HOW TO REGISTER, MANAGE USERS AND CHANGE USER PASSWORD ON eFILING
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1 PURPOSE

- The purpose of this document is to assist clients in registering and using eFiling. eFiling is an electronic tool designed by SARS to offer electronic services such as filing tax returns, making payments and accessing accounts to name a few. In addition, eFiling can be viewed as a tool that allows taxpayers to have ownership and management of their tax accounts. This guide will demonstrate the following:
  - How to register various profiles (Individual, Tax Practitioner and Organisation) for the use of eFiling;
  - How to activate various tax accounts on eFiling;
  - How to administer and manage users of the profiles; and
  - How to change login details.

- 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

- One of the issues that emerged from SARS customer satisfaction research is that the public often dreads standing in long queues, filling in paperwork and visiting SARS branches. The introduction of an electronic filing system, called eFiling, was to address these issues, while ensuring that the services SARS provides are efficient and convenient for the taxpayer and make use of the most recent technology available.

- 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.

3 DESCRIBING THE EFILING SYSTEM

3.1 OVERVIEW

- SARS eFiling is a free, electronic service that allows individual taxpayers, tax practitioners and businesses to submit tax returns, make payments and interact with SARS in a secure, online environment. To access this software, you have to be registered. Once registered, eFilers can submit returns, view their tax status and make payments to SARS electronically 24 hours a day. This section of the guide will aid you in understanding the software and describing it by listing the benefits of using eFiling.

3.2 WHAT IS eFILING?

- eFiling is an electronic channel which can be used for a variety of functions by taxpayers interacting with SARS. Since the software is online, almost everything relating to submission and processing occurs in real-time. This implies that when a taxpayer files their income tax return via eFiling, it is submitted and processed in real time as though he/she submitted it via the SARS branch channel.

- The software has various functions which offer a variety of services to taxpayers. However, since SARS values taxpayers and protects their tax accounts, not all services are offered online. Services such as change of banking details must be done
3.3 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)
  - Personal Income Tax (ITR12)
  - Trusts (IT12R)
  - Advanced Tax Ruling (ATR)
  - Change of Personal Details (IT77/RFC)
  - Additional Payments
  - Request for Tax Clearance Certificate
  - Request for Tax Directive
  - Transfer Duty
  - Stamp Duty
  - Security Transfer Tax (STT)
  - Tax Practitioner Registration
  - VAT Vendor Search
  - Notification Tool
  - Tax Calculators
  - Complete history of eFiling usage
  - Customs payments
  - Air Passenger Tax payments

- SARS intends to expand the services offered through eFiling as the service matures; thus this list may expand in coming years.

3.4 BENEFITS OF USING eFILING

- eFilers are given more time to make their submissions as appose to manual submissions.

- eFilers have a full history of all submissions, payments and electronic correspondence available at the click of a button.

- eFilers can receive SMS and email notifications to remind them when submissions are due.

- The simplicity of the process results in fewer errors.

- As it is an electronic channel, there is a faster turnaround time for most processes on eFiling.

- eFilers can use the tax calculator function to receive a pre-assessment of their submission before a final assessment is done.

3.5 DOCUMENTATION REQUIRED TO REGISTER ON eFILING

- To complete the registration process, the following documentation is required:
  - Tax registration number/s
  - Identity number

at a SARS branch.
3.6 WHO CAN REGISTER FOR THE USE OF eFILING

- To enjoy the full benefits and convenience of using eFiling, the potential eFiler (individual, organisation or tax practitioner) must be registered with SARS for at least one tax type such as income tax. This registration must be done at your SARS branch. The potential eFiler will be issued with an income tax reference number. Once the potential eFiler has been registered with SARS, he/she may then register on eFiling for the use of the system. Below are the various definitions of the profiles that may register on eFiling:

- Individuals
  - An individual refers to individuals operating in their personal capacity.

- Tax practitioners
  - A tax practitioner refers to individuals that submit returns on behalf of other individuals or businesses and are registered with both SARS and an official Registered Controlling Body as a tax practitioner.

- Organisations
  - An Organisation refers to an individual that submits returns on behalf of the company for which they work.

Note:
- An eFiler cannot move between profiles, for example an individual cannot be an organization. You either login as an individual or organization.
- Taxpayers may give rights to tax preparers/tax practitioners to access their eFiling profiles. However, they too must be registered and linked to the taxpayer on eFiling. For more on this, refer to the following guide on the SARS website www.sars.gov.za:
  - Guide for Tax Practitioners on eFiling - External Guide

4 REGISTRATION ON EFILING

4.1 OVERVIEW

- To access eFiling, the taxpayer must be registered. Registration involves the process where a potential eFiler provides SARS with the necessary information which will be validated and accepted by SARS. The registration process allows the user to obtain login details which should be used when accessing eFiling.

- It is imperative that the potential eFiler submits accurate information when initially registering for income tax. This will allow the registration and validation process to be quick. If your details have changed, visit the branch office and provide SARS with your most recent banking and personal information with regards to your income tax. It takes approximately 24 hours after registration for a login to be created and sent to the eFiler.
If invalid information is provided for submission purposes, the registration process may require the potential eFiler to provide additional information. Communication will be made to the potential eFiler in a form of a letter requesting him/her to visit the SARS branch with particular documentation. To enquire on the progress after submission, potential eFilers may call the SARS Contact Centre.

This is to validate whether the information provided is correct and forms part of the process of protecting taxpayers from fraud.

**Note:**

- Ensure that the documents mentioned in section 3.5 above are at hand as the information will be required.
- We advise the potential eFiler to visit SARS branch and update his/her personal and banking details with the most recent details before registering for the use of eFiling.

### 4.2 REGISTER ON eFILING

- Access the following web address [www.sarsefiling.co.za](http://www.sarsefiling.co.za)
- The following screen will be displayed

  ![Register on eFiling Screen](image)

- Click on *Register* on the top right corner of the screen
The following screen will be displayed

The screen displayed has three registration profiles: Individuals, Tax Practitioners and Organisations.

Terms and conditions should be accepted for all registration profiles.

Make a selection by clicking on the arrow below the appropriate profile. Refer to section 3.6 for profile definitions.

4.2.1 INDIVIDUALS

If For Individuals is selected, the Registration Process screen will appear:
Read and note the registration process steps and the terms and conditions.

Once you have read through the terms and conditions, click on the check box I Accept and click on Continue.

The User login information page will be displayed.

Click on: I wish to register as an Individual

Note and read through the pop up message and click on the appropriate response (OK to continue or Cancel to register as tax practitioner or organisation).

If you clicked on OK, an Individual User – Quick Registration form will be generated.
• Fill in the appropriate blanks on the form
• Ensure that banking details filled on the form are correct
• On the login details screen, edit the form with your preferred login details and password
• Take note of your response to the security questions
• Type in the security PIN and click on Register. However, to cancel the registration process click on Cancel Register.

• Ensure that the login details which appear on the next screen are kept safe as they will be reused for login purposes.

• Once you have completed your registration and if the registration process was successful, the following screen will be displayed:

• Note that communication in a form of an email and SMS will be sent to the successfully registered individual.

4.2.2 TAX PRACTITIONER

• If For tax practitioner was selected, this will lead you to the Registration Process screen. Note and read through the registration process steps and Terms and Conditions.
• Once you have read through the terms and conditions, click on the check box **I accept** and click on **Continue**.

• The **User login Information** page will be displayed.

• Click on: **I wish to register as a Tax practitioner**.

![User Login Information](image1)

• On the login details screen, edit the form with your preferred login details and password.

• Take note of your response to the security questions.

![Login Details](image2)
• Click on Register

• Fill in the required information on the form that appears.

• Select the appropriate tax types that you wish to register for.
Once completed, click on Register.

Once the registration process has been successful, the following screen will be displayed.

Take note that the tax practitioner is required to click on Print summary in order to print and sign the “Declaration to eFile”. Email the Declaration, copy of his/her ID or passport and a full and complete Power of Attorney to efilingregistrations@sars.gov.za.
• When you click on ‘Finish’, the following message will be displayed. Ensure that documentation is submitted to SARS to avoid delay in the registration process.

4.2.3 ORGANISATION

• If For organisation was selected, this will lead you to the Registration Process screen. Note and read through the registration process steps and Terms and Conditions.

• Once you have read through the terms and conditions, click on the check box I accept and click on Continue.

• Click on: I wish to register as a Company.

• On the login details screen, edit the form with your preferred login details and password.

• Remember to take note of your response to the security questions.
• Click on Register
Fill in the required information on the form that appears.
- Continue to fill in the required information.
- Click on the appropriate tax product for which you wish to register.
• Once completed, click on Register.

• If the registration has been successful the following screen will be displayed.

  ![SARS eFiling Registration Screen]

  Thank you for registering on SARS eFiling.

  Your Login Name is:

  Please make a note of your unique login name for future use.

  In order to finalize your registration you should complete these three steps:

  1. Click on the PRINT SUMMARY button to print the "Declaration to eFile".
  2. Sign the "Declaration to eFile".
  3. Email the signed "Declaration to eFile", a copy of your ID or passport and a full and complete Power of Attorney to efilingregistrations@sars.gov.za.

  We will pre-activate your account while we await the signed Declaration to eFile, a copy of your ID or passport and the Power of Attorney. The pre-activation will enable you to navigate through our site. We will require an additional step to the system or submit tax returns until we have received the signed "Declaration to eFile", your ID or passport copy and the full and complete Power of Attorney.

  Once we have fully activated your account you will have access to the full range of SARS eFiling services and we will register you at SARS for electronic submissions.

  To register additional companies, please log into SARS eFiling, click on the Organisation menu and use the left hand side menu items to "Register New".

  To register additional users, please await our confirmation of full activation, log into SARS eFiling, click on the User menu and use the left hand side menu items to "Register New".

  Please note: Should there be a need to access the "Declaration to eFile" at a later stage, you can log on and print it again from the "Summary" menu in the Organisation section.

  Please click on the Finish button below in order to begin the SARS eFiling system.

• Take note that the representative of the organisation is required to click on Print summary in order to print and sign the “Declaration to eFile”. Email the Declaration, copy of his/her ID or passport and a full and complete Power of Attorney to efilingregistrations@sars.gov.za.

• When you click on ‘Finish’, the following message will be displayed. Ensure that documentation is submitted to SARS to avoid delay in the registration process.
4.3 THINGS TO NOTE DURING REGISTRATION

4.3.1 FINALISATION OF REGISTRATION

- Once your particulars have been submitted and your eFiling registration need to be authenticated, SARS may request you to submit supporting documents in order to finalise your registration. If this is required, SARS will communicate with you via email or where no email address has been provided, your temporary SARS profile.

- Typically, your ID, proof of address and banking details will be required as supporting documents. These supporting documents must be submitted at a SARS branch. The communication which you will receive from SARS will indicate which documents are required; once all the required information and documents have been received you will receive feedback from SARS within 72 hours detailing the outcome of your registration.

- To view the feedback notification on eFiling, you will need to login to eFiling and proceed as follows:

  - Click on Organisations displayed on the main menu,
  - Click on Organisation displayed on the left menu
  - Click on Pending registration
  - The following screen will be displayed:

  ![SARS eFiling](image)

- Click on View to display the notification

▲ Note that the Status column is to inform you of the status of your registration process.

▲ The status could be one of the following:

  - **Supporting documents required** – This means that supporting documents are required from you by SARS. The documents that must be submitted will be specified on the notification issued.
  - **Rejected** – The registration has been rejected.
  - **Registration activated** – The registration was successful.
• Note that if the registration status is either supporting documents required or rejection, this indicates that your eFiling registration is still incomplete. This results in you not being able to submit returns or make use of eFiling. For clarification on the status of your eFiling registration, kindly call the on 0800007277.

4.3.2 ERROR MESSAGES

• This section lists the various error messages that could appear whilst registering for the use of eFiling. This will usually be as a result of invalid information submitted to SARS. If you get these error messages, we advise the taxpayer to visit SARS to update their profile with your most recent profile information. This includes your banking details as well. Listed below are the error messages.

![Individual User - Quick Registration]

We were not able to match the captured information against that which we have on record for you.
Please confirm your information, recapture your password and then select the 'Continue with Registration' button below to proceed with the registration process if you are confident your information is correct. If you are uncertain please contact our call centre.

![Individual User - Quick Registration]

You are attempting to register a new SARS eFiling account!
The ID/Passport number which you have entered is already associated with an existing SARS eFiling Taxpayer and User account.

• Because you have an existing Individual User profile, you will not be allowed to re-register.
• Select 'Cancel Registration' to log into your existing profile.
• You can then add the required tax type if it does not already exist against a different user, perform a transfer from the holding tax user if it exists against his/her profile, or you can share the access of your tax type with the other user.
• To add a tax type, select the 'Tax Types' option from the Home menu once logged into eFiling.
• To perform a transfer of a tax type, select the 'Remove Tax Practitioner Access' button within the 'Tax Types' option from the Home menu once logged into eFiling.
• Where applicable, you may transfer both your IT and/or PTAX tax types in one transfer process where they both exist against the same holding tax user.
• Where each of the tax types exist against a different User, you will need to perform separate transfers.
• To obtain a shared access to your tax type, select the 'Obtain Shared Access' button within the 'Tax Types' option from the Home menu once logged into eFiling.
• If you have forgotten your login credentials, please contact our helpdesk on 0800 00 SARS (7277), send an email to support@sarsefiling.co.za or select the Forgotten Login Details link from the Login page.

• Take note of the contents of the message as it will reveal what the issue is and how to proceed further with your registration.

4.3.3 ACCESS TO MY PROFILE

• Where an eFiling profile has already been created by your tax practitioner and you require your own profile, you must register by selecting the individual profile option. In order to do this, follow the registration process described above. You will however receive an error message as displayed in section 4.3.2.

• This section will unpack how you can continue to register for eFiling as an individual and how you can control the access of your profile by your tax practitioner.

• Login to eFiling
• The following screen will be displayed

![Screen shot of SARS eFiling access to my profile](image)

• If you click on ‘Obtain View Only Shared Access’ the system will only allow the eFiler to view the screen, this implies that the eFiler will not be able to file returns or do any transactions on eFiling.

• If you click on Obtain Full Shared Access Ability, the user will have full shared access.

• If you click on Deactivate Tax Type, this option will deactivate the tax type you have selected.

• Refer to the following guide for linking the tax practitioner to your profile: Guide for Tax Practitioners on eFiling - External Guide

5 ACTIVATION OF YOUR TAX PRODUCTS ON eFILING

5.1 OVERVIEW

• After having successfully registered for eFiling, taxpayers are required to activate various tax types for completion and submission on eFiling. The activation step requires the taxpayer to indicate on eFiling, which tax type/s he/she is registering for. This will result in various forms/returns being created for completion and submission via eFiling for the eFiler.

• This section will take the eFiler through the basic principles on how to activate various tax types for the completion and submission of returns via eFiling. Ensure that this section is completed accurately for future and current eFiling submissions returns.

5.2 ACTIVATION ON eFILING

5.2.1 INDIVIDUAL

• Go to the SARS eFiling web page: www.sarsefiling.co.za

• Click on the icon LOGIN.
- Type in your login details and password.

- The eFiler should land on the following page.

- If the eFiler did not land on the page displayed above, another option is to click on Home.

- Click on User.
Click on **Tax Types**

Once you have checked the appropriate tax type, inserted the reference number and the tax office number, click on **Register**.

**Note that the Tax Office is the Branch office area where the taxpayer registered with SARS**

Under the Customs Registration tab, the Customs Sufficient Knowledge functionality will be available. Refer to the Customs Sufficient Knowledge external guide on the SARS website for more information regarding this function.

The following screen should be displayed which shows that the system is processing your information:
This will lead you to the Income Tax Work Page screen.

- Take note of the message displayed on the screen. After having read it, click OK
- The following screen will be displayed:
Note the content of the pop-up message and select the appropriate option.

5.2.2 ORGANISATION

- Login on eFiling as an organisation.
- Click on Organisations.
- Click on Organisation.
- Click as Organisation Tax types.
- The following screen will be displayed.
Check/Click the appropriate tax product.

Insert the **Reference Number** and the **Tax Office** area at which income tax was registered.

*Note that the reference number is your Income Tax number and the tax office is the geographical location of where you registered for Income Tax.*

Once done, click **Register** below the screen to finalise the activation process.

### 5.2.3 TAX PRACTITIONER

- Go to the SARS eFiling web page: www.sarsefiling.co.za.
- Login on eFiling
- Click on **Organisations**
- Click on **Organisation**
Click on Organisation Tax types

- Click on the appropriate tax product of your choice.
- Insert the Reference Number and the Tax Office area at which income tax was registered.

Note that the reference number is your Income Tax number and the tax office is the geographical location of where you registered for Income Tax.

- Once done, click on Register below the screen to finalise the activation process.
- Once activated the status will indicate that the tax type selected has been successfully activated.

**5.2.4 ACTIVATION FINALIZATION**

- Taxpayers may view the activation as well as the status of the tax type in question by clicking Organisation Tax Types to view the status displayed next to the tax type of interest. If the status is pending, the tax type has not been activated yet and is still in the authentication process.

- During the activation process, validation is done to determine the accuracy of the tax type being activated. This might result in supporting documentation being required from you. Notification of the outcome of the validation process can be obtained on eFiling by navigating as follows:
  - Login on eFiling
  - Click Organisations, displayed on the main menu
  - Click Organisation, displayed on the left menu
  - Click Organisation Tax Types

- The following screen will be displayed:
The ‘Status’ column communicates the progress of the activation process for all tax types.

Click on the ‘Open’ hyperlink, to display the Registration work page.

Click on Case number to open the notification.

The Query status button will display the status of the activation process.
In some instances supporting documents may be required, this will be displayed as follows:

- You are expected to upload the supporting documents detailed on the notification letter. To view the notification letter click on View displayed on the Letter Description row. Note that if the required supporting documents are larger than 5MB, the eFiler must submit the supporting documents at their nearest SARS branch.

To upload the supporting documents proceed as follows:

- Click on Documents for Registration displayed on the Supporting documents row
- The Supporting Documents for Registration of Tax Types page will be displayed
• Click **Browse** to search for the necessary documents on your PC.

• Once found, click **Upload**

• The following screen will be displayed

• When all the documents required have been uploaded, click **Submit to SARS**.

• Click on the **Manually Submitted** button if the supporting documents have been submitted manually at a SARS Branch.

• Click **Back** to return to the previous screen.

• Once submitted, the following screen will be displayed
6  MANAGE YOUR eFILING USERS

6.1  OVERVIEW

- Tax preparation is the process of preparing tax returns, for another person. Tax preparation may be done by a licensed professional such as an attorney, certified public accountant or enrolled agent, or by an unlicensed tax preparation business. An eFiler across all the various eFiling profiles may give certain individuals certain rights on their accounts. However only the owner of the account may file/submit returns to SARS. This section will guide you on how to manage users on your account via eFiling.

6.2  MANAGE USERS ON eFILING

6.2.1  TAX PRACTITIONER

- Login to eFiling
- Click Home
- Click on User
- Click on **Register New**

- Fill in the details of the new/additional user

- Make the necessary selection of the user roles by clicking on the appropriate roles that the user should have.

- Once done, click on **Continue**
- The screen will display the information inserted
- Click on **Continue**
- To manage your group, proceed as follows:
  - Click on **Organisation**
  - Click on **Rights Groups**
  - Click on **Manage Group**
  - The **Update Group Details** page will be displayed; ensure that the appropriate check box is selected
• Click on Update

The Add Taxpayers to Group screen will be displayed

This screen displays information about the group that has access to the organisation

The user can either select Save to save the information or click Back to proceed to the previous page.

7 CHANGE LOGIN AND PASSWORD INFORMATION

This section will illustrate how to change the users' login and password details. The users must be registered for the use of eFiling and recall their login and password. Proceed as follows:

- Login
  - Click on User displayed on the top menu
  - Click on User displayed on the left menu
  - Click on Change Own Password
• Enter relevant details
• Click on **Submit**
• The following screen will be displayed:

![Password Change Screen](image)

• The screen indicates that your password has been successfully changed.
8 CROSS REFERENCES

<table>
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<th>DOCUMENT #</th>
<th>DOCUMENT TITLE</th>
<th>APPLICABILITY</th>
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<tr>
<td>GEN-ELEC-10-G01</td>
<td>Guide for Tax Practitioners on eFiling - External Guide - External</td>
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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 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).