EXTERNAL GUIDE

HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE
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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 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 EXISTING USERS

All existing 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.

4.3 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.
4.4 ONE-TIME PIN (OTP)

The OTP is a unique 4-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.

4.5 CHAT BOT

The chat bot icon appears on the bottom right side of your screen. You can click on this icon to ask a question within the context of the screen that you are busy on.

- Type a question in the input text-box
- Click on the button on your screen and press <Enter> on your keyboard to submit the question
- Lwazi, the online assistant, will process your request and display the answers on your screen.

5 REGISTRATION ON EFILING

5.1 HOW TO REGISTER AS A NEW USER ON EFILING

Procedure:

a) Log on to the SARS website.
- On the top right side of the home page is a list of SARS eFiling options. Select <Register Now>.
- The eFiling Register screen will display.

b) Please enter the following personal details and click on <Next>.
- Name
- Surname
- South African Citizen (indicate Yes/No)
- Identification Number
c) Please enter the following information on the contact details screen and click on <Next>.

- Date of Birth
- Note: If you are not a South African citizen please enter your passport number and your income tax number (if registered).

- Cell number
- Email
- A unique user name (you may opt to use your email address as your user name)
- Password (please refer to the password rules above)
- Confirm Password.

d) 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 has expired 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.

e) If you have successfully entered the OTP, the eFiling Login Screen will display.

**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.

**Illustration**
5.2 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.

Procedure:

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.

c) The file size may not exceed 5mb and the following file types will be accepted:
   - 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 submitted you will not be able to add more documents unless you receive a new request from SARS.
   - If you are sure you have uploaded all the documents required, click on <Submit>.

d) You can log in with your username and password to view the status of your registration process (e.g. awaiting supporting document, documents submitted). Once SARS has verified your details, the status will change to 'Request Successful'. You will be notified via email and SMS.
   - Click on the <Complete Registration> button.

e) Confirm 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.
f) Please enter the OTP sent to either your cellphone number or your email address. Once the correct OTP is entered, the eFiling Login screen will display.

**NOTE:**
If we cannot find your tax record, you will be required to complete your address details.

**Illustration:**

![Registration Request Received](image1)

![Registration Workpage](image2)
Welcome to SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

**eFiling Security Contact Details**

**Preferred Method of communication**

- **Cell Number**
  - 0833333333

- **Email**
  - TEST@TEST.CO.ZA

**Continue**
6 FIRST TIME LOGIN FOR EFILING USERS REGISTERED ON/AFTER 1 JULY 2019

Procedure:

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 <Link> 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 notices sent by SARS.

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 visit your nearest 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.

Illustration:
Welcome, please login to SARS eFiling

Username:
EFILING TEST3

Forgot Your Username?
Forgot Your Password?

Next

Password:

Forgot Your Username?
Forgot Your Password?

Login

Don't have an account? Register

Welcome to SARS eFiling

SARS eFILING TERMS & CONDITIONS

THE USE OF THIS WEB SITE IS REGULATED BY THE RULES FOR ELECTRONIC COMMUNICATION PRESCRIBED UNDER SECTION 255(3) OF THE TAX ADMINISTRATION ACT, 2001 (ACT NO. 53 OF 2001) THE "RULES".

THE RULES WERE ISSUED IN PUBLIC NOTICE GN 444 IN GG 37940 OF THE 28TH OF AUGUST 2014, AVAILABLE HERE

THE RULES AS WELL AS THE TERMS AND CONDITIONS HEREBY ARE BINDING AND ENFORCEABLE AGAINST ALL PERSONS THAT ACCESS THIS WEB SITE OR ANY PART THEREOF. IF YOU DO NOT AGREE TO THE RULES OR THESE TERMS AND CONDITIONS, YOU MUST LEAVE THIS WEB SITE NOW. AS FURTHER USE SHALL AUTOMATICALLY BIND YOU.

I Decline  I Accept

EXTERNAL GUIDE - HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE GEN-ELEC-18-G01

REVISION: 6
7 FIRST TIME LOGIN FOR EFILING USER REGISTERED BEFORE 1 JULY 2019

7.1 SINGLE LOGIN PROFILE

Procedure:

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
- Select your preferred method of communication and click on <Continue>
- This will serve as your eFiling security contact details and 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.

**d)** 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 notices sent by SARS.

**Illustration:**

![eFiling Login Page](image)

![eFiling Dashboard](image)
### Welcome To SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

<table>
<thead>
<tr>
<th>eFiling Security Contact Details</th>
<th>Preferred Method of communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell Number</td>
<td>0833333333</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:TEST@TEST.CO.ZA">TEST@TEST.CO.ZA</a></td>
</tr>
</tbody>
</table>

Continue

### One Time Pin

OTP has been sent to the following cellphone number 078******91
Pin expires in 02:09

1 1 1 1 1 2 3 4 5 6

Please enter the last 5 digits of your OTP.

Resend OTP  Submit

### 7.2  MULTIPLE LOGIN PROFILES

**Procedure:**
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 User Name and Password details and click on <Login>. Please read and accept the terms and conditions.

b) A screen will display with a list of all the login profiles linked to your identity/passport number. Please select the primary login name that you would like 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 from the profile that you are currently logged in with (e.g. taxpayer222222), you will be prompted to enter the password for that primary login selected (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>. Select your preferred method of communication and click on <Continue>.

- This will serve as your eFiling security contact details and 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) Insert the OTP issued to you.

f) A message will display confirming that your primary login has been successfully set-up. Click on <Continue>.

g) The Portfolio Management screen will display for you to link, unlink or add portfolios.

- Please refer to the Portfolio Management section below.

**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."

**Illustration:**
Welcome To SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

<table>
<thead>
<tr>
<th>eFiling Security Contact Details</th>
<th>Preferred Method of communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cell Number</td>
<td>0833333333</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:TEST@TEST.CO.ZA">TEST@TEST.CO.ZA</a></td>
</tr>
</tbody>
</table>

Continue

One Time Pin

OTP has been sent to the following cellphone number
083****93
Pin expires in 02:00

1 2 3 4 5 6
Please enter the last 6 digits of your OTP.

Resend OTP
Submit

Thank you for confirming your primary login details

Please note: that going forward you will only use the primary login to access eFiling. You will have the opportunity to link your other logins as “Portfolios” to your profile.

What is a portfolio?

A registered eFiler can act in different “roles”, as a tax administrator, on eFiling. These “roles” are referred to as Portfolio Types. For example:

- Individual - Acting as himself or herself when administering his or her own individual taxes.
- Tax Practitioner - Acting as a Tax Practitioner that is (registered with a Recognised Controlling Body (RCB) and in good standing) on behalf of another tax paying entity with a signed Power of Attorney in place.
- Organisation - Acting as the representative of a tax paying entity, 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.

With regards to the Tax Practitioner and Organisation Portfolio Type - An eFiler will be able to activate one or more taxpayers against the Portfolio Type and will also be able to group taxpayers together under the same Portfolio Type. The eFiler will be able to specify a descriptive name for each group, for ease of reference.

Previously, an eFiler accessed his or her different Portfolios by using a unique username and password for each Portfolio. Going forward, you will only have one username and password (referred to as the primary login) and after login, you can choose the Portfolio that you want to access.

Continue
8 MY PROFILE

8.1 PROFILE AND PREFERENCE SETUP

This function is used to update your primary login details, security contact details and method of authentication. You cannot change your tax reference number and identity/passport number on this screen.

Procedure:

a) Log on to eFiling, click on <My Profile> from the menu on the left and select <Profile and Preference Setup>.

b) To change your security contact details:

- Insert your new email address
- Insert your new cell number
- Select your preferred method of communication
- Click on <Update & Save>
- Click on <Send OTP> to send the One-Time-Pin number to your preferred method of communication
- After you have entered the correct OTP, a pop-up message will display confirming that your security contact details have been updated successfully.

c) To change your username and password:

- Insert your new username (you may use 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 pop-up message will display confirming that your username and password have been updated successfully.

d) 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. To switch on two-factor authentication:

- Select the button to switch on two-factor authentication
- Select the option <One time pin to preferred method of communication>. Note: additional options will be added to the system at a later stage.
- 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.

**Illustration:**

![Security Contact Details](image)

**Your Login Details**

![Your Login Details](image)

**Two-Factor Authentication**

![Two-Factor Authentication](image)

8.2 **ACCESS TO MY PROFILE**

If your tax number(s) 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.
Procedure:

a) When you log on to eFiling a message will display stating that our records indicate that you do not have any tax types linked to your current profile. Select the option to link your own tax type (e.g. provisional tax or individual income tax) to your profile.

b) 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>**

Illustration:
9 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.

**Procedure:**

a) Once you have logged on to eFiling, click on `<My Profile>` from the menu on the left and select `<Portfolio Management>`.

b) The Portfolio Management screen will display for you to link, unlink, or add portfolios.

c) 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.

d) You can set a default portfolio so that the system 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.

e) To change the portfolio type, 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

f) 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>`.

g) To link a new portfolio to your profile, click on `<Add Portfolio>`. 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.

**Illustration:**
10 MANAGE USERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

10.1 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.

In order 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.

**Procedure:**

a) To access the required Organisation or Tax Practitioner portfolio:
   - Select <My Profile>
   - Select <Portfolio Management>
   - 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:

- Send a reminder to the user to accept the invite – this option will resend the notification message to the user)
- Cancel the 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 the user’s rights (i.e. edit roles).

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

- Insert a reason for your request to delete the user
- Click on <Delete User>
- A pop-up message will display for you the confirm your request. Click on <OK>.

**NOTE:**

- 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.
**USER ROLES**

- Manage Transfer Duty Financial Account
  This role allows users to maintain all financial details against the Transfer Duty account.
- SARS Registration
  Can register taxpayers with SARS to get tax reference numbers.
- RLA - View Customs Product information
  With this profile, users can only view information such as address, contact and bank account details. Users can also view information relating to their specific client type(s) eg. importer/exporter.
- RLA - View Client Type
  With this profile, users can only view information relating to their specific client type(s) eg. importer/exporter.
- RLA - Manage Customs Product information
  With this profile, users can view and change information such as address, contact and bank account details. Users can also view and change information relating to their specific client type(s) eg. importer/exporter.
- RLA - Manage Client Type
  With this profile, users can only view and change information relating to their specific client type(s).
- Manage Users
  Can create & change users and assign them to groups.
- Manage Taxpayers
  Can create & change taxpayers and assign them to groups.
- Manage Groups
  Can create & change groups and assign users and taxpayers to groups.
- Manage Excise Financial Account
  This role allows users to maintain all financial details against an Excise Account.
- Manage Deferment Account
- ISV Activation
  This role allows users access to the ISV activation screen.
- Directives
- Perform Bulk and Additional Payments
  This role allows a user without full admin rights to perform bulk and additional payments.

*Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.*
10.2 ACCEPT INVITE TO BE A USER ON A PORTFOLIO

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

Procedure:

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 you have successfully entered the OTP, a pop message will display to confirm that the organisation/tax practitioner profile will be linked to your profile.

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.
**Illustration:**

![Illustration of eFiling interface: Portfolio Management, Manage Groups, Rights Group details, Group Details screen with Group Name and Authorization Level options.]

**11 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 portfolio.

**Procedure:**

a) To activate the tax type functions and services:

- Select <Organisation> 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 be displayed.

b) Click on the <Open> hyperlink:

- Insert/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 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>`.

**Illustration:**

![Illustration of SARS eFiling interface](image-url)
12 MANAGE TAXPayers ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

Procedure:

a) To manage taxpayer types linked to a portfolio:
   - Select <Organisations> from the menu on the top
   - Click <Organisation> from menu on the left.

b) From the menu on the left:
   - Select <Register New> to add a new taxpayer type (e.g. individual, company, trust) to your portfolio.
     - After you have completed the relevant fields, click on <Continue>
     - Select the taxpayer groups and click on <Continue>
     - A summary of the new taxpayer’s details will display. Click on <Continue>
     - Select the return types that you want to activate for the taxpayer. Insert the reference number and click on <Register>.
   - To amend a specific taxpayer’s details on your portfolio, search for the taxpayer and then select <Change Details> from the menu on the left.
After you have completed the relevant fields, click on <Update Details>
Select the taxpayer groups and click on <Continue>
A summary of the taxpayer’s details will display. Click on <Continue>
Select the return types that you want to activate/deactivate for the taxpayer and click on <Register>.

Illustration:

13 ACTIVATE/DEACTIVATE TAX TYPES

In order to transact (e.g. submit returns, make payments, request statement of account) on specific tax types (e.g. provisional tax), you will need to activate that specific tax type.

13.1 INDIVIDUALS

Procedure:

a) To activate/deactivate tax types on your own individual profile.
   - Select <Home> from the menu on the top
   - Select <User> from the menu on the left
Select **<Tax Types>** from the menu on the left
Select the check box for the tax type you want to activate (or deactivate)
Insert the tax reference number
Click on **<Register>**
Once SARS has verified your details, the status will change to ‘successfully activated’.

Illustration:

13.2 ORGANISATIONS AND TAX PRACTITIONERS

**Procedure:**

a) To activate/deactivate tax types for taxpayers on your portfolio, click on the ellipses ( ⬤ ) menu icon and then search for the specific taxpayer.

b) Select **<Organisations>** from the menu on the top.

- Select **<Organisation>** from the menu on the left
- Select **<Organisation Tax Types>** from the menu on the left
- Select the check box for the tax type you want to activate (or deactivate)
- Insert the tax reference number
- Click on **<Register>**
- Once SARS has verified the details, the status will change to ‘successfully activated’.

Illustration:
13.3 TAX TYPE ACTIVATION PENDING

There may be cases where SARS will need to review the 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.

**Procedure**

a) You can view your case number and case status on the `<Pending Registration>` function:

- If you are an individual, select `<Home>` from the menu on the top and then select `<User>` and `<Pending Registration>` from the menu on the left
- For Organisations and Tax Practitioners, select `<Organisations>` from the menu on the top and then click on `<Organisation>` and `<Pending Registration>` from the menu on the left.
- Click on <Open> to view the case details.

b) Click on <Query Status>. A pop-up message will display if your request is still in progress.

c) Should SARS require additional information to process your request, a letter will be issued and the workpage will display a link for you to upload supporting documents. Once the case has been reviewed and approved, your tax type will be activated.

Illustration:
14 SARS CORRESPONDENCE

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

Procedure

a) 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>.

NOTE:

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.
15 **FORGOT PASSWORD**

**Procedure**

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 successfully.

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.

**Illustration:**

![Illustration Image]

**Search Correspondence**

- **Name**: JT Taxpayer
- **Tax Reference Number**: 0388499267
- **Tax Type**: Individual Income Tax (ITIN)
- **Year/Period**: 2019-2020
- **Date**: 18/11/2019
- **Description**: Request for supporting document for registration

![Search Correspondence Details]

- **Radio Options**
  - All
  - Read
  - Unread

- **Columns**
  - Name
  - Tax Reference Number
  - Tax Year
  - Tax Type
  - Year/Period
  - Date
  - Description
  - View
  - Document

- **Buttons**
  - Clear
  - Search
Welcome, please login to SARS eFiling

Forgot Password

Please enter your password

Forgot Your Username?

Forgot Your Password?

Next

Username

EFILING TEST3

Forgot Your Username?

Next

One Time Pin (OTP) Contact Details

SARS would like to send you an OTP. Please indicate your preferred channel and click Send OTP.

Email

Cell Number

Your Preferred Contact

TE**@T***.CO.ZA

Send OTP

One Time Pin

OTP has been sent to the following email

TE**@T***.CO.ZA

Pin expires in 02:51

Please enter the last 6 digits of your OTP.

Send OTP

Resend OTP

Submit

Forgot Password

Please enter your new password

New Password

******

Confirm Password

******

Submit

Message

Your password has been successfully changed.

OK
16 FORGOT USERNAME

Procedure

b) 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).

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

d) 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.

e) 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.

Illustration:
**Forgot Username**

Please enter ID or Passport number and contact details

- **Call Number**
  0833333333

- **Email**
  cena@test.co.za

**Are you a South African Citizen?**

- **Yes**
- **No**

**Foreign ID / Passport Number**

123456789CE

**Tax Number Linked to the Username**

Continue

**One Time Pin**

OTP has been sent to the following email

CE**@T**.CO.ZA

Pin expires in 02:50

1 1 1 1 6

Please enter the last 6 digits of your OTP.

Resend OTP  Submit

**Forgot Username**

Please enter your new password

Your username is:

CENA@TEST.CO.ZA

**Message**

Your password has been successfully changed.

OK

New Password

Confirm Password
17 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 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).