



# GUIDE FOR THE SUBMISSION OF THIRD-PARTY DATA USING THE CONNECT DIRECT CHANNEL

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## 1 SUMMARY

- a) Connect: Direct™ technology is one of the channels which tax representatives can submit limitless third-party data to SARS. The submission of third-party data file by third-party entities, forms part of the SARS third-party data reporting process. SARS third-party data systems receive and process information as per appropriate legislation, Government Gazette and External BRS documents aligned to international best tax practices.
- b) This guide describes the process to submit third-party data files to SARS via the Connect: Direct channel. This includes the various steps required for submission such as the enablement of eFiling users, data preparation, submission of the data/file and finally the declaration of the data file submitted to SARS.

## 2 INTRODUCTION

- a) South African Revenue Service (SARS) implementation of Third-Party Data Platforms enables third-party entities to submit third-party supporting data to SARS via the following channels:
  - i) eFiling (via a data submission form with a limited volume only)
  - ii) Direct Data Flow (by using the Connect: Direct™ technology)
  - iii) Direct Data Flow (by using the Secure Web: HTTPS)
- b) Selecting the Connect: Direct™ technology channel to submit third-party data to SARS, ultimately allows users to submit bulk data, reduces the overall administrative burden of large volume data transfer, shorten data processing cycle times, and provide for faster feedback.

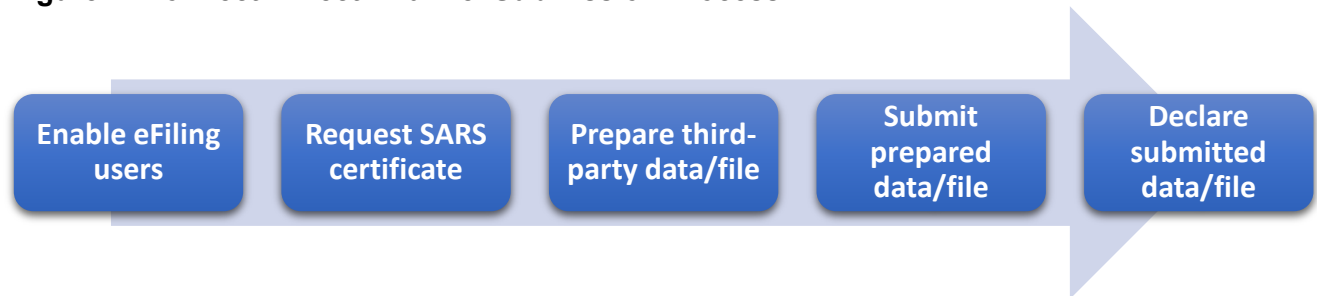
## 3 THIRD-PARTY DATA FILE SUBMISSION PROCESS

- a) Third-Party data submission process pertains to the following operational segments; registration, activation, enrolment, submission, and the declaration of submitted data. Registration, activation, and enrolment are vital for the use of eFiling and the submission of third-party data files to SARS. However once successfully completed, submission and declaration are the two operational segments that should be followed during the required periodic third-party data submissions.
- b) Do note the following pertaining to the submission of third-party data file:
  - i) Taxpayers who want to use the Connect: Direct™ technology channel must have eFiling profiles to enrol for this channel and activate it on eFiling.
  - ii) Taxpayers choosing to use the Connect: Direct™ technology channel should be in possession of a SARS security certificate. Furthermore, after a successful submission of the third-party data file, taxpayers are required to declare the accuracy of the submitted data to SARS by authorising the data submission.
- c) The following tax types can be submitted via the Connect: Direct™ technology channel.
  - i) IT3 (b), (c), (d), (e), (s) and (t),
  - ii) INS, MED,
  - iii) TRN (Tax Reference Number Request),
  - iv) Foreign Tax Information (FTI) and CRS.

### 3.1 Connect: Direct channel third-party data file submission process

- a) The third-party data submission process using the connect direct channel pertains to the following phases described on the figure below.

**Figure 1: Connect: Direct Channel Submission Process**



- b) **Enable eFiling users.**
- i) Enrol the organisation and eFiling users for third-party data submission on SARS eFiling.
  - ii) For more information on eFiling registration, activation, and enrolment, refer to the following guide:
    - A) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide
- c) **Request SARS certificate**
- i) Request the SARS certificate on eFiling
- d) **Prepare third-party data file.**
- i) Prepare a data file as per specified BRS.
- e) **Submit prepared third-party data file.**
- i) Submit the prepared data file on the SARS Production environment using the Connect: Direct platform.
- f) **Declare submitted third-party data file.**
- i) Declare the submitted third-party data file by submitting the specified declaration form via eFiling to SARS.

## 4 ENABLE EFILING THIRD-PARTY USERS

- a) This section describes eFiling users that are required for the necessary administration and submission of third-party data to SARS.

### 4.1 eFiling Users required for the submission of third-party data

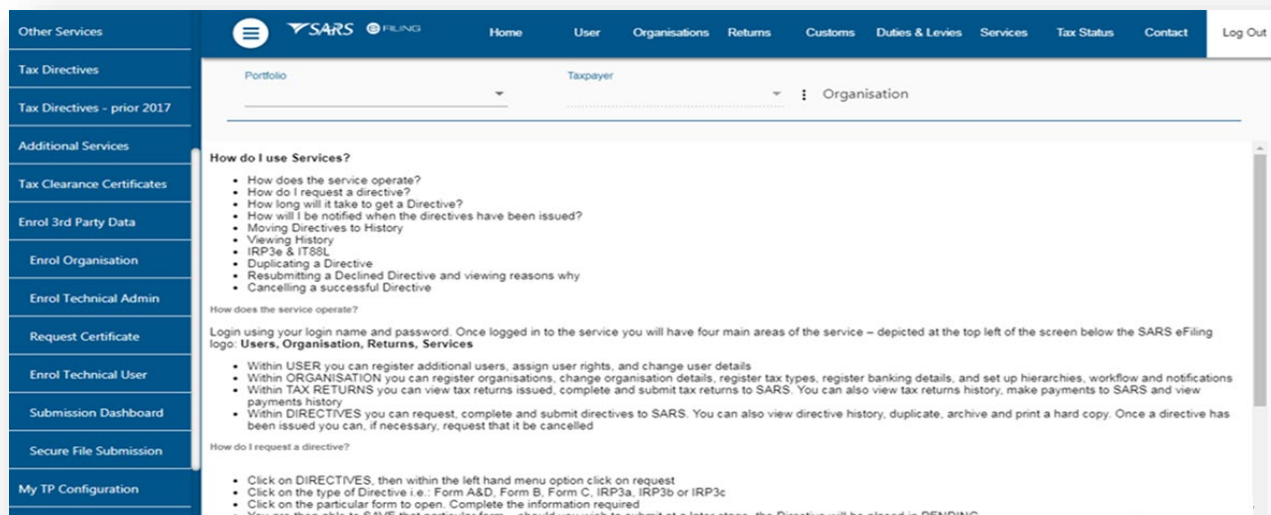
- a) Non-eFilers wishing to use the Direct Data Flow channel should register for eFiling at [www.sarsefiling.co.za](http://www.sarsefiling.co.za)
- b) To manage third-party data submission, third-party entities should have the following three users allocated for the enrolment and submission of third-party data to SARS.
- i) **Business Administrator** – This user is the same as the current eFiling full administrator (registered representative). The role of this user is to enrol the legal entity/organisation that will be submitting

data to SARS and the Technical Administrator. The entity/organization is not required to allocate a new eFiling administrator (registered representative) for the purposes of third-party data submissions if one already exists.

- ii) **Technical Administrator** – The role of this user is to request the SARS security certificate and to enrol Technical Users. Where the entity/organization decides to change the Technical Administrator, a new Technical Administrator should be added before the existing one can be removed. Also note that there should always be at least one Technical Administrator for each enrolled organisation.
- iii) **Technical User** – The role of this user is to submit the data files to SARS via the Connect: Direct™ technology channel. An entity/organization can have multiple Technical Administrators and Technical Users to allocate work according to the organisation’s requirements. Do note that the Technical User must be a different person from the Technical Administrator.

## 4.2 Third-Party data user roles on eFiling

- a) To access the third-party data platform on eFiling, proceed as follows:
  - i) Login on eFiling
  - ii) Once logged into eFiling, on your **Organisation’s work page**, click on **Services** in the top menu bar.
    - A) From the side menu options, select **Enrol 3rd Party Data**.



- b) Under the **Enrol 3rd Party Data** option the following sub-menus are available:
  - i) Do note the menu options and which user role can access the service.

Enrol 3rd Party Data
Enrol Organisation
Enrol Technical Admin
Request Certificate
Enrol Technical User
Submission Dashboard
Secure File Submission

Sub-Menu	Accessed by role
Enrol Organisation	Business Administrator (eFiling Administrator)
Enrol Technical Admin	Business Administrator (eFiling Administrator)
Request Certificate	Technical Administrator
Enrol Technical User	Technical Administrator
Submission Dashboard	Technical Administrator/Technical User
Secure File Submission	Technical User

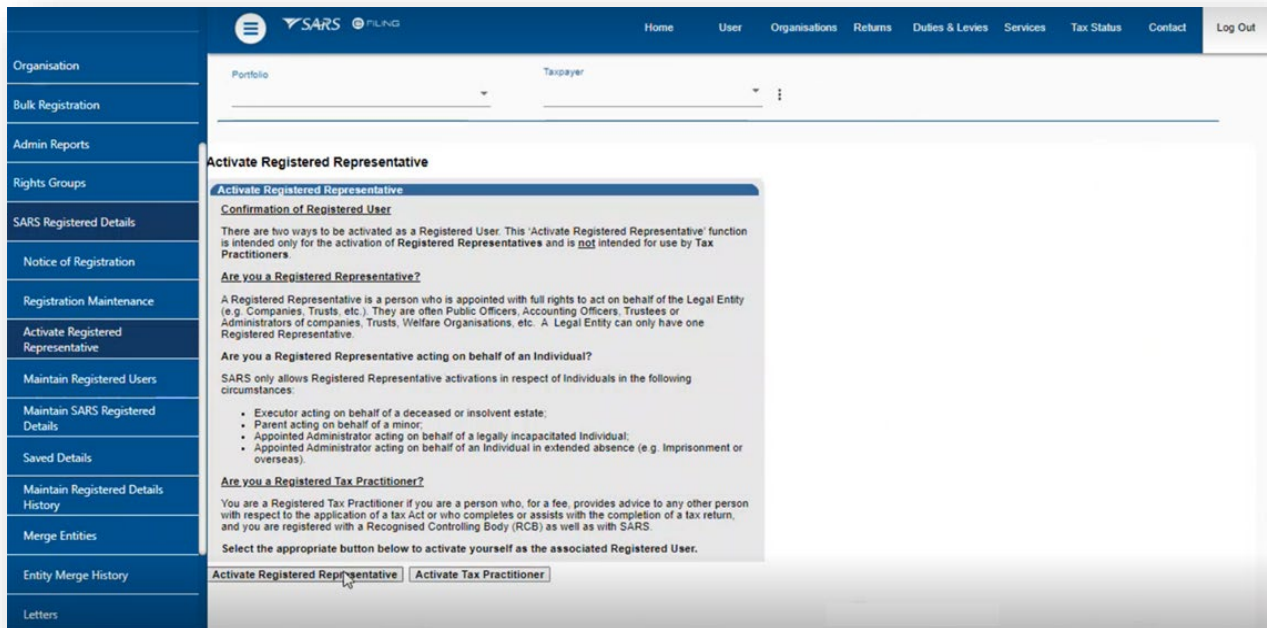
- ii) Also note that the Technical User is responsible for submitting the third-party data file via the Connect: Direct channel to SARS.

## 5 VERIFICATIONS FOR A SUCCESSFUL THIRD-PARTY DATA SUBMISSION

- a) eFiling has prerequisites for a successful third-party data submission. This section details these and describes how the user can navigate on eFiling to make these verifications.
- b) Where the user has verified that these have not been done for their organisation, kindly refer to the following external guide:
  - i) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide
- c) However, where the user is continuously experiencing problems, kindly notify SARS via the following email address: SARS\_ThirdPartyData\_Support@sars.gov.za.
  - i) The email subject must specify the relevant Third-Party Data Return, Product, Data Type, or System.
  - ii) Example: Subject: IT3(b) / IT3(c) / IT3(d) / IT3(e) / IT3(s) / IT3(t) / INS / MED / FTI / eFiling / Connect Direct / HTTPS — Response files not received, etc.

### 5.1 The Business Administrator has been enrolled

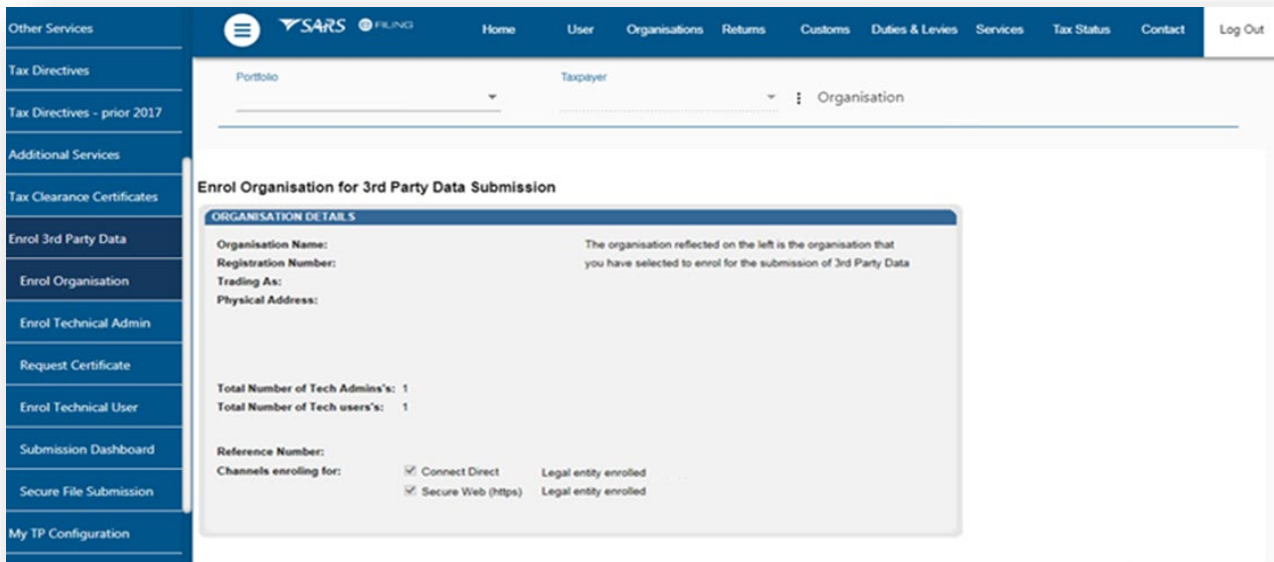
- a) The Business Administrator is the Registered Representative of the organisation.
- b) To activate a Registered Representative, proceed as follows:
  - i) Select **Organisation** on the main menu.
  - ii) Select **SARS Registered Details**
  - iii) Select **Activate Registered Representative**
  - iv) The **Activate Registered Representative** page will be displayed.



- c) Click on **Activate Registered Representative**
  - i) The **Registered Representative** page will be displayed.
- d) Click on **Open** to view more details of the registered representative.
- e) Where the organisation has not activated the registered representative, kindly refer to the following guide.
  - i) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide

## 5.2 The organisation has been enrolled for the submission of third-party data via Connect: Direct

- a) To submit the data file, the third-party entity (organisation) should be enrolled to submit third-party data via the Connect: Direct platform.
- b) To validate whether this has been done, proceed as follows:
  - i) Select **Services** from the main menu options.
  - ii) Select **Enrol 3<sup>rd</sup> Party Data** from the left menu options
  - iii) Select **Enrol Organisation**
- c) The following screen should be displayed.



- d) Note that the enrolled channel will be checked. Additionally, where the organization has been successfully enrolled, the status will read as **Legal Entity Enrolled**.
- e) Where the status reads as **Legal Enrolment Requested**. This implies that SARS is still validating the enrolment.
- f) Where the organisation has not been enrolled successfully (Connect Direct channel is not checked on the Enrol Organisation for 3<sup>rd</sup> Party Data Submission page), enrol the organisation as per external guide:
  - i) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide

### 5.3 The Technical Administrator has been enrolled

- a) The Business Administrator is responsible for enrolling the Technical Administrator.
- b) To validate whether the Technical Administrators have been enrolled successfully, proceed as follows:
  - i) Select **Services** from the top menu option.
  - ii) Select **Enrol 3<sup>rd</sup> Party Data**, from the left menu option.
  - iii) Select **Enrol Technical Admin**
- c) The screen below will be displayed. The Enrol Technical Administrator for 3<sup>rd</sup> Party Data Submission page will display all the Technical Administrators. Additionally, the associated status of the Technical Administrators regarding their enrolment and activation will be displayed.
  - i) Take note of the status of the applicable Technical Administrator. The status should read as **“Link Enrolled”**.

**Enroll Technical Administrator for 3rd Party Data Submission**

**ORGANISATION DETAILS**

Organisation Name:  
 Registration Number:  
 Tax Reference:

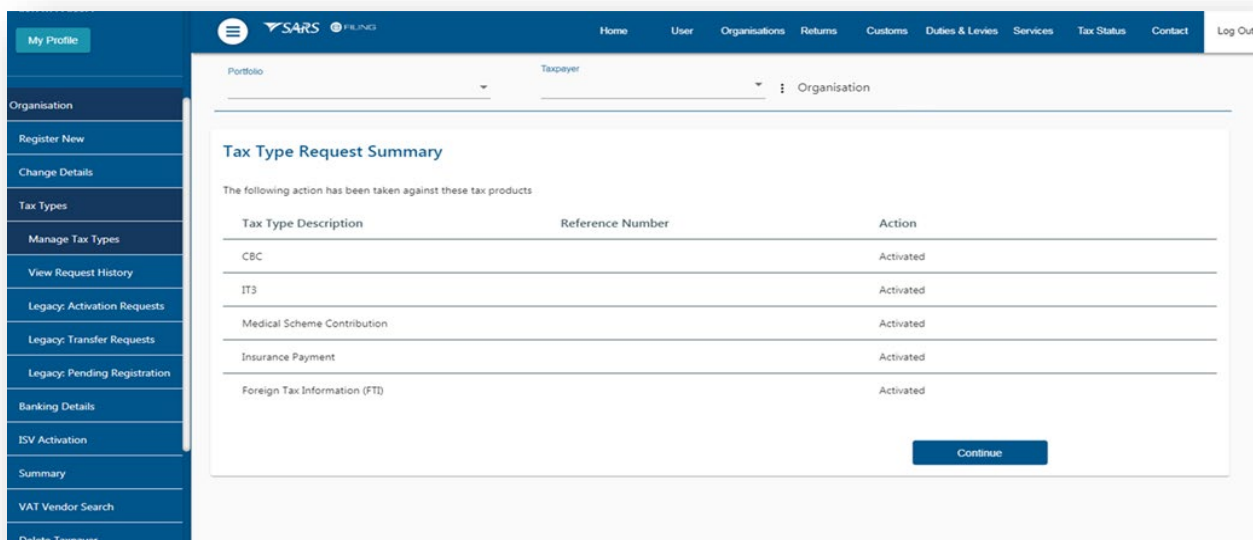
NAME	ID NUMBER/PASSPORT NUMBER	ENROLLMENT DATE	STATUS
			Link Enrolled <span style="float: right;"><a href="#">Open</a></span>

[Find Technical Administrator](#)

- d) Where the Technical Administrator has not been enrolled or does not appear on the page, refer to the following guide to invite and enrol the Technical Administrator.
  - i) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide

### 5.4 The tax type for submission has been activated

- a) The Business Administrator is responsible for activating the tax type for submission.
- b) To validate whether the tax type has been activated, proceed as follows:
  - i) Login to your profile
  - ii) On the left menu
    - A) Select **Organisation**
    - B) Select **Tax Types**
    - C) Select **Manage Tax Type**



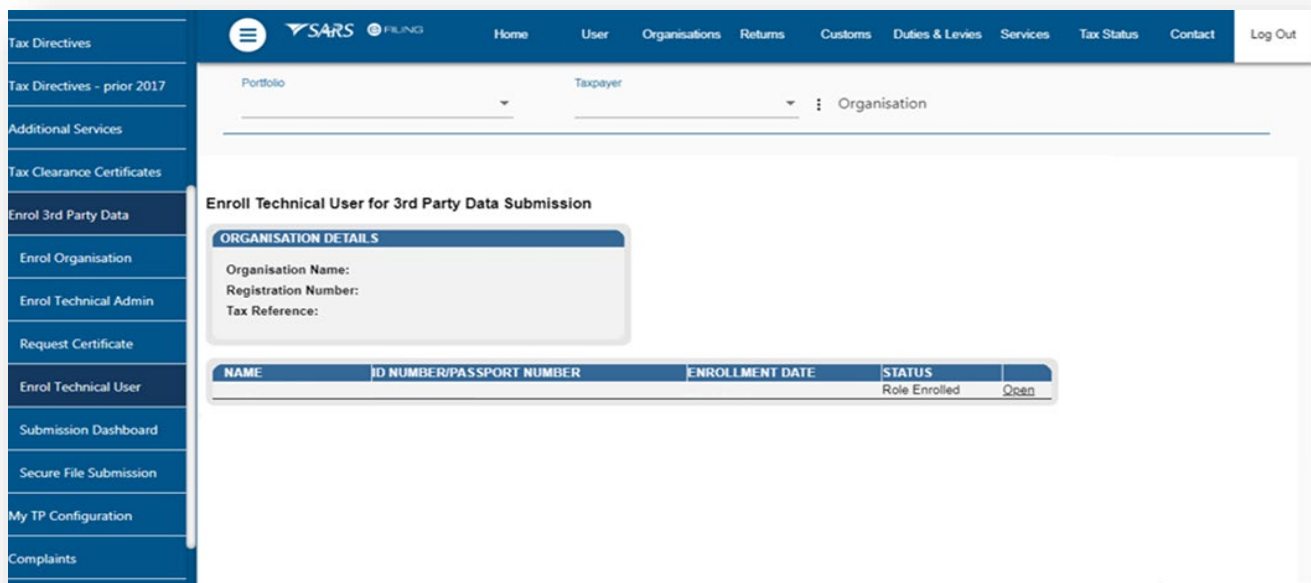
Tax Type Description	Reference Number	Action
CBC		Activated
IT3		Activated
Medical Scheme Contribution		Activated
Insurance Payment		Activated
Foreign Tax Information (FTI)		Activated

- c) Do note that the screen will display all the activated tax types. Where the desired tax type under for submission is not displayed or under **Action** is not Activated, proceed to activate the tax type, by referring to the following external guide:

- i) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide

## 5.5 The Technical User has been enrolled

- a) The Technical Administrator is responsible for enrolling the Technical User
- b) To view all the enrolled Technical Users, proceed as follows:
  - i) Select **Services** from the top menu option.
  - ii) Select **Enrol 3<sup>rd</sup> Party Data**, from the left menu option.
  - iii) Select **Enrol Technical User**
  - iv) The Enroll Technical User screen will be displayed



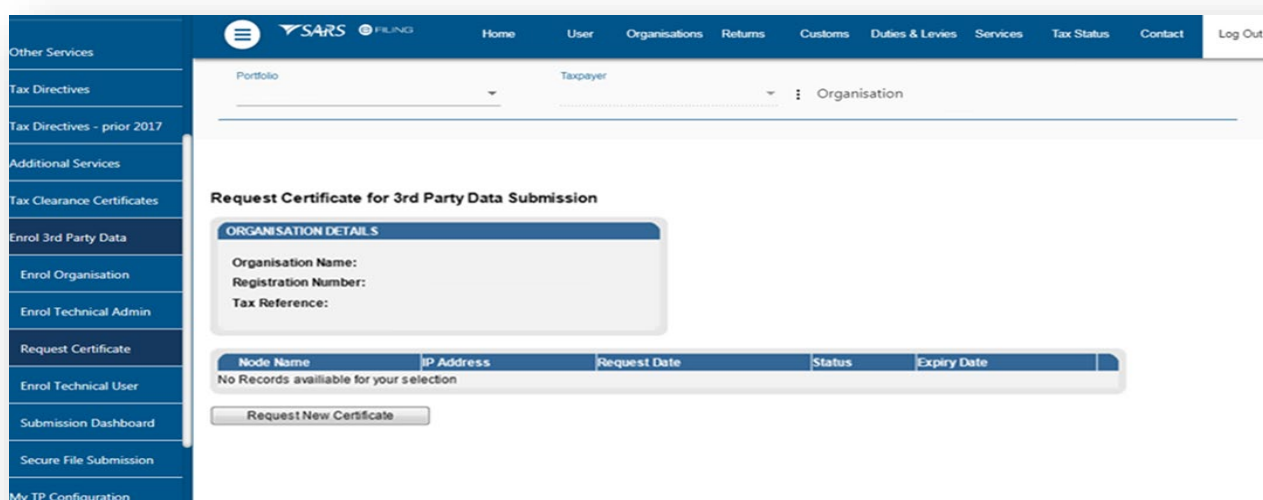
- c) All the Technical Users with the associated status with regard to their enrolment and activation will be displayed on the screen.
  - i) On the **STATUS** column, the status **Role Enrolled** should be displayed. Where the status is displaying **Role Enrolment Requested**, this suggests that SARS is processing the enrolment.
- d) To view the details of a Technical User,
  - i) Click **Open** next to the relevant user.
- d) Where the Technical User does not appear, or has not been enrolled, proceed to enrol him/her referring to the following guide:
  - i) GEN-ENR-01-10 - Manage Submission of Third-Party Data - External Guide

## 6 REQUEST A SARS SECURITY CERTIFICATE

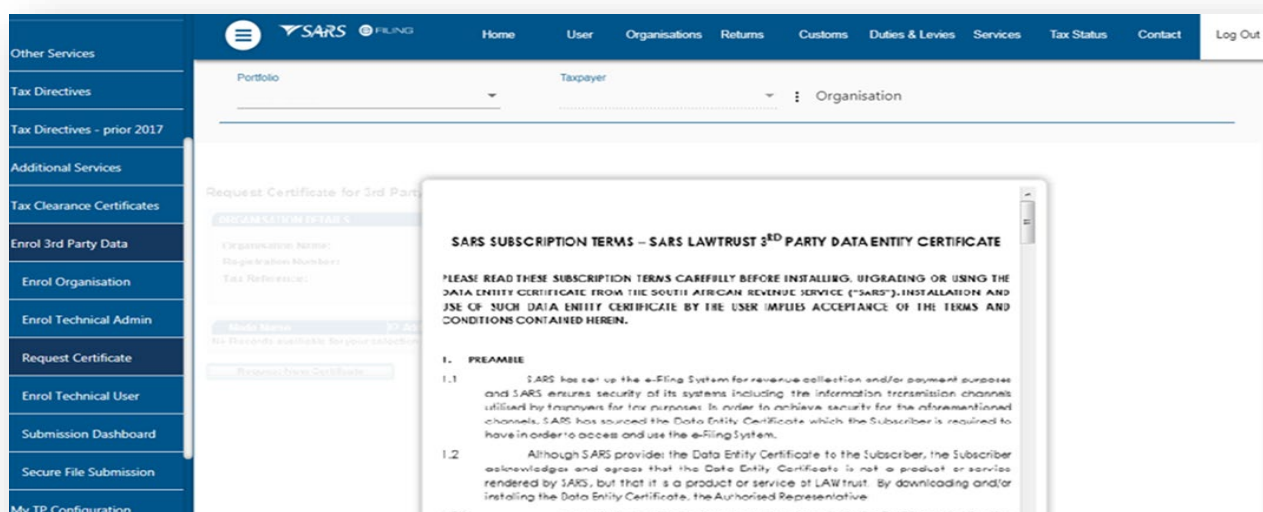
- a) It is important to note that before a successful submission, third-party data entities should request a security certificate from SARS. The security certificate is only valid for 12 months from the date it was issued.

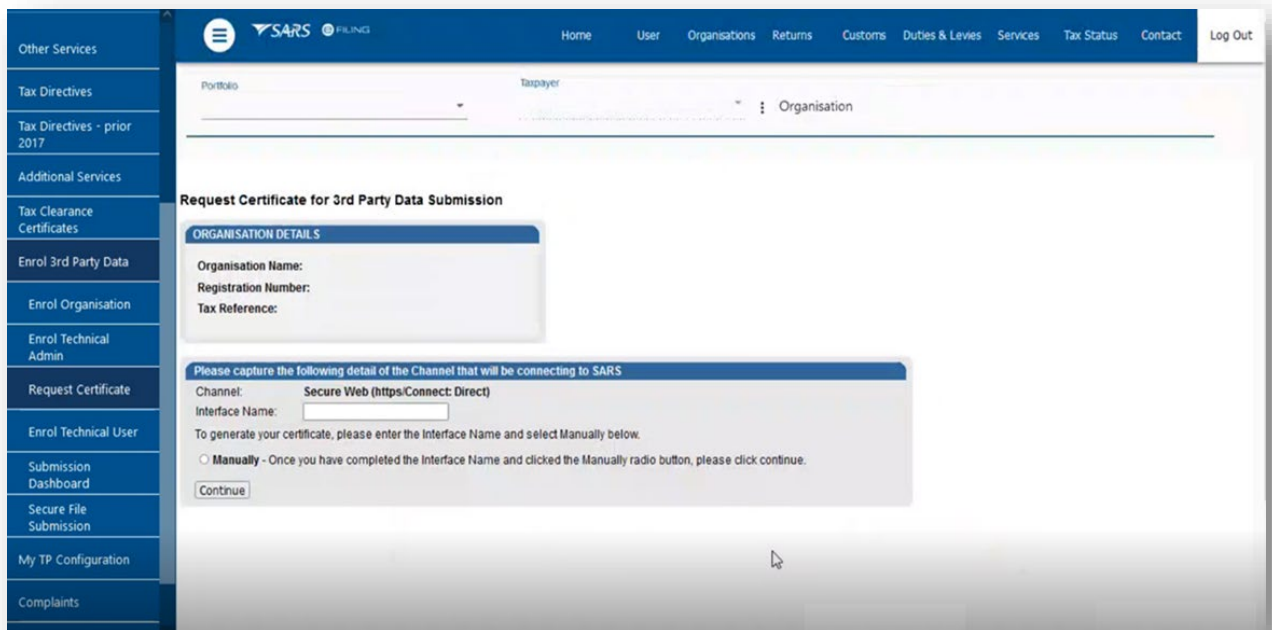
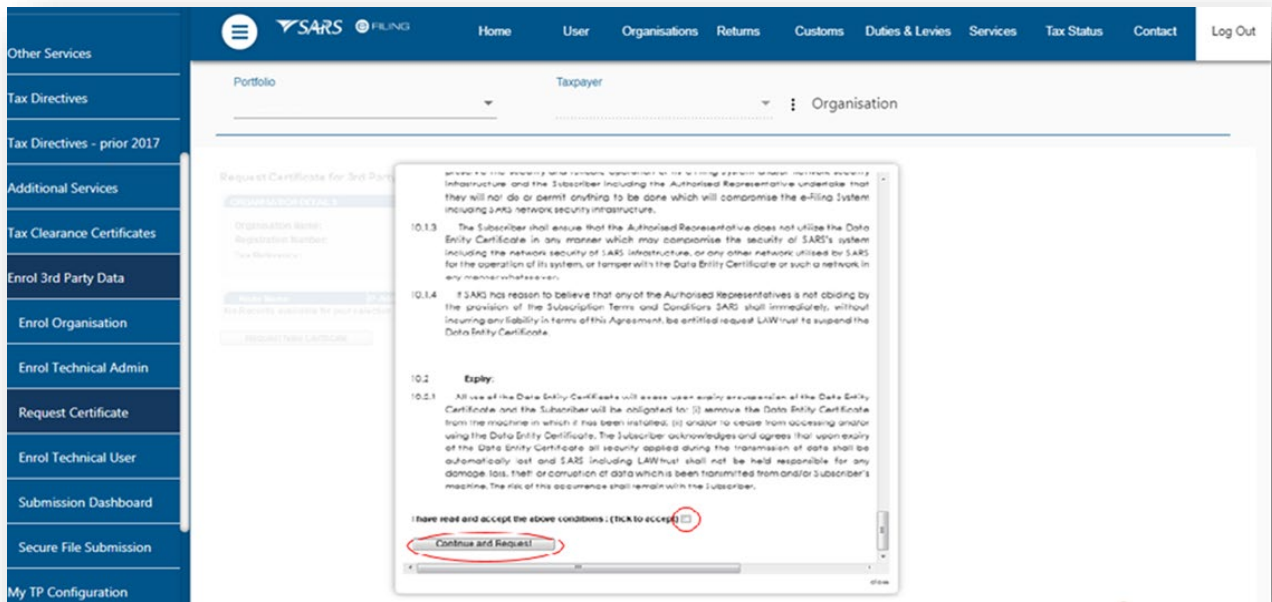
## 6.1 How to request a SARS Security Certificate

- a) The Technical Administrator requests SARS security on behalf of the entity. Additionally, the Technical Administrator should have been enrolled successfully to request the security certificate from SARS. This security certificate is required for the submission of data via the Connect: Direct channel.
- b) To request the security certificate from SARS, the Technical Administrator should proceed as follows:
  - i) Login to eFiling
  - ii) Select **Services** on the main menu.
  - iii) On the left menu option
    - A) Select **Enrol 3<sup>rd</sup> Party Data**
    - B) Select **Request Certificate**,
- c) The **Request Certificate** screen will list all certificates that were issued for that taxpayer. Initially this list will be empty. Click **Request New Certificate** to start a new certificate request process.

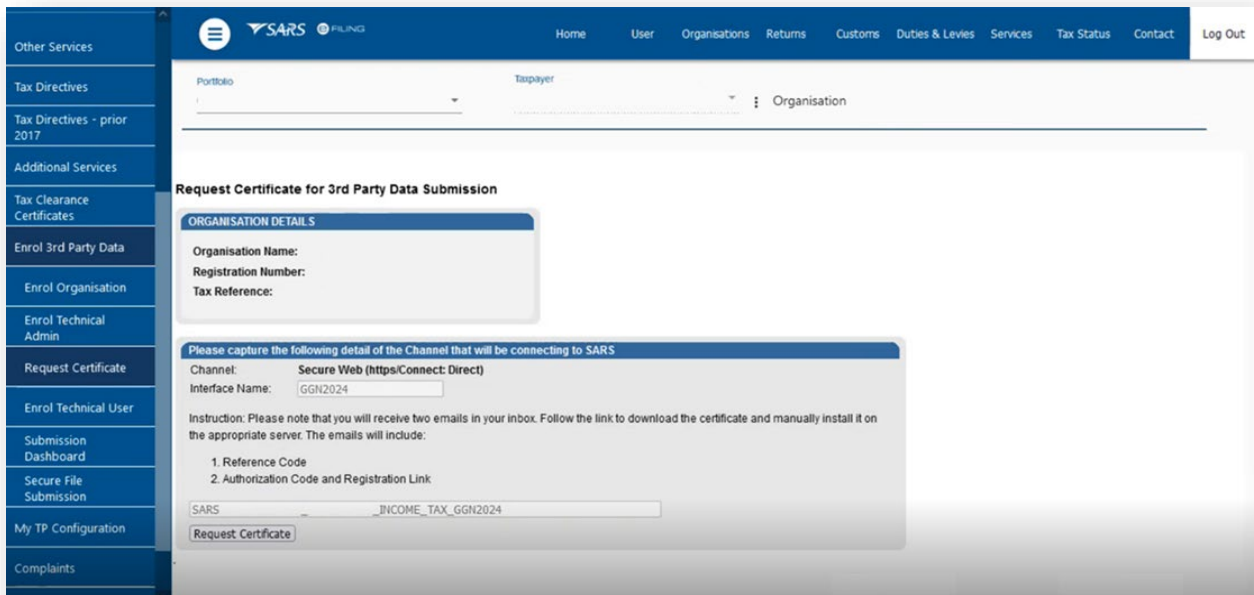


- d) You will be requested to accept the Terms and Conditions (T&C) that govern the use of this service by ticking the box next to **I have read and accept the above conditions**. Once the terms and conditions have been accepted, click **Continue and Request**. Please note that unless the terms and conditions are accepted, you will not be able to proceed to the next step.

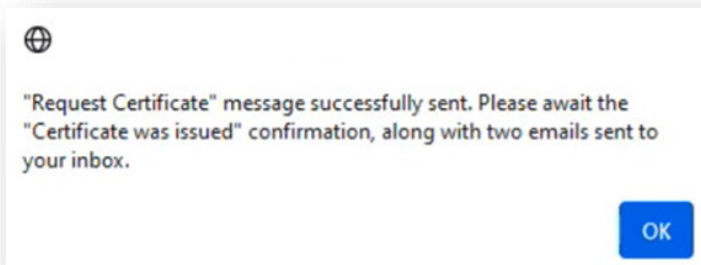




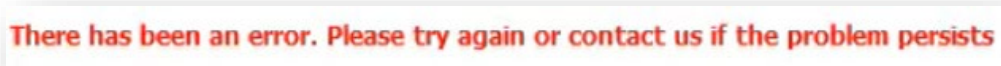
- e) Capture the **Interface Name**
  - i) Do note the **Interface Name** for future reference.
- f) Select **Manually**
- g) Click on **Continue**
- h) The following screen will be displayed.



- i) Do note the **message** displayed on the page.
- i) The user will receive two emails from SARS. The emails will contain the following:
  1. **Reference Code**
  2. **Authorization Code and Registration Link**
- j) Click on **Request Certificate**
- k) The following pop-up screen will be displayed.



- l) Take note of the message and click on **Ok**.
- m) Do note that if there is an error in your request, the following message will be displayed.



- n) To resolve, please try again.
- o) Where the certificate was issued successfully, the following screen will be displayed.

**Request Certificate for 3rd Party Data Submission**

**ORGANISATION DETAILS**

**Organisation Name:**  
**Registration Number:**  
**Tax Reference:**

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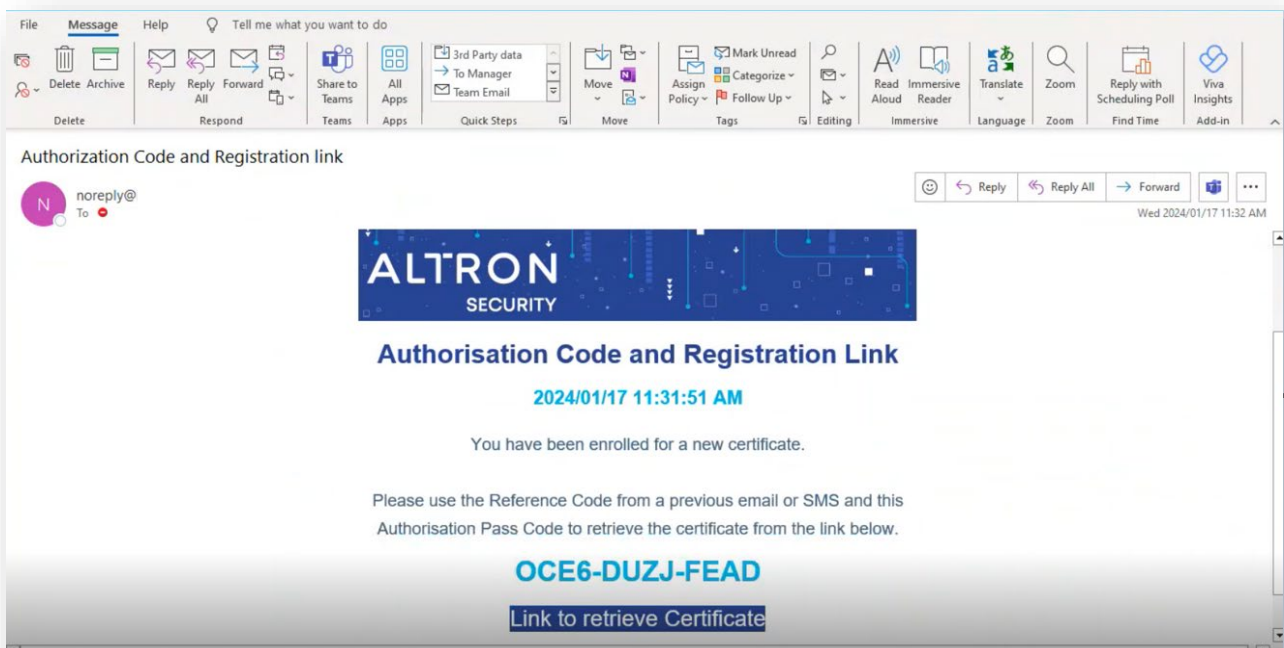
**Please capture the following detail of the Channel that will be connecting to SARS**

Channel: **Secure Web (https/Connect: Direct)**  
Interface Name:

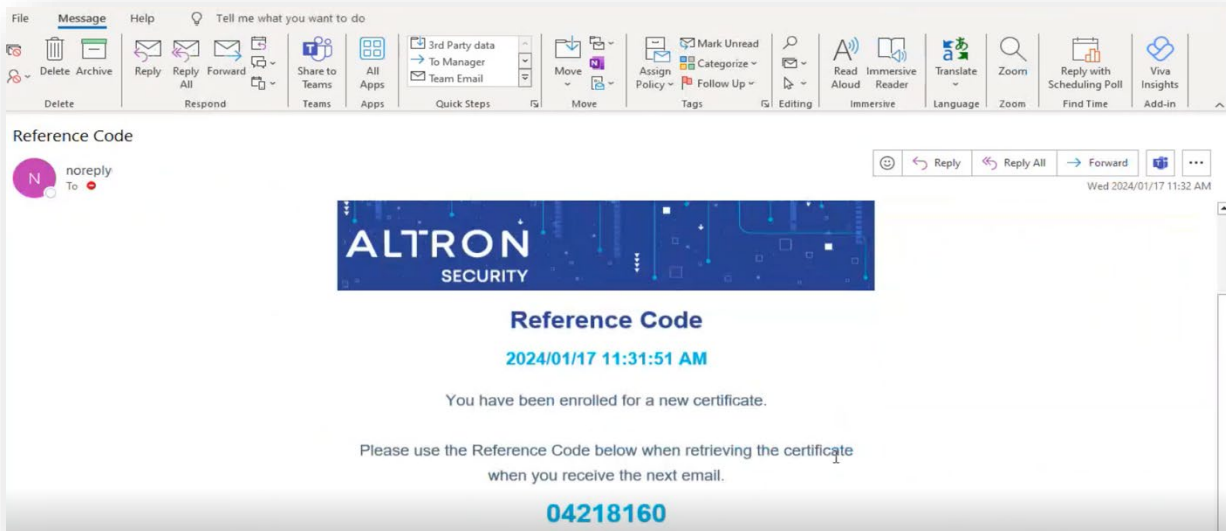
**Your certificate has been successfully issued**

Status: Certificate Issued

- p) Note the two buttons:
- i) **Revoke Certificate** – You have the option to revoke a security certificate. If the **Revoke Initiation** button is clicked, a pop-up message will be displayed informing you to contact the Third-Party Data Support team. There will also be a hyperlink to kick off the email sending (SARS\_ThirdPartyData\_Support@sars.gov.za.) process on the pop-up.
  - ii) **Renew Certificate** – Security certificates are only valid for 12 months from date of issue. The **Renew Certificate** button will only be available 30 days prior to the expiry date.
- q) Proceed to your email to access the **Authorisation code and Registration link**.
- r) The emails sent through by SARS will be displayed as follows:



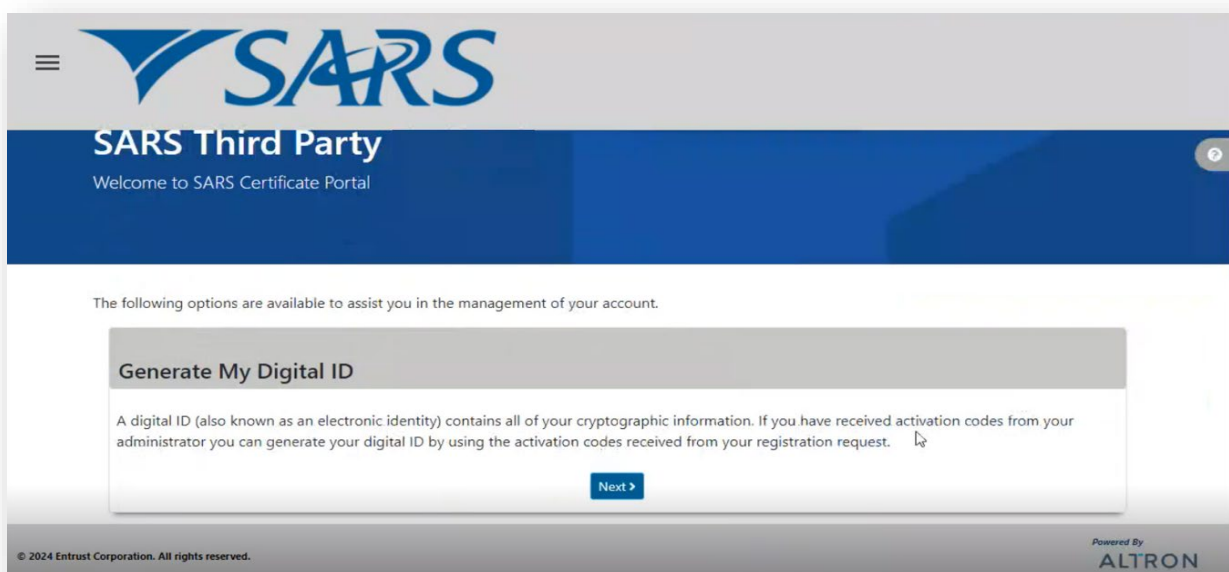
- i) Do note the **Authorisation Code** and the **Certificate Link** on the email.



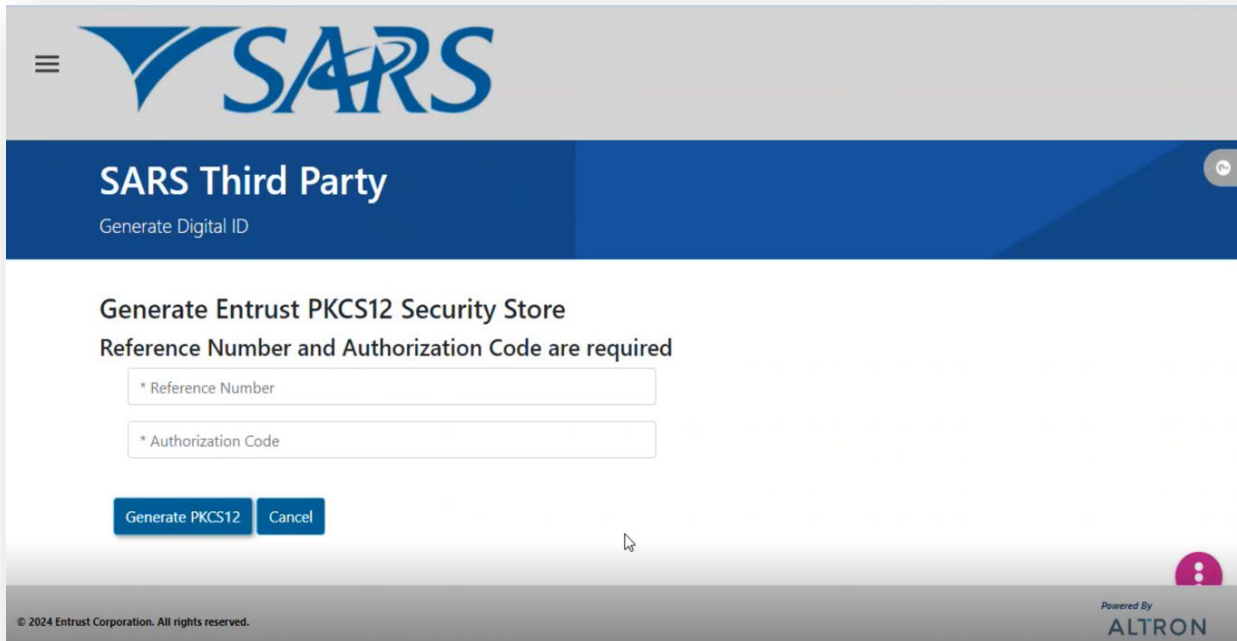
- ii) Do note the **Reference Code** on the email.
- s) Proceed to retrieve the certificate as follows:
  - i) Click on **Link to retrieve Certificate** from the email sent by SARS.



- ii) The SARS Third Party Data page will be displayed.

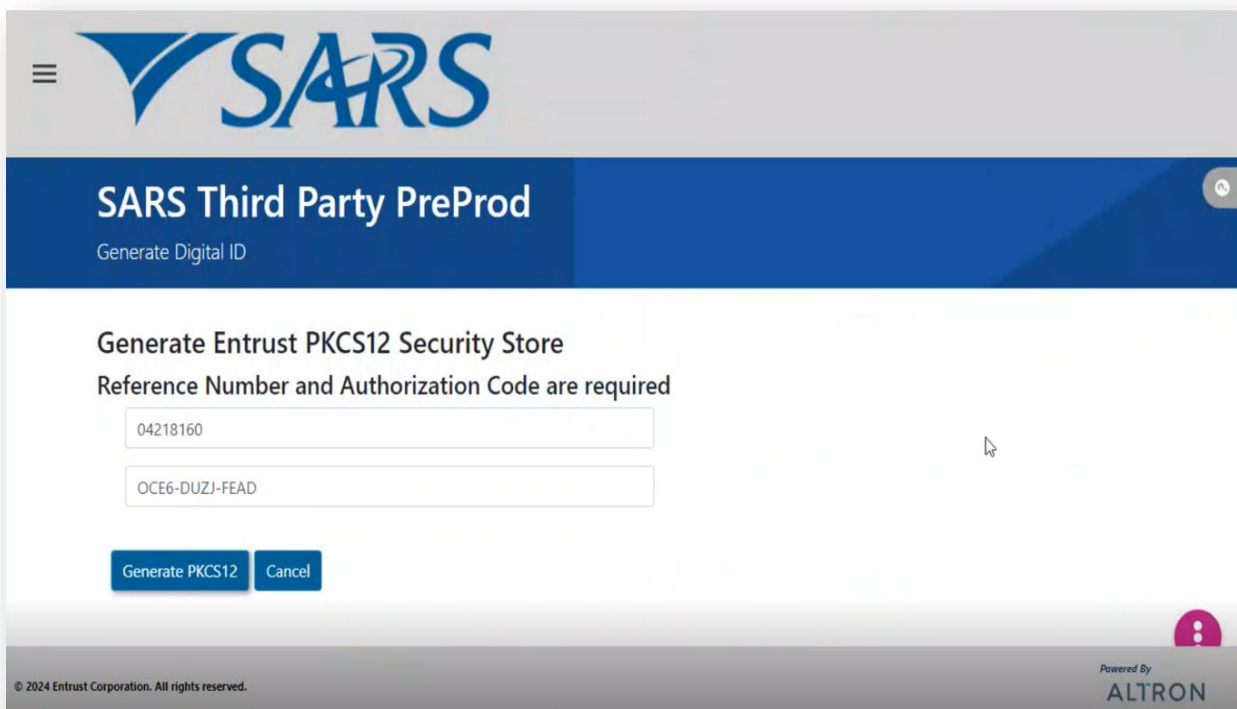


- iii) Click on **Next**



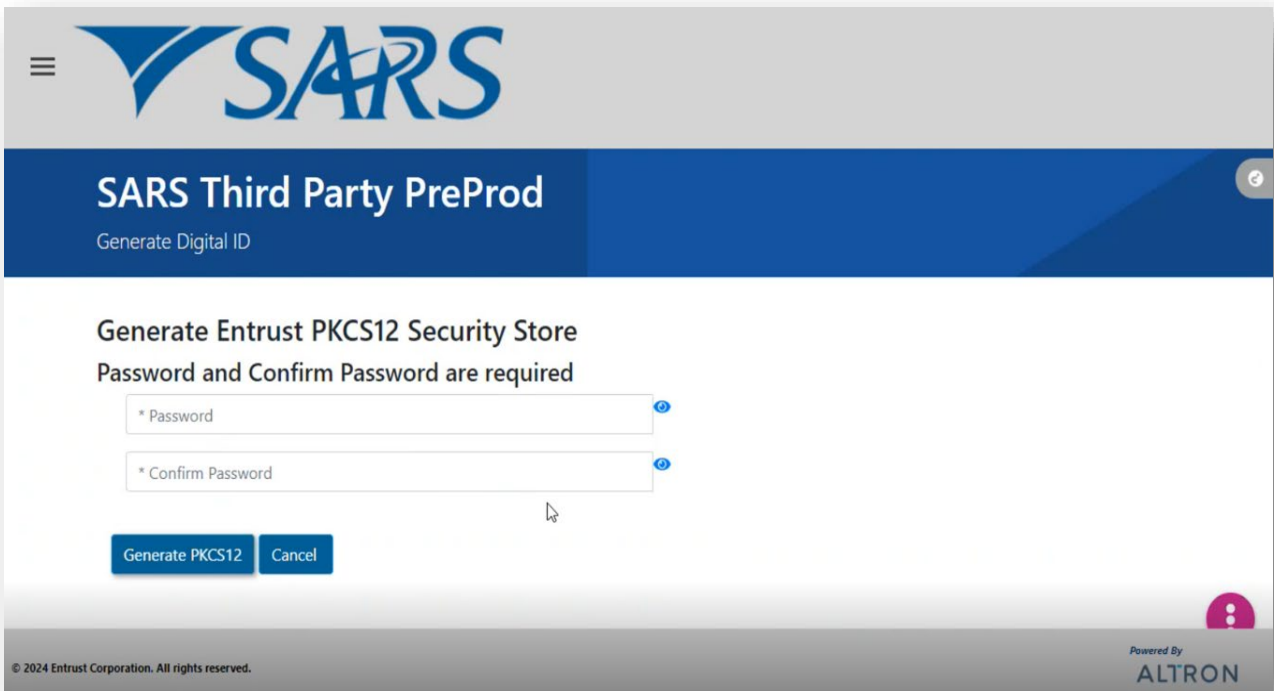
The screenshot shows the SARS Third Party 'Generate Digital ID' interface. The header includes the SARS logo and a hamburger menu icon. Below the header, the page title is 'SARS Third Party' with a sub-header 'Generate Digital ID'. The main content area is titled 'Generate Entrust PKCS12 Security Store' and includes the instruction 'Reference Number and Authorization Code are required'. There are two input fields: '\* Reference Number' and '\* Authorization Code'. Below the fields are two buttons: 'Generate PKCS12' and 'Cancel'. The footer contains the copyright notice '© 2024 Entrust Corporation. All rights reserved.' and the 'Powered By ALTRON' logo.

- iv) Complete the **Reference Number** and **Authorization Code** sent through via email.
  - A) Click on **Generate PKC12**

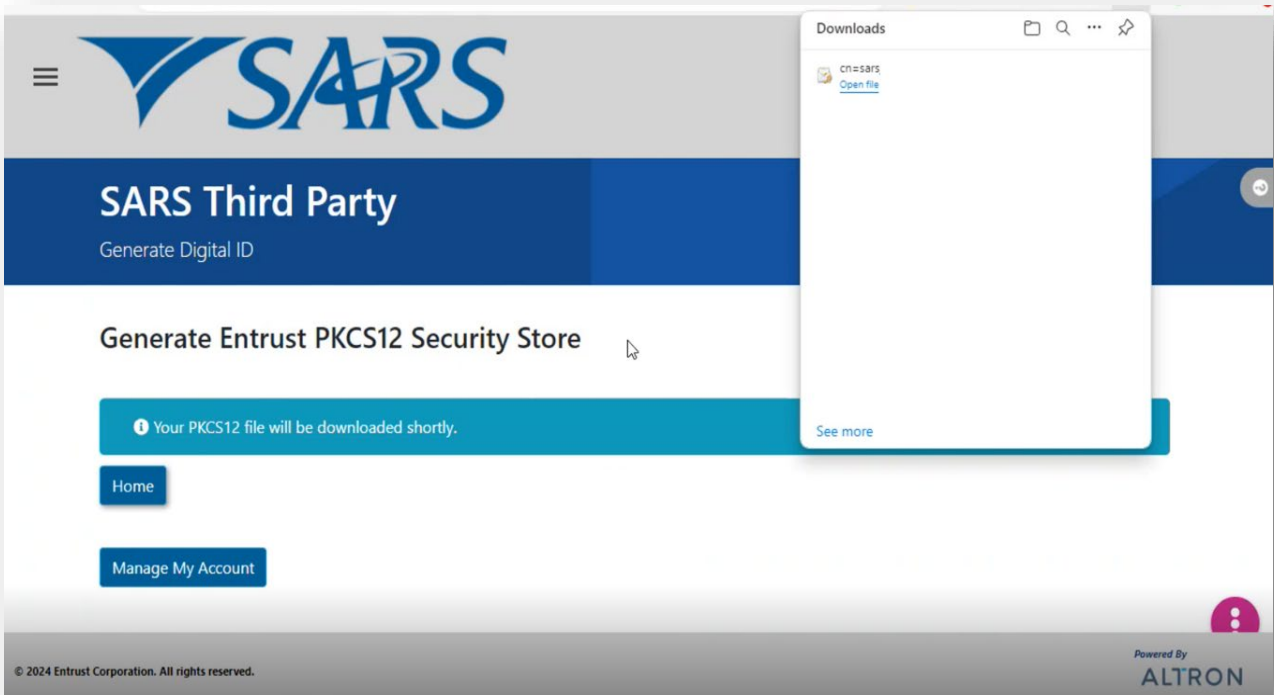


The screenshot shows the SARS Third Party PreProd 'Generate Digital ID' interface. The header includes the SARS logo and a hamburger menu icon. Below the header, the page title is 'SARS Third Party PreProd' with a sub-header 'Generate Digital ID'. The main content area is titled 'Generate Entrust PKCS12 Security Store' and includes the instruction 'Reference Number and Authorization Code are required'. There are two input fields: the first contains '04218160' and the second contains 'OCE6-DUZJ-FEAD'. Below the fields are two buttons: 'Generate PKCS12' and 'Cancel'. The footer contains the copyright notice '© 2024 Entrust Corporation. All rights reserved.' and the 'Powered By ALTRON' logo.

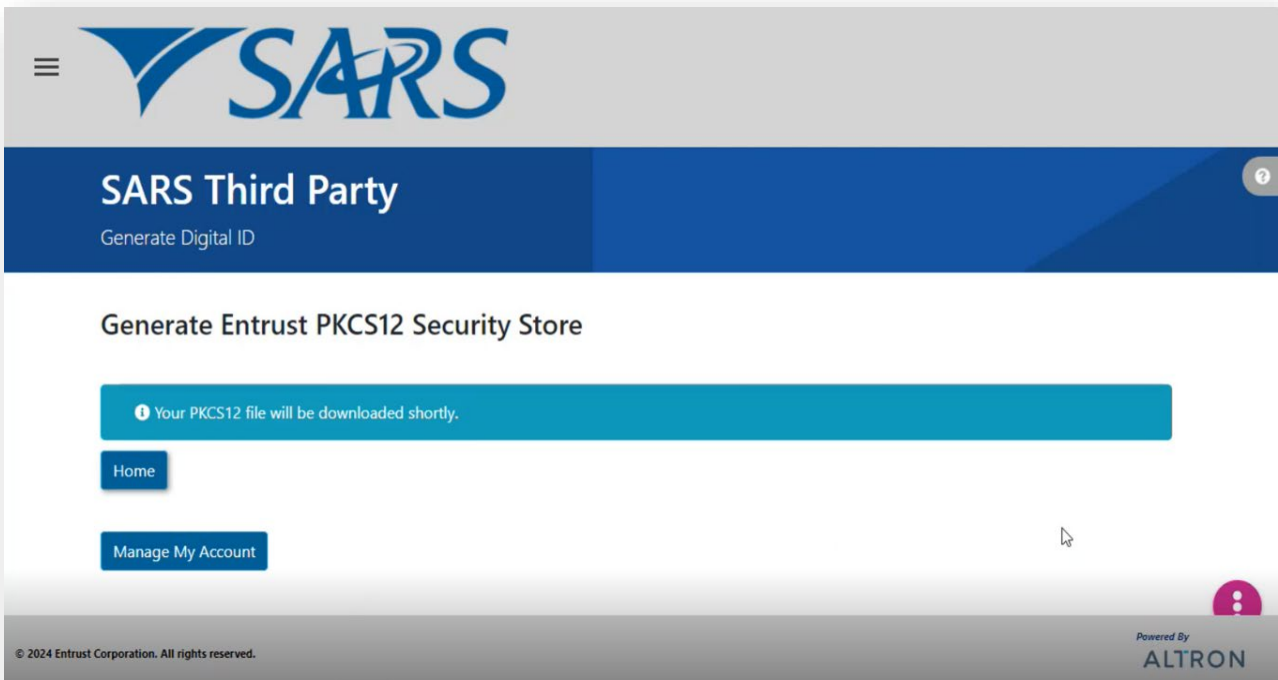
- v) Once completed the following screen will be displayed.



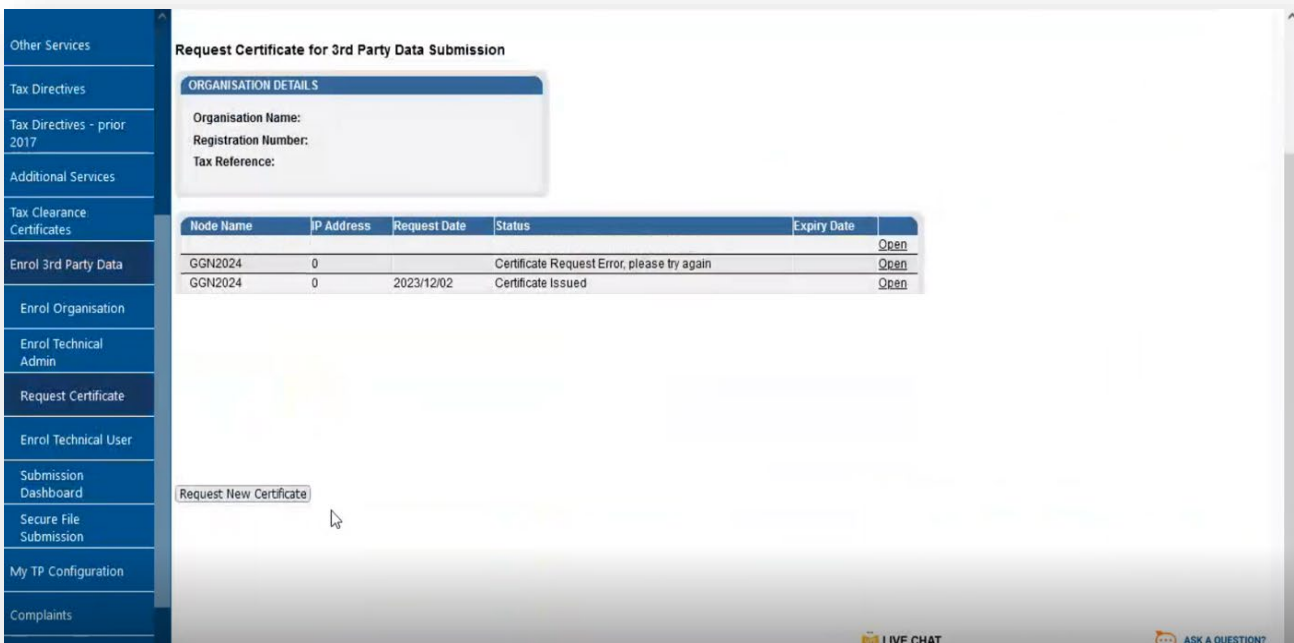
- A) Complete the Password as requested.
  - B) Once completed, click on **Generate PKCS12**
- vi) The following screen will be displayed.



- vii) Download the file according to your PC settings.

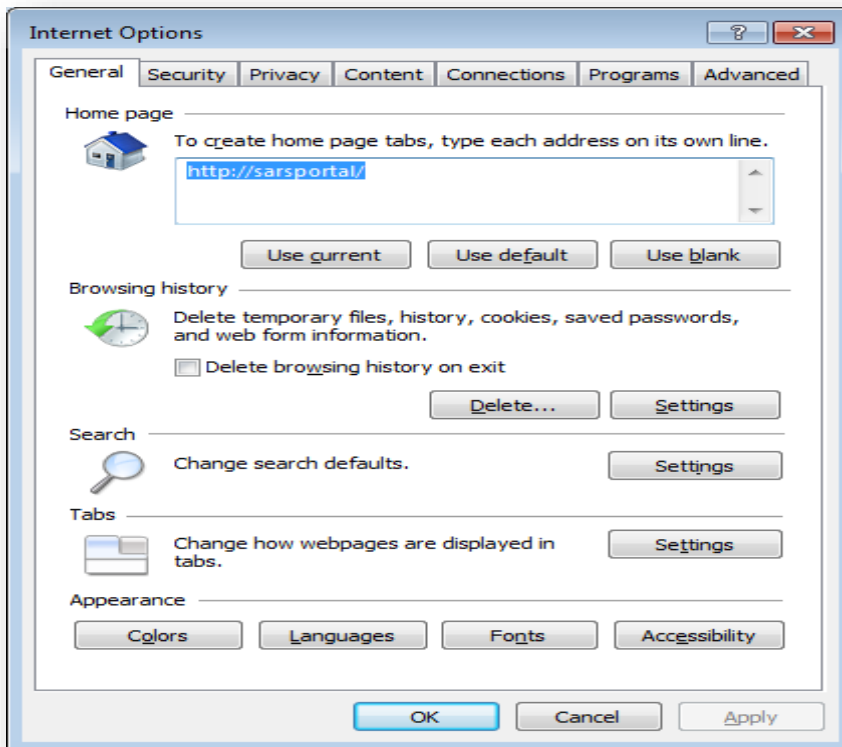


b) On eFiling the status will display as **Certificate Issued**.

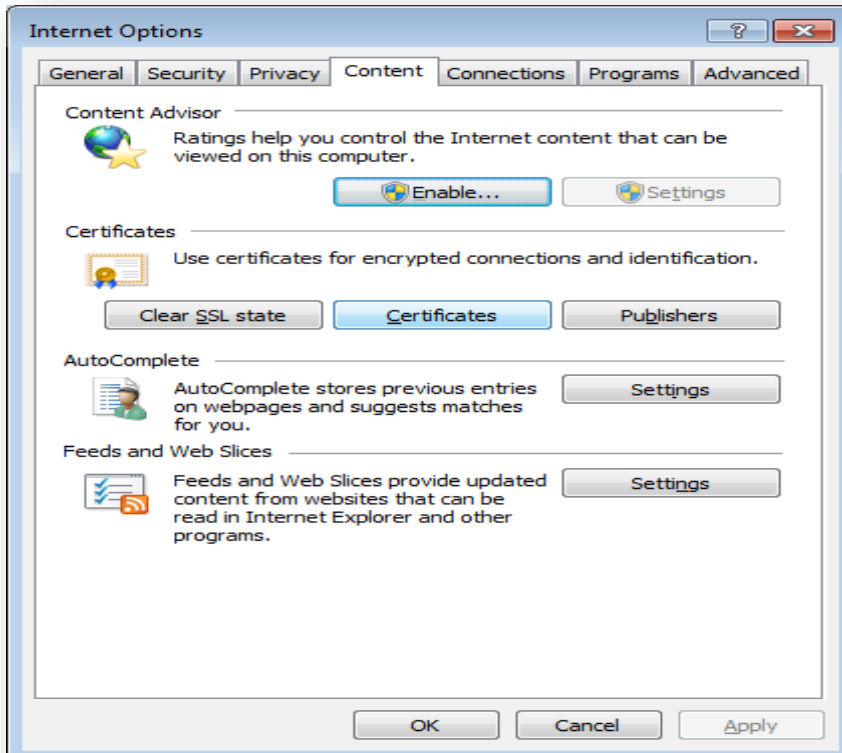


## 6.2 How to import a SARS security certificate

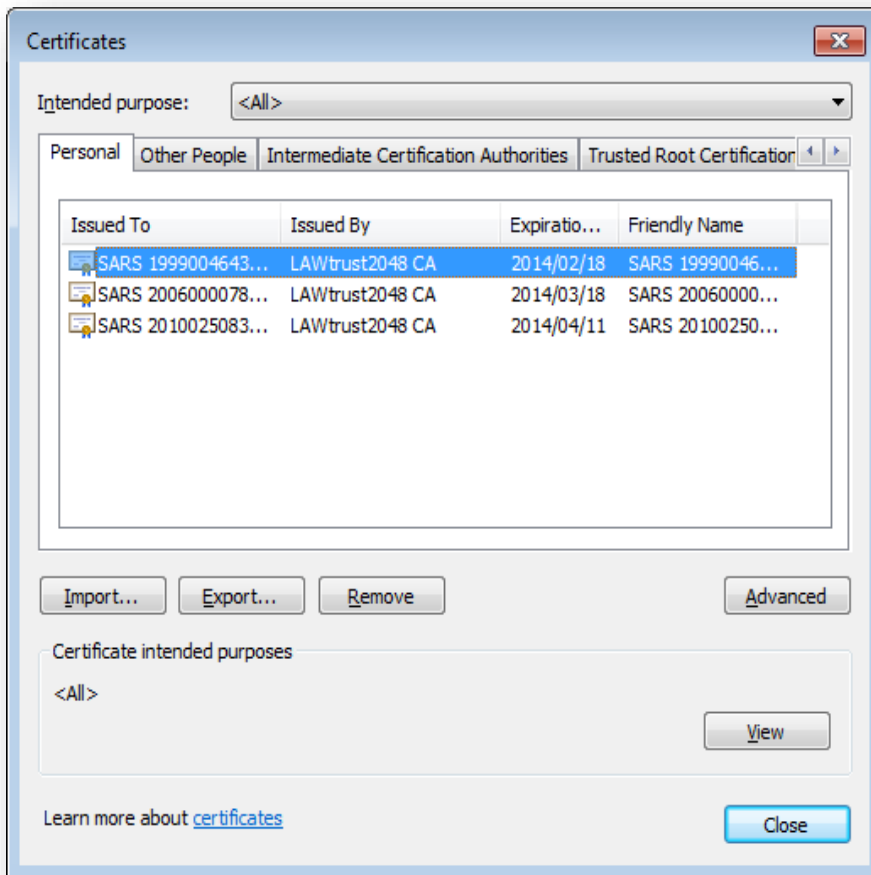
a) To access Internet Options, on the Windows Search bar, type Internet options and the screen below will be displayed.



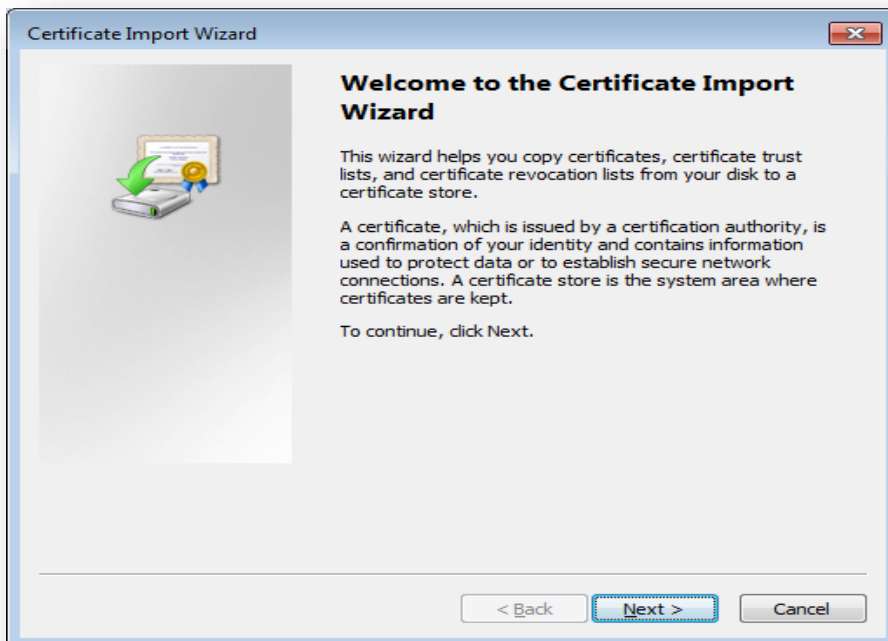
i) Click on **Content**



ii) Click **Certificates**

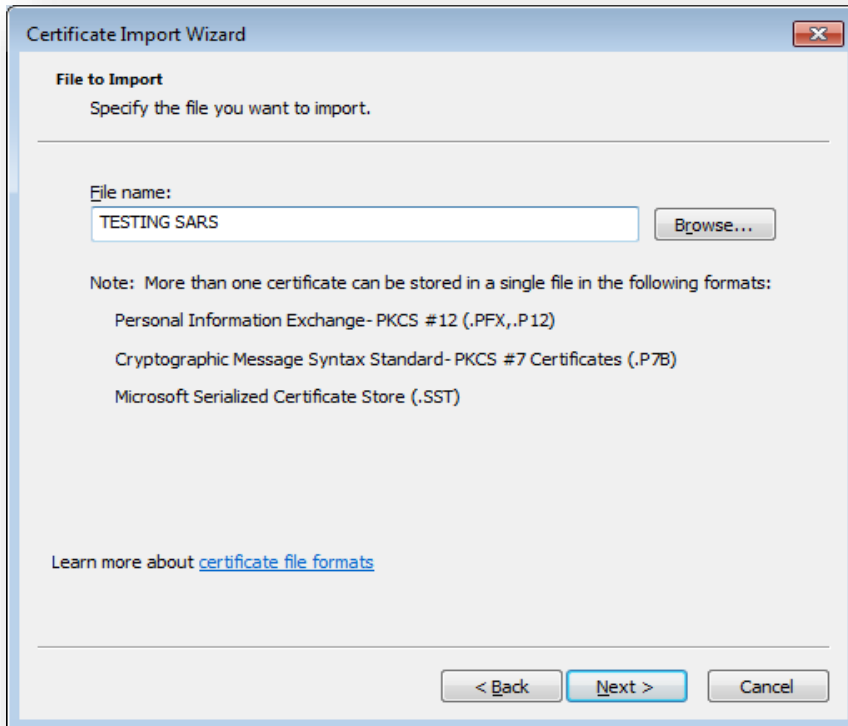


b) Select the Certificate and click **Import**

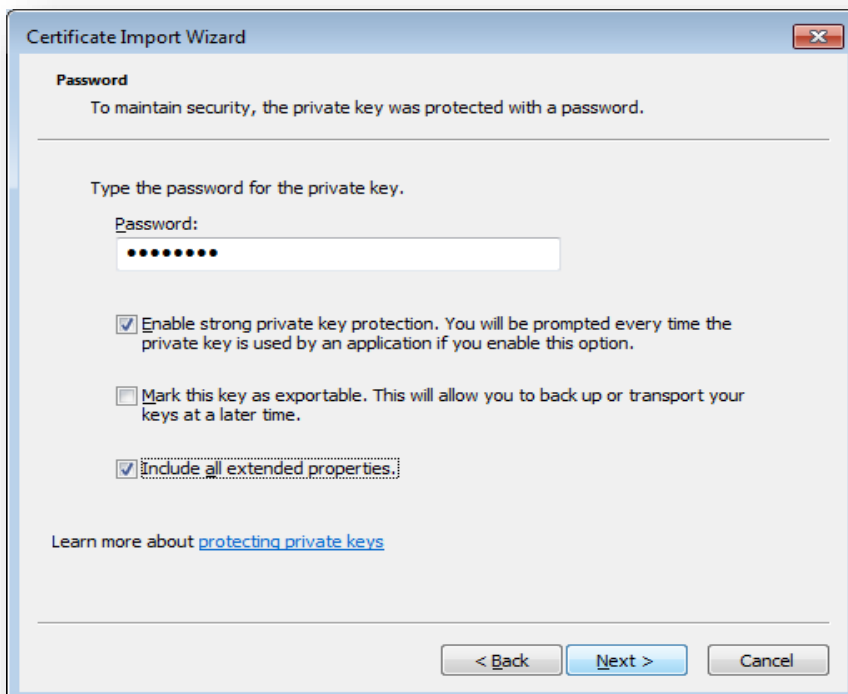


i) Click **Next**.

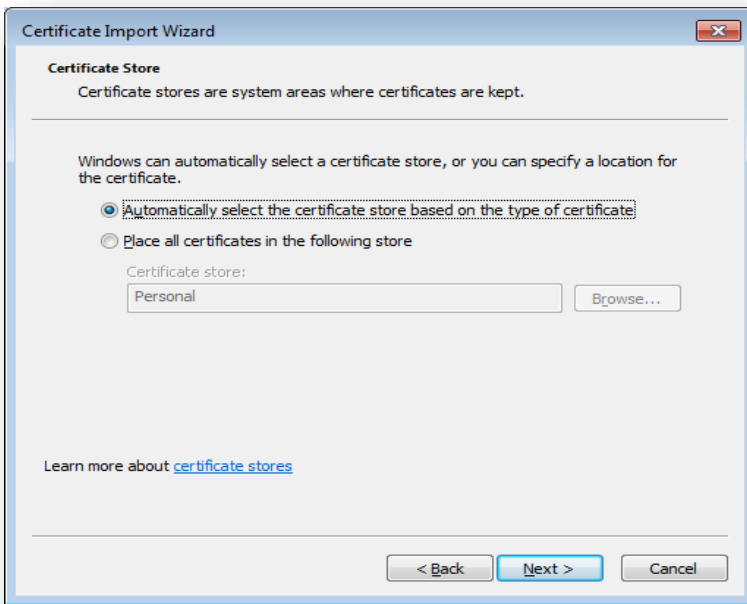
- c) Click **Browse** and search for the path where the certificate is saved.



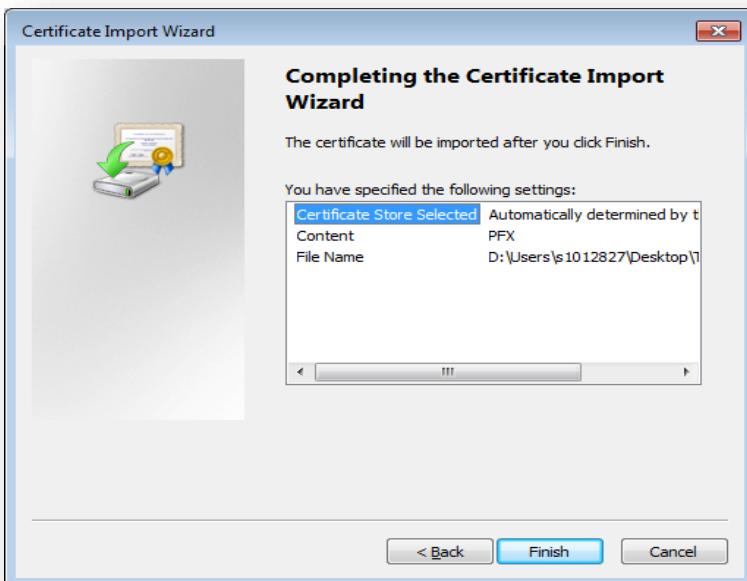
- i) Click **Next**.



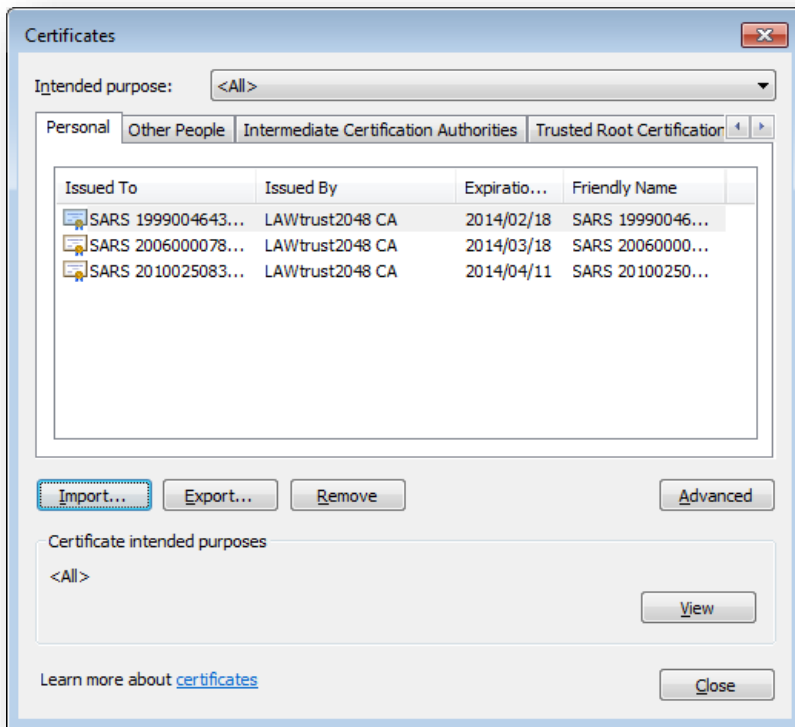
- d) Enter a password and click **Next**.
- e) Select **Automatically select the certificate store based on type of certificate**.



i) Click **Next**.



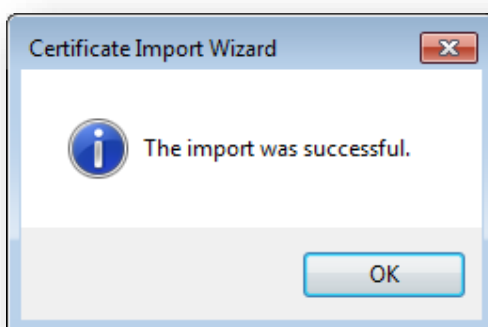
ii) Click **finish**.



f) Select the import file and click on **Import**

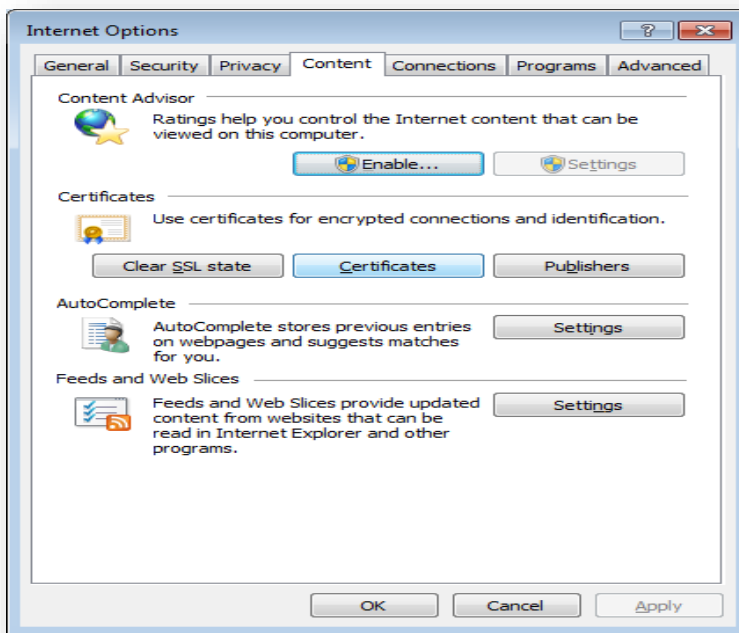


i) Click **OK**

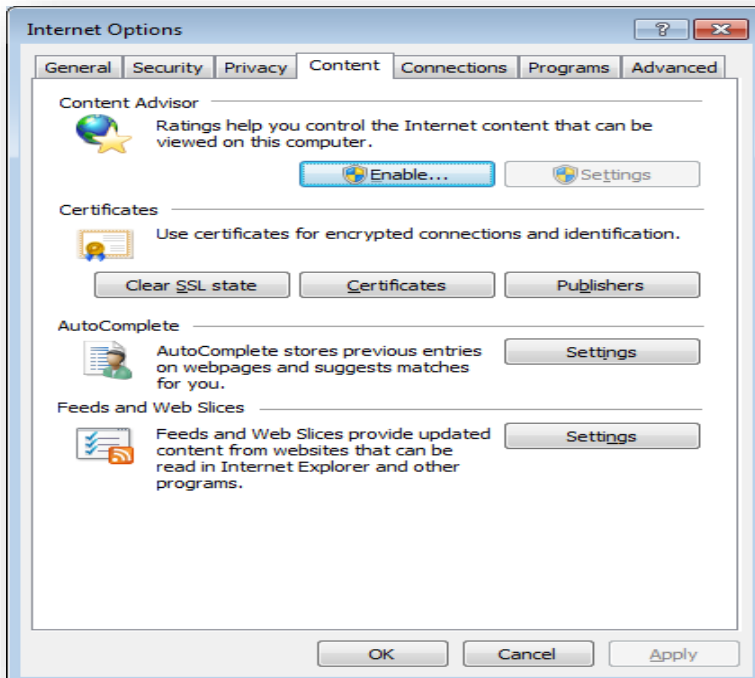


### 6.3 How to export a SARS security certificate

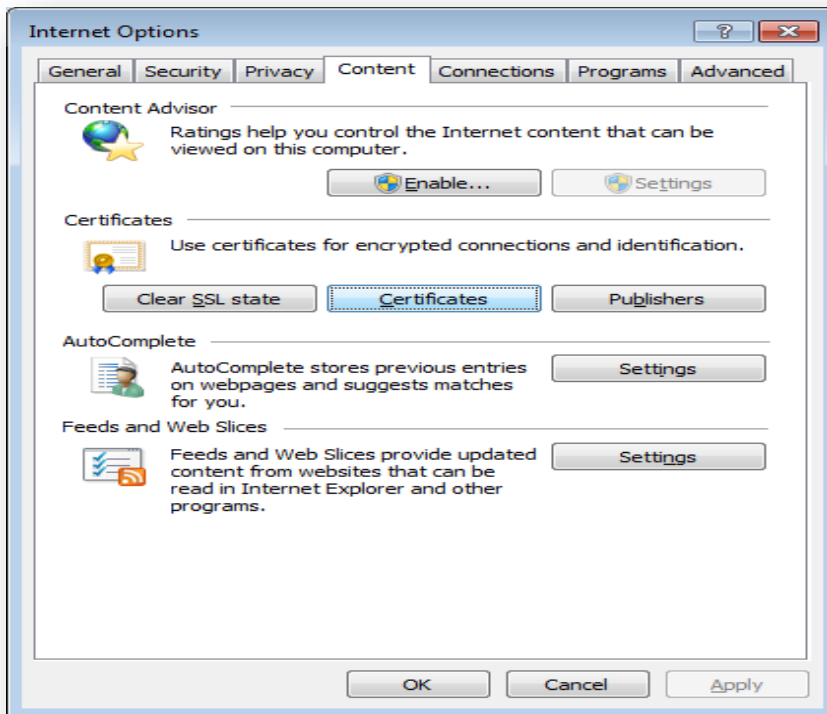
- a) To access Internet Options, on the Windows Search bar, type Internet options and the screen below will be displayed.



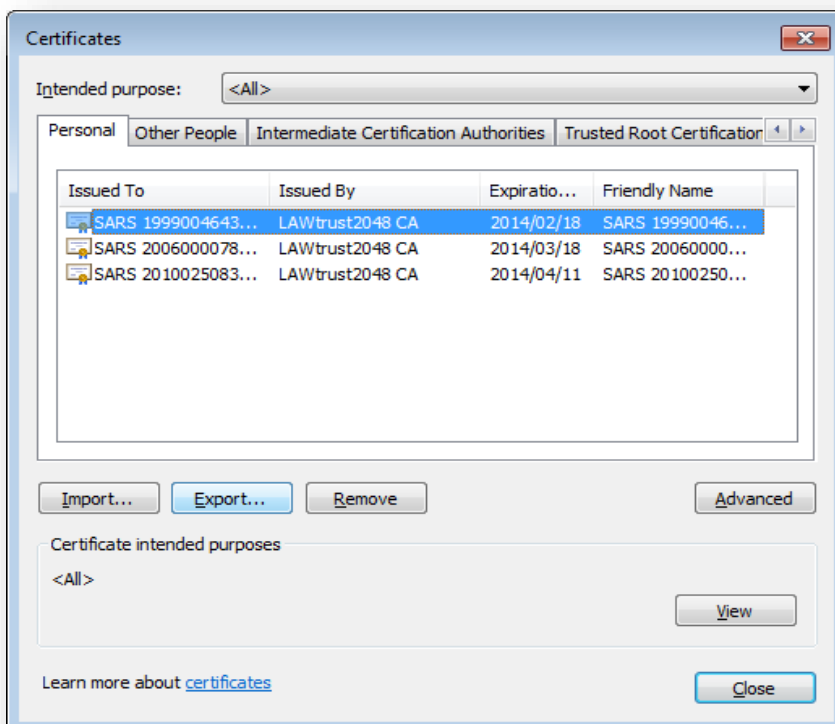
- b) Select **Content**



- c) Select **Certificate**



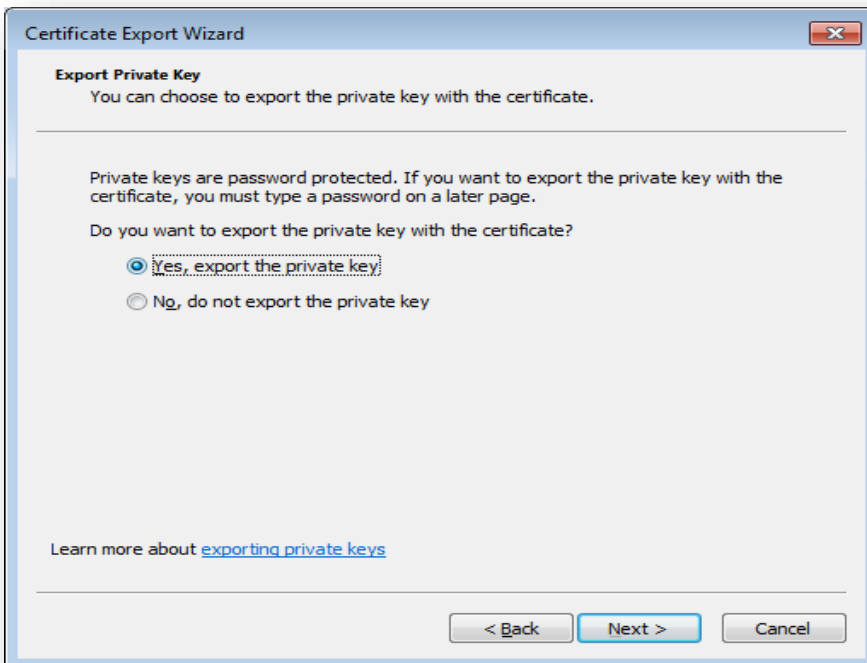
d) Select the Certificate you want to export.



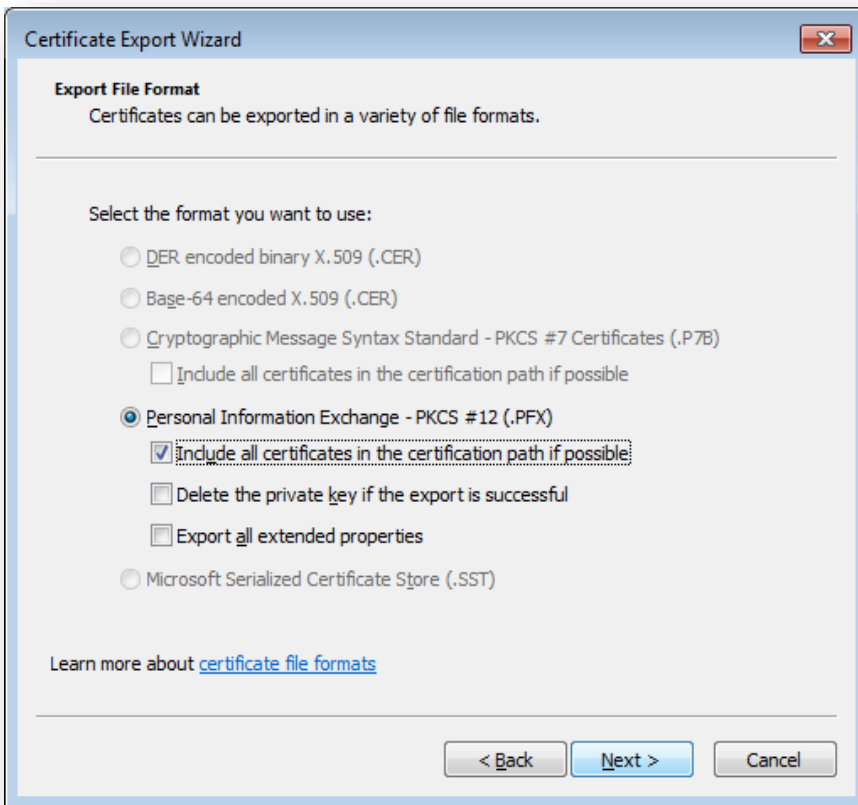
e) After you selected the certificate, click **Export** and then **Next**.



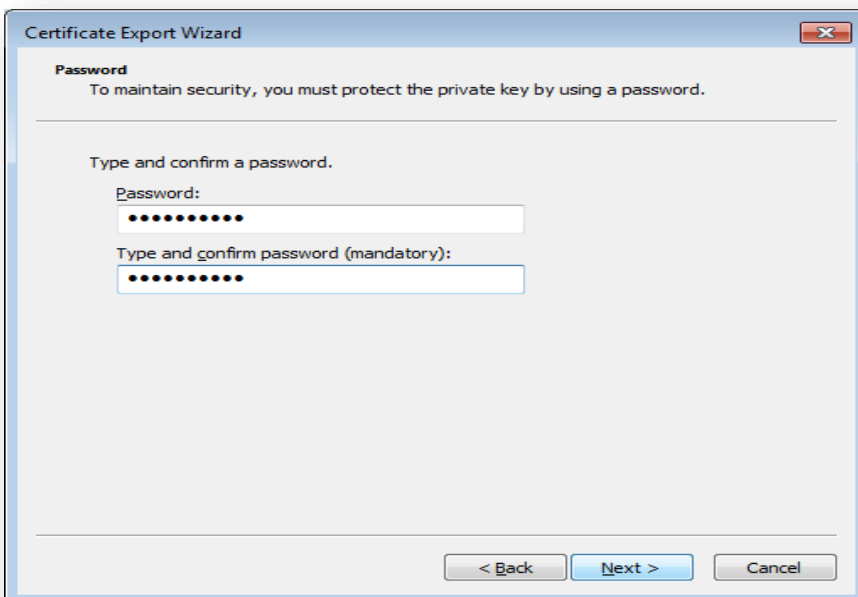
f) Click **Yes, export the private key** and then **Next**



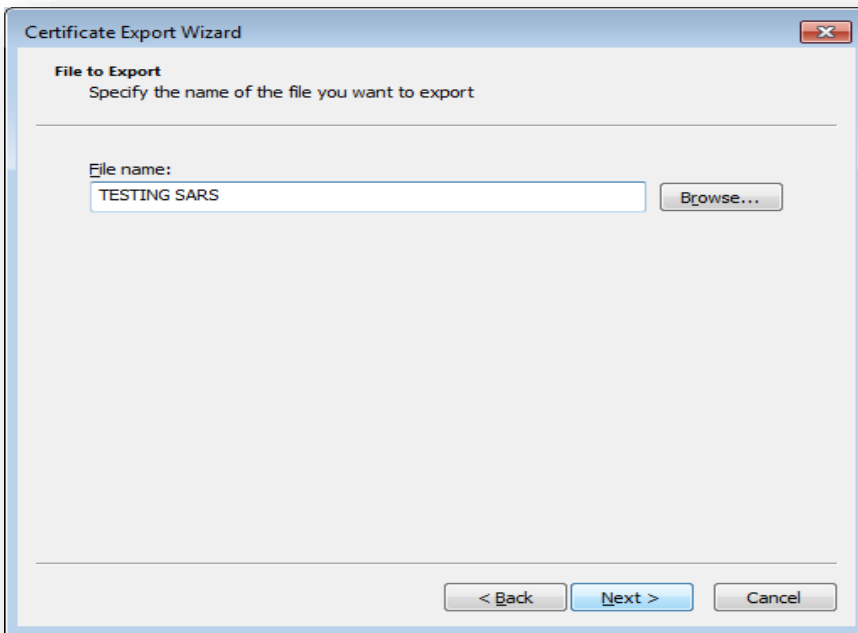
g) Select **Personal Information Exchange** and click **Next**



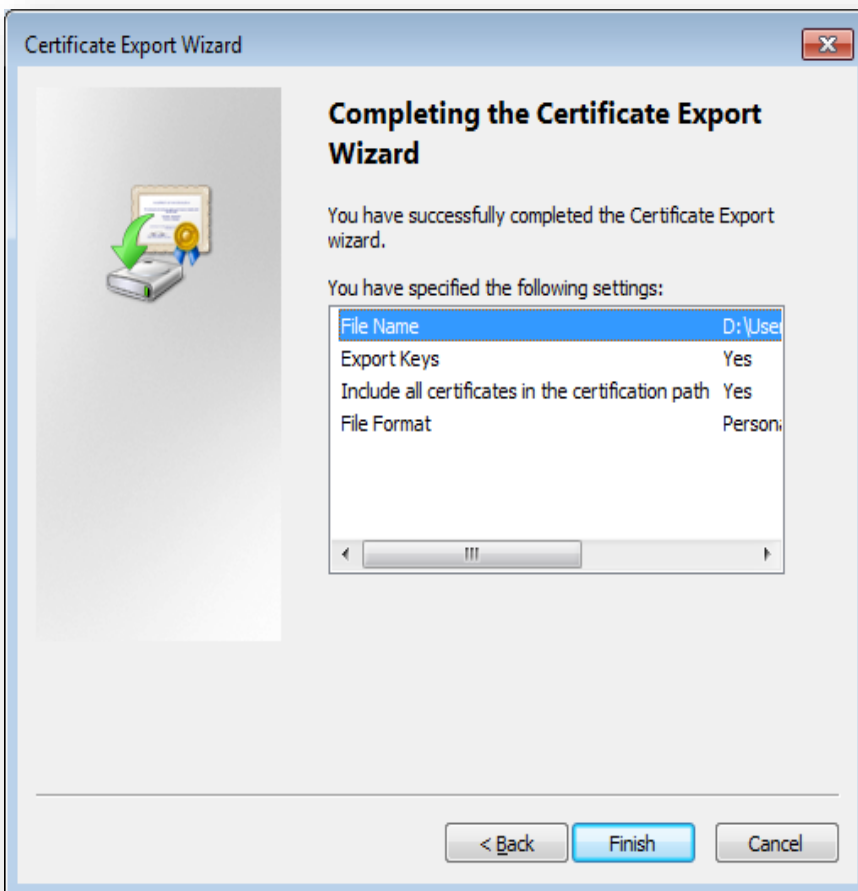
h) Select a password for the private key.



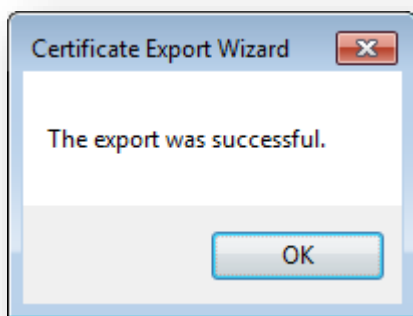
i) Enter a file name and click on **Next**.



i) Click **Finish**



j) The export was successful.



## 7 PREPARE THIRD-PARTY DATA FILE FOR SUBMISSION

- a) The electronic data file submissions should be structured and uploaded as described on the file specifications detailed in the SARS External Business Requirements Specification (BRS). The SARS External BRS is available on the Third-Party Data Annual Submission Page on the SARS website, [www.sars.gov.za](http://www.sars.gov.za). This page details all the external BRS as per data type. Additionally, some submissions on the webpage list the period in which the data type is on the “Trade Testing Go Live” platform and when it is on the “Production Submission Period”.
  - i) Note that when the data type is on Trade Testing this implies that during this period, third-party entities may test the submission process, by submitting test files to SARS. This process will allow entities to query SARS on the submission process thus increasing ease in the use of the SARS platform in submitting data files. Additionally, this is an opportunity for users/entities to test and finalise their completed files on the SARS third-party data platform.
    - A) SARS will notify third-party entities when to engage during this process.
  - ii) When the data type is on the Production Submission period it implies that third-party entities should submit their completed data files. Do note that for some data types, submission is annual whilst for others it is bi-annual.
    - A) When possible, ensure that the data file to be submitted has been tested during the pre-prod process of the data type. The dates for these are also available on the SARS website.
- c) When preparing the third-party data file, do note the following:
  - i) Submit the data file as per relevant SARS External BRS.
  - ii) The fields and records required by SARS for the completion of the data file, are as per appropriate legislation, Government Gazette, thus kindly ensure that all the data required such as the tax reference number is completed.
- d) Lastly when applying changes and resubmitting your third-party data file, do note that, data will be prepopulated in instances where the data file was submitted and declared. Additionally, once the data file is submitted again, the system usually takes 24-48 hours to reflect the updated /changes made on the data.

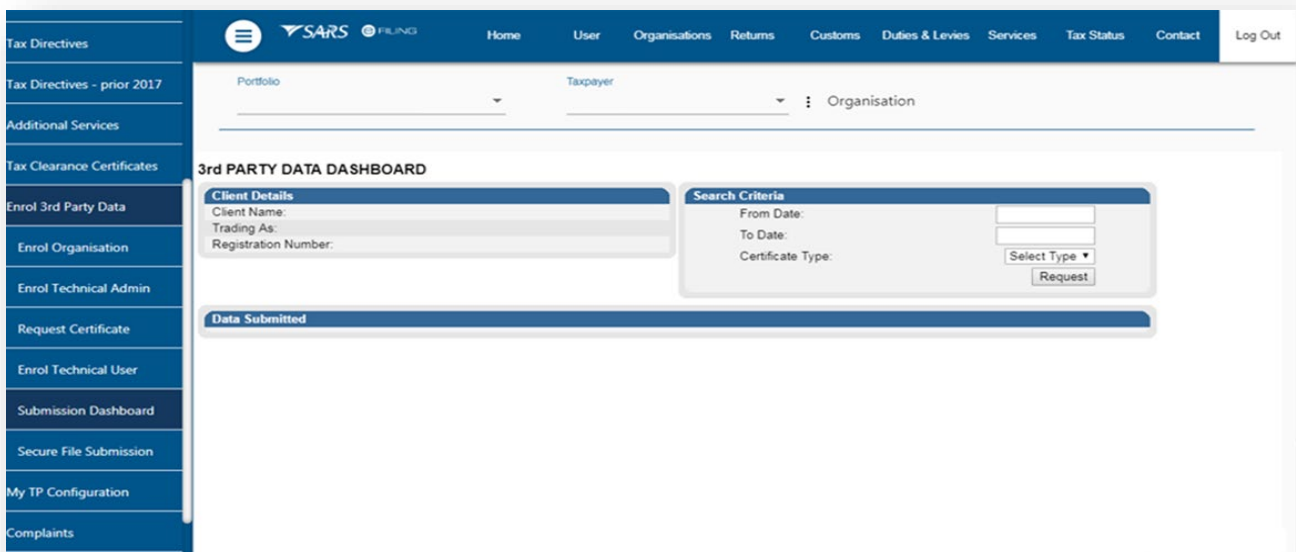
## 8 SUBMIT THIRD-PARTY DATA FILE

- a) SARS encourages entities to submit their third-party data as soon as they are ready. Additionally, SARS places great emphasis on receiving complete, correct and quality data submissions the first time around. If an amendment is required regarding a submission, please alert SARS as soon as possible and make the necessary corrections timeously.
- b) SARS also encourages entities to test their completed prepared files in the test environment. This will give the entities an opportunity to engage with SARS and receive feedback regarding file preparations. Once the data files have been prepared and completed as per the SARS External BRS, submit the file to SARS via the Connect: Direct platform. The data file should be submitted during the specified periods as per applicable Gazette.

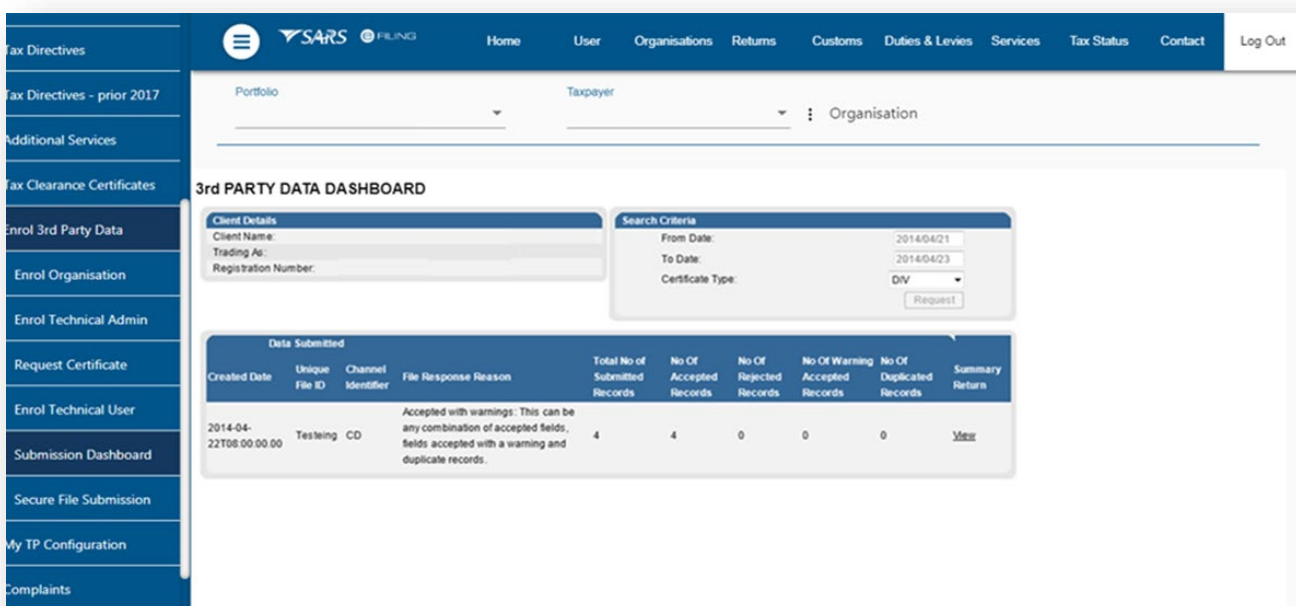
- c) Lastly, do note that the Technical User should submit the data on behalf of the entity. Additionally, when having challenges during this period, engage with the SARS Third-Party data support team via the following email address. SARS\_ThirdPartyData\_Support@sars.gov.za.

## 8.1 Submission Dashboard

- a) To view the submission dashboard, the user must be logged in as a Technical Administrator or Technical User.
- b) To access the **Submission Dashboard**,
  - i) Select **Submission Dashboard** from the side menu options, on your Organisations work page under the 'Enrol 3rd Party Data' menu.

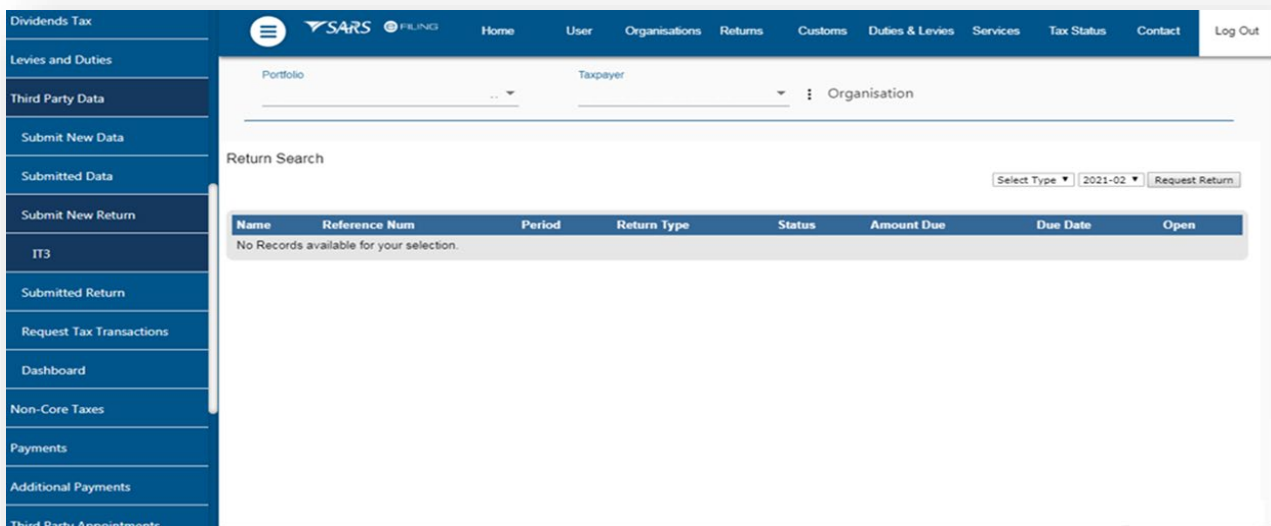


- c) In the **Search Criteria**, the entities are able to select the desired dates using the **From Date** and **To Date** fields.



## 9 DECLARE SUBMITTED THIRD-PARTY DATA FILE

- a) The declaration of submitted data is done by submitting the applicable data type return to SARS via eFiling. This implies that the data type declaration return must be submitted for every third-party data file submitted via the Connect: Direct channel. Do note that the declaration return to be submitted will have a suffix of **02**. (E.g., the FTI-02 return will be the declaration return of the FTI data submission, the IT3-02 return will be the declaration return of the IT3 data submission, etc.)
- b) Below is a demonstration of the declaration for the submission of the IT3 third party data file submission made. Do note that the same principle should be applied when declaring all other third-party tax data types. Also do note the suffix of the return tax type will be **02**.
- c) To declare your submitted IT3 data file, proceed as follows:
  - i) Click on **Returns** on the main menu option
  - ii) Click on **Third Party Data** button on the left side menu.
  - iii) Click on the **Request Return** button.
    - A) Click on **IT3** button, if there are issued or saved returns a list will be displayed on the screen.
    - B) Select the applicable third-party data type (e.g. IT3(b)) from the dropdown list.
    - C) On the date dropdown list you will be presented with tax period. Select the applicable period.



- d) Once the period has been selected and the user has clicked on **File Return** button, eFiling will display a prepopulated IT3-02 return.



- e) Where no data was submitted eFiling will display the message: **“No data found for Data Type IT3B, Tax Reference Number xxxxxxxxxxxx and Tax Year xxxx”**.
- f) On the IT3 work page, click on the **IT3B** hyperlink to open the IT3-02 declaration form.
- g) The IT3-02 Declaration form will be displayed for verification and submission.
- h) The **Declaration Details** container will be pre-populated with the type of return selection made.



**Note: Validate whether the pre-populated information is accurate and corresponds to your submitted data.**

- i) To declare that the summary information captured on the IT3-02 return contains correct figures, submit the return by clicking on **Submit**.

**Note: You can save the return and work on it later.**

### 9.1 How to correct or update the submitted third-party data file

- a) The user may perform a request for correction (RFC) on previously submitted and declared data. This is done by resubmitting the updated data file via Connect Direct Channel.

## 10 DEFINITIONS AND ACRONYMS

Link for centralised definitions, acronyms, and abbreviations: [Glossary A-M | South African Revenue Service \(sars.gov.za\)](#)

## DISCLAIMER

The information contained in this guide is intended as guidance only and is not considered to be a legal reference, nor is it a binding ruling. The information does not take the place of legislation and readers who are in doubt regarding any aspect of the information displayed in the guide should refer to the relevant legislation or seek a formal opinion from a suitably qualified individual.

### For more information about the contents of this publication you may:

- Visit the SARS website at [www.sars.gov.za](http://www.sars.gov.za).
- Make a booking to visit the nearest SARS branch.
- Contact your own tax advisor / tax practitioner.
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277); or
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).