

## EXTERNAL GUIDE

# A STEP-BY-STEP GUIDE TO THE AUTO MERGE FUNCTION ON eFILING

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## 1 PURPOSE

- SARS is embarking on a data improvement initiative through which taxpayer records will be merged into a consolidated profile where the identity information of the taxpayer is exactly the same across all his/her tax types and/or Customs and/or Excise records. Once the merge has been completed the taxpayer can view and maintain related tax types from a single profile. The consolidated profile will improve the accuracy and successful processing of Tax Clearance Certificates.
- SARS will notify affected taxpayers by letter of the intended auto merge. Recorded Registered Representatives or Taxpayers will be able to indicate that they are not in agreement with the intended auto merge.
- The purpose of this document is to explain how Registered Representatives and Taxpayers can submit a correction request if they are not in agreement with the proposed merge.

## 2 INTRODUCTION

- SARS will only perform an Auto Merge where the identity information of the taxpayer is exactly the same across tax types.
- An **“Update to Your Tax Profile”** letter will be issued to taxpayers to inform them of the proposed merge. If for any reason you do not agree with the proposed merge, you will have 21 days from the date of issue of the “Update to Your Tax Profile” letter to request a correction of the proposed merge.
- A written correction request stating the reasons why you do not agree with the merge, together with the “Update to Your Tax Profile” letter should be submitted either via eFiling as supporting documents or at a SARS branch.
- If the correction request has not reached SARS within the 21 day period, SARS will regard the profile as confirmed and will include the records as listed in the “Update to Your Tax Profile” letter when creating your new profile.
- If an invalid reason is provided, SARS will inform you of the outcome through a rejection letter sent to your eFiling correspondence or letters page.
- If you have provided valid reasons SARS will issue you with a confirmation letter via post that your records will not be auto merged.
- If you have outdated/incorrect registered particulars; SARS cannot accept or perform any updates to registered particulars as part of the auto merge process. Any outdated information must be updated by you, using the existing eFiling Registration, Amendment and Verification (RAV01) form or visit a SARS branch.
- Your current eFiling access and permission rights will not be impacted unless the Company you are representing has multiple Registered Representatives listed in our Client Information System. During the auto merge process, a number of rules will be applied in order to match and select the most recent recorded representative as the Main Representative. All other Representatives will still have the ability to submit returns and make payments on eFiling if they are currently activated for these services on eFiling. The impacted representatives will however not be able to request sensitive detail changes such as new Tax Product registrations, additional merges or Tax Clearance Certificates.

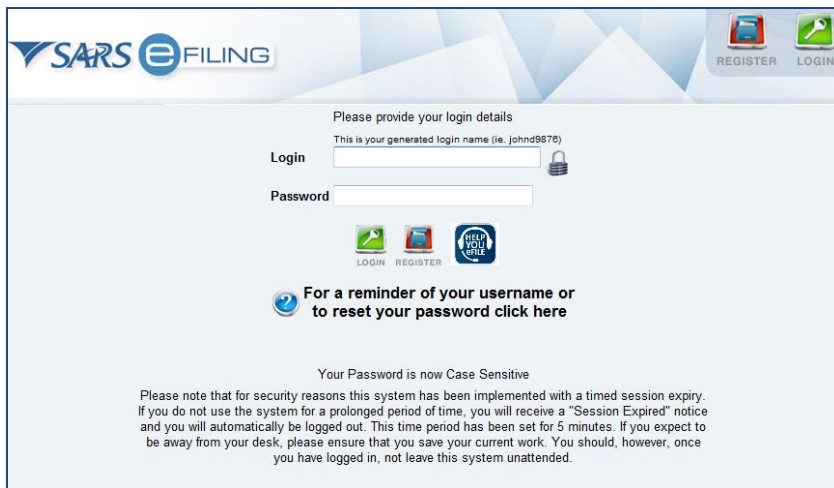
### 3 THE AUTO MERGE PROCESS

#### 3.1 LOGIN TO EFILING

- Navigate to [www.sarsefiling.co.za](http://www.sarsefiling.co.za) and click on the “Login” button.



- Login with your Login name and Password.



- Select the “Organisations” tab on eFiling.
- Associated Auto Merge Letters issued to the Representative or Taxpayer can be accessed from two different Menus in their current eFiling Profile;
- As first option: Click on the SARS Registered Details functionality, under the Home tab to proceed.

## 4 SARS REGISTERED DETAILS

- The SARS Registered Details functionality contains a new “**Letters**” menu option which will allow the user to view the pre-merge letter and upload any supporting documents, where the user is not in agreement with the proposed merge.
- On the **Individual**, and **Organisation** profiles on eFiling, the “**Letters**” option is displayed under the SARS Registered Details functionality.
- Select the “**Letters**” option under SARS Registered Details.

### Organisation:



OR

- Option 2: Under the “**Return**” Tab select “SARS Correspondence”



- The following screen will be displayed:

Taxpayer Name	Reference Num	Date	Open Letter	Documents
Mr		2016/05/18	<a href="#">View</a>	<a href="#">Waiting for Documentation to be Uploaded</a>

- Click **“View”** to open the selected letter. Once viewed close the applicable letter.
- If the user wants to object or request a correction of the proposed merge request, they can select **“Waiting for Documents to be Uploaded”**, under Documents.
- You will not be required to indicate that you are in agreement with the proposed merge, you should only upload a written correction if you are NOT in agreement with the proposed merge. Your written request must please specify why you are not in agreement with SARS consolidating your Tax and/or Customs and/or Excise records, if all your records have exactly the same identity information. Once you have written and scanned your request proceed by selecting the **“Waiting for Documentation to be uploaded”** option.

Taxpayer Name	Reference Num	Date	Open Letter	Documents
Mr		2016/05/18	<a href="#">View</a>	<a href="#">Waiting for Documentation to be Uploaded</a>

- The following screen will be displayed:

**UPLOAD SUPPORTING DOCUMENTS**

Please ensure that all documents are successfully uploaded before submitting this group.

Document Name:

**Very important:**

- The following file types may be uploaded: .pdf, .doc, .docx, .xls, .xlsx, .jpg and .gif.
- The maximum allowable size of each file uploaded may not exceed 2Mb per document.
- The following files may not be uploaded as they will result in the entire group of documents being rejected:
  - X Documents with the same name.
  - X Password protected documents.
  - X Spread sheets with multiple sheets.
  - X Blank or empty documents.

- Select the **“Browse”** option to select the relevant document, then **“Upload”** to attach your document.
- When the document has been uploaded it will be displayed under **“Uploaded Documents”** as indicated in the following screen. If you wish to remove the document that you have uploaded, click the document and select the **“Remove”** button.

UPLOADED DOCUMENTS						
Document Name	File Size	Success	File Status	Date / Time Uploaded	Open	Remove
Chrysanthemum.pdf	859	<input checked="" type="checkbox"/>	Converted and stored	5/18/2016 8:42:26 AM	<a href="#">View</a>	<input type="checkbox"/>

[Remove](#)

### DOCUMENT GROUP

Please provide a group name for all the documents that you have uploaded above.

Document group name

Status Uploaded

[Submit to SARS](#) [Manually Submitted](#) [Back](#)

- Select the **“Submit to SARS”** button to continue.
- The following screen will indicate the user’s document has been successfully submitted to SARS.

Taxpayer Name	Reference Num	Date	Open Letter	Documents
Mr		2016/05/18	<a href="#">View</a>	<a href="#">Submitted</a>

**Note:** After 21 days SARS will proceed with the merge if no correction request have been attached or if SARS has rejected your request. In cases where your correction request was rejected SARS will notify you by posting the response on your eFiling “Correspondence “ page.

If SARS has successfully merged your records into a consolidated tax profile, you will be issued with a **“Confirmation of Your Tax Profile”** letter which will also be posted to your eFiling “Correspondence “ page.

### 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](http://www.sars.gov.za)
- Visit your nearest SARS branch
- Contact your own registered tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 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).