Digital Channels Webinar

South African Revenue Service

Date

eFiling for Organisations

The purpose and SARS Vision 2024

Purpose:
- This presentation is merely to provide information in an easily understandable format and is intended to make the provisions of the legislation more accessible
- The information therefore has no binding legal effect and the relevant legislation must be consulted in the event of any doubt as to the meaning or application of any provision.

SARS Vision

To build a smart modern SARS with unquestionable integrity, trusted and admired by Government, the public, as well as our international peers.
We focus on the following strategic intents:

- **MAKE IT EASY & SIMPLE TO COMPLY**
- **MODERNIZE SYSTEMS TO PROVIDE SEAMLESS ONLINE DIGITAL SERVICES**
- **CREATE AWARENESS, CLARITY & CERTAINTY**
- **MAKE IT HARD TO NOT COMPLY**

South African Revenue Service

Introduction

Introduction

From 1 July 2019 SARS has modernised the eFiling platform to a single user sign on.

- If you have been migrated to the new eFiling platform and 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.
- The Tax Type Transfer process for **Company Tax**, **Personal Income Tax** and **Provisional Tax** has been enhanced to enable ease of transfer of tax types between taxpayers, tax practitioners and registered representatives on eFiling.
  - With this enhancement the approval lies directly with the **Taxpayer (owner of the PIT)** or the **Registered Representative** of the PIT, to transfer the tax type to the requestor.

Agenda / Points of Discussion

- How to Register on eFiling
- How to Manage your Profile on eFiling
- Portfolio Management
- Registered Representative
- Register/Adding a Taxpayer on eFiling
- Manage Tax Types
- Manage Groups
- Activation of a Registered Representative
- Invite User and Delegate Rights
- SARS Online Query System

How to Register on SARS eFiling

YouTube Video

[How to Register on SARS eFiling]

How to Manage your Profile on SARS eFiling

YouTube Video

[How to manage your profile on SARS eFiling]

Portfolio Management

Portfolio Management

This function is used to link, unlink and add various portfolios (roles) on your eFiling profile

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.

YouTube Video

[How to add a new portfolio on SARS eFiling]

Portfolio Management

Portfolios

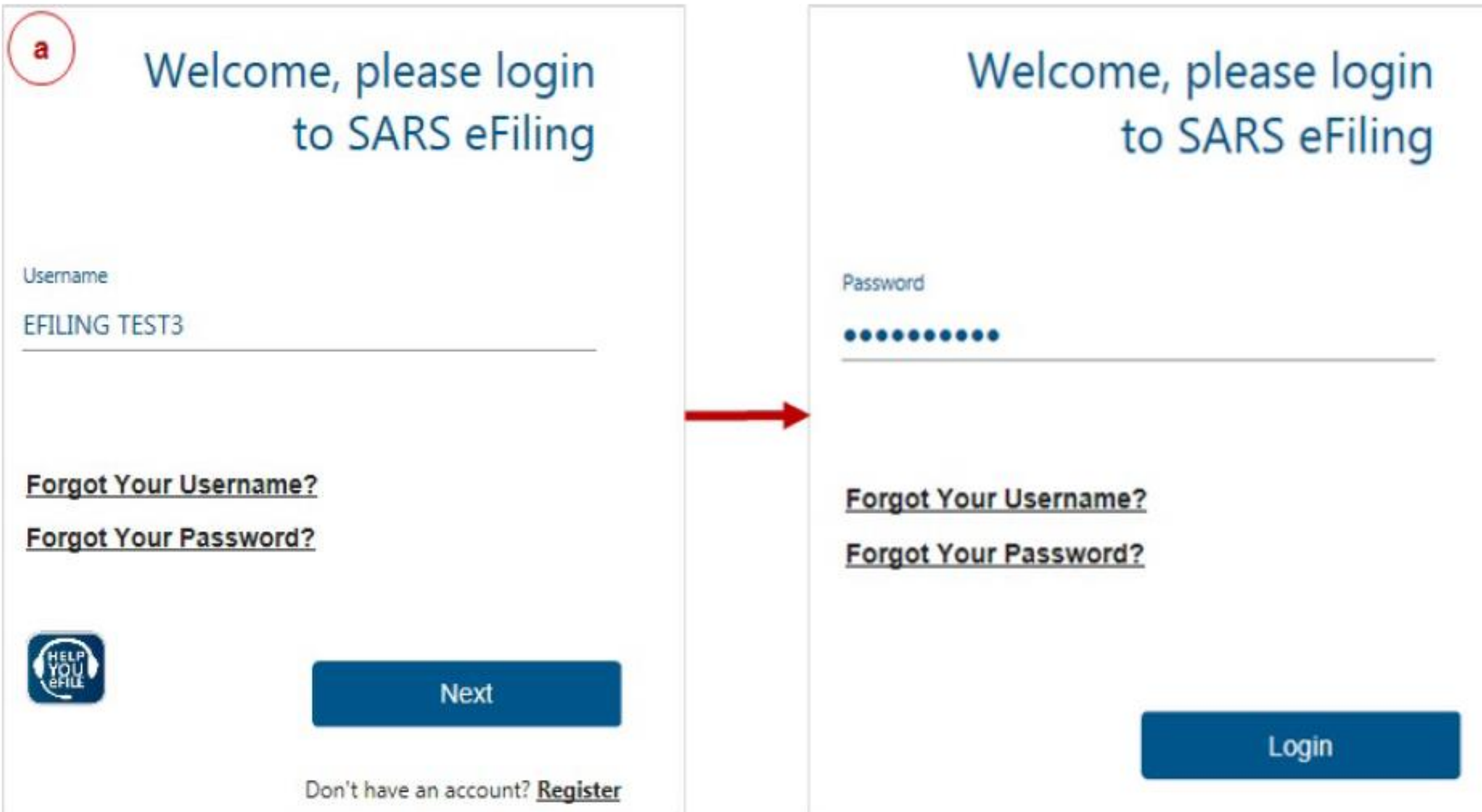
A registered eFiler can act in different “roles” on eFiling. These “roles” are referred to as Portfolio Types. For example:

- **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.

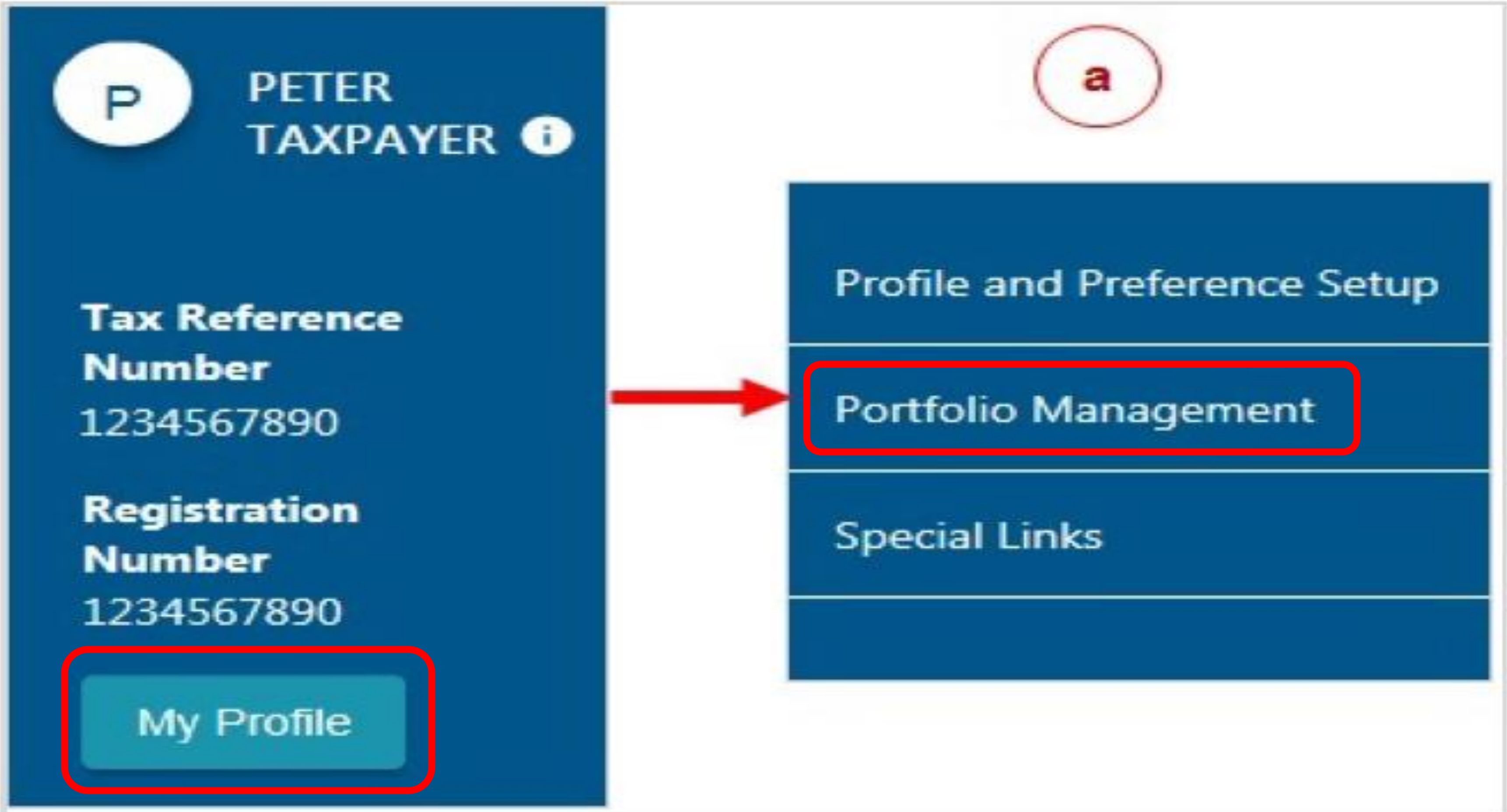
Note: Single login (Primary Username) one username and one password

Portfolio Management

Login to eFiling

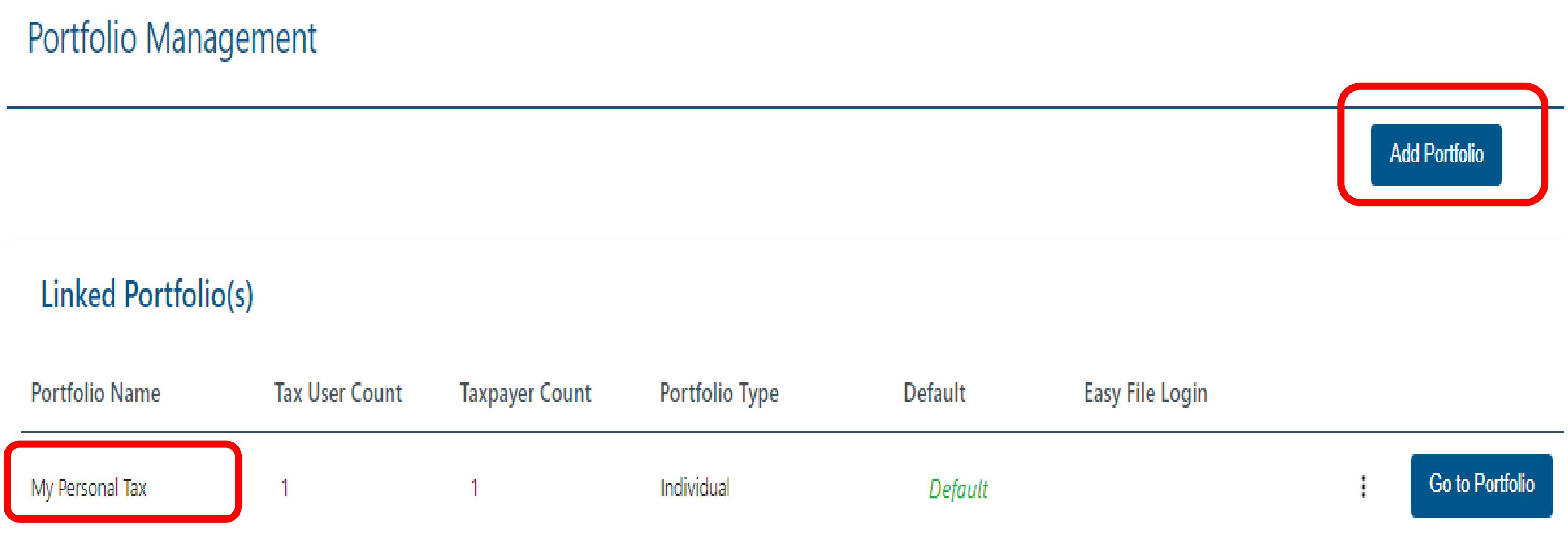


Portfolio Management



Portfolio Management

The Portfolio Management Screen will be displayed for you to add portfolios.



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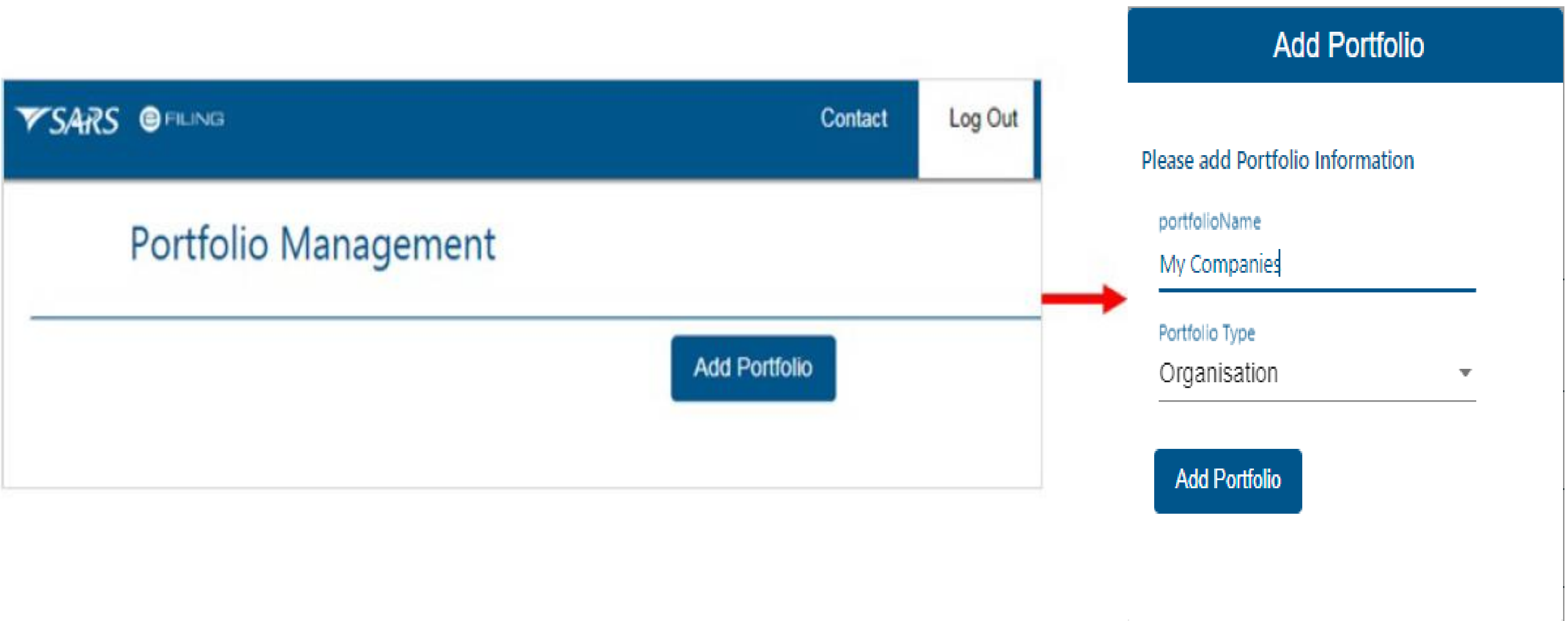
Portfolio Management

To add a new portfolio to your profile, select “Add Portfolio”



Portfolio Management

- You can **rename portfolios** for your ease of reference,
- You can **change the portfolio type AND**
- You can set a **Default Portfolio** so that the system automatically displays this portfolio when you login.

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default		
Test345 - SARS Pty Ltd	2	1	Organisation		⋮	Go to Portfolio
Test123 - Mr Taxpayer	1	1	Individual	*Default*	⋮	Go to Portfolio

Rename
Change Portfolio Type
Set As Default

Please note: Portfolio cannot be deleted

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Registered Representative (RR)

Registered Representative

Who is the Registered Representative?

The list below is the capacity of the Registered Representative:

- **Treasurer – If you are treasurer for the entity;**
- **Curator – If you have been appointed as the Curator for the taxpayer;**
- **Liquidator/ Executor/ Administrator (Estates)**
- **Main Partner – If you are the Main Partner in a partnership**
- **Main Trustee – If you are the Main Trustee of the trust**
- **Public Officer – If you a Public Officer of the company**
- **Main Member – If you are the Main Member of the Close Corporation;**
- **Parent/Guardian – If you are a Parent / Guardian of a child; or**
- **Accounting Officer – If you are an Accounting Officer of the entity.**

Registered Representative

SARS only allows the activation of a Tax Practitioner as a Registered Representative for Individuals in the following circumstances:

Executor acting on behalf of a deceased estate or insolvent estate

Parent acting on behalf of a minor,

Who is the Registered Representative?

Appointed Administrator acting on behalf of a legal incapacitated individual

Appointed Administrator acting on behalf of an individual in extended absence (Imprisoned or Overseas)

Registered Representative

Registering a Registered Representative (RR)

By completing our SARS Online Query System on the SARS website

The Taxpayer needs to book an appointment with SARS via:

- E-Booking system to register as a Registered Representative
- eFiling

Documents to be submitted when appointing a Registered Representative.
https://www.sars.gov.za/client-segments/registered-representatives/

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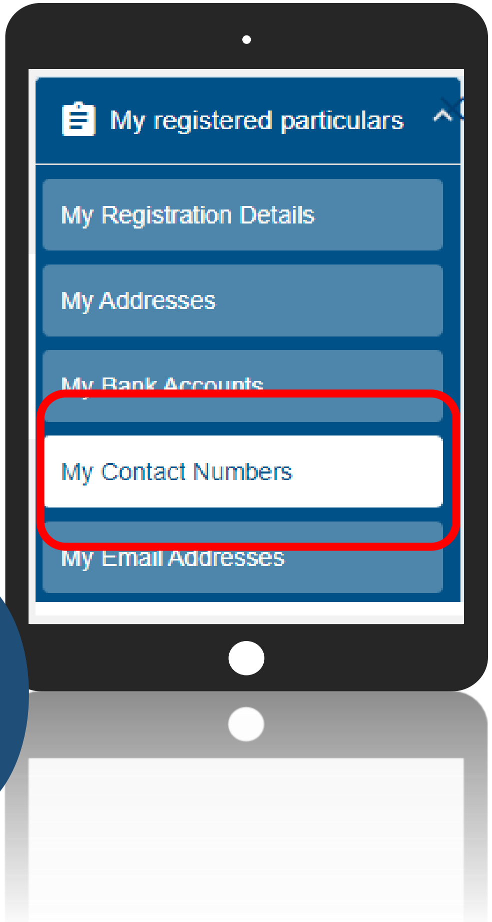
Registered Representative

The Registered Representative must ensure that the represented entity and the representative profiles are merged at SARS

The Registered Representative must also ensure that their **personal contact details (cell phone and email address)** are updated on SARS records.

This is to ensure that the **One Time Pin (OTP)** can be sent to the **Registered Representative** to approve any tax type request or activation.

If the Registered Representative is the registered **eFiler**, contact details can be updated via their **personal** eFiling profiles via the **Registration Amendments and Verification form (RAV01) or their SARS Mobi-App**



Registered Representative

"After registering the Registered Representative it will be indicated on the **"Registration and verification from (RAV01)"** and ticked under **"Representative Taxpayer"**

Parties Representing Me

Surname / Registered Name	First Name	Initials	Appointed Date	Capacity	Representative Taxpayer	Delete
Surname	Name		2015-09-10	PUBLIC OFFICER	X	Delete

This will then allow the Representative to be able to “Activate” the required “Tax Type” of their client.

Registered Representative

What to consider for eFiling to work effectively:

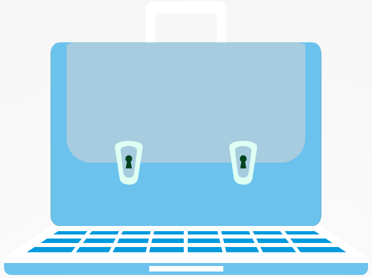
Register yourself as a Registered Representative at SARS.

The entity must be merged (One profile on SARS record**).**

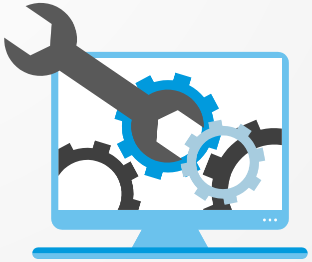
The Registered Representative must be merged (One profile on SARS record**)**

The Registered Representative must have updated or registered a cell phone number and email address on their personal profile at SARS.

Activate Registered Representative on eFiling.



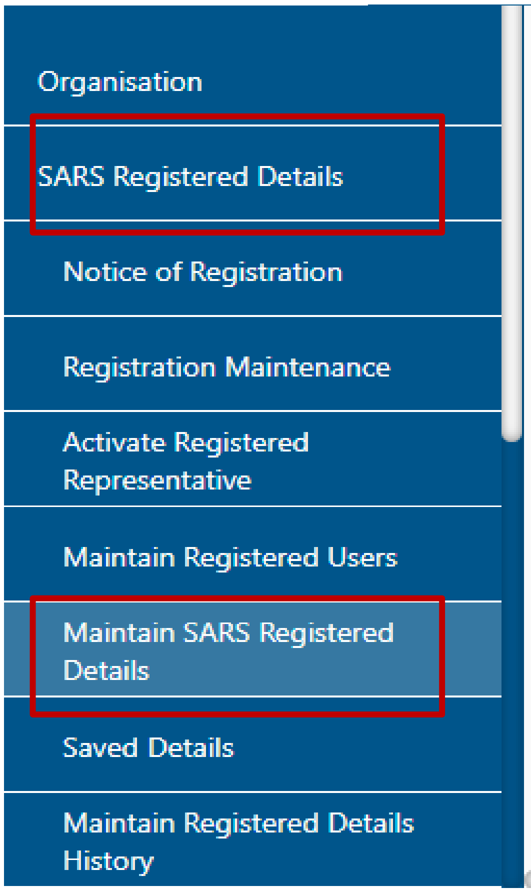
HOW TO REMOVE YOURSELF AS THE REGISTERED REPRESENTATIVE



Remove a Registered Representative

To remove yourself as a Registered Representative:

- Select **"Organisations"** from the top menu

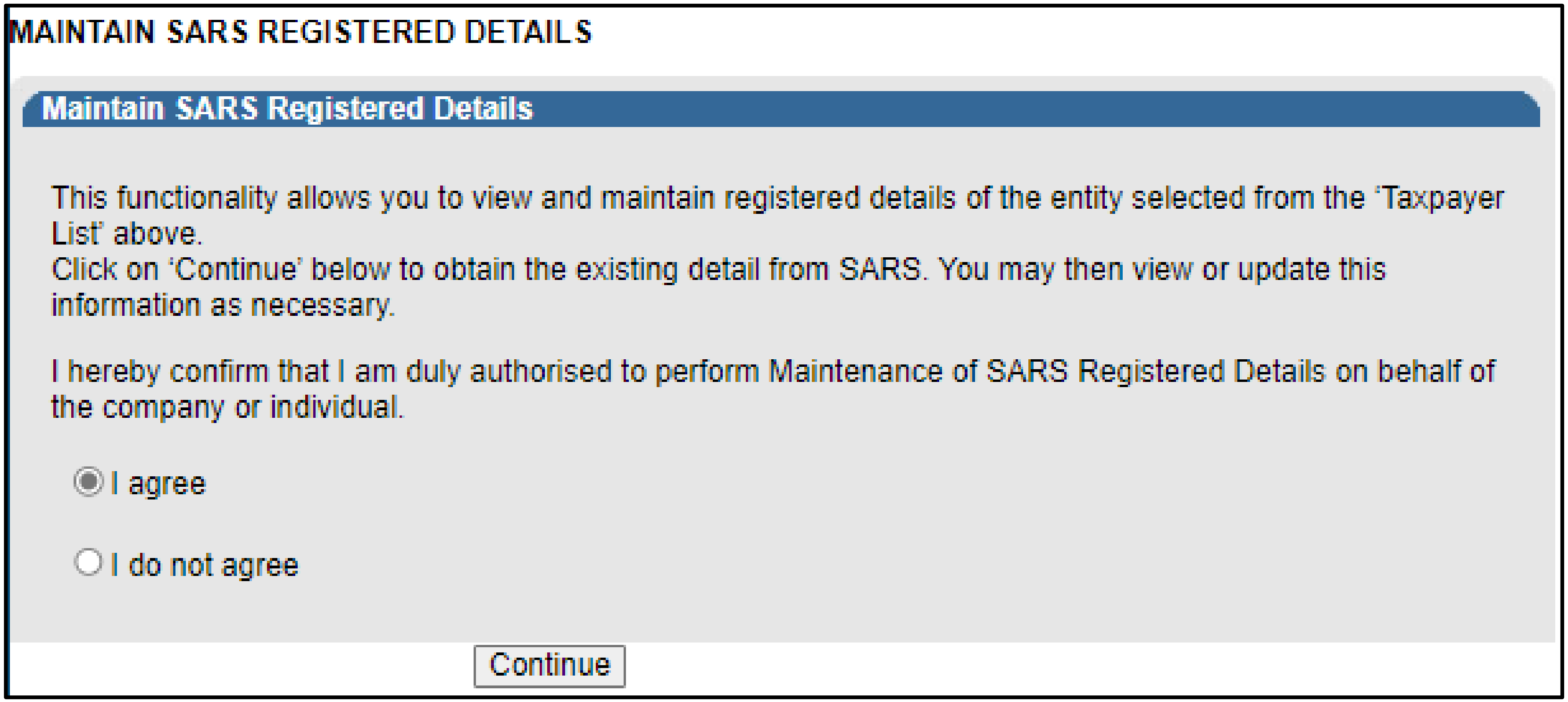


Click on SARS Registered Details

Click on Maintain SARS Registered Details

Remove a Registered Representative

Tick **"I Agree"** to the terms and conditions and click **"Continue"**


MAINTAIN SARS REGISTERED DETAILS

Maintain SARS Registered Details

This functionality allows you to view and maintain registered details of the entity selected from the 'Taxpayer List' above.
Click on 'Continue' below to obtain the existing detail from SARS. You may then view or update this information as necessary.

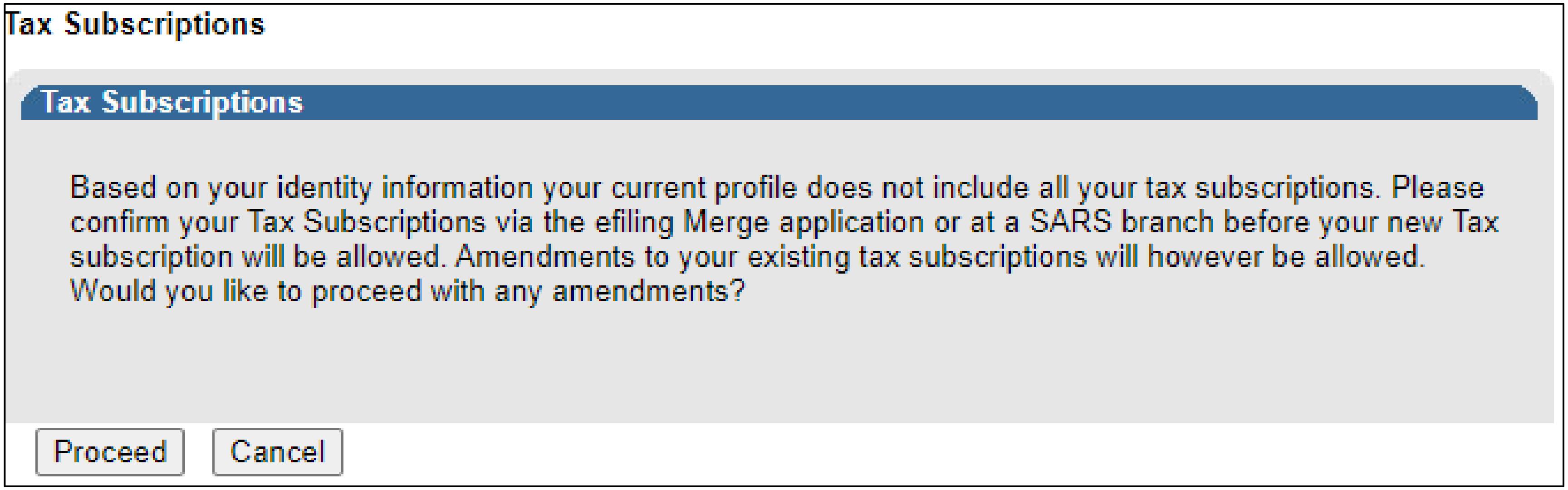
I hereby confirm that I am duly authorised to perform Maintenance of SARS Registered Details on behalf of the company or individual.

- (x) I agree
- ( ) I do not agree

Continue

Remove a Registered Representative

Then click **“Proceed”** to the Tax Subscription screen

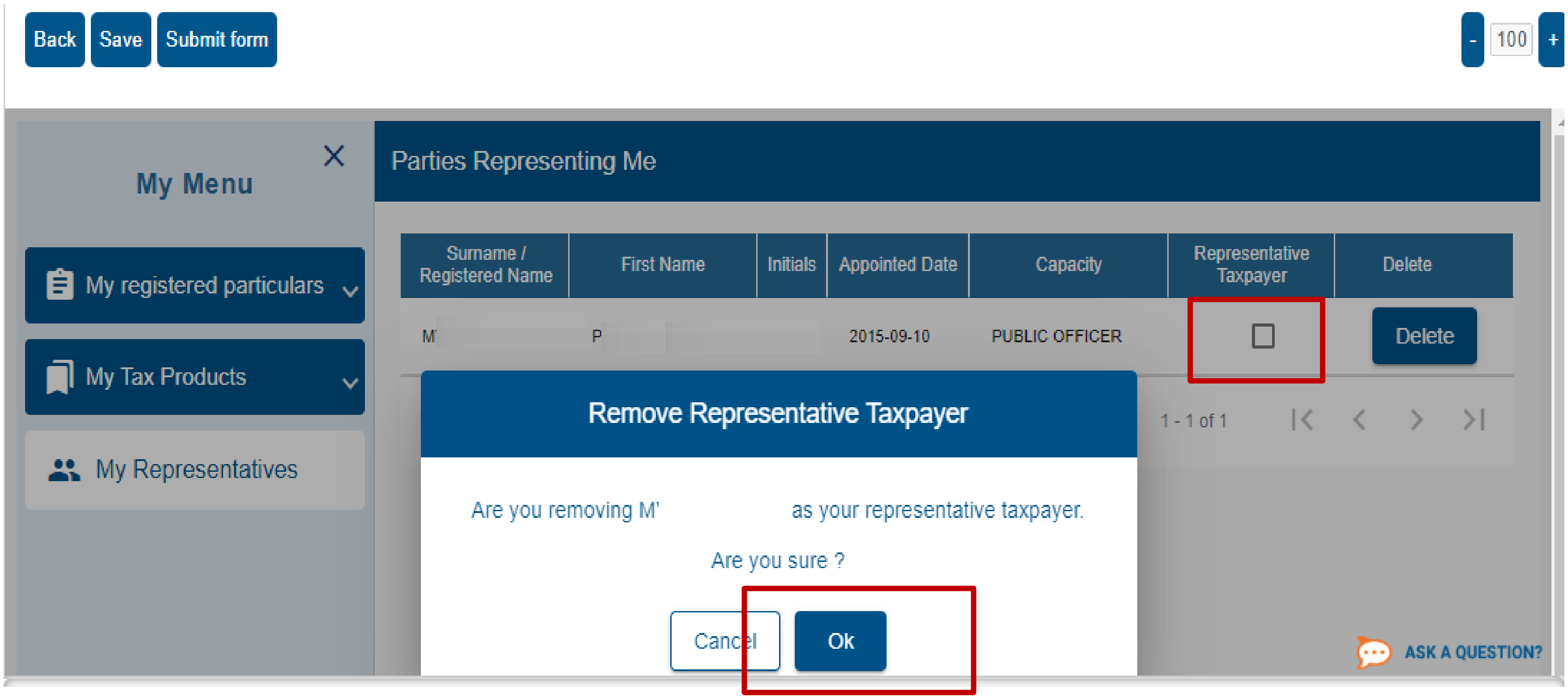


Remove a Registered Representative

The **RAV01** Form will appear, click on **"My Representative"**

Remove a Registered Representative

Untick the **"Representative Taxpayer"** option and then click **"Ok"**



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Remove a Registered Representative

Click the **“Delete”** button

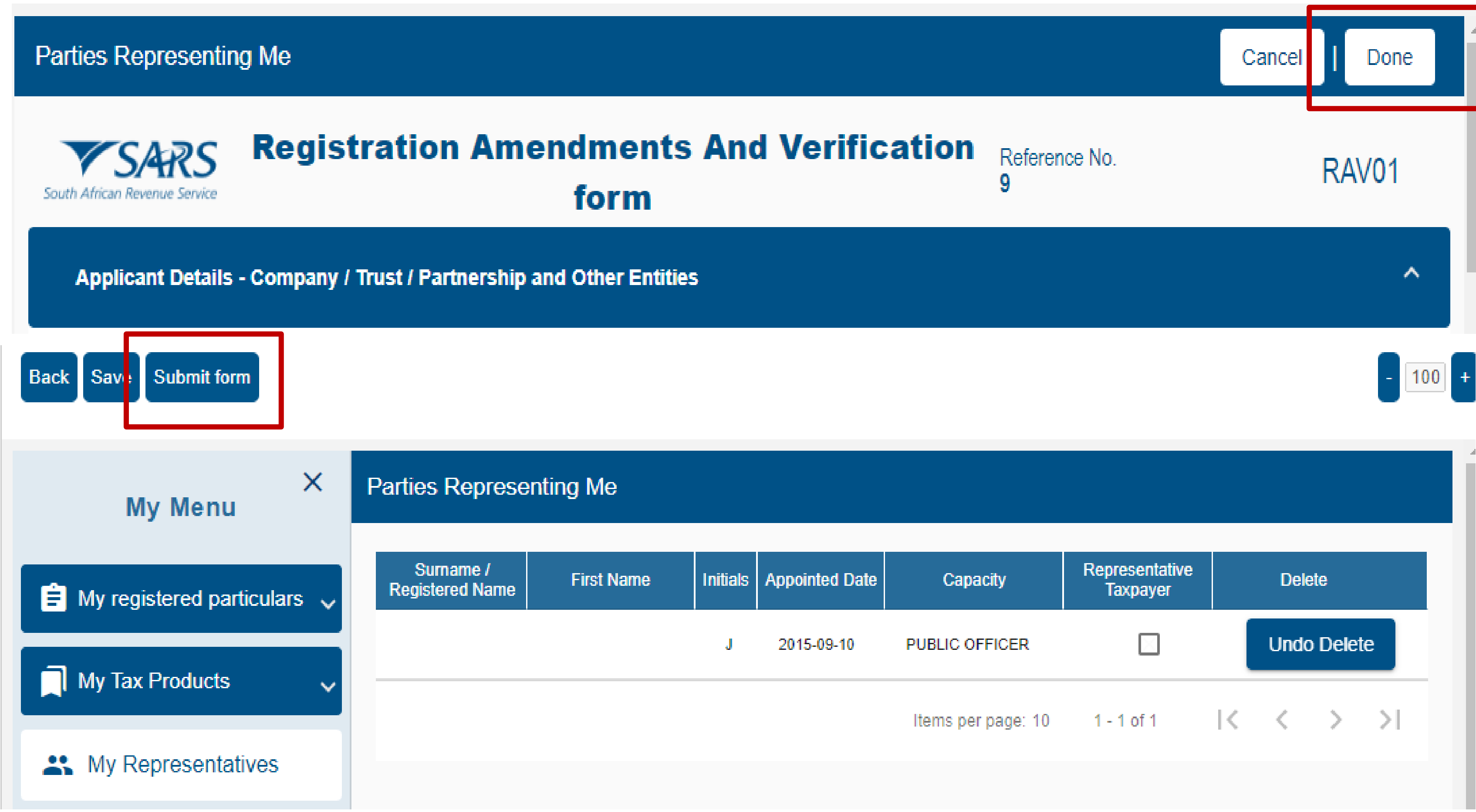
Parties Representing Me

Surname / Registered Name	First Name	Initials	Appointed Date	Capacity	Representative Taxpayer	Delete
M			2015-09-10	PUBLIC OFFICER	☐	Delete

Items per page: 10 1 - 1 of 1

Remove a Registered Representative

Click on the **"Done"** and then **"Submit"**



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Remove a Registered Representative

The confirmation page on the **Registration Work Page** will appear

REGISTRATION WORK PAGE

Legal Entity Details	
Taxpayer Type:	COREG
Trading Name:	M
Registration Number:	2
Tax Reference Number:	9

Legal Entity Name	ID / Registration Number	Status	Status
M	2	Submitted To SARS	

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ADD A COMPANY TO YOUR EXISTING EFILING PROFILE AND MANAGE TAX TYPES

YouTube Video

[How to add a company to your existing eFiling profile and request the transfer of your tax types]

Manage Groups

Manage Groups

Chose the portfolio by clicking on **“Go to Portfolio”**

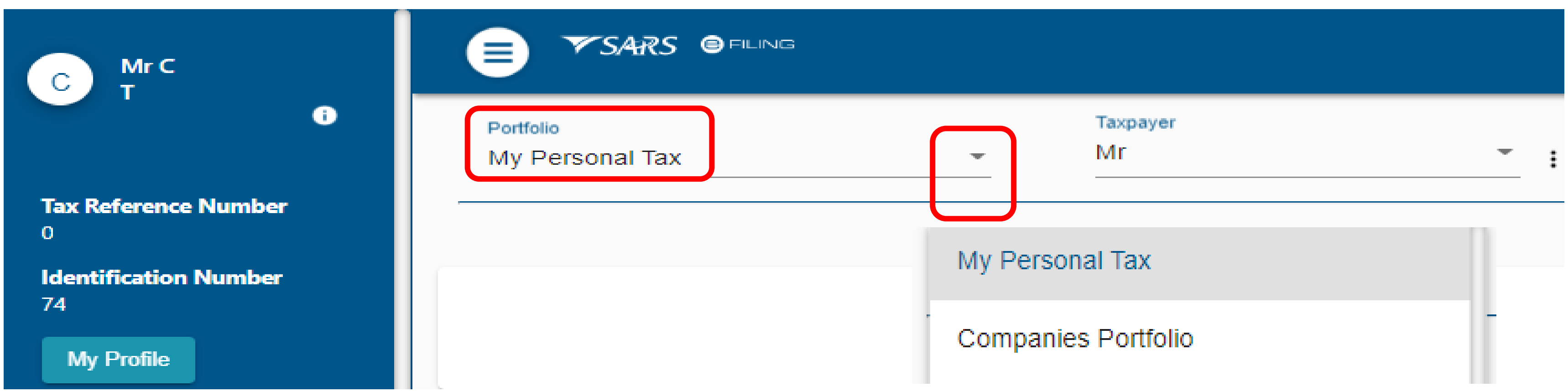
Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	Easy File Login	
My Personal Tax	1	1	Individual	*Default*		Go to Portfolio
My Companies	1	1	Organisation			Go to Portfolio

OR



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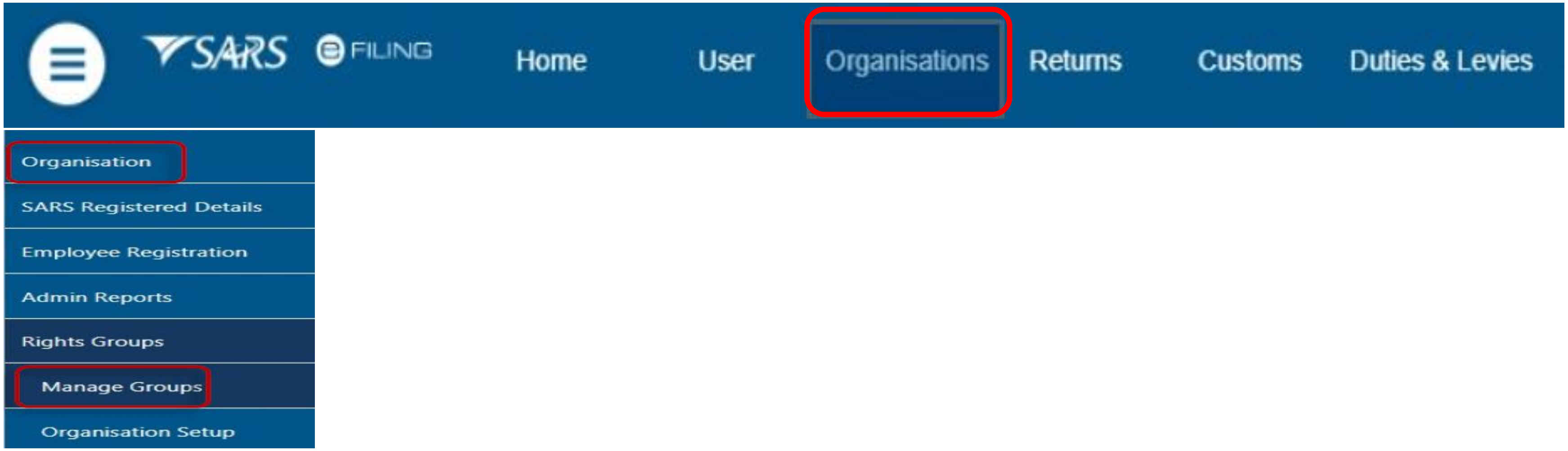
Manage Groups

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 organisation's portfolio.

To activate the tax type functions and services:

- Select "**Organisations"** from the menu on the top
- Select "**Organisation**" again from menu on the left
- Click on "**Rights Group"**
- Click on "**Manage Groups**"



Manage Groups

The "**Group Details**" screen will display.

- Click on the "Setup New Group" button to create a new group (e.g. Return Submissions)

Group Details

Setup New Group

Group Name	Authorisation Level	Access to Payments	Open	Taxpayers	Users
System Default	Submissions	Yes	Open	Manage Payers	Manage Users
1					

Create or Edit the **"Group Name"** where applicable and select the applicable **"Authorisation Level"**

- **View Only**
- **Completions**
- **Submissions**

UPDATE GROUP DETAILS

Group Name	SARS Group
Authorisation Level	Submissions ▾
Access To Payments	☑
Tax Types	☑ Provisional Tax (IRP6) ☑ VAT201 ☑ Organisation Income Tax (ITR14/IT12EI/ITR12T) ☑ Individual Income Tax (ITR12) ☑ Employee's Tax (EMP201) ☑ IT56 - Secondary Tax On Companies (STC) ☑ EMP501 - Submission

Manage Groups

Select the applicable tax types to be activated (e.g., Directives, Tax Reference Number, Tax Compliance Status, etc.)

SARS Group

Submissions ▾

- [x]
- [x] Provisional Tax (IRP6)
- [x] VAT201
- [x] Organisation Income Tax (ITR14/IT12EI/ITR12T)
- [x] Individual Income Tax (ITR12)
- [x] Employee's Tax (EMP201)
- [x] IT56 - Secondary Tax On Companies (STC)
- [x] EMP501 - Submission

- Click on the **"Manage Payers"** hyperlink to add Taxpayers (activated on your organisation's portfolio) to a specific group.

Group Name	Authorisation Level	Access to Payments	Open	Taxpayers	Users
Q Group	Completions	Yes	Open	Manage Payers	Manage Users
Estelle	Completions	Yes	Open	Manage Payers	Manage Users

Add Taxpayers to Group

GROUP INFORMATION

Group Name	Authorisation Level	Payments	Created
Companies	Submissions	Yes	2012/02/24

TAXPAYERS

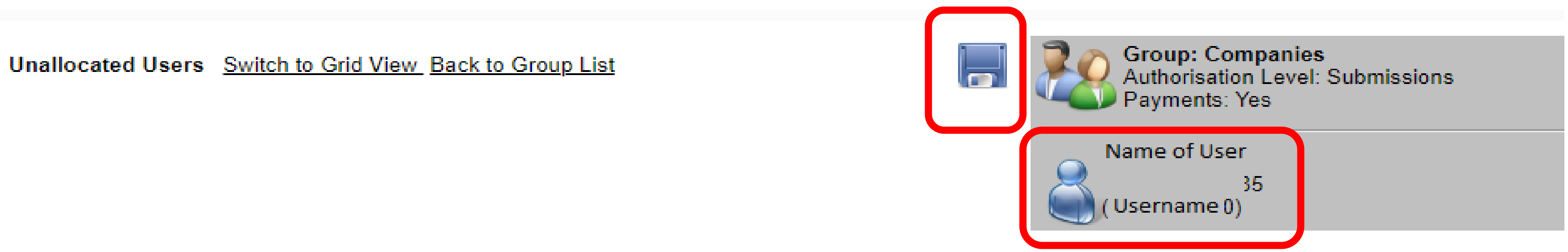
Name	Registration Number	In Group
CAL. 'ELLERS	/08	☑
ENTERPRISE	6/07	☑
CC	/23	☑

Save | Back | Check All | Uncheck All

Manage Groups

Click on the “Manage Users” hyperlink to add users on your organisation’s portfolio to a specific group (for more information refer to the section on manage users).

Group Name	Authorisation Level	Access to Payments	Open	Taxpayers	Users
Q Group	Completions	Yes	Open	Manage Payers	Manage Users
Estelle	Completions	Yes	Open	Manage Payers	Manage Users

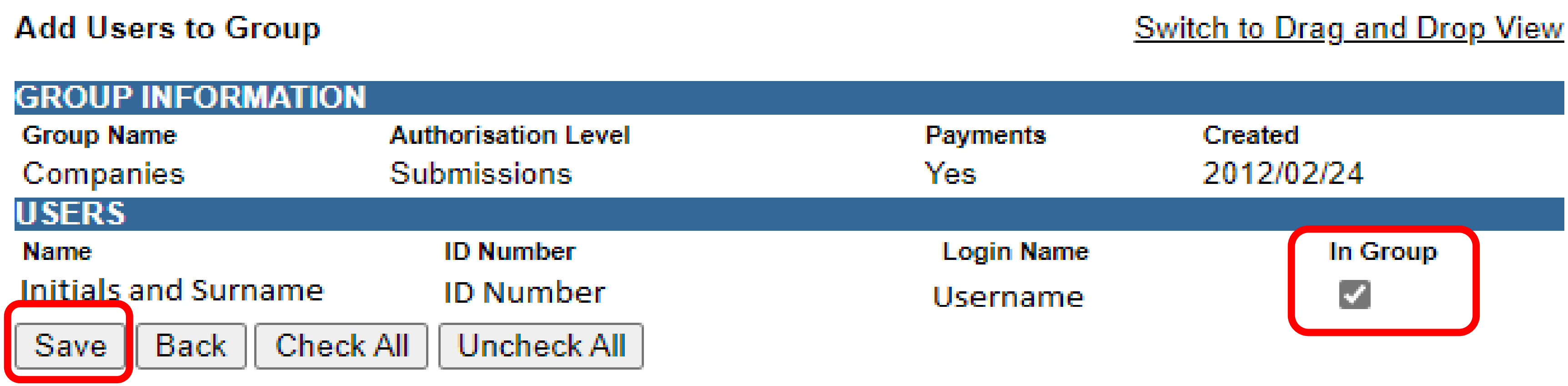


Drag the user into the grey box to give access to the group and then click on the **“Save”** Icon.

Manage Groups

Alternatively, click on “Switch to Grid View”

Select the user to give access to a group under **“In Group”** and then click on **“Save”**



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Manage Groups

To amend the details of an existing group click on the **“Open”** hyperlink:

Group Name	Authorisation Level	Access to Payments	Open	Taxpayers	Users
Q Group	Completions	Yes	Open	Manage Payers	Manage Users
Estelle	Completions	Yes	Open	Manage Payers	Manage Users

Edit the **“Group Name”** where applicable

Select the applicable **“Authorisation Level”**

- **View Only**
- **Completions**
- **Submissions**

UPDATE GROUP DETAILS	
Group Name	SARS Group
Authorisation Level	Submissions
Access To Payments	☑
Tax Types	☑ Provisional Tax (IRP6) ☑ VAT201 ☑ Organisation Income Tax (ITR14/IT12EI/ITR12T) ☑ Individual Income Tax (ITR12) ☑ Employee's Tax (EMP201) ☑ IT56 - Secondary Tax On Companies (STC) ☑ EMP501 - Submission

Select the applicable tax types to be activated (e.g. Directives, Tax Reference Number, Tax Compliance Status, etc.)

Activation of a Registered Representative

Registered Representative Activation

eFiling for Organisation

If you are the Registered Representative for an entity and you have been registered at SARS, you must activate the status on eFiling in order to transact on behalf of your client

- Select **“Organisations”** from the menu on the top
- Select **“SARS Registered Details”** from the menu on the left
- Select **“Activate Registered Representative”**
- Select the applicable option **(i.e. Tax Practitioner or Registered Representative)**
- Agree to the declaration confirming that you are the authorised representative for the taxpayer and click on **“Continue”.**
- Complete the applicable fields and select the representative capacity (e.g. accounting officer, curator, public officer, parent guardian, etc.)
- Click on the activate button at the bottom of the screen

Registered Representative Activation

eFiling for Organisation

If the Registered Representative status is "**Unconfirmed**".

- The Registered Representatives are encouraged to Activate themselves on eFiling.

If the Registered Representative status is **"Awaiting Verification".**

- The Registered Representative details on eFiling did not match those on the SARS records, supporting documents maybe required (To be uploaded via eFiling)

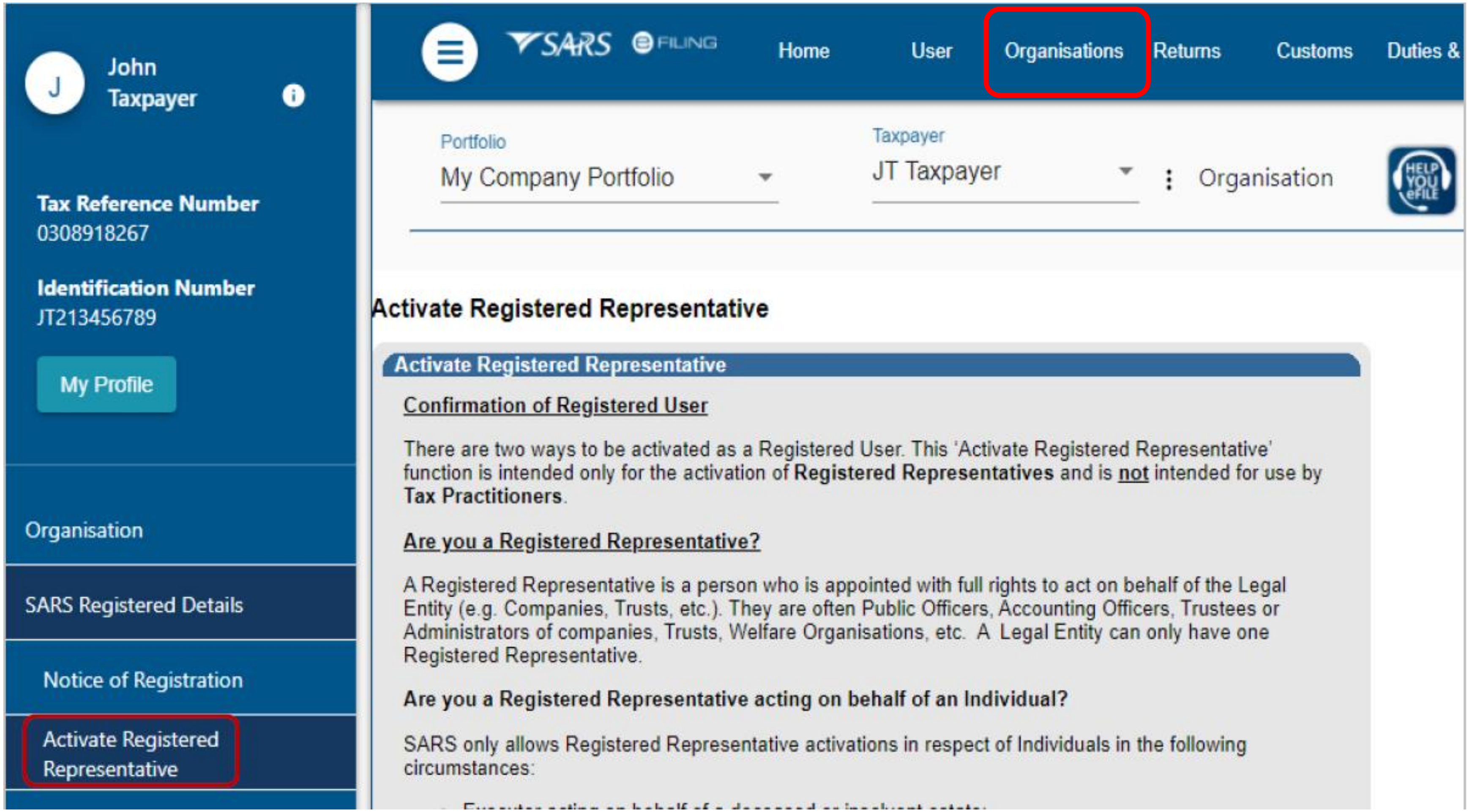
If the Registered Representative status is **"Active".**

- This means that SARS was able to match the records of eFiling with those registered on the SARS system.

Please Note: Registered Representative will have limited **access to the RAV01** for their entities if the status is not indicated as **"Active"**

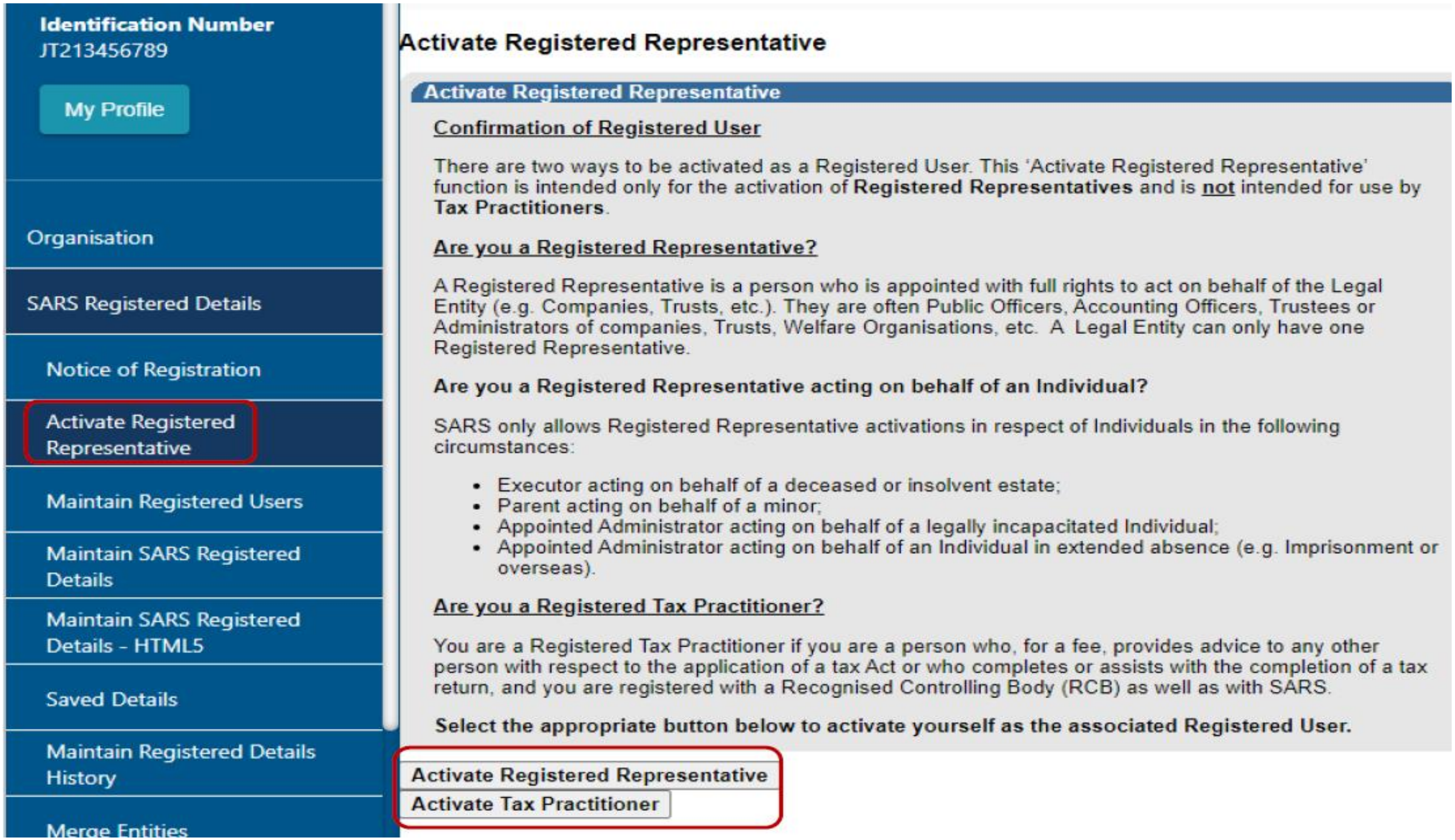
Registered Representative Activation

eFiling for Organisation



Registered Representative Activation

eFiling for Organisation



Identification Number
JT213456789

My Profile

Organisation

SARS Registered Details

Notice of Registration

Activate Registered Representative

Maintain Registered Users

Maintain SARS Registered Details

Maintain SARS Registered Details - HTML5

Saved Details

Maintain Registered Details History

Merge Entities

Activate Registered Representative

Activate Registered Representative

<u>Confirmation of Registered User</u>

There are two ways to be activated as a Registered User. This 'Activate Registered Representative' function is intended only for the activation of **Registered Representatives** and is <u>not</u> intended for use by **Tax Practitioners**.

<u>Are you a Registered Representative?</u>

A Registered Representative is a person who is appointed with full rights to act on behalf of the Legal Entity (e.g. Companies, Trusts, etc.). They are often Public Officers, Accounting Officers, Trustees or Administrators of companies, Trusts, Welfare Organisations, etc. A Legal Entity can only have one Registered Representative.

Are you a Registered Representative acting on behalf of an Individual?

SARS only allows Registered Representative activations in respect of Individuals in the following circumstances:

- Executor acting on behalf of a deceased or insolvent estate;
- Parent acting on behalf of a minor;
- Appointed Administrator acting on behalf of a legally incapacitated Individual;
- Appointed Administrator acting on behalf of an Individual in extended absence (e.g. Imprisonment or overseas).

<u>Are you a Registered Tax Practitioner?</u>

You are a Registered Tax Practitioner if you are a person who, for a fee, provides advice to any other person with respect to the application of a tax Act or who completes or assists with the completion of a tax return, and you are registered with a Recognised Controlling Body (RCB) as well as with SARS.

Select the appropriate button below to activate yourself as the associated Registered User.

Activate Registered Representative

Activate Tax Practitioner

Registered Representative Activation

eFiling for Organisation

The **“Representative Declaration”** screen will display

If you select **“I agree”** the **“Continue”** button will be available to select.
If you select **“I do not agree”**, you will not be able to continue.

Activate Registered Representative

Activate Registered Representative

I, KIM I, ID/Passport number 7 being the authorised Representative Taxpayer of ER A registration number 50 . do hereby confirm that I have been duly appointed by the taxpayer in this capacity, and that my obligations as defined in the relevant legislation include, but are not limited to, the following:

- Maintenance of registered particulars at SARS
- Submission of tax returns
- Payment of amounts due
- Other related obligations

I am fully aware of my personal accountability in this regard and the consequences of any false declaration.

(•) I agree

( ) I do not agree

Continue

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Registered Representative Activation

eFiling for Organisation

The **“Activate Registered Representative”** screen will display

Activate Registered Representative

As the designated Representative of the entity you may obtain a Registered user role and use eFiling to view and maintain all registered details of the entity. Once you have confirmed your details below, you may activate your Registered user status by clicking on the 'Activate Registered Representative' button. To first make changes to your eFiling User details, please click here.

Once activated, you will be assigned with a Registered Representative role on eFiling. This will also allow you to assign this role to other users to perform certain duties on your behalf, such as to submit new registration requests. You may assign the role to other users, revoke their access, as well as revoke your own access via the 'Maintain Registered Users' menu on the left. The right to perform merging of entities cannot be assigned to other users.

Legal Entity Details

TaxPayer Type:	Individual
Registration Number:	51
Registered Name:	Mr
Trading Name:	G

eFiling User Details

Title:	Mr	Initials:	A
First Name:	Anything	Surname:	Something
Identification Type:	South African ID	ID/Passport Number:	88
Cell Number:	0	Telephone Number:	012
Email Address:	@sars.gov.za	Tax Reference Number:	
Activation status on eFiling:	Active	Request Reference Number:	47858624
Capacity:	Please select		

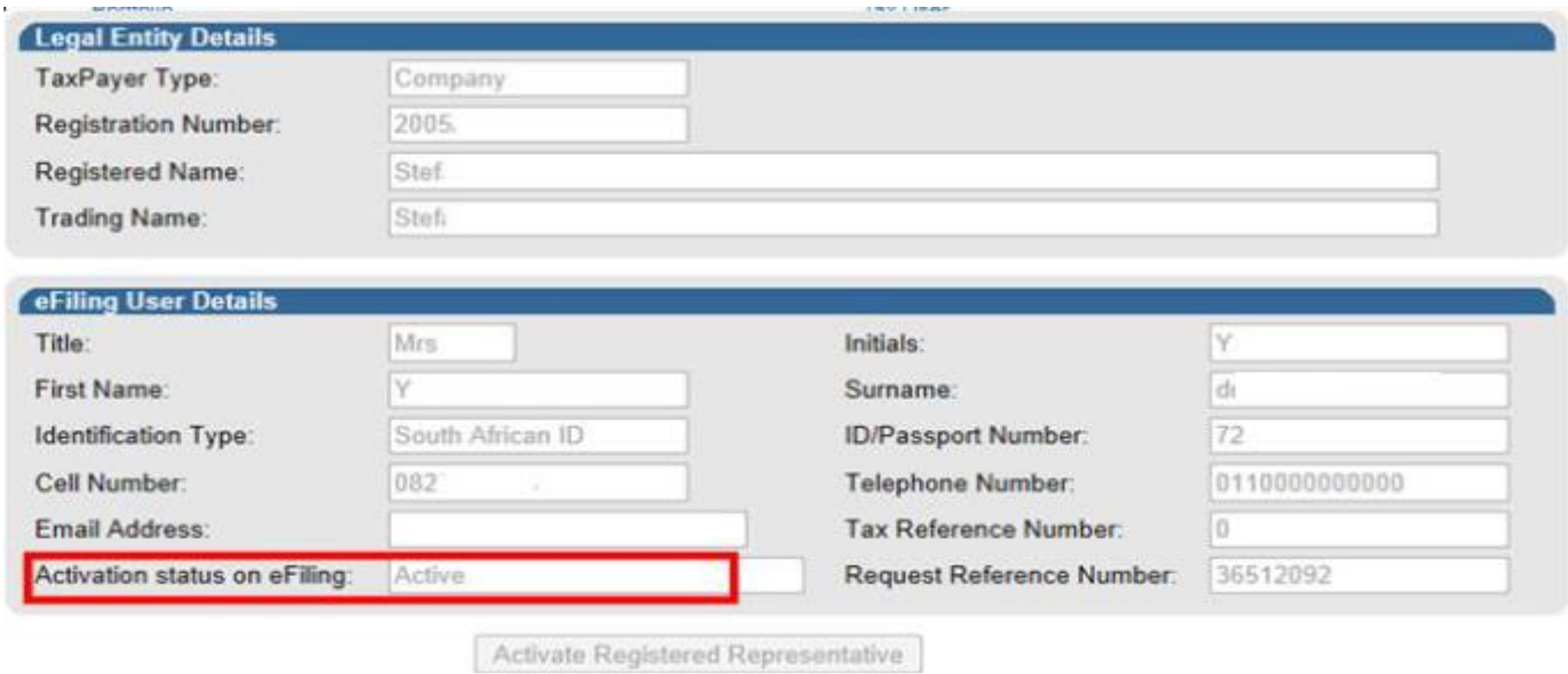
Activate Registered Representative

Ensure that the **“Representative’s tax number”** is completed and the correct **“Capacity”** as per the SARS record is selected and click the **“Activate Registered Representative”** button.

Registered Representative Activation

eFiling for Organisation

Upon successful activation of the registered representative on eFiling, the status field will be indicated as **“Active”.** On completion of the activation step, the **“Activate Registered Representative”** button will be **inactive/Greyed out.**



Invite Users and Delegate User Rights

Invite User

Who can be invited as a user on a Portfolio?

A requestor can only be allowed to invite a user if all of the following conditions apply:

- The user who has completed his/her eFiling registration.
- SARS can find a match for the user details entered (ID number /Passport number and Surname).
- The user registered for eFiling prior to 1 July 2019 and must have logged in to set up his/her profile on the new eFiling website.
- The user who does not exists on the portfolio he/she is being invited to.

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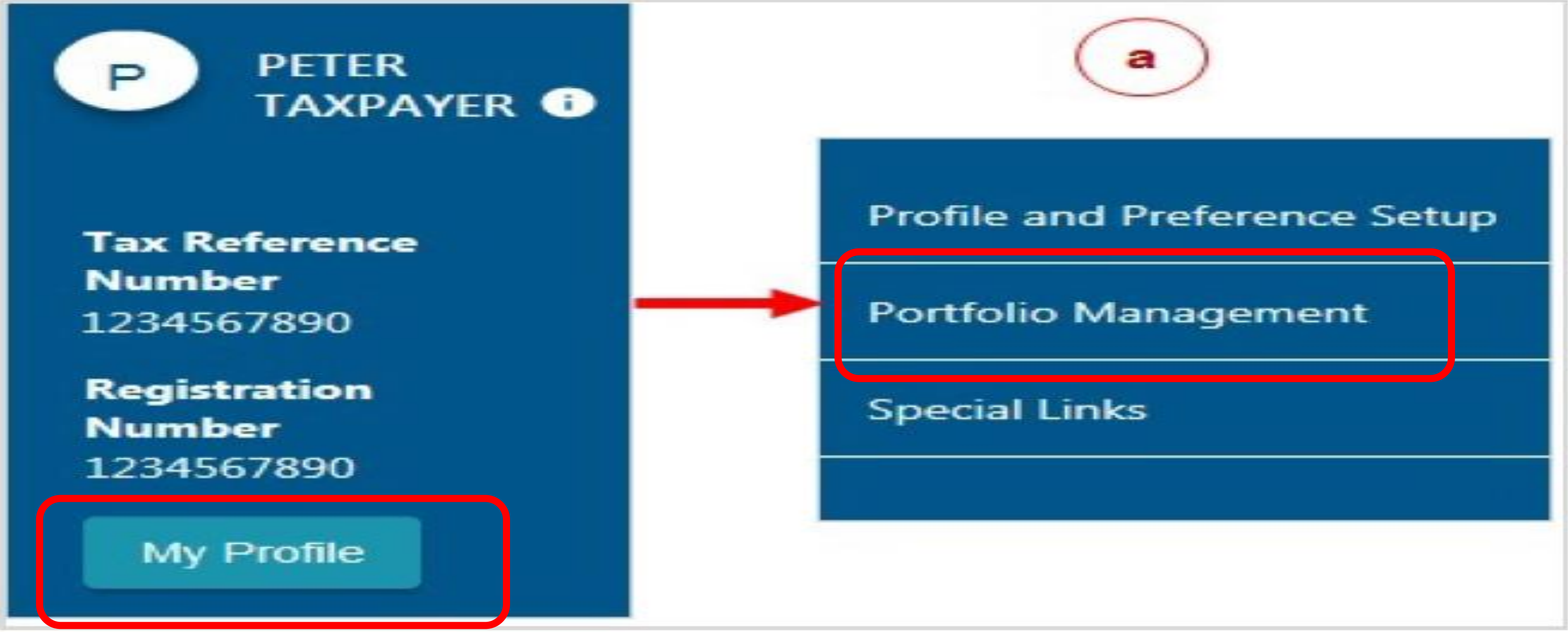
Invite User

In order to Invite a new user to a **portfolio** select the **correct portfolio**.

- Click on **“My Profile”** on the left screen.
- Then select **“Portfolio Management”**



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Invite User

Chose the portfolio by clicking on **“Go to Portfolio”**

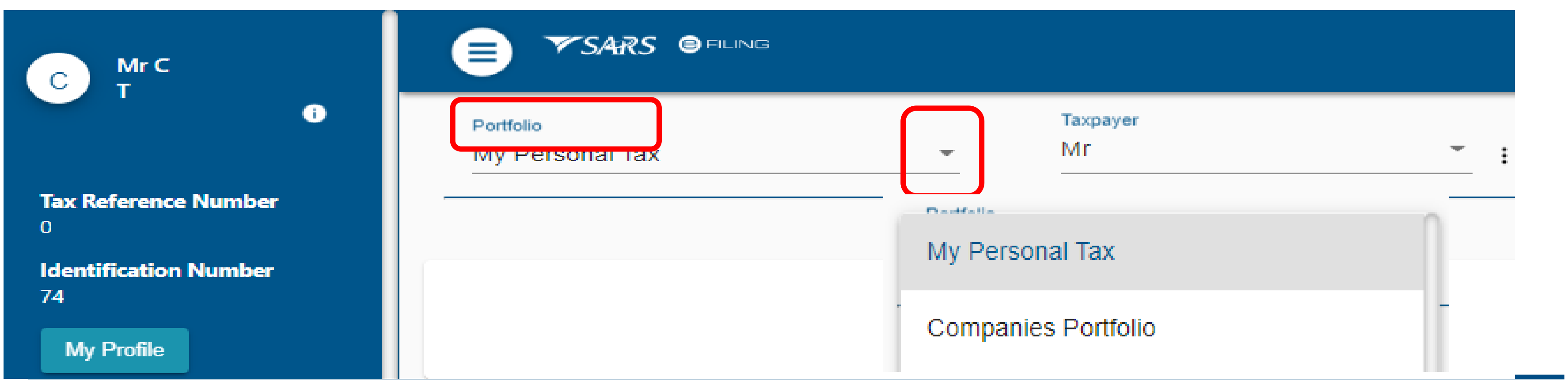
Portfolio Management

Add Portfolio

Linked Portfolio(s)

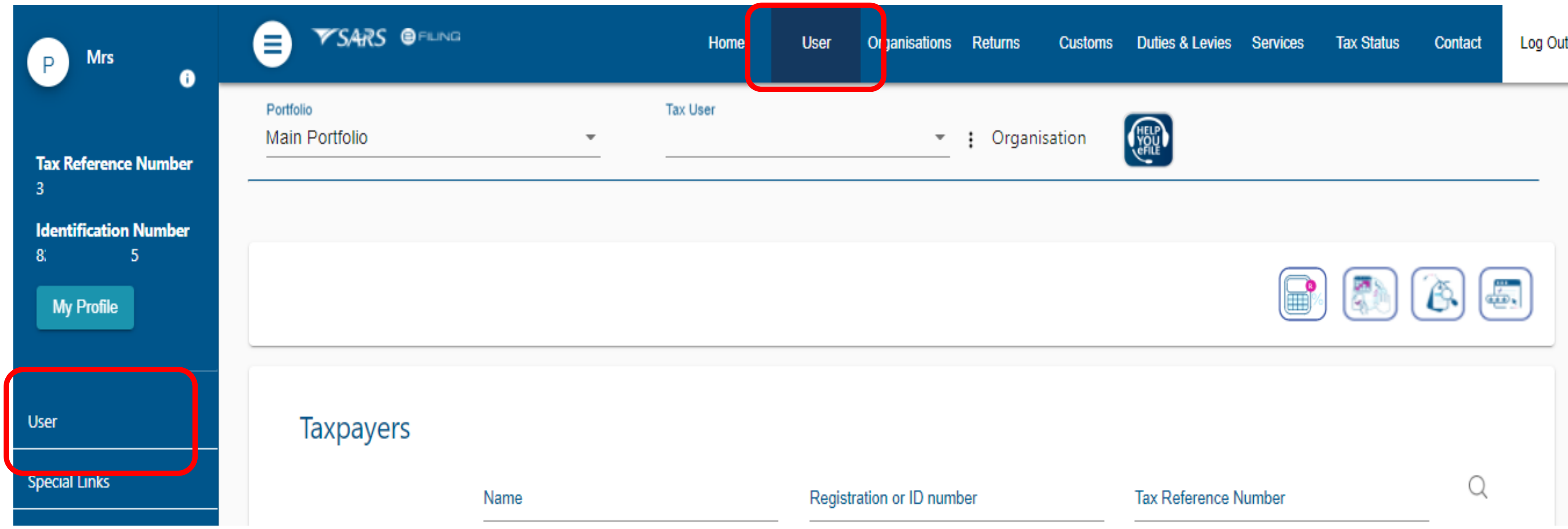
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	Easy File Login	
My Personal Tax	1	1	Individual	*Default*		Go to Portfolio
My Companies	1	1	Organisation			Go to Portfolio

OR



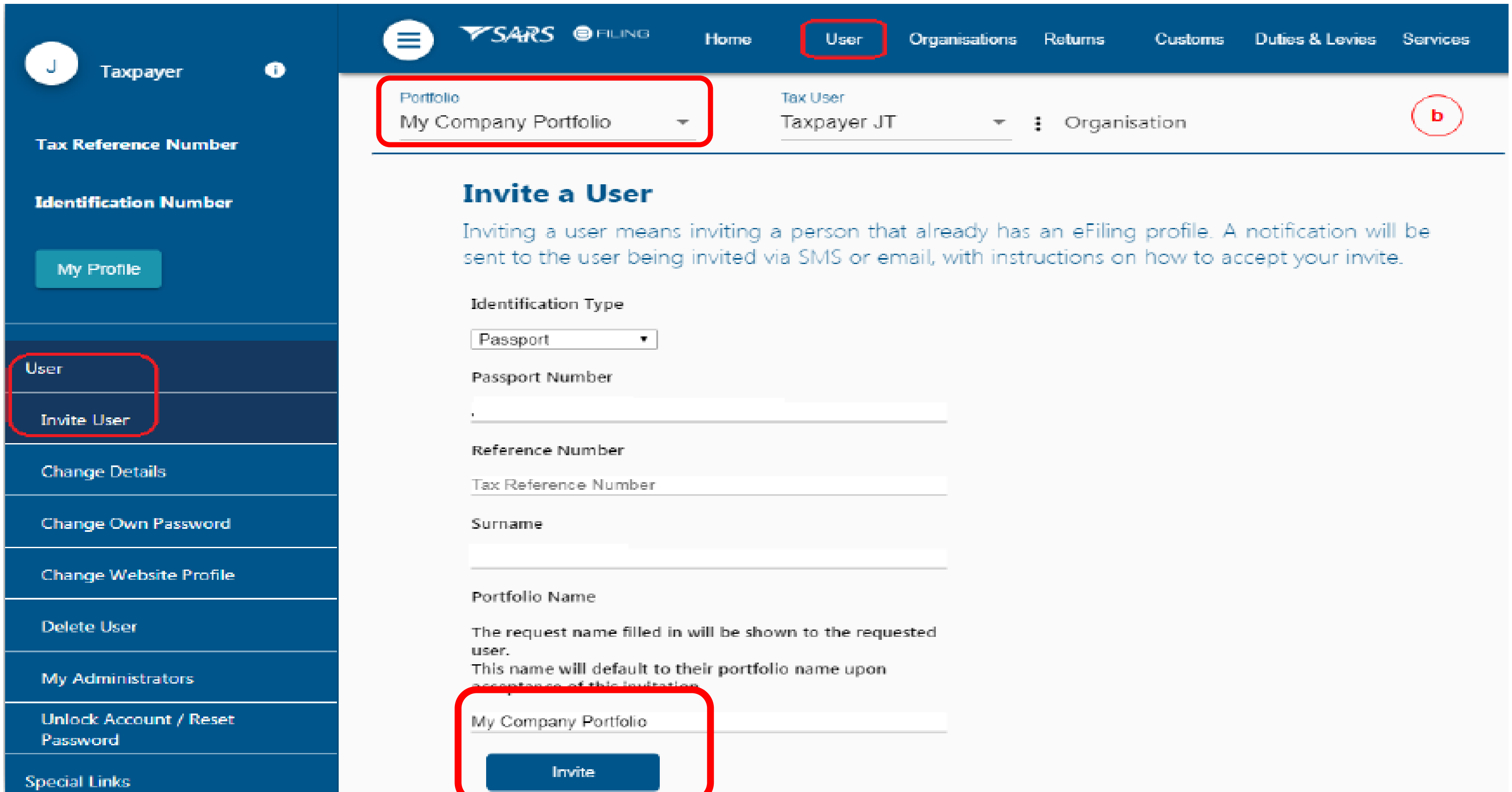
Invite User

Click on **"User"** from the top menu, then click on **"User"** on the left menu.



Invite User

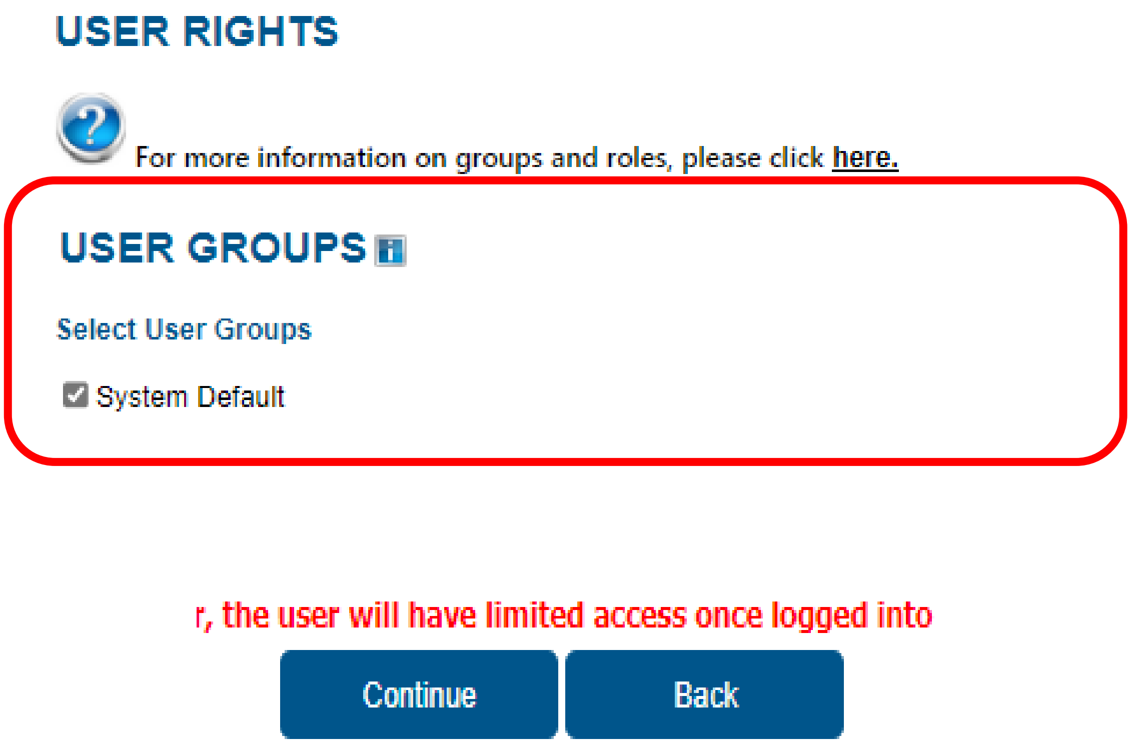
Select **“Identification Type”,** Enter **“ID number”**, Enter **“Surname”**, Click on **“Invite”**



SARS South African Revenue Service

Invite User

Give the new user **“Access Rights”** on the next screen by selecting the group you want the user to have access to and by selecting the role of the user.



South African Revenue Service

Invite User

Then select the role of the user under **"User Roles"**

USER ROLES

- [x] Manage Transfer Duty Financial Account
This role allows users to maintain all financial detail against the Transfer Duty account

- [x] SARS Registration
Can register taxpayers with SARS to get tax reference numbers

- [ ] RLA - View Customs Product information
RLA â€" View Customs Product information

- [ ] RLA - View Client Type
RLA - View Client Type

- [x] RLA - Manage Customs Product information
RLA â€" Manage Customs Product information

- [ ] RLA - Manage Client Type
With this profile, users can only view and change information relating to their specific client type(s)

- [x] Manage Users
Can create & change users and assign them to groups

- [x] Manage Taxpayers
Can create & change taxpayers and assign them to groups

- [x] Manage Groups
Can create & change groups and assign users and payers to groups

- [x] Manage Excise Financial Account
This role allows users to maintain all financial detail against an Excise Account

- [x] Manage Deferment Account

- [x] ISV Activation
This role allows users access to the ISV activation screen

- [x] Directives

- [x] 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.

Continue | Back

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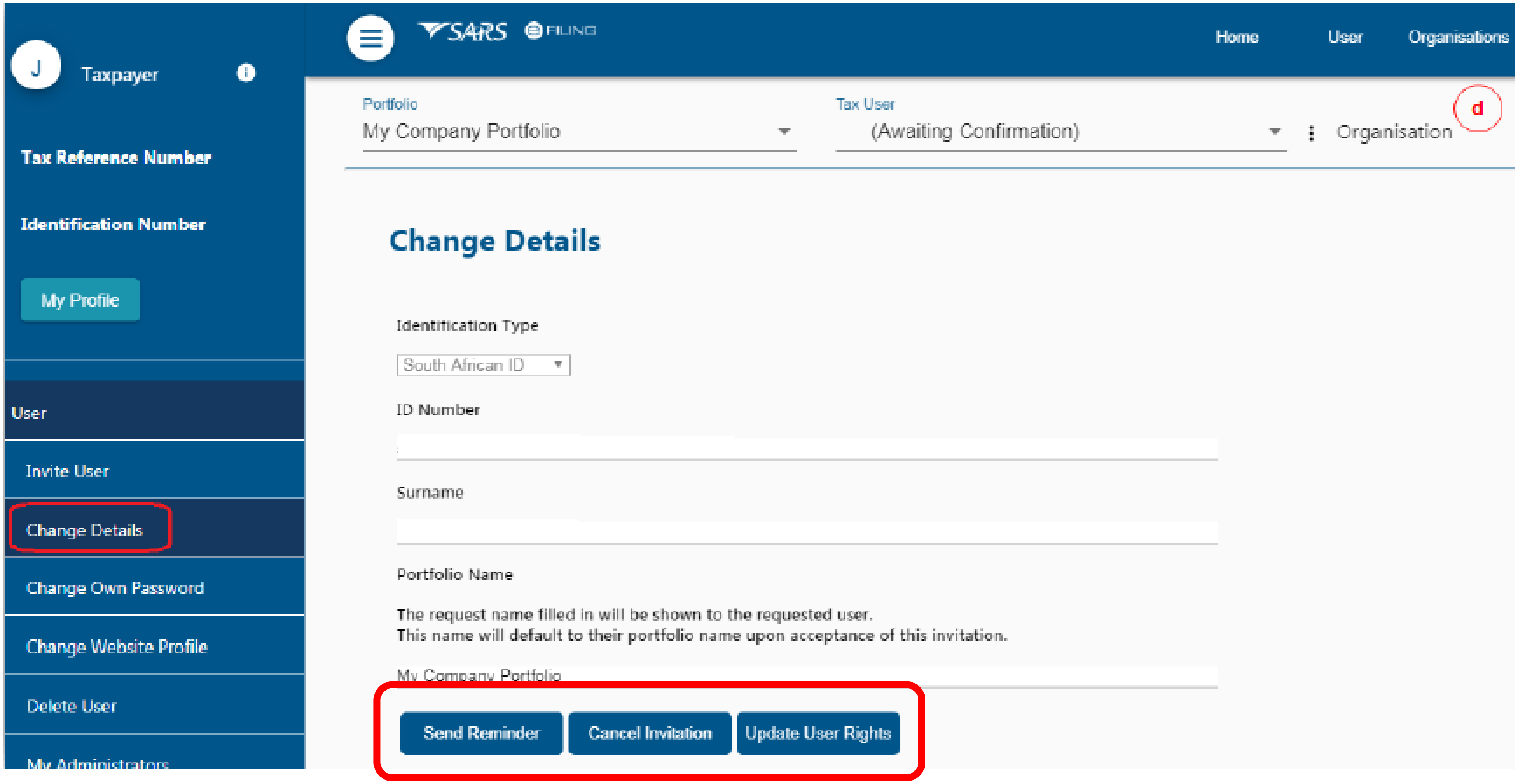
Accepting the Invitation

The status will show **"Awaiting Confirmation".**
Invitation can be "**cancelled"** by clicking **"Cancel Invitation"** and the user can send a reminder by clicking the **"Send Reminder"**



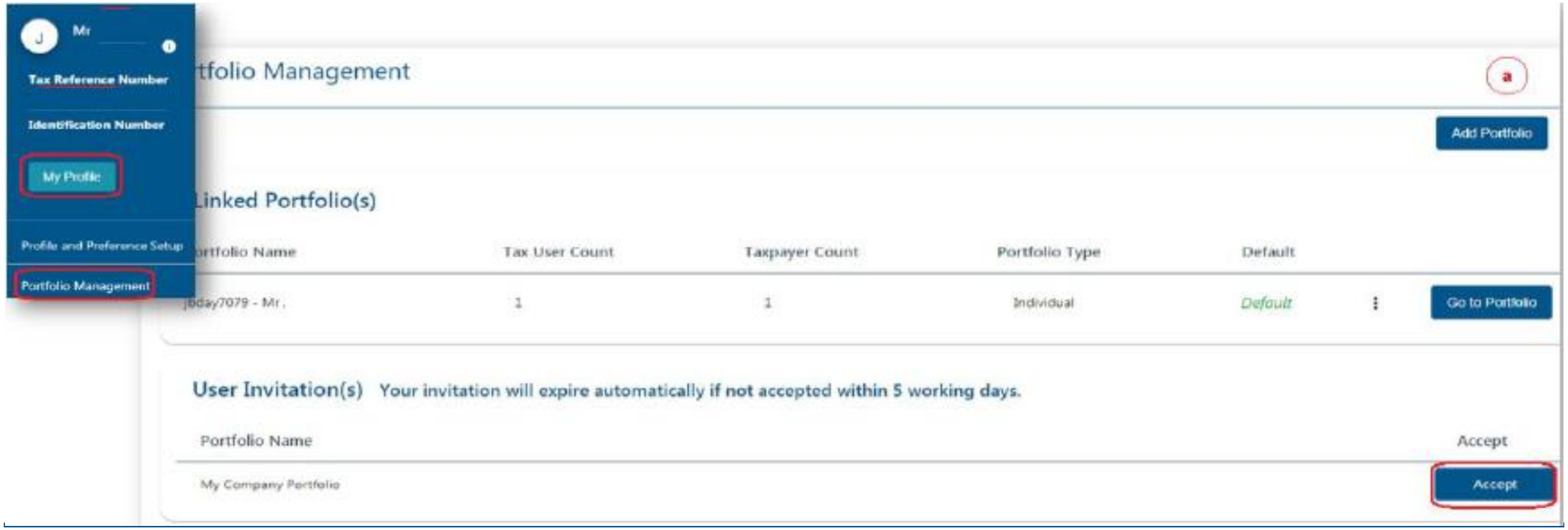
South African Revenue Service

Accepting the Invitation

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

Log on to your eFiling profile.

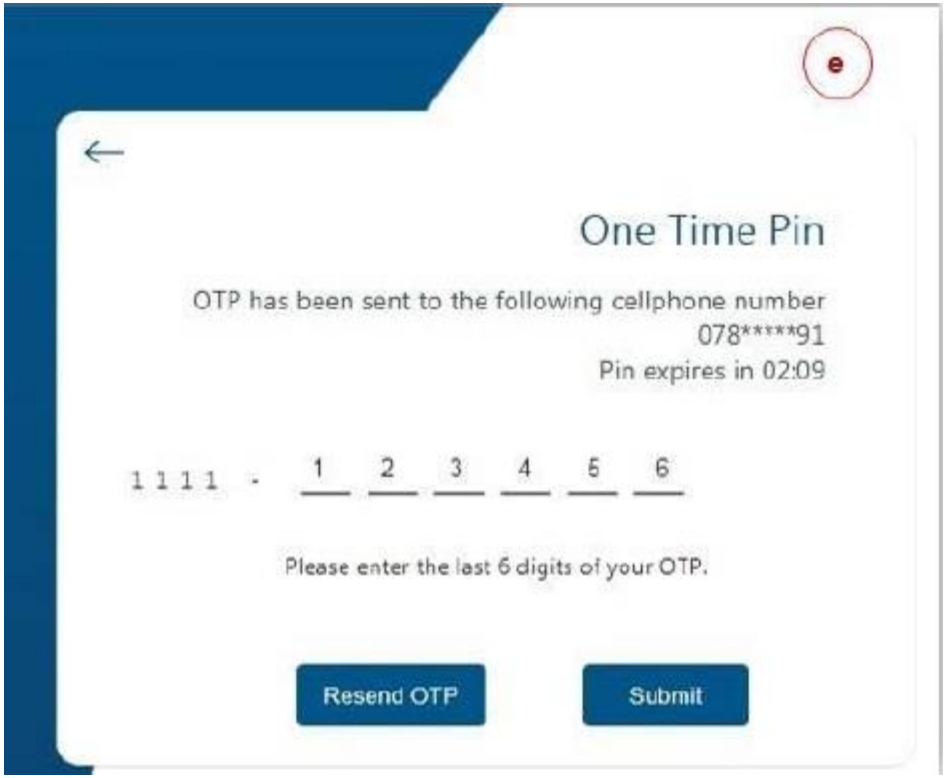
- Select **“My Profile”**
- Select **“Portfolio Management”**
- The User Invitation will display. Click on **“Accept”.**



Accepting the Invitation

Accepting the Invitation

The new user will be sent an **OTP** (One Time Pin) via the preferred means of contact (cell phone or email)

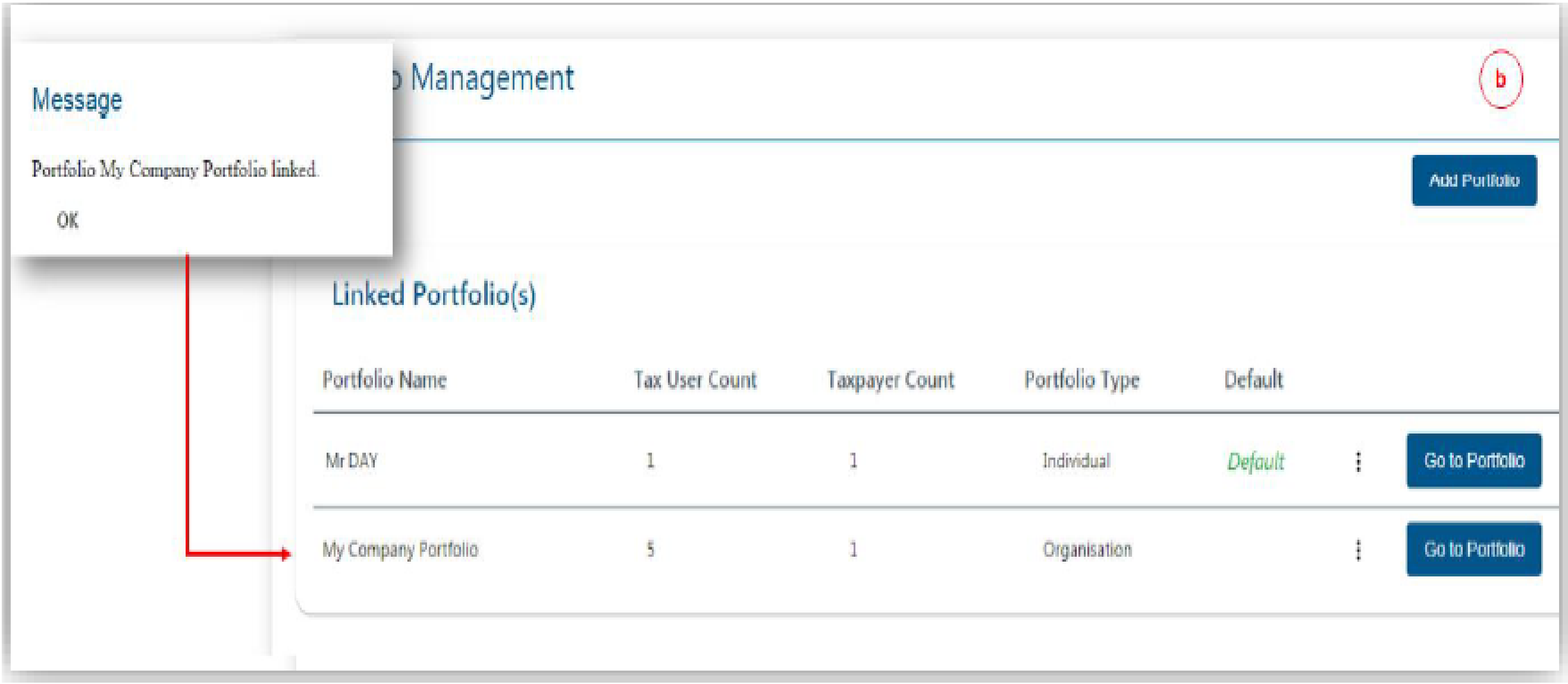


South African Revenue Service

Accepting the Invitation

Accepting the Invitation

The message will come up confirming that the Portfolio has been linked. The linked portfolio will move to **"Linked Portfolio"**



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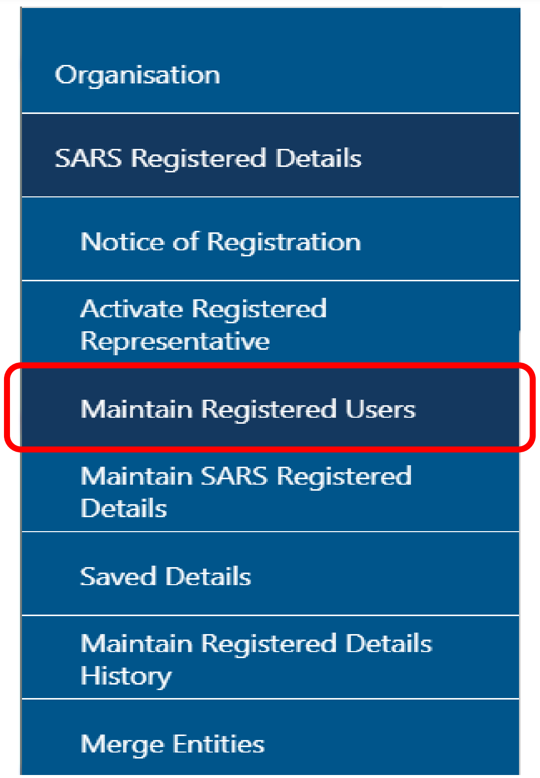
Delegate Rights

eFiling for Organisation

An appointed registered representative for an entity; has the ability to delegate this function to additional eFiling administrators/users by clicking **"SARS Registered Details"** and then **"Maintain Registered Users"**



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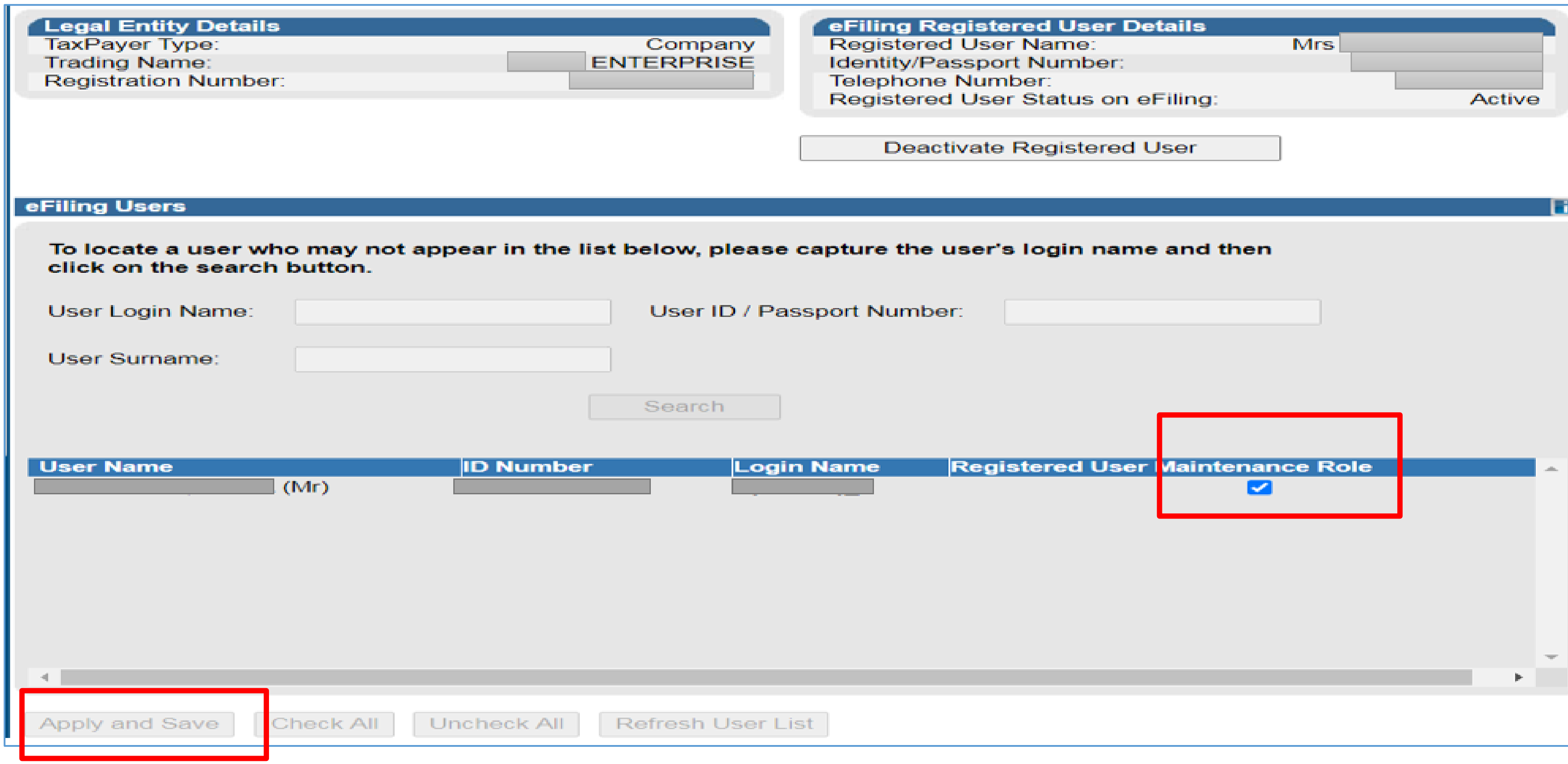
Delegate Rights

eFiling for Organisation

An appointed registered representative will tick under **"Registered User Maintenance Role"** and click **"Apply and Save"** at the bottom.



South African Revenue Service

SARS ONLINE QUERY SYSTEM

Introduction

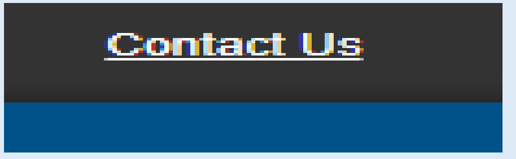
- The **SOQS** is an easy-to-use online platform that is accessible via the SARS Website (www.sars.gov.za).

- The **SOQS** enables taxpayers who wish to raise queries with SARS without the need to go to a SARS branch.

- To initiate a query, taxpayers simply need to complete the online form by selecting a Query Type; complete a set of required information fields; attach supporting documentation where necessary and submit the data to SARS for processing and review.

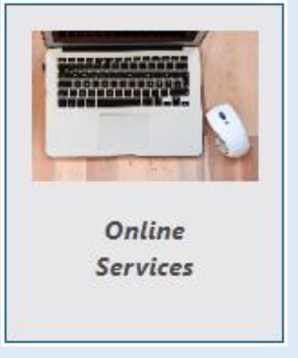
Accessing SOQS

To access the SOQS taxpayers can visit the SARS website www.sars.gov.za then click on **“Contact Us”,** then select the applicable query under **“Send Us a Query”.**



Alternatively

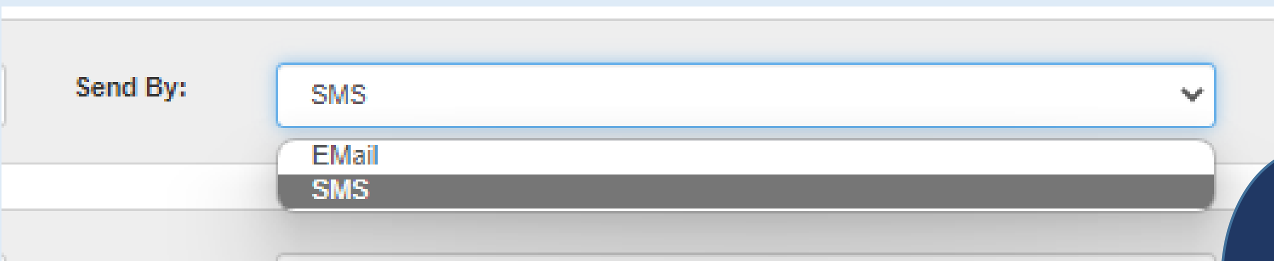
Access the SOQS on the SARS Home page **(www.sars.gov.za)** by clicking **“Online Services”**



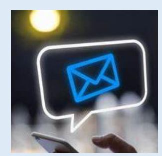
SOQS Query Types

Request Your Tax Number:

- Taxpayers who are registered for Income Tax and do not know what their tax reference number is, can request it via the SOQS system using the" What's My Tax Number" query type.
- Supporting documents and tax reference details are not required for this query type.
- Select the channel to receive the tax number from the "Send By" dropdown list:



Email – if the taxpayer wants to receive the tax reference number via email.



SMS – if the taxpayer wants to receive the tax reference number via SMS.

Contact details must be the same contact details on SARS Record.

SOQS Query Types

Submit Supporting Documents:

This query type can be accessed, when the taxpayer is requested to upload supporting documents.

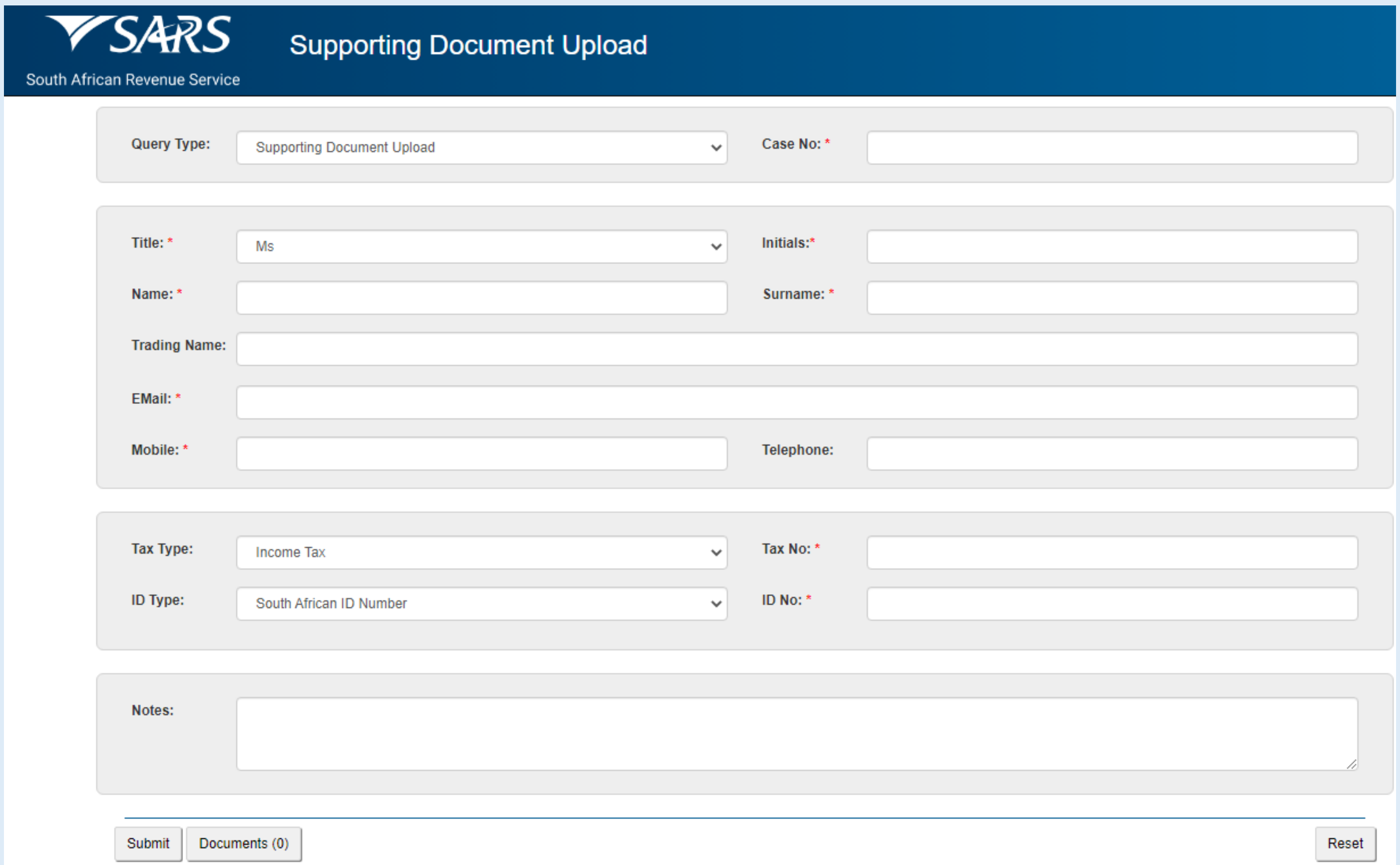
This query type is available for all taxpayers including eFilers.

This service is available for the following tax products:

- ✓ Income Tax,
- ✓ PAYE,
- ✓ VAT, or
- ✓ Transfer Duty.

Supporting Documents Upload

In order to submit supporting documents to SARS, the taxpayer is required to upload them, along with a set of mandatory data, using the Supporting Document Upload Query Type.



South African Revenue Service

Supporting Documents Upload

Capture the case number relating to the supporting documents that must be attached. The system will match the case number, and one of the following outcomes is possible:

Scenario 1.

Where the captured case number cannot be matched to the supplied case number but there are other active case numbers.

The message **"Invalid Case Number.** The following case numbers are active for this tax reference number" will be displayed**.**

- A list of case numbers will be displayed.
- Review the list and enter the correct case number.

Supporting Documents Upload

Scenario 2.

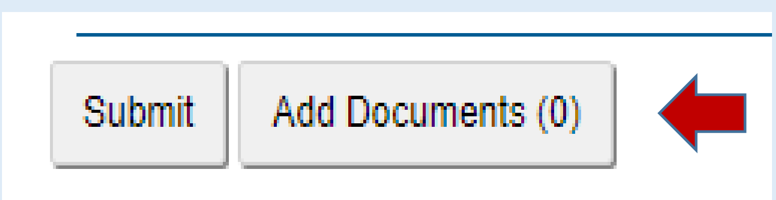
Where the captured case number cannot be matched, and no other active case numbers exist.

- The message **“Invalid Case Number”.** There are currently no active cases for this tax reference number” will be displayed.
- Review the letter received, requesting the supporting documents to be uploaded, to ensure that the correct case number is captured.

- Where the captured case number is invalid. The message **“The Case Number captured is invalid”** will be displayed.

Add notes in the “Notes” field to explain the reason for submitting the supporting documents.

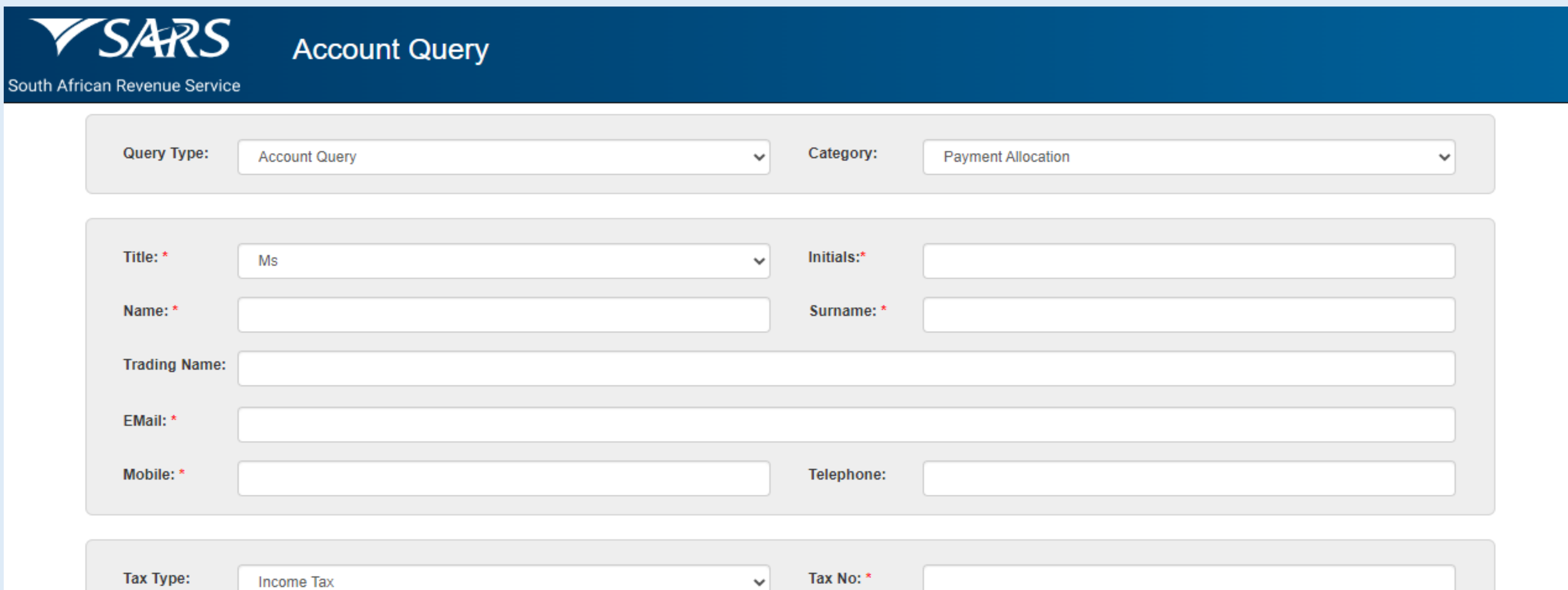
- Click on **“Add Documents”** button to add the supporting documents.



Submit a Payment Allocation

This is for queries relating to SARS allocation of payments in respect of Income Tax, PAYE, and VAT.

- Capture the required mandatory information and you will thereafter be able to attach and submit supporting documents.
- Add notes in the “Notes” field to explain how the payments must be allocated. Make sure the notes are clear and understandable .



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Report a New Estates Case

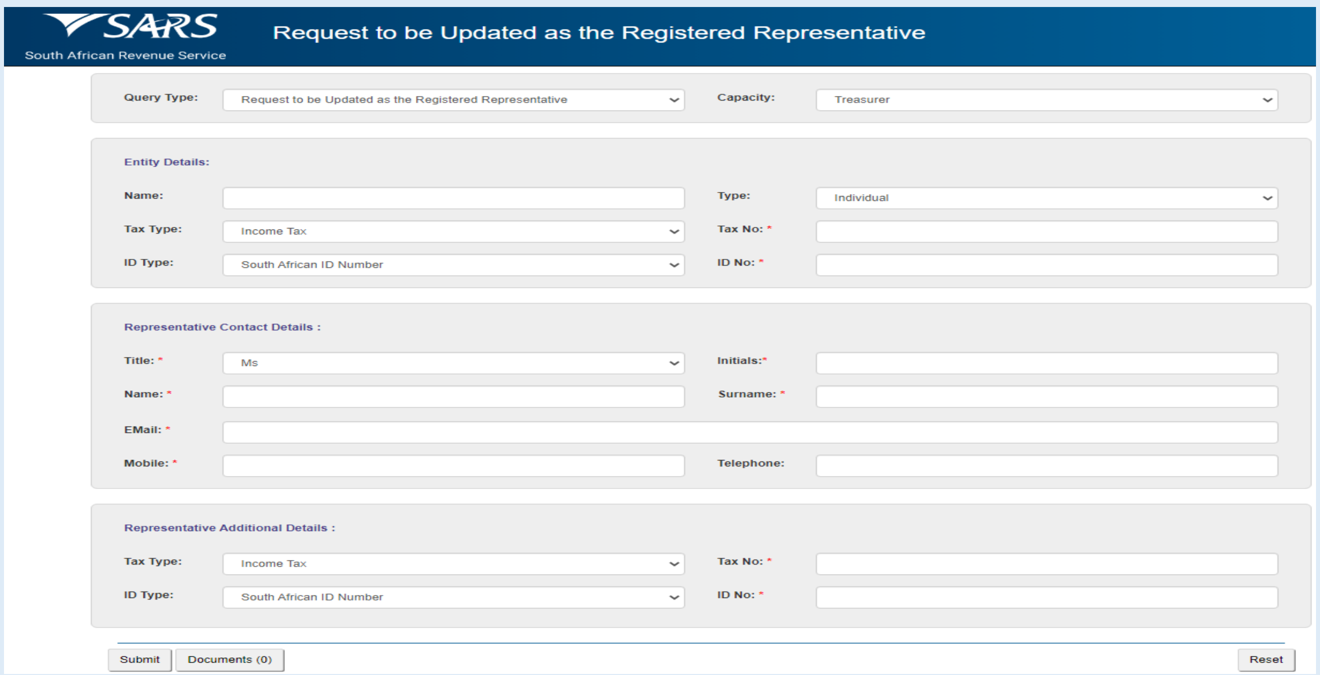
Queries relating to reporting a taxpayer as an estate in respect of Income Tax, PAYE and VAT, can be submitted using query type Report New Estate Case.

- Capture the required mandatory information and you will be able to attach the supporting documents required for this query.
- Once the query is submitted, the system will determine if there is an existing estate coding case.
- If there is an existing case SARS will inform the taxpayer of the existing case and the supporting documents submitted will be attached to the existing case.
- If there is no case, a new estate coding case will be created, and the supporting documents submitted will be attached to the case.

Register a Representative

Queries relating to updating of registered representative of a taxpayer in respect of Income Tax, PAYE and VAT can be submitted using this query.

- The requestor captures the required mandatory information and attaches the supporting documents required for this query.
- Once the query is submitted a case will be created for a SARS official to resolve.


SARS South African Revenue Service

Request to be Updated as the Registered Representative

Query Type: Request to be Updated as the Registered Representative
Capacity: Treasurer

Entity Details:

Name:
Type: Individual
Tax Type: Income Tax
Tax No: *
ID Type: South African ID Number
ID No: *

Representative Contact Details :

Title: * Ms
Initials:*
Name: *
Surname: *
EMail: *
Mobile: *
Telephone:

Representative Additional Details :

Tax Type: Income Tax
Tax No: *
ID Type: South African ID Number
ID No: *

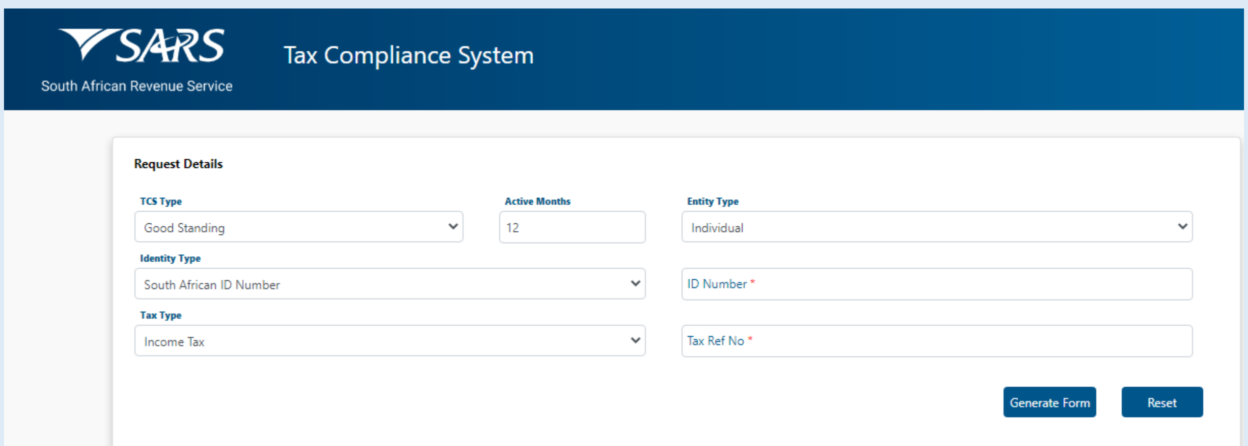
Submit
Documents (0)
Reset

Tax Compliance Status Request

Taxpayers can use this query to request their TCS. Any of the following TCS types can be requested:

- Good standing
- Tender
- Foreign Investment Allowance (FIA)
- Emigration

The taxpayer must capture all the mandatory fields to be able to submit the TCS request.

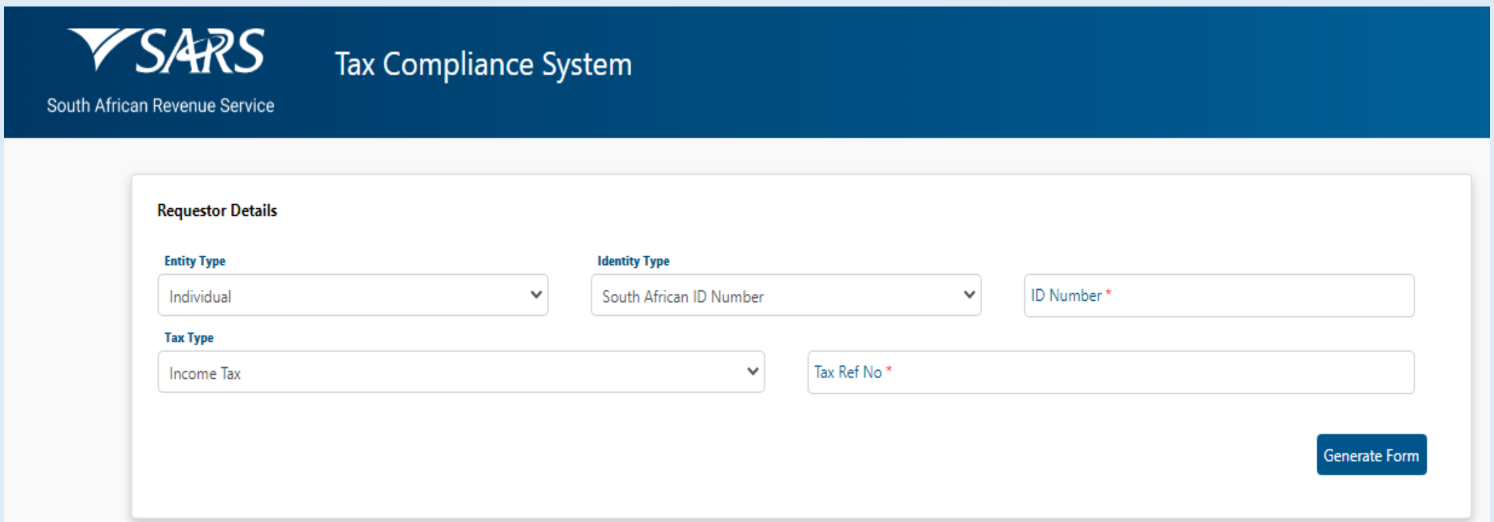


SARS South African Revenue Service

Tax Compliance Status Verification

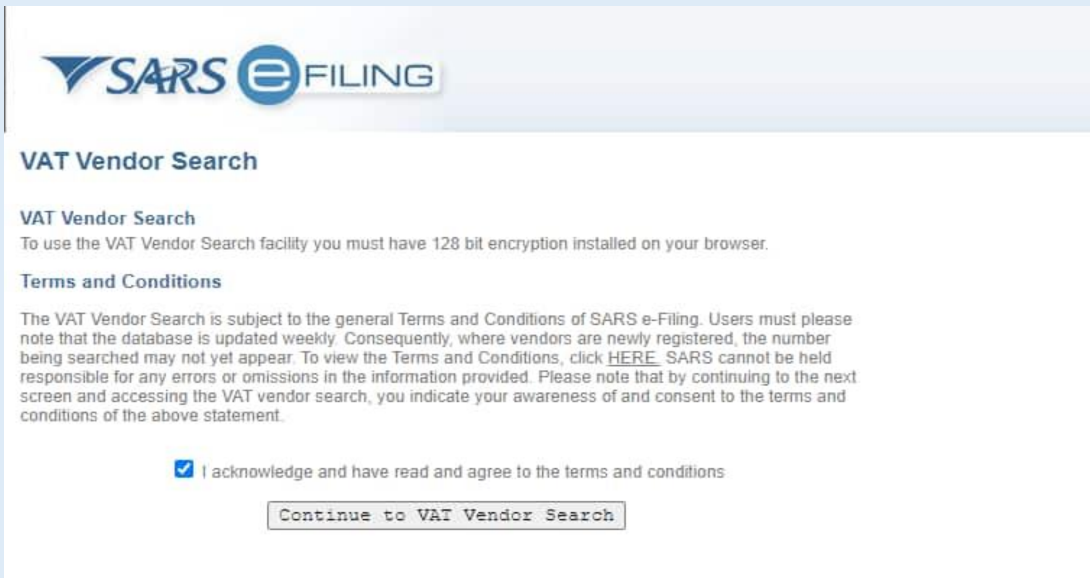
This query allows institutions permitted by the taxpayer to verify the taxpayer's TCS. For the third party to be able to verify, he/she must have the taxpayer's reference number and the TCS Pin.

- The third party must capture all the mandatory fields to be able to verify the TCS.



VAT Vendor Search

To verify if a VAT vendor is registered, this functionality can be used by clicking “ Search for a VAT Vendor”



VAT Vendor Search

VAT Vendor Search

To use the VAT Vendor Search facility you must have 128 bit encryption installed on your browser.

Terms and Conditions

The VAT Vendor Search is subject to the general Terms and Conditions of SARS e-Filing. Users must please note that the database is updated weekly. Consequently, where vendors are newly registered, the number being searched may not yet appear. To view the Terms and Conditions, click HERE. SARS cannot be held responsible for any errors or omissions in the information provided. Please note that by continuing to the next screen and accessing the VAT vendor search, you indicate your awareness of and consent to the terms and conditions of the above statement.

☑ I acknowledge and have read and agree to the terms and conditions

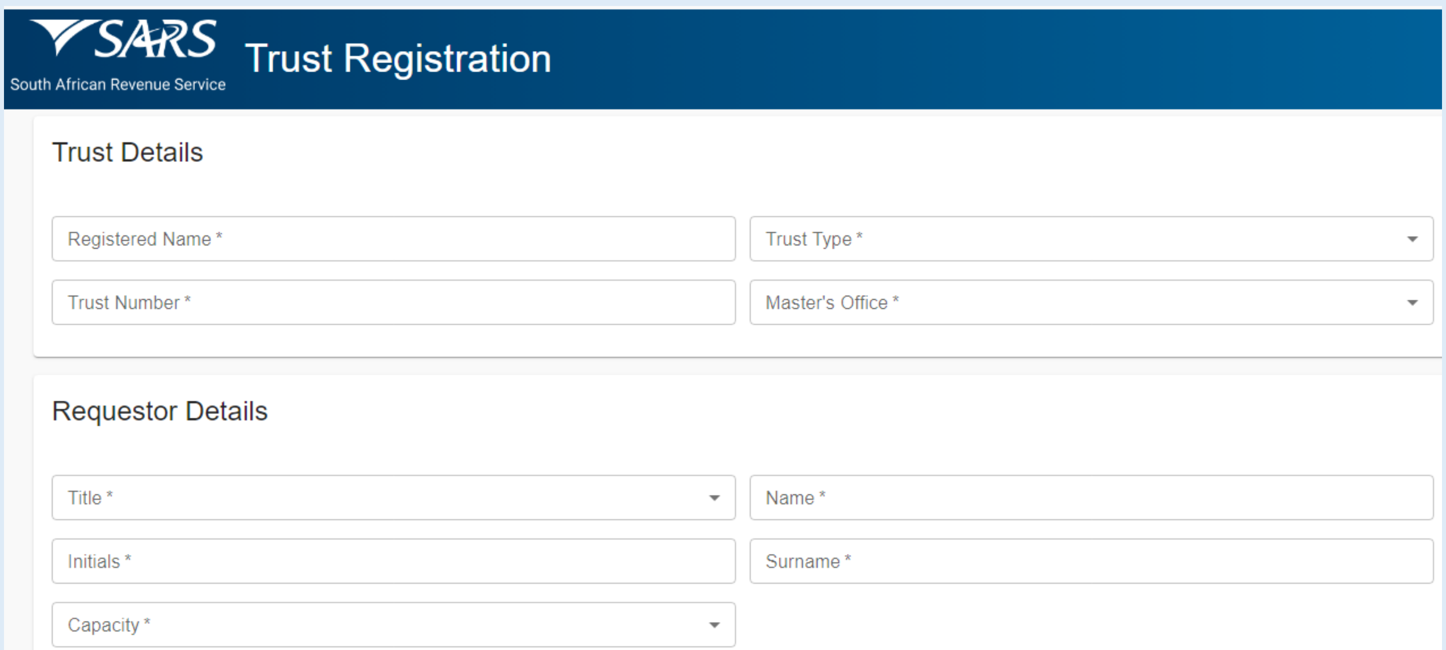
Continue to VAT Vendor Search

Trust Registration

This query will enable the Trust representative to apply for Income Tax registration via SOQS.

• The requestor captures the required mandatory information on the screen and uploads the supporting documents required for this query.

• Once the query is submitted a case will be created for a SARS official to resolve.


SARS
South African Revenue Service
Trust Registration

Trust Details

Registered Name *
Trust Type *
Trust Number *
Master's Office *

Requestor Details

Title *
Name *
Initials *
Surname *
Capacity *

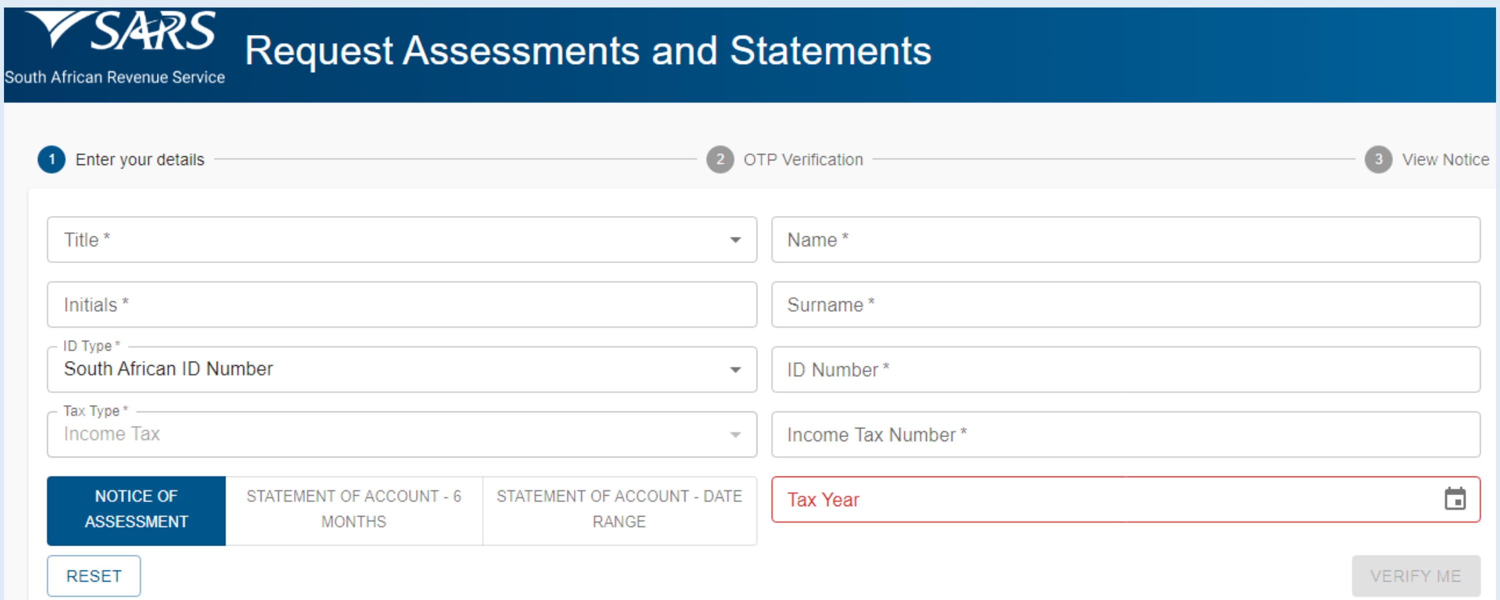
SARS Notices

Taxpayers can use this query to request either a:

I. **Notice of Assessment ITA34** or
II. **Statement of Account (SOA)** for Income Tax.

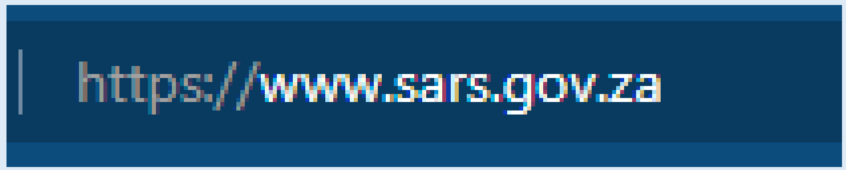
The Notice of Assessment is printed per tax year and the SOA can be printed for a period of 6 months or for a date range period.

Capture all the mandatory fields on the screen to be able to submit the request.



Accessing the SMME Webpage

Go to the SARS Website



Click on “Small Businesses”

Accessing the SMME Webpage on the SARS Website

SARS

South African Revenue Service

Individuals | Businesses and Employers | Tax Practitioners | Customs and Excise

Home » Businesses and Employers » Small Businesses – Taxpayers

Small Businesses – Taxpayers

Starting a business and tax | Corporate Income Tax | Pay As You Earn | Value-Added Tax | Turnover Tax | Small business relief | Register for VAT | Cancellation of VAT registration (Deregistration) | Employing staff | Employment Tax Incentive (ETI) | Small Businesses – Traders and Travellers | Closing a Business or Company | How do I learn about taxes?

What's New?

- **9 January 2023 – SMME Newsletter**

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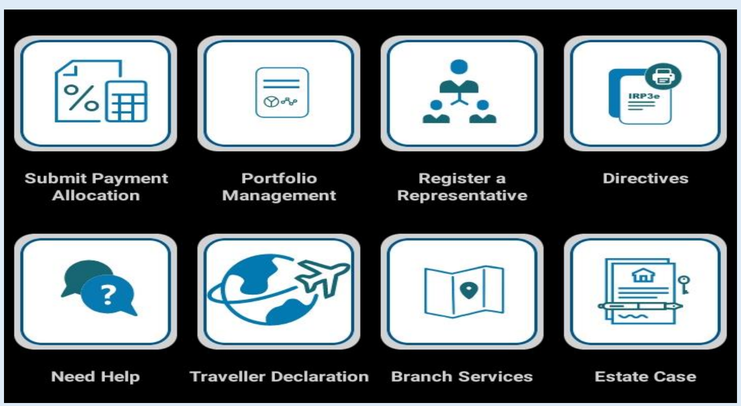
Sole Proprietor Functionalities on MobiApp



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- Submit Supporting Documents
- Maintain Registered Details
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Follow Us

- **Visit us on our Social Media platforms and our SARS YouTube Channel**
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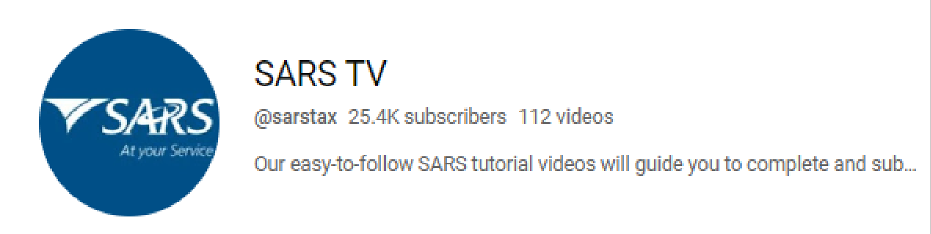
  - Facebook
  - Twitter (X)

SARS YouTube Channel



For more information, visit the:

➢ SARS website https://www.sars.gov.za/businesses-and-employers/small-businesses-taxpayers/

Thank you
Re a leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza