

EXTERNAL GUIDE

GUIDE TO THE SARS EFILING MOBILE APPLICATION

TABLE OF CONTENTS

TABLE OF CONTENTS	2
1 PURPOSE	3
2 INTRODUCTION	3
3 DOWNLOADING THE SARS EFILING APPLICATION FROM THE APPLE ISTORE	3
4 LOGIN TO EFILING	4
5 COMPLETION AND SUBMISSION OF THE INCOME TAX RETURN	5
6 SURVEY	12

1 PURPOSE

- The purpose of this guide is to assist taxpayers with the SARS eFiling Mobile Application (App) in order to submit income tax returns.

2 INTRODUCTION

- The SARS eFilingApp is a mobile application which taxpayers can install from the App Store, Google Play Store on their mobile device (android phones/tablet or Apple iPhone 4/4S/iPhone 5 with iOS v6+, iPad mini with iOS v6+, Samsung Galaxy S4/ Samsung Note II) in order to complete and submit their individual Income Tax Return (ITR12).

3 DOWNLOADING THE SARS EFILING APPLICATION FROM THE APPLE ISTORE

- Open the App Store by tapping on the App Store tile on the springboard of your Apple device.



- Type "SARS eFiling" into the Search Box. Once the app appears in the search results, tap on the FREE button to continue and install the app.



- Type in your APPLE ID and Password and tap OK to continue.



- The App will start loading, then Install as indicated below. When the App has completely installed, the SARS eFiling App tile will be displayed on your home screen.



- You can now tap on the SARS eFiling tile and the login page will be displayed. Enter your eFiling Username and Password and select Login to continue. In the event that either the username or password is incorrect, a Login Failure message will be displayed.

4 LOGIN TO EFILING

- Enter your eFiling Username and Password, select Login to continue. In the event that either the username or password is incorrect, a Login Failure message will be displayed.

- If you have forgotten your login details, click on hyperlink under the reminder for username or password and the following two options will be displayed to the user to reset the login name or password. Select the appropriate option.

- Depending on the option selected above, relevant information will be required in order to reset the password.

I forgot my login name - I have forgotten my login name but remember my password and want to have my login name sent to me.

Delivery Method

Email

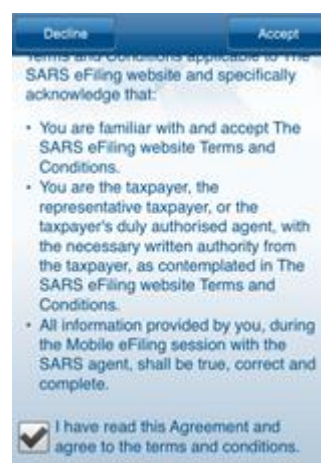
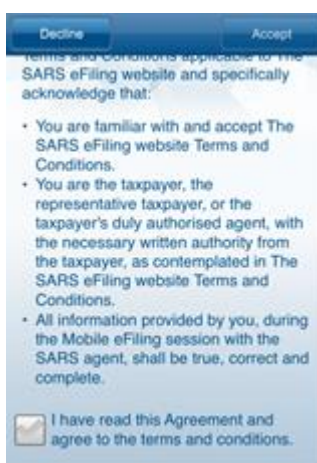
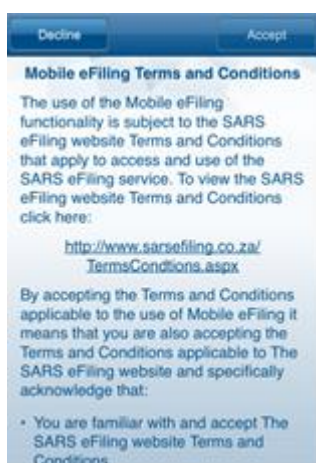
SMS

Tax Reference Number

ID/Passport Number

Submit

- After the successful login, the Mobile eFiling Terms and Conditions page will be displayed. Select the hyperlink to view the website terms and conditions. Select Accept to continue.



5 COMPLETION AND SUBMISSION OF THE INCOME TAX RETURN

- The Home screen, as indicated below, will be displayed if the taxpayer previously logged into the app.

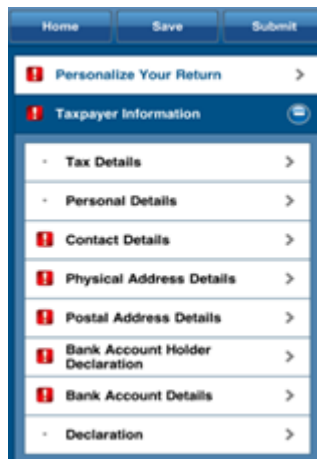
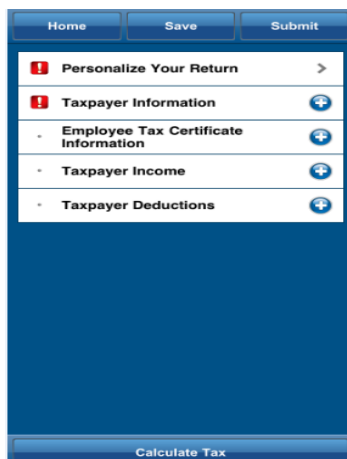
Note: In order to type in free-text fields, ensure that you tap twice on the field to activate the keyboard.



- The following Welcome page will be displayed to the taxpayer on the Home screen. After the welcome page has been loaded, select <Next> to continue.



- The eFiling Work Page will be displayed. Ensure that all relevant sections are completed. If there is missing information in any of the sections, a red indicator will be displayed next to the container that is incomplete.



- Personalize Your Return – is the container that has the standard questions to populate all the relevant sections for your ITR12.
- **Note:** The mobile application may consume a fair amount of device resources when forms are opened with large numbers of containers, e.g. more than 10 IRP5s.

Standard

Is this declaration made by a Tax Practitioner?
 Y N

Were you unemployed for the full year of assessment and received no income and realised no capital gain / loss?
 Y N

Did you receive income that is reflected on an IRP5 or (T3(a) certificate?
 Y N

How many certificates did you receive?

Did you incur any medical expenditure (including medical scheme contributions made by you or your employer)?
 Y N

Did you make any retirement annuity fund contributions?
 Y N

Do you want to claim expenditure against a travel allowance?

- Taxpayer Information – entails your personal, demographic information, Voluntary Disclosure, Bank Account Holder Declaration, Bank Account Details, Practitioner Details and Declaration information.

Home Save Submit

Personalize Your Return >

Taxpayer Information ⓘ

- Tax Details >
- Personal Details >
- ! Contact Details >
- ! Physical Address Details >
- ! Postal Address Details >
- ! Bank Account Holder Declaration >
- ! Bank Account Details >
- Declaration >

Menu Save Submit

Taxpayer Information

Personal Details

Surname

First Name

Other Name

Initials

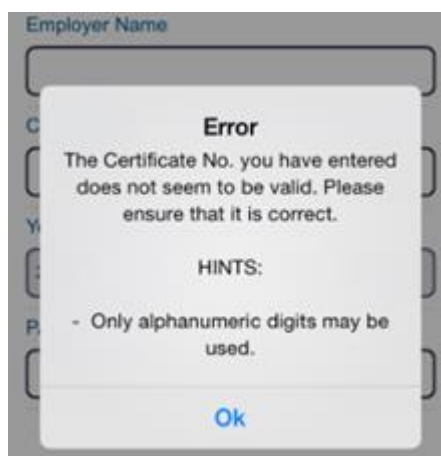
Date of Birth (CCYYMMDD)

ID No.

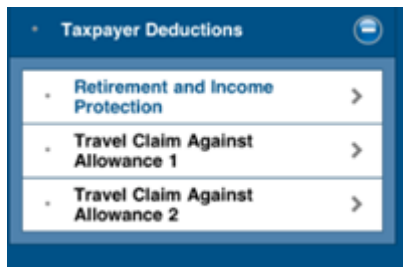
- The Bank Account Holder Declaration must be completed. You will be required to complete the reason if you use a South African Bank Account of a third party.

- Employees' Tax certificate – contains a summary, Employer Address Details, Income Received, Deductions / Contributions, Tax Withheld, Pay Periods and Directive Numbers information.

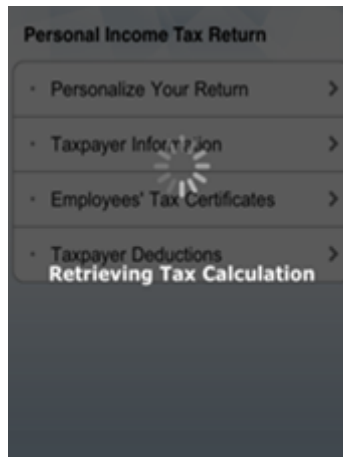
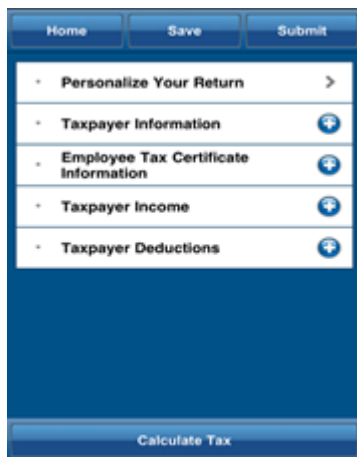
- Errors will be displayed continuously when information/details are entered with errors.



- Taxpayer Deductions – A list of the taxpayer Deductions will be displayed according to the answers selected in the Personalize Your Return section. Allowable Deductions for example, medical deductions.



- Ensure that you save your return before submitting.
- You can select the <Tax Calculator> at the bottom of the screen in order to view an estimation of your assessment.



Amounts Assessed		
Code	Description	Amount
2601	Income (PAYE)	100000.00
Total		100000.00
Deductions		
Code	Description	Amount
Total		0
Taxable Income		100000.00
Rating Percentage (%)		0
Rating Amount		0
Taxable income - Subject to retirement fund lump sum benefit tax rates		0
Taxable income - Subject to retirement fund lump sum withdrawal benefit tax rates		0
Tax Calculation		
Normal Tax on taxable income		18000.00
Rebates		12000.00
Additional tax		0
Administrative penalties		0

- Please ensure that the date is completed on your declaration under the Taxpayer Information section.

Menu Save Submit

Taxpayer Information

Declaration

I declare that:

- The information furnished in this return is true and correct in every respect; and
- I have disclosed in full the gross amounts of all income accrued to or received by me during the period covered by this return; and
- I have the necessary receipts and records to support all my declarations on this form which I will retain for inspection purposes.

Date (CCYYMMDD)

For enquiries go to www.sars.gov.za or call 0800 00 SARS (7277)

- When you have successfully submitted your return and the return has been assessed, the following screen will be displayed. Select the LOGOUT button when you are done.



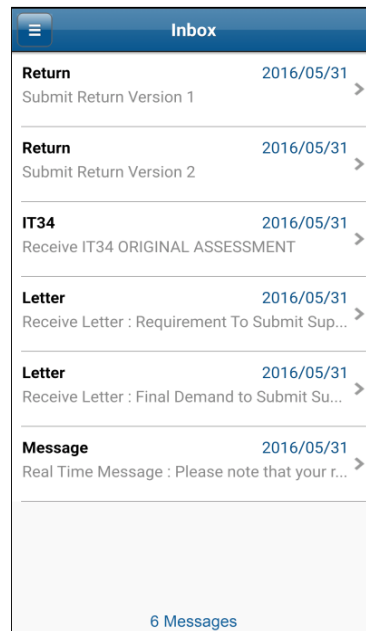
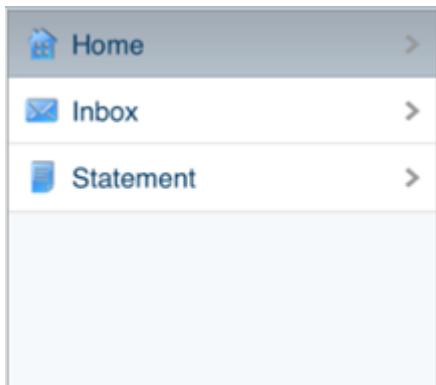
- When you have submitted your return and you have received your assessment, you can request a correction in the case when the assessment is incorrect. The Home page will be displayed, select the return that you want to make changes on. See example below:



- The Personal Income Tax Return will be displayed with all the containers in the return as previously submitted. Tap the relevant container to change accordingly. Continue with the same steps as when you submitted your return the first time to complete the Request for Correction.



- On the mobile applications, an Inbox will be available where you will be able to view notifications issued to you.



6 SURVEY

- When you have submitted your ITR12 and have logged out. A survey will be loaded, complete the survey so that we can determine how you experience the SARS eFiling App the first time you used it.

The screenshot shows the 'Survey' screen in the SARS eFiling mobile app. At the top, there are navigation options: 'Home', 'Search', and 'Logout'. Below the title bar, a blue header contains the word 'Survey'. A red warning message reads: 'Survey: Please ensure that you complete the following mandatory fields: At least one question on the survey needs to be answered.' The survey consists of several questions with dropdown menus and radio buttons:

- 'Which device did you use?' with a dropdown menu.
- 'If your device is not listed above, please state the device' with a text input field.
- 'If you make use of an iPhone 4 or iPhone 4S, please also include the IMEI (International Mobile Equipment Identity number). To access your IMEI number select Settings > General > About and proceed to scroll down for the required information.' with a text input field.
- 'How did you find the SARS eFiling mobsite? (1 - Poor, 10 - Excellent)' with a dropdown menu.
- 'What did you think of the graphics? (1 - Poor, 10 - Excellent)' with a dropdown menu.
- 'How easy did you find it to input data on the SARS eFiling mobsite? (1 - Poor, 10 - Excellent)' with a dropdown menu.
- 'How easy did you find it to edit data on the SARS eFiling mobsite? (1 - Poor, 10 - Excellent)' with a dropdown menu.
- 'Could you do all the things you wanted to do on the SARS eFiling mobsite?' with radio buttons for 'Yes' and 'No'.
- 'What else would you like to be able to do?' with a text input field.

- The following are examples of the survey questions:

This block shows three examples of survey questions:

- 'Will you file future returns on the SARS eFiling mobsite?' with radio buttons for 'Yes', 'No', and 'Maybe'.
- 'On a scale of 1 - 10 how likely would you be to recommend submitting a return on the SARS eFiling mobsite to a friend?' with a dropdown menu.
- 'We are really interested in your views do you have any other comments you feel we should know about?' with a text input field.

At the bottom of the examples, there are two buttons: 'Cancel' and 'Finish'.

- When you have completed the survey, the following message will be displayed. Tap the LOGOUT to close the screen and return to the eFiling home page.

The screenshot shows the 'Survey Complete' screen. At the top, there is the SARS eFiling mobile logo. Below it, a blue header contains the text 'Survey Complete'. The main message reads: 'Thank you for completing the survey.' At the bottom, there is a blue button labeled 'Home'.

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 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).