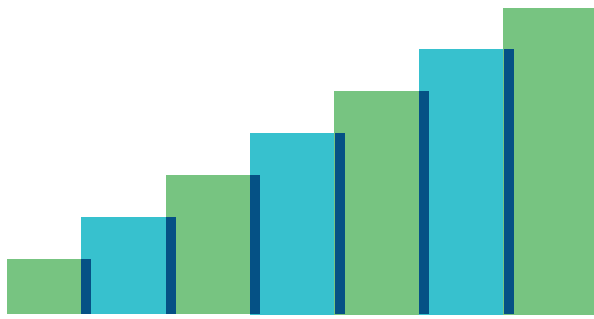
AT A SARS BRANCH

31 October 2018: Non-provisional and provisional taxpayers

VIA eFILING

31 October 2018: Non-provisional taxpayers

31 January 2019: Provisional taxpayers



eFILE YOUR RETURN IN 7 EASY STEPS

CLICK www.sarsefiling.co.za AND FILE FROM ANYWHERE

1. Login name and password

Login to www.sarsefiling.co.za with your eFiling login name and password.

2. Go to the Income Tax Work Page

Open your 2018 income tax return.

3. Create your form

Complete the questionnaire to create your customised return. To add extra income and deduction sections, select the relevant options on the wizard. Once completed, click **Create Form**. If you've made any mistakes along the way, you can still go back and make changes before you submit your return.

4. To refresh data

You can refresh the prepopulated IRP5 data, medical data or retirement annuity data on your INCOME TAX WORK PAGE by clicking the **Refresh Data** button. This will replace the data in that section with the latest data that SARS has received from your employer, medical aid or investment holder.

NOTE: If any information on your tax certificates [IRP5, IT3(b) or IT3(s)] is incorrect, you can approach your employer, retirement fund, medical aid or investment holder to correct it. They must provide the correct information to SARS to update our records. The information will then reflect on your Income Tax Return (ITR12).

5. Complete all relevant fields

Check the info on your income and deductions. Where relevant, enter information from your supporting docs, making sure you enter it against the right codes.

6. Save your return

Click **Save Return**. You can then come back to it later.

7. Submit your return to SARS

Once you've captured all the information and you are ready to submit, click **Submit return to SARS** to complete the process.

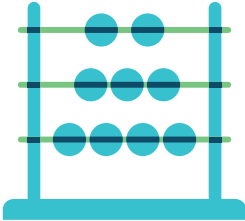
NEED SOMEONE ELSE TO FILE ON YOUR BEHALF?

REGISTERED TAX PRACTITIONER

Only deal with registered tax practitioners. Be cautious of persons who make claims that they can help you with your tax affairs, reduce your tax bill or secure a tax refund. You can ask for the tax practitioner's registration number and verify it on www.sarsefiling.co.za > QuickLinks > Confirm Practitioner Registration Status.



You can also check through our Contact Centre. If your tax practitioner can't provide you with a registration number they may not be registered and may not charge you a fee.



If a tax practitioner completes and submits your ITR12, as the taxpayer, you still have to make a true declaration. You're also responsible for any outstanding returns, payments and penalties. If you are registered for

eFiling, you can obtain shared or full access to your profile to see how your tax practitioner is progressing with filing your return.

REGISTERED REPRESENTATIVE

This is a person who is appointed with full rights to act on your behalf and must be registered with SARS. A Power of Attorney Form must be completed and presented at a SARS branch together with the IDs of both parties.



The registered representative may not charge a fee. Visit www.sars.gov.za for more information.



Remember that you will be held responsible for the information that you or your registered tax practitioner/registered representative supply to SARS. Your tax affairs are your personal responsibility.

HELP-YOU-eFILE

Get expert online help from a friendly SARS agent.



Click the **Help-You-eFile** icon and select **Call Me** and a SARS agent will assist you every step of the way while you're eFiling.

The SARS Contact Centre hours are 08:00 – 17:00 on Monday, Tuesday, Thursday and Friday and 09:00 – 17:00 on Wednesday.

WHAT ABOUT MEDICAL DEDUCTIONS?

If your medical scheme has supplied your information to SARS, your contributions paid by yourself or your employer towards a medical scheme where you are the main member may be prepopulated on your tax return.



If this information has been prepopulated, check it against your medical scheme tax certificate. If this information is not contained in the return, you can refresh the prepopulated medical data on your **INCOME TAX WORK PAGE** by selecting the **Refresh Data** button.

If SARS has not received any information from your medical aid, you will have to fill in the information.

HOW TO HANDLE DISABILITY EXPENSES

A taxpayer can claim expenses incurred and paid in consequence of a disability suffered by the qualifying taxpayer, his/her spouse, child or a dependant. To claim deductions, the disability needs to be confirmed by a duly registered medical practitioner who has to complete an ITR-DD form. You do not need to submit the ITR-DD with your tax return, but we will let you know if we need it.



Physical impairment is distinguished from disability by the fact that the severity of its effects can be overcome by a device or be corrected through therapy.

People who have physical impairments may claim expenses related to their impairment only when such expenses exceed 7.5% of their taxable income.



WHAT ABOUT YOUR RETIREMENT ANNUITY?

If your fund supplied your information to SARS your data may be prepopulated on your tax return. Check it against your tax certificate. You can refresh the data by selecting **Refresh Data** on your **INCOME TAX WORK PAGE**. If you choose to refresh your retirement annuity data, it will be replaced with the latest data that SARS has received from your retirement annuity fund. If we haven't received any information from your retirement annuity fund, you will have to fill in the information yourself.

The following fields will be updated with the latest information that SARS has:

- Number of retirements funds (Policies) contributed to for the year of assessment
- Total contributions for the year of assessment for all of your retirement annuities
- Name of the fund
- Policy number
- Contribution made to this policy

ARE YOU DUE FOR A REFUND?

After submitting your return, you will receive your Notice of Assessment or ITA34. If it shows an amount next to "Net amount payable under this assessment", then you must pay this amount to SARS.

If your ITA34 shows an amount that is "refundable under this assessment" and has a minus sign in front of it, you will receive a refund from SARS.



NEED TO UPLOAD SUPPORTING DOCS? NO PROBLEM

Scan your documents and save them on your computer/desktop. Log in to eFiling and upload your documents. Make sure that the files are in .pdf, .doc, .docx, .xls, .xlsx, .jpg and .gif format to enable SARS to view them. The maximum allowable size **per document** is 5MB and a maximum of 20 documents may be uploaded. Remember to click '**Submit**' to send the documents to SARS.



Please note: It is recommended that you scan your documents through in batches to remain within the 5MB file size limit. Remember to click '**Submit**' once you have uploaded your documents to ensure that SARS receives all your documents.

The following files may not be uploaded as they will result in the entire group of documents being rejected:

- Documents with the same name
- Password protected documents
- Spreadsheets with multiple sheets
- Blank documents

Please note: The link to upload your documents on eFiling will only be available when you receive the letter from SARS requesting you to submit supporting documents. Once you have submitted the documents, the link will close and you will not be able to upload any more documents.

MADE AN ERROR ON YOUR RETURN? NO SWEAT

Click **Request for Correction** on your **INCOME TAX WORK PAGE**. Your return will appear and you can make the necessary changes and resubmit your return. Remember, you have 30 days in which to make a **Request for Correction**.



ALWAYS CHECK YOUR eFILING INBOX

Get all SARS notices and letters about your tax return assessment in your eFiling inbox. Log in to your profile and check your inbox regularly.



HAVE YOU BEEN CHOSEN FOR AUDIT OR VERIFICATION? DON'T WORRY

If you have been selected it will be shown on your Notice of Assessment under Compliance Information, with an N for No (not selected) or Y for Yes (you have been selected).

Compliance Information			
Unprocessed payments	0.00	Provisional taxpayer	N
Selected for audit or verification	N		

The N indicates that you are not selected for audit or verification.

Compliance Information			
Unprocessed payments	0.00	Provisional taxpayer	N
Selected for audit or verification	Y		

The Y indicates that you are selected for audit or verification. If you are selected for verification, you will be notified by SARS through an official letter. If you are an eFiler, look out for the letter in your inbox on your eFiling profile. SARS will issue you with a reminder letter and an SMS message if you need to submit supporting documents to finalise your audit.

Please note: If a refund is due to you, it will not be paid until the verification or audit has been completed.

DISAGREE WITH THE ASSESSMENT OUTCOME? LET'S FIX THIS

Submit a **Notice of Objection (NOO)** together with supporting documents to substantiate your objection.

If you disagree with your assessment and don't clearly understand the assessment and therefore do not know on what basis to formulate an objection, you may submit a **Request for Reasons** within 30 days of the assessment.



If you disagree with a **penalty**, submit a **Request for Remission** before objecting.

MAKING PAYMENT TO SARS? EASY!

- Use SARS eFiling
- Use internet banking



NOT HAPPY WITH OUR SERVICE? LET'S FIX THAT

Lodge a complaint via eFiling – login and follow the **lodge a complaint** process. If you experience any problems with your eFiling profile please call the SARS Contact Centre for assistance.



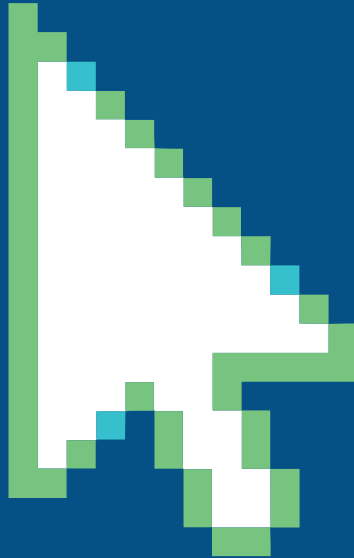
BE HONEST

If you submit false information to SARS you are guilty of an offence. If convicted, you will face a fine or imprisonment for up to two years, so make sure that isn't you.



NEED MORE INFO?

CHECK OUR USEFUL
GUIDES AVAILABLE ON
WWW.SARS.GOV.ZA
OR CALL THE SARS
CONTACT CENTRE
ON **0800 00 7277**
For more information you may:



- Visit the SARS website www.sars.gov.za
- Visit your nearest SARS branch
- Contact your registered tax practitioner
- Contact the SARS Contact Centre –
If calling locally, on 0800 00 7277
If calling from abroad, on +27 11 602 2093
(only between 8:00 and 16:00 South African time).

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DISCLAIMER

The information contained in this leaflet 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 leaflet should refer to the relevant legislation, or seek a formal opinion from a suitably qualified individual.