



HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE

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1 SUMMARY

- a) The purpose of this document is to assist clients to register for eFiling and manage their eFiling profiles.
- b) eFiling is a free electronic tool designed by SARS to offer electronic services such as filing tax returns, making payments and accessing accounts to name a few. It allows you the benefit of direct, secure and real-time electronic access to your tax profile as well as the opportunity to manage this at any time and from anywhere.
- c) You must be linked to a tax type (e.g. income tax) in order to have full access to the services on eFiling and to transact.
- d) SARS values you, the taxpayer. In order to protect your tax account(s), please note that not all services are offered online. Services such as change of name and surname must be done at a SARS office.

2 MIGRATION OF USERS

- a) All eFiling users registered prior to 1 July 2019 will be authenticated and migrated to one single user sign on. If you had 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.

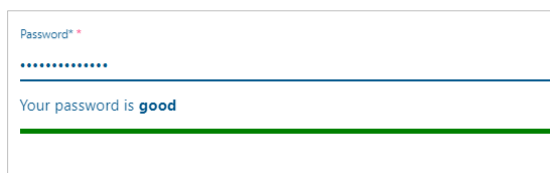
3 PORTFOLIOS

- a) A registered eFiler can act in different "roles" on eFiling (e.g. tax administrator). These "roles" are referred to as Portfolio Types. For example:
 - i) **Individual** – a person acting as himself/herself to administer his/her own individual taxes
 - ii) **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.
 - iii) **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.
- b) eFilers with a **Tax Practitioner** and **Organisation** portfolio type can:
 - i) Activate multiple **taxpayers against that portfolio type**
 - ii) **Group taxpayers under the same portfolio type**
 - iii) **Specify a descriptive name** for each group (for ease of reference).
- c) If you registered different portfolio types prior to 1 July 2019, you would have accessed each of the abovementioned portfolios with a unique username and password. As from 1 July 2019, you only require one username and password (referred to as the primary login) to login to eFiling. You can then choose the portfolio that you want to access.

4 PASSWORD RULES

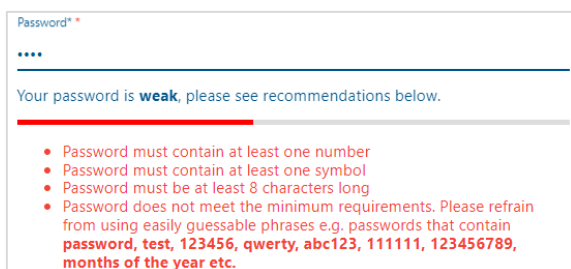
- a) When creating or changing a password on eFiling, please ensure that the password meets the following criteria:
 - i) Contains a minimum of 8 characters
 - ii) Includes at least one uppercase, lowercase, numeric and special character
 - iii) Excludes personal information (*like your name / surname / email address / username*);
 - iv) Excludes repetitive or sequential characters (*like "aaaaa" or "12345" etc*).

- b) The password meter will guide you and provide an indication of the strength of your password.



Password* *

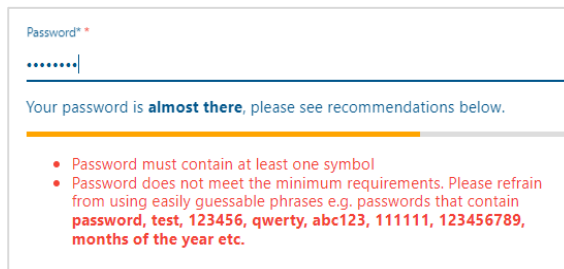
 Your password is **good**



Password* *

 Your password is **weak**, please see recommendations below.

- Password must contain at least one number
- Password must contain at least one symbol
- Password must be at least 8 characters long
- Password does not meet the minimum requirements. Please refrain from using easily guessable phrases e.g. passwords that contain **password, test, 123456, qwerty, abc123, 111111, 123456789, months of the year etc.**



Password* *
|
 Your password is **almost there**, please see recommendations below.

- Password must contain at least one symbol
- Password does not meet the minimum requirements. Please refrain from using easily guessable phrases e.g. passwords that contain **password, test, 123456, qwerty, abc123, 111111, 123456789, months of the year etc.**

5 BIOMETRIC AUTHENTICATION

- a) SARS has introduced biometric facial recognition software to authenticate taxpayers and to protect taxpayer information from profile hijacking and identity fraud.
- b) The biometric authentication process may be required for individuals who register for eFiling using a valid South African ID. The photos captured will be matched real-time against the applicable reference data and the system will immediately provide the outcome of the biometric authentication.
- c) If using the eFiling website, you will require a camera-enabled device (i.e. desktop with a webcam or a laptop with a camera feature).
- i) If you have a smartphone with a camera, you can download the SARS MobiApp and use the smartphone for the biometric authentication.
- d) If the biometric authentication is unsuccessful or if you do not have access to a camera-enabled device please book an appointment for a SARS official to assist you.

6 CONTACT DETAILS

- a) You must provide a valid email address and cell phone number to utilise the eFiling service. This will serve as your eFiling security contact details and will be used to send a One-Time-Pin (OTP) to authenticate you.
- i) If the status of your contact details is “unconfirmed” (according to SARS records), the system will prompt you to confirm/update your information as soon as you log in. For more information please refer to the [Profile and Preference Setup](#) section below
- b) If our system identifies that the email address or cell phone number entered has already been provided by an eFiler and is actively in use, an error message will display. Please insert alternate contact details to continue or book an appointment (via the SARS website) for a SARS office for further assistance.

Error	Error
Sorry, this email address is already in use.	Sorry, this cell phone number is already in use.
<input type="button" value="OK"/>	<input type="button" value="OK"/>

7 ONE-TIME PIN (OTP)

- a) The OTP is a unique 6-digit security PIN and you will be required to enter this pin as confirmation when performing certain functions on eFiling.
 - i) You can choose to receive the OTP via SMS or email. The system will send the OTP to the cell number or email address saved on your eFiling profile.
 - ii) For security reasons, the OTP is time-sensitive and you will be required to enter it within the time period indicated. If you are unable to enter the OTP within the specified time, you may request for it to be resent to you.
 - iii) For your security, you can only opt to resend an OTP **twice**.

8 CHAT WITH SARS

8.1 LWAZI THE CHATBOT

- a) Lwazi the chatbot is a virtual assistant that provides automated answers to general queries.
- b) The chat bot icon appears on the bottom right side of your screen.



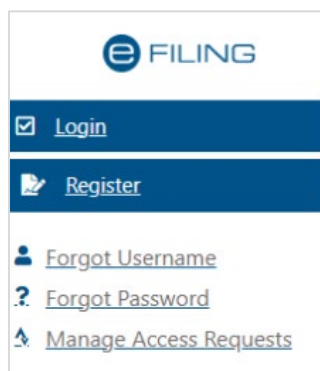
- i) Click on the chatbot icon to ask a question:
 - ii) Type a question in the input text-box
 - iii) Click on the send/arrow button on your screen or press <Enter> on your keyboard to submit the question
 - iv) Lwazi, the virtual assistant, will process your request and display the answers on your screen.
- c) The following personal income tax services can also be requested via the virtual assistant. Note, you will be prompted to provide certain information (e.g. ID number, email, cell number) to enable us to authenticate you for the required service:
 - i) Request Tax Reference Number
 - ii) Request Statement of Account
 - iii) Request Refunds Status

- iv) Request Audit Status
- v) Request Notice of Assessment

9 REGISTRATION ON EFILING

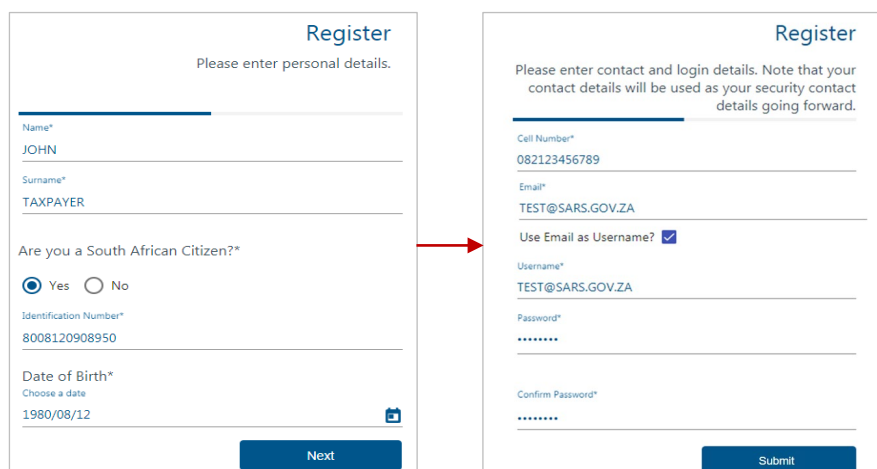
9.1 HOW TO REGISTER AS A NEW USER ON EFILING

- a) Log on to the SARS website. On the top right side of the home page is a list of SARS eFiling options.



- b) Select **<Register>**

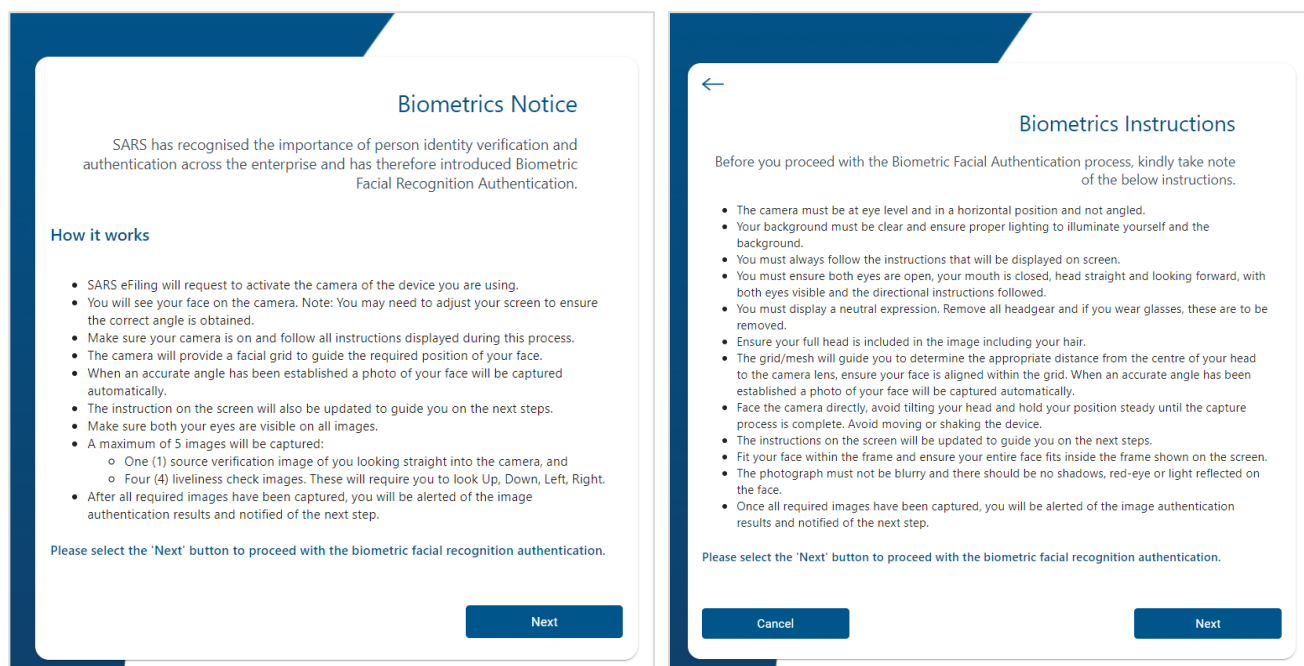
- i) Complete your personal details and click on **<Next>**
- ii) Complete your [contact details](#)
 - A) Note: If our system identifies that the same contact details has already been provided by an eFiler and is actively in use, an error message will display. Please insert alternate contact details to continue or contact SARS for further assistance.
- iii) Complete your preferred username and password and click on **<Submit>**
- iv) If you are a **South African citizen**, you will be directed to the 'Biometric Facial Recognition Authentication' step
- v) If you are a **non-South African** and the registration information you entered:
 - A) Is successfully matched to the SARS records, you will be presented with the [One-Time-Pin](#) (OTP) screen. After the OTP is entered, the eFiling Login Screen will display (refer to the section on 'First Time Login' below).
 - B) Cannot be matched to the SARS records, you will be required to provide documentation for authentication (refer to the section on '[Request for Additional Information to Finalise Registration](#)').



9.2 BIOMETRIC AUTHENTICATION PROCESS

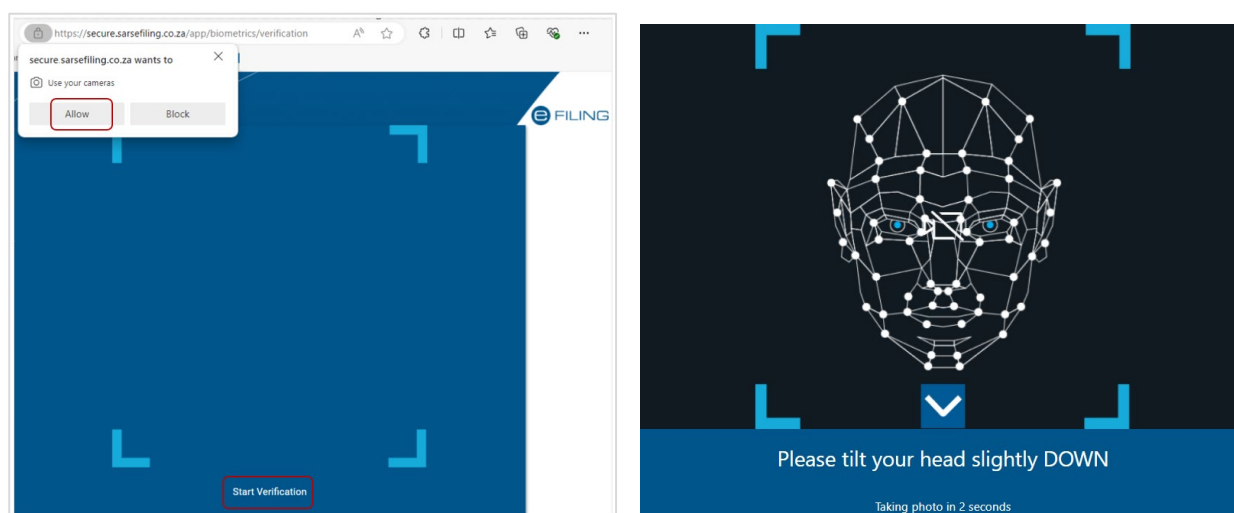
- a) **Biometric Instructions:**

- i) Note: this step is applicable if you are a South African citizen.
- ii) The **Biometrics Notice** screen will display with an explanation of the process.
 - A) Read the steps to understand how the biometric facial recognition authentication works
 - B) Click on **<Next>**
- iii) The **Biometrics Instruction** screen will display.
 - A) Kindly take note of all the instructions (e.g. background setting, removal of head gear and glasses, position and distance from the camera, etc) to ensure that the photos are captured successfully.
 - B) Click on **<Next>** to proceed with images
 - C) If you select **<Cancel>** the registration process will end.

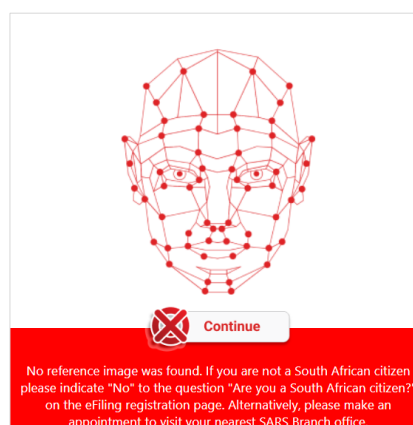
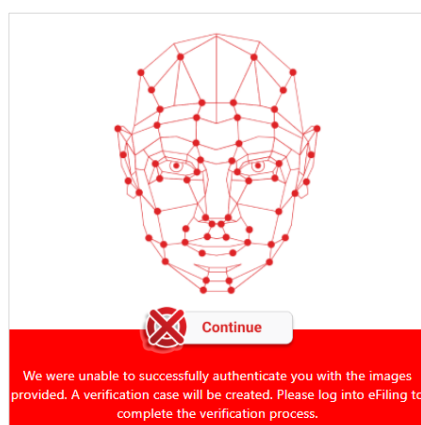
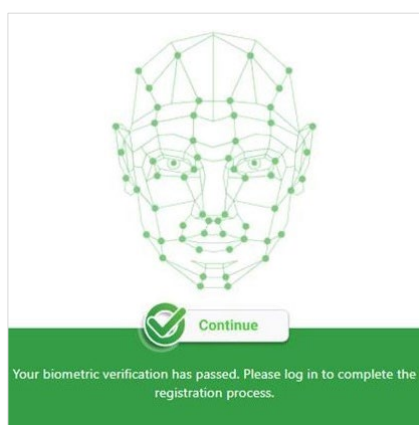


b) Capture Images for Biometric Authentication:

- i) A pop-up message will display with a request for eFiling to use your camera
 - A) Select **<Allow>** on the pop-up message
 - B) Click on **<Start Verification>** at the bottom of the screen.
 - C) The biometric process will start. Follow the on screen instructions and voice prompts to capture the images.
 - D) If the photos are not captured successfully, please try again and ensure that you follow the instructions provided on the screen.



- ii) Once all the photos are taken, the system will display the outcome of the biometric authentication.
- A successful biometric verification will be denoted by the green image below. Click on **<Continue>** to [complete the eFiling registration](#) process.
 - If we cannot successfully match the photo with the images on our reference data, it will be denoted by the first red image below. A verification case will be created and you will be required to log on to eFiling and provide additional information (refer to the section on [Request for Additional Information to Finalise Registration](#)).
 - If we cannot find any image on our reference data, it will be denoted by the second red image below and you may be required to book an appointment (via the SARS website) for a SARS official to assist you to register for eFiling.



Please Note:

- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first visit your nearest SARS branch office to register for income tax or activate your income tax number.
- If our system identifies you as a registered eFiler, you will either have the option to login with your existing eFiling profile or recover your password (if you cannot remember it).
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain [shared access](#) or revoke the other party's access.

9.3 REQUEST FOR ADDITIONAL INFORMATION TO FINALISE REGISTRATION

- This section is applicable if you are a:
 - Non-South African and we were unable to finalise your eFiling registration immediately; or
 - South African citizen and the biometric authentication was unsuccessful because we could not successfully match your photo with the image on our reference data.
- The following message will display confirming your registration request and prompting you to upload supporting documents in order to finalise your eFiling registration.
 - A case number will be allocated to you. Please quote this number when contacting SARS to follow up on the progress of your eFiling registration.
 - If you are logged out, please use the username and password that you provided during the registration process to log back in.
 - Please note: You will have 21 business days to upload the required documents.

- iv) Click on **<Continue>**.

Registration Request Received

Thank you for registering for SARS eFiling. In order to finalise your eFiling Registration, we request that you upload the required documents within 21 business days or your eFiling registration will be declined. Click Continue to upload your documents. Alternatively, you may click Save For Later to continue this process later. Should you be logged out, please use the Username and password that you provided during the registration process. Please use the case number below should you need to follow up on your registration case.

Case Number

Continue
Save for Later

- c) The Registration Workpage will display. Click on **<Upload>** to upload the required supporting documents.
- The file size may not exceed 5mb.
 - The following file types will be accepted:
 - .doc
 - .jpeg
 - .png
 - .docx
 - .jpg
 - .xls
 - .jiff
 - .pdf
 - .xlsx
 - Follow the screen prompts to upload the documents.
 - The document file names must be unique. If you upload more than one file with the same name, an error message will display.
 - Please ensure that you upload **all** the documents requested by SARS before you click on the **<Submit>**. Once the documents are submitted you will not be able to add more documents unless you receive a new request from SARS
 - After you have uploaded the documents, click on **<Continue>**.
- d) SARS will receive the case for review. You can log in with your username and password at any time to view the status of your registration (e.g. awaiting supporting document, documents submitted).

Welcome

Johnny John

Status: Supporting Documents Submitted

Your Tax Reference Number
3****442**

Registration ID Number
51102751511027

Registration Workpage

Case Details

Case Number	Case Requested Date	
131621865	2021-03-11	Query Status

Document Details

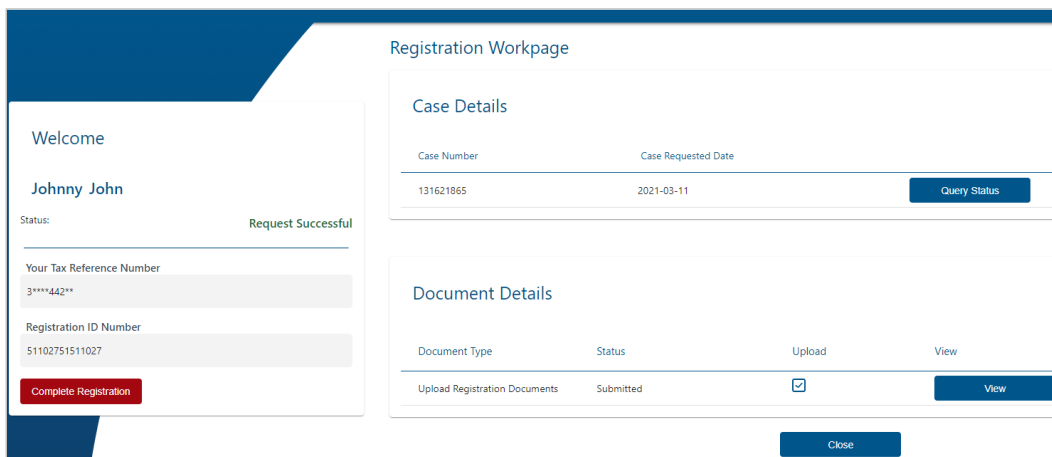
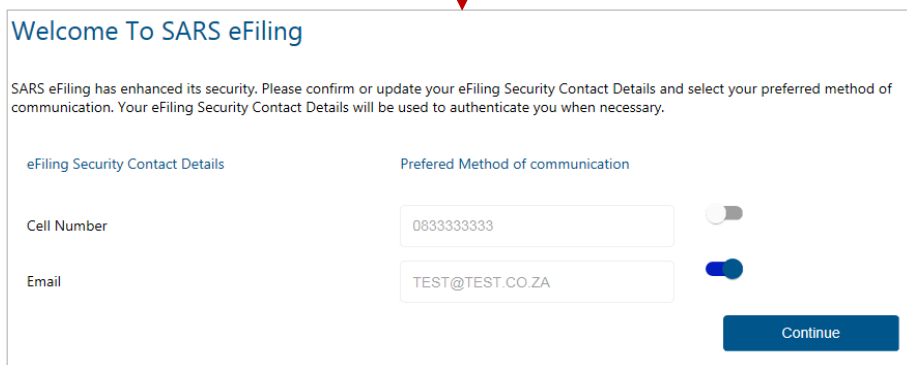
Document Type	Status	Upload	View
Upload Registration Documents	Submitted	<input checked="" type="checkbox"/>	View

- e) Once SARS has verified your details, the status will change to 'Request Successful' and you will be

notified via email and SMS.

9.4 COMPLETE EFILING REGISTRATION

- a) After successful verification, you will need to finalise the eFiling registration.
 - i) Please use the same username and password that you provided during registration to log in.
 - ii) Click on the **<Complete Registration>** button.
 - iii) Select your preferred method of communication and click on **<Continue>**. The method you select will serve as your eFiling security contact details and to receive One-Time-Pins (OTP) to authenticate you.

- b) Please enter the OTP sent to either your cell number or your email address. Once done, the eFiling Login Screen will display (refer to the section on ['First Time Login'](#) below).

Please Note:

You may be requested to complete your address details in the following instances:

- To assist us to [automatically register you for income tax](#)
- If you are already registered for income tax and we cannot match the details you entered with the SARS records.

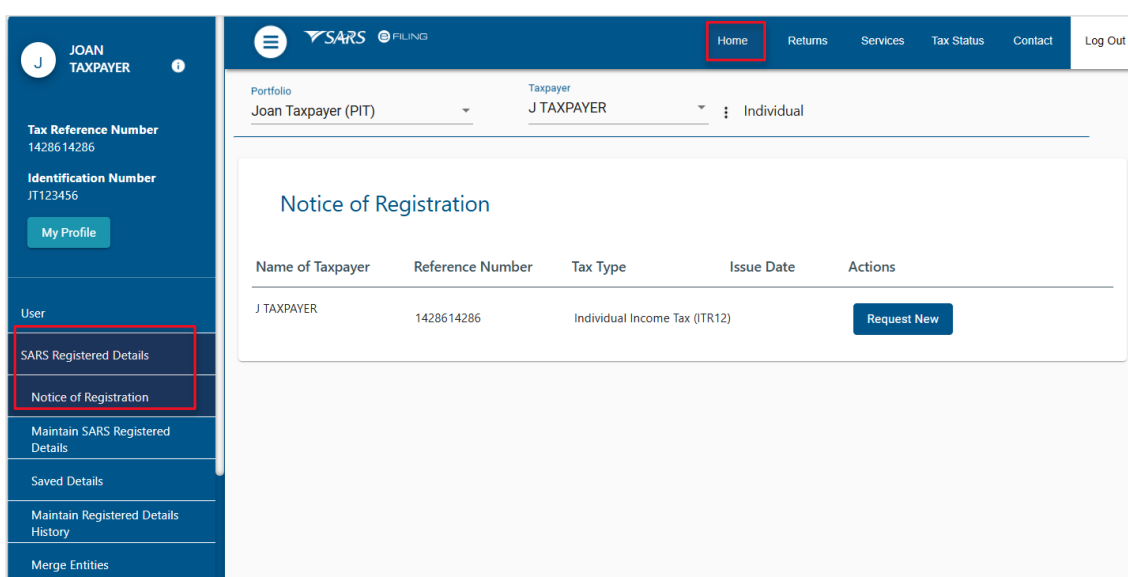
9.5 AUTOMATIC REGISTRATION FOR INCOME TAX

- a) When you [register as a new eFiler](#), SARS will do the work for you and automatically issue a personal

Effective Date: 25 August 2025

income tax number to you if:


- i) You are not yet registered for income tax
 - ii) You have a valid South African ID number.
- b) A Notice of Registration will be available to you, should you need to provide a third party (e.g. an employer) with proof of your income tax number.
- c) After you have successfully registered for eFiling, login with your username and password, link the tax number to your profile and follow the steps below to access your notice of registration:
- i) Select **<Home>** from the menu on the top
 - ii) Select **<SARS Registered Details>** from the menu on the left
 - iii) Select **<Notice of Registration>**
 - iv) Click on **<Request New>**.



The screenshot displays the SARS eFiling user interface. On the left, a sidebar menu for user 'JOAN TAXPAYER' includes options like 'My Profile', 'SARS Registered Details', and 'Notice of Registration'. The 'Notice of Registration' option is highlighted with a red box. The top navigation bar features a 'Home' button, also highlighted with a red box. The main content area, titled 'Notice of Registration', contains a table with the following data:

Name of Taxpayer	Reference Number	Tax Type	Issue Date	Actions
J TAXPAYER	1428614286	Individual Income Tax (ITR12)		Request New

Effective Date: 25 August 2025



 South African Revenue Service

INCOME TAX

Notice of Registration

Enquiries should be addressed to SARS


Contact Detail

SARS	0800 00 7277
Alberton	Website: www.sars.gov.za
1528	

Details

Taxpayer Reference No:	030891826	Always quote this reference number when contacting SARS
Date:	2020-03-25	

Electronic Certification



South African Revenue Service

Certified as a true copy and there is no indication that the original has been amended by any unauthorised person

2020-03-25

Dear Taxpayer

NOTICE OF REGISTRATION

The South African Revenue Service (SARS) confirms registration of the following taxpayer:

Name and Surname: JOHN TAXPAYER
 Passport number: JT123456789
 Taxpayer reference number: 030891826
 Date of Registration: 2019-11-14

Your tax obligation

Depending on your circumstances, you may be required to submit an annual income tax return. Should you be a provisional taxpayer, returns and payments will be required every six months. More details can be obtained from the SARS website.

Any person who derives by way of income any amount which does not constitute remuneration or an allowance or advance contemplated in section 8(1) of the Income Tax Act is regarded as a Provisional Taxpayer and may be required to submit provisional returns.

Kindly notify SARS of any change to your registered particulars within 21 business days of such change.

Should you have any queries please call the SARS Contact Centre on 0800 00 7277. Remember to have your taxpayer reference number at hand when you call to enable us to assist you promptly.

Sincerely

ISSUED ON BEHALF OF THE COMMISSIONER OF THE SOUTH AFRICAN REVENUE SERVICE

10 FIRST TIME LOGIN

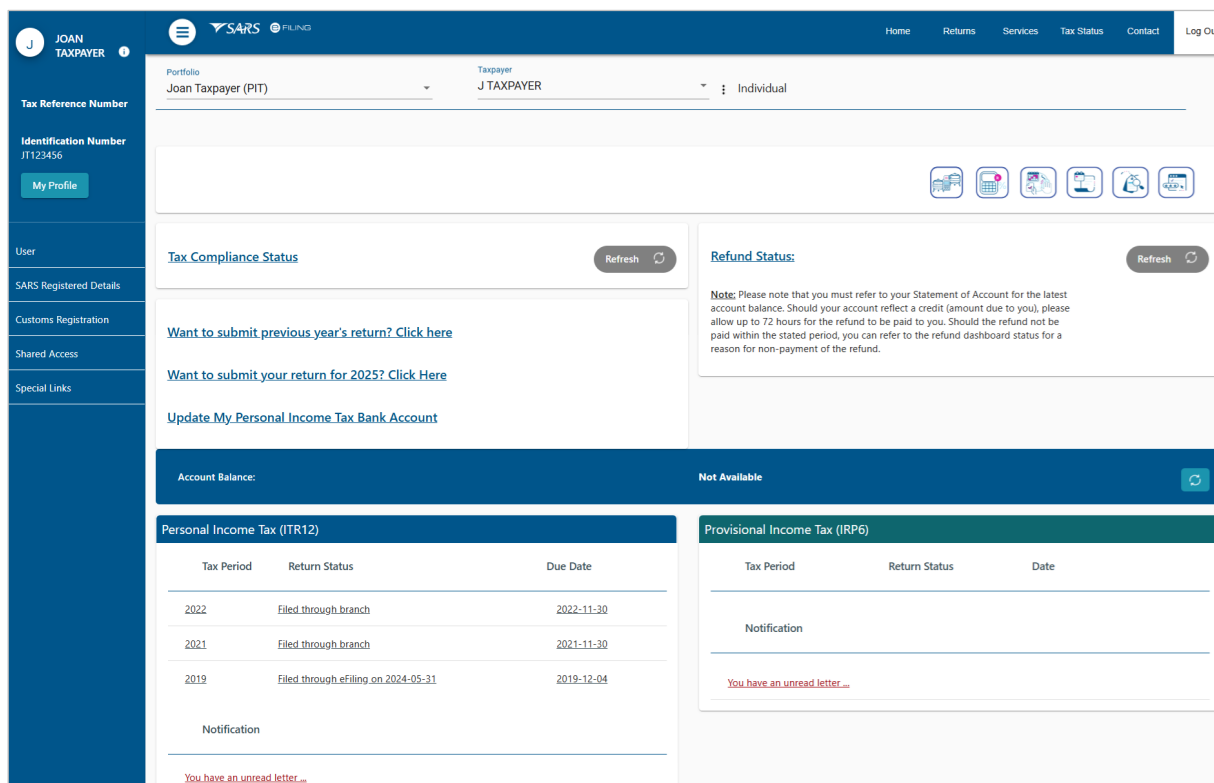
10.1 FIRST TIME LOGIN FOR EFILING USERS REGISTERED ON/AFTER 1 JULY 2019

- a) From the [SARS website](#), select <Login> from the top right side of the home page:
 - i) Enter your eFiling Username and click on <Next>
 - ii) Enter your Password and click on <Login>
 - iii) Enter the [OTP](#) and click on <Submit>.

- b) The eFiling welcome screen will display. Please read the terms and conditions. At the bottom of the screen click on **<I Accept>** to continue with the log in process.

- c) You will be presented with a list of return types as per SARS records.
- Please click on the **<Link>** button for each return type that you want to activate on your profile
 - Click on **<Remove>** to remove a return type from your profile
 - After you have selected the return type(s), click on **<Submit>**.

- d) The eFiling home page will display. This screen is also referred to as the **eFiling Dashboard** and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notifications sent by SARS.



JOAN TAXPAYER

Portfolio: Joan Taxpayer (PIT) | Taxpayer: J TAXPAYER | Individual

Identification Number: JT123456

[My Profile](#)

User

SARS Registered Details

Customs Registration

Shared Access

Special Links

Tax Compliance Status [Refresh](#)

[Want to submit previous year's return? Click here](#)

[Want to submit your return for 2025? Click Here](#)

[Update My Personal Income Tax Bank Account](#)

Refund Status [Refresh](#)

Note: Please note that you must refer to your Statement of Account for the latest account balance. Should your account reflect a credit (amount due to you), please allow up to 72 hours for the refund to be paid to you. Should the refund not be paid within the stated period, you can refer to the refund dashboard status for a reason for non-payment of the refund.

Account Balance: Not Available [Refresh](#)

Personal Income Tax (ITR12)		
Tax Period	Return Status	Due Date
2022	Filed through branch	2022-11-30
2021	Filed through branch	2021-11-30
2019	Filed through eFiling on 2024-05-31	2019-12-04
Notification		
You have an unread letter ...		

Provisional Income Tax (IRP6)		
Tax Period	Return Status	Date
Notification		
You have an unread letter ...		

Please Note:

- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first contact a SARS branch office to register for income tax or activate your income tax number.
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain [shared access](#) or revoke the other party's access.

10.2 FIRST TIME LOGIN FOR EFILING USER REGISTERED BEFORE 1 JULY 2019

10.2.1 USER WITH SINGLE LOGIN PROFILE

- a) Log on to the [SARS website](#). On the top right side of the home page select **<Login>** from the list of eFiling options.
- Enter your eFiling Username and click on **<Next>**
 - Enter your Password and click on **<Login>**.
 - The eFiling welcome screen will display.
 - Please read the terms and conditions. Click on **<I Accept>** at the bottom of the screen to continue with the log in process.

b) Select your preferred method of communication and click on **<Continue>**.

- i) We will send a One-Time-Pin ([OTP](#)) to your preferred method of communication in order to authenticate you
- ii) Note: You can edit your contact details on this screen.

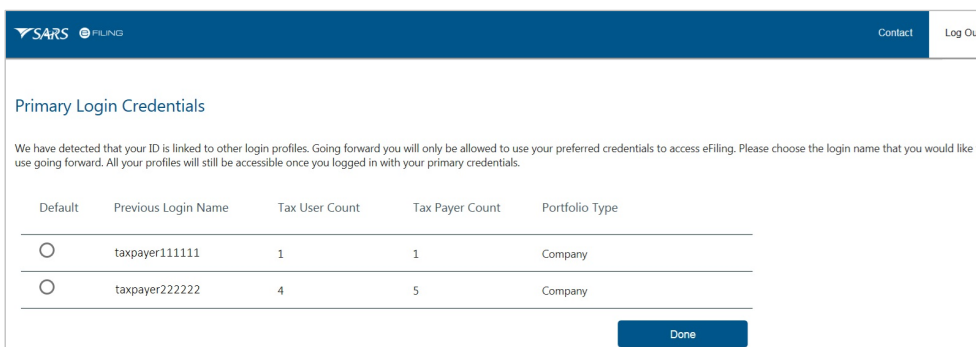
c) Please enter the OTP sent to either your cell number or your email address.

- i) Once the correct OTP is entered, the eFiling home page will display.
- ii) This screen is also referred to as the eFiling Dashboard and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notifications sent by SARS.

10.2.2 USER WITH MULTIPLE LOGIN PROFILES

- a) Log on to the [SARS website](#). On the top right side of the home page select **<Login>** from the list of eFiling options.
 - i) Enter your eFiling Username and click on **<Next>**
 - ii) Enter your Password and click on **<Login>**
 - iii) Please read and accept the terms and conditions (refer to the section above).
- b) After you have accepted the terms and conditions, a screen will display with a list of all the login profiles linked to your identity/passport number **prior to 1 July 2019**.
 - i) Please select the [primary login](#) name that you would prefer to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

Effective Date: 25 August 2025



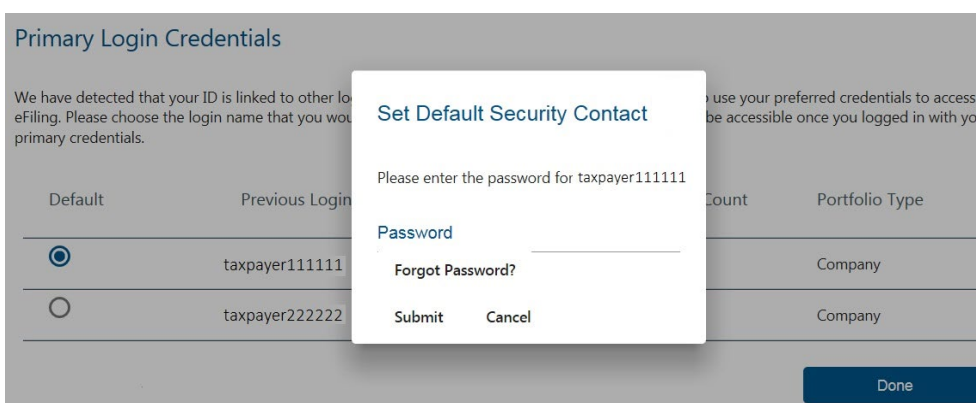
Primary Login Credentials

We have detected that your ID is linked to other login profiles. Going forward you will only be allowed to use your preferred credentials to access eFiling. Please choose the login name that you would like to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

Default	Previous Login Name	Tax User Count	Tax Payer Count	Portfolio Type
<input type="radio"/>	taxpayer111111	1	1	Company
<input type="radio"/>	taxpayer222222	4	5	Company

Done

- c) You will be prompted to enter the password if the primary login you selected (e.g. taxpayer111111 as illustrated in the screen below) is different to the profile that you are currently logged in with (e.g. taxpayer222222). If you do not remember the password, click on **<Forgot Password>** to reset it.



Primary Login Credentials

We have detected that your ID is linked to other login profiles. Going forward you will only be allowed to use your preferred credentials to access eFiling. Please choose the login name that you would like to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

Default	Previous Login Name	Tax User Count	Tax Payer Count	Portfolio Type
<input checked="" type="radio"/>	taxpayer111111	1	1	Company
<input type="radio"/>	taxpayer222222	4	5	Company

Set Default Security Contact

Please enter the password for taxpayer111111

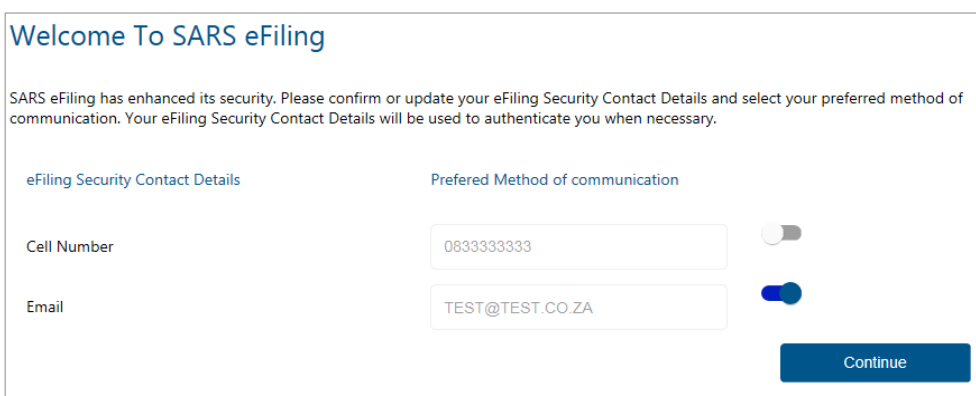
Password

Forgot Password?

Submit Cancel

Done

- d) After you select the primary login, click on **<Done>**. On the next screen select your preferred method of communication and click on **<Continue>**.
- i) This will serve as your eFiling security contact details. We will send a One-Time-Pin (OTP) to your preferred method of communication in order to authenticate you
- ii) You can edit your contact details on this screen.



Welcome To SARS eFiling

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

eFiling Security Contact Details	Preferred Method of communication
Cell Number	0833333333
Email	TEST@TEST.CO.ZA

Continue

- e) Please enter the OTP sent to your cell number or email address. A message will display to confirm that your primary login has been successfully set-up. Click on **<Continue>**.

Effective Date: 25 August 2025

Thank you for confirming your primary login details

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

What is a portfolio?

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

- Individual - Acting as himself or herself when administering his or her own individual taxes,
- Tax Practitioner – Acting as a Tax Practitioner that is (registered with a Recognised Controlling Body (RCB) and in good standing) on behalf of another tax paying entity with a signed Power of Attorney in place,
- Organisation – Acting as the representative of a tax paying entity, either as the representative taxpayer (e.g. Public Officer, Executor of an estate, etc.) or an appointed representative with a signed Power of Attorney in place.

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

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

[Continue](#)

- f) The Portfolio Management screen will display for you to link, unlink or add [portfolios](#). For more information please refer to the [Portfolio Management](#) section below.

Portfolio Management

[Add Portfolio](#)

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default	
taxpayer222222 - SARS PTY LTD	1	1	Organisation	Default	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
taxpayer111111	-	Link	Remove

Please Note:

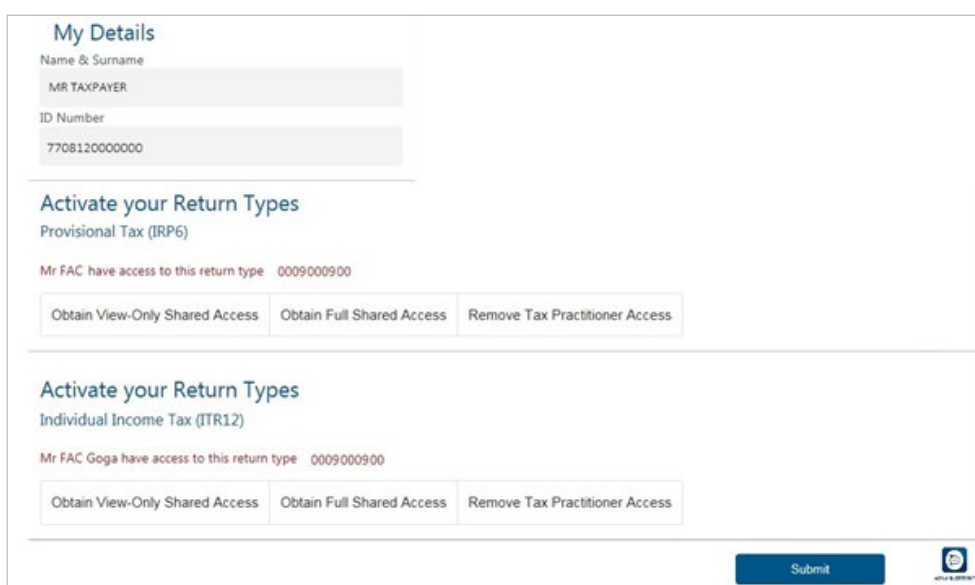
- After you select and confirm your primary login, you must only use that login to access eFiling. If you attempt to login with any other portfolio that is linked to your identity/passport number, the following error message will display:

"According to our records you have already chosen your Primary Login. Please Login with your Primary Login details and then activate your other profiles in the Portfolio Management section on eFiling".
- If you are an individual with multiple logins and you try to login with the username that is not linked to your personal income tax number, the following message will display:

"Our records indicate that your own personal income tax is associated to one of your other existing Login details. Due to improved security measures implemented, please authenticate this profile by providing the applicable password below. Note – should you not be able to authenticate this profile now, you may be required to do so at a later stage to gain access to certain online transactions".

10.3 ACCESS TO MY PROFILE

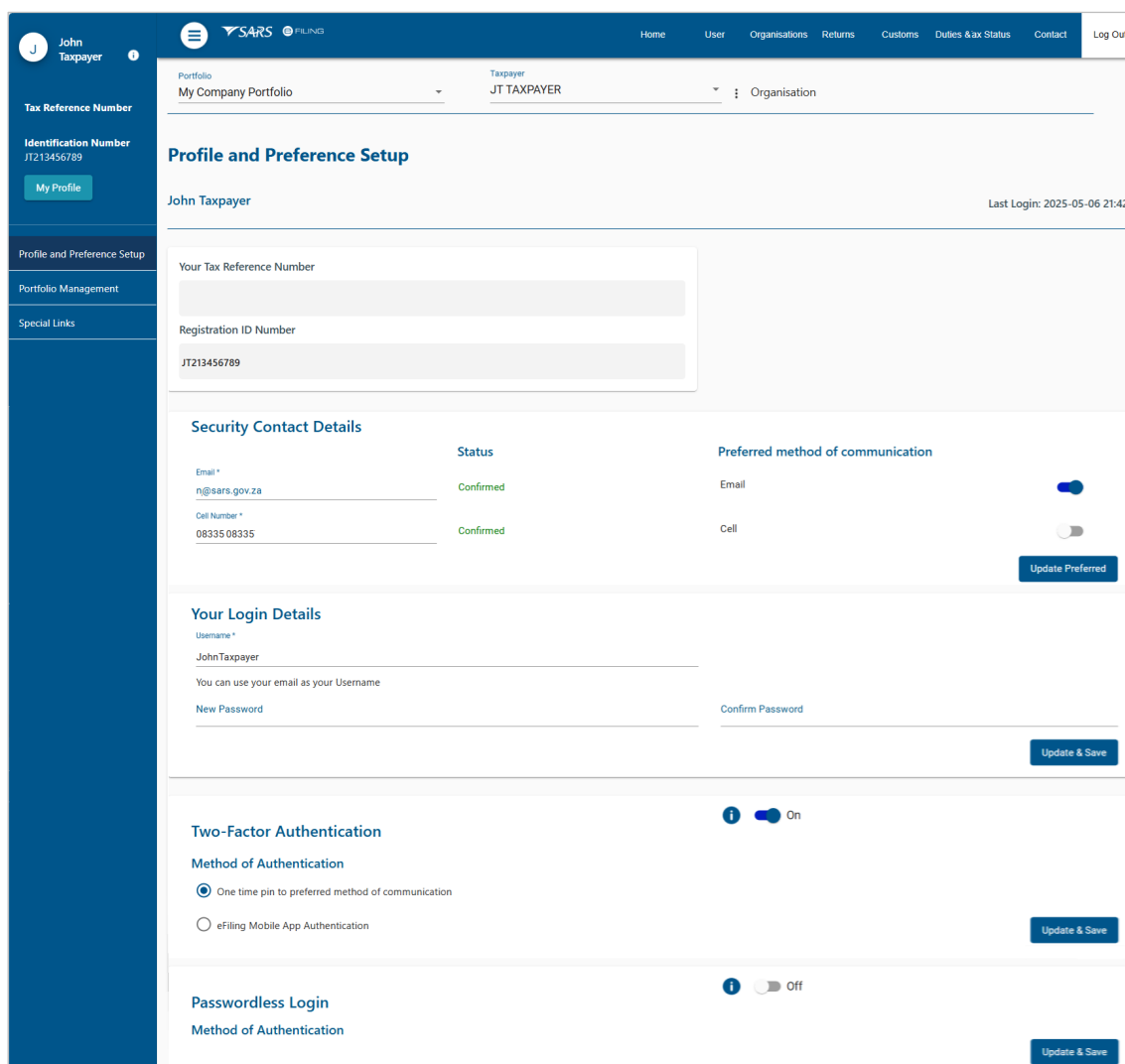
- a) When you log in for the **first time** and your tax number(s) is already registered against another party's eFiling profile (e.g. a tax practitioner), the system will display the name of the party who has access to the tax type. You have the option to obtain shared access or revoke the other party's access.
- b) Select the type of access you require (see below) and click on **<Submit>**:
 - i) **<Obtain View Only Shared Access>** - this option will only allow you to view transactions done on your behalf on eFiling
 - ii) **<Obtain Full Shared Access>** - this option will allow you to have full shared access and the other party will still retain access rights to the tax type
 - iii) **<Remove Tax Practitioner Access>**
 - iv) **<Remove My Access>** - This option will display if you currently have shared access with your tax practitioner
 - v) **<Deactivate Tax Type>**



The screenshot shows the 'My Details' section of the SARS eFiling portal. It displays the user's name and surname as 'MR TAXPAYER' and their ID number as '7708120000000'. Below this, there are two sections for 'Activate your Return Types'. The first section is for 'Provisional Tax (IRP6)' and shows that 'Mr FAC have access to this return type' with the number '0009000900'. It provides three buttons: 'Obtain View-Only Shared Access', 'Obtain Full Shared Access', and 'Remove Tax Practitioner Access'. The second section is for 'Individual Income Tax (ITR12)' and shows that 'Mr FAC Goga have access to this return type' with the number '0009000900'. It also provides the same three buttons. At the bottom right, there is a blue 'Submit' button and a small SARS logo.

11 PROFILE AND PREFERENCE SETUP

- a) This function is used to manage your primary login details, security contact details, two-factor authentication and passwordless login (each item is discussed in the sub-sections below). You cannot change your tax reference number and identity/passport number on this screen.



The screenshot displays the SARS eFiling 'Profile and Preference Setup' interface. The user is logged in as 'John Taxpayer'. The page includes a sidebar with navigation links: 'Tax Reference Number', 'Identification Number', 'My Profile', 'Profile and Preference Setup', 'Portfolio Management', and 'Special Links'. The main content area is titled 'Profile and Preference Setup' and shows the user's profile information, including 'My Company Portfolio' and 'JT TAXPAYER'. The 'Security Contact Details' section shows the user's email and cell number, both confirmed, and the preferred method of communication (Email and Cell). The 'Your Login Details' section shows the user's username and password. The 'Two-Factor Authentication' section shows the user's preferred method of authentication (One time pin to preferred method of communication) and the status of the authentication (On). The 'Passwordless Login' section shows the user's preferred method of authentication (One time pin to preferred method of communication) and the status of the authentication (Off).

11.1 MANAGE SECURITY CONTACT DETAILS:

- a) The purpose of the 'Security Contact Details' saved on your eFiling profile is to authenticate you and to issue One-Time-Pin ([OTP](#)) numbers required to perform certain functions on eFiling.
 - i) Note: if you cannot remember your security contact details, please refer to the section below for the steps to [Update Contact Details](#) without logging in.
- b) To update your security contact details after you have logged on, select **<My Profile>** from the menu on the left and click on **<Profile and Preference Setup>**
 - i) Scroll down to the section **<Security Contact Details>**
 - ii) Insert your new email address and/or your new cell number
 - A) Note: If our system identifies that the same [contact details](#) has already been provided by an eFiler and is actively in use, an error message will display. Please insert alternate contact details to continue or contact SARS for further assistance.
 - iii) Select your preferred method of communication
 - iv) Click on **<Update Preferred>**
 - v) On the pop-up screen that displays, select your preferred method of communication to receive the One-Time-Pin number
 - vi) After you have entered the correct OTP, a message will display confirming that your security contact details have been updated successfully.

Security Contact Details

	Status	Preferred method of communication
Email * qa@sarsefiling.co.za	Confirmed	Email <input type="checkbox"/>
Cell Number * 08350835083	Confirmed	Cell <input checked="" type="checkbox"/>

[Update Preferred](#)

c) If the status of your 'Security Contact Details' saved on your profile is '*Unconfirmed*':

- Click on the **<Confirm>** button if the contact details displayed are correct; or
- Insert the correct contact details and click on **<Update>**
- An [OTP](#) number will be sent to you to confirm the action.

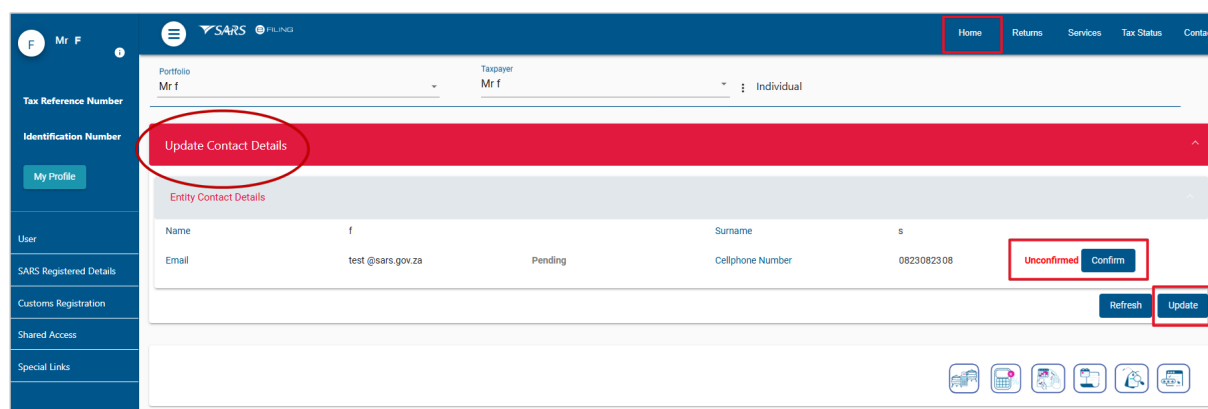
Security Contact Details

	Status	Preferred method of communication
Email * qa@sarsefiling.co.za	Unconfirmed Confirm	Email <input checked="" type="checkbox"/>
Cell Number * 0000000000	Unconfirmed Confirm	Cell <input type="checkbox"/>

[Update Preferred](#)

d) Please note: Your 'Entity Contact Details' serves a different purpose compared to the 'Security Contact Details'. The entity contact details is used to issue tax related correspondence (e.g. notice of assessment).

- Click on the **<Home>** button to view the entity contact details.
- The entity contact details is defaulted to the Income Tax contact details
- If you are registered for any other product (e.g. Customs, VAT), the contact details of those products will also display on this screen.
- If the status of your contact details is '*unconfirmed*', it will be highlighted in red.
 - Click on the **<Confirm>** button if the contact details are correct; or
 - Click on the **<Update>** button to amend the contact details. You will be redirected to the Maintain SARS Registered Details screen. For more information, please refer to the guide '*GEN-REG-01-G04 – How to Complete the Registration Amendments and Verification Form RAV01*' available on the SARS website.



11.2 CHANGE USERNAME AND PASSWORD:

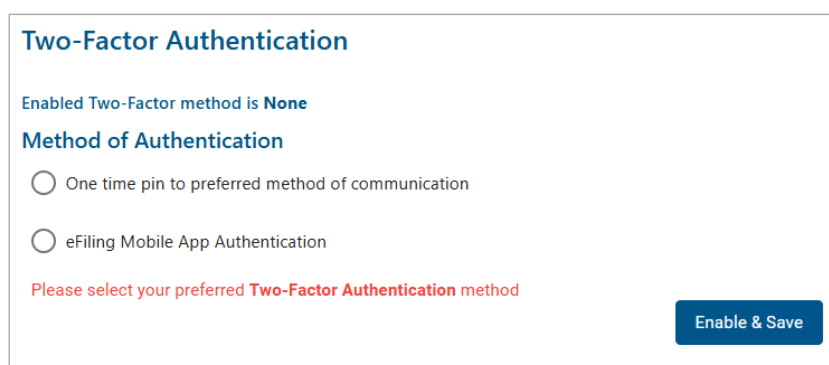
a) Select **<My Profile>** from the menu on the left and click on **<Profile and Preference Setup>**

- i) Scroll to the section <Your Login Details>
- ii) Insert your new username (you may use your email address as your username)
- iii) Insert your new password
- iv) Insert your new password again to confirm it
- v) Click on <Update & Save>
- vi) An OTP will be sent to your preferred method of communication
- vii) After you have entered the correct OTP, a message will display confirming that your username and password have been updated successfully.



11.3 TWO-FACTOR AUTHENTICATION

- a) Two-factor authentication is an additional security measure and requires you to provide your password as well as a second factor of authentication to login to eFiling. You can choose one of the following methods for authentication:
 - i) One time pin ([OTP](#))
 - ii) SARS MobiApp
- b) Please note: Two-factor authentication is mandatory on all individual profiles.
 - i) If two-factor authentication has not been activated, the following screen will display when you log on to eFiling.
 - ii) Select a preferred option and click on <Enable and Save>. Refer to the sections below for more information.



11.3.1 TWO-FACTOR AUTHENTICATION USING A ONE TIME PIN

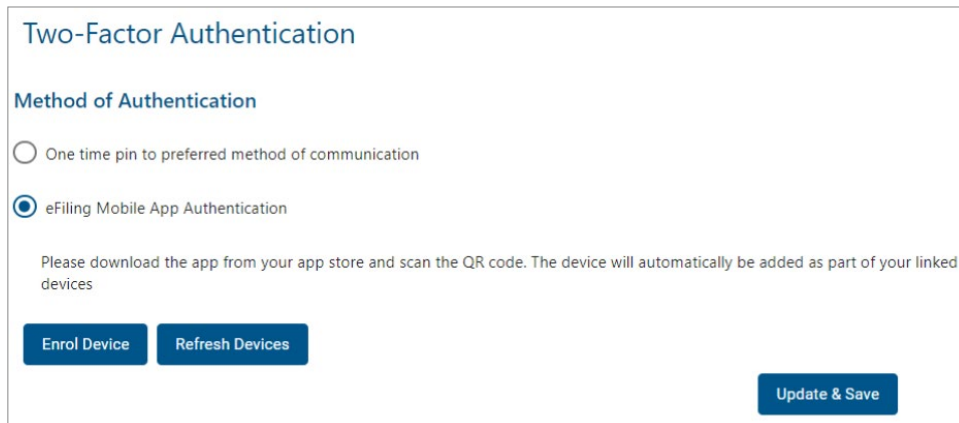
- a) Select <My Profile> from the menu on the left and click on <Profile and Preference Setup>
 - i) Scroll down to the section 'Two-factor authentication'
 - ii) Select <One time pin to preferred method of communication>
 - iii) Click on <Update and Save>
 - iv) An OTP will be sent to your preferred method of communication

- v) After you have entered the correct OTP, a pop-up message will display confirming that your two-factor authentication has been successfully activated.
- vi) Going forward, you will be required to do the following each time you log on to your profile via the eFiling website:
 - A) Enter username
 - B) Enter password
 - C) Enter OTP.

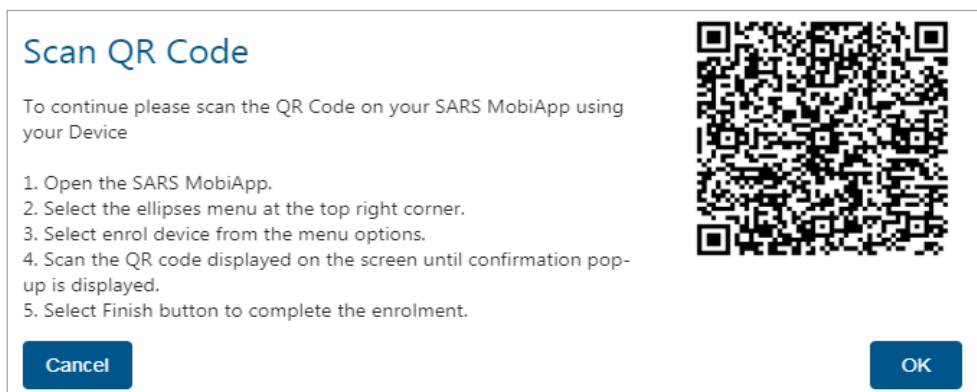


11.3.2 TWO-FACTOR AUTHENTICATION USING THE EFILING MOBILE APP

- a) If you prefer to use the mobile app for additional authentication, please download the SARS MobiApp from your app store. Once you have downloaded the app onto your device, follow the steps described below.
- b) Log on to the eFiling website:
 - i) Select **<My Profile>** from the menu on the left and click on **<Profile and Preference Setup>**
 - ii) Scroll down to the section 'Two-factor authentication'
 - iii) Select **<eFiling Mobile App Authentication>**
 - iv) Click on the **<Enrol Device>** button

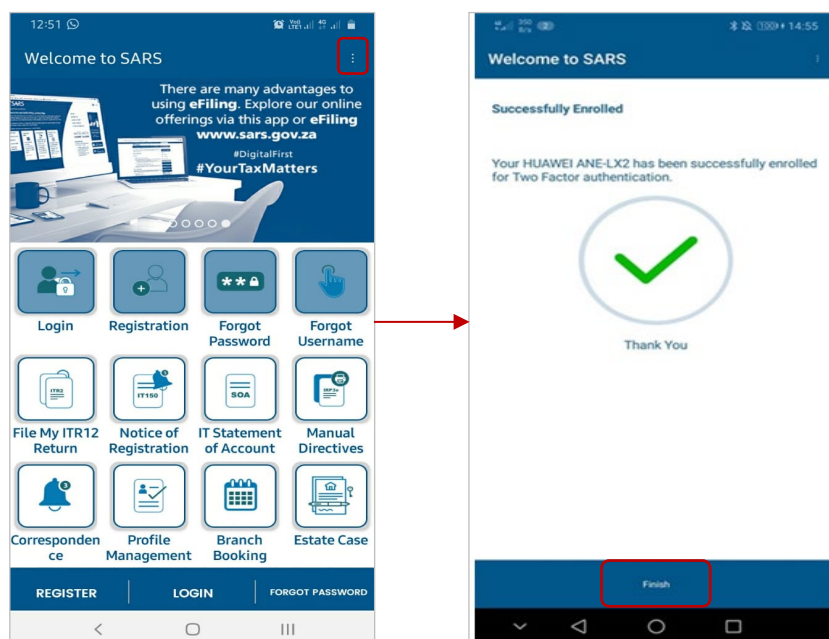


- v) You will be issued with an OTP to confirm the device you want to enrol
- vi) A pop-up screen will display with a **QR Code** and instructions. Please ensure that you only click the **<OK>** button on this screen after the device enrolment is completed (*refer to step c below*) else the device will not be added to your eFiling profile.



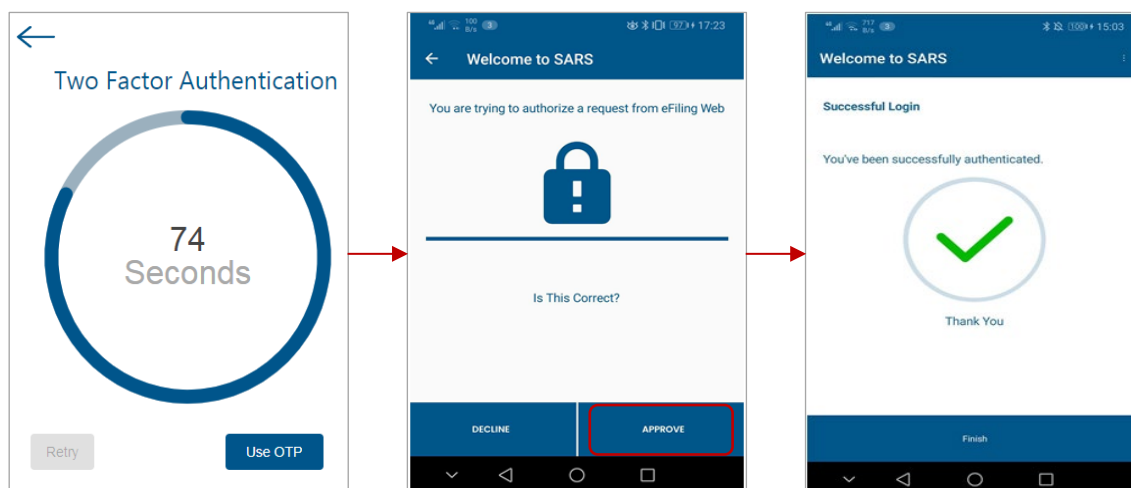
c) Launch the mobile app on your device:

- i) Click on the ellipses (:) on the top right corner of the screen to display the menu
- ii) Select **<Enrol Device>**
- iii) Use your device to scan the QR code displayed on the eFiling website
- iv) Once the QR Code is scanned successfully, a message will display to confirm that your device has been enrolled
- v) Click on the **<Finish>** button to complete the enrolment
- vi) The device will automatically be added as part of your linked devices on eFiling
- vii) For more information on how to use the app please refer to the '[Guide to the SARS MobiApp](#)' which is available on the SARS website.



d) After the device has been enrolled, you will be required to do the following each time you log on to the eFiling website:

- i) Enter username
- ii) Enter password (the "Two Factor Authentication" timer will display)
- iii) Click on **<Approve>** on your mobile device to authorise the request before the timer expires. You will be logged in to the eFiling website.

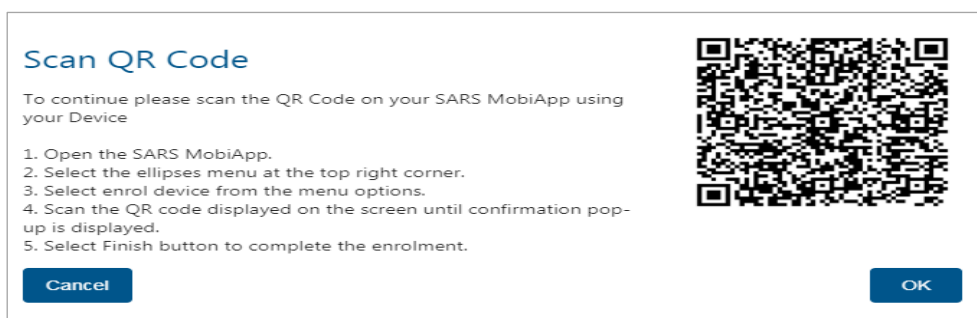


Please Note:

- A device can only be enrolled on one eFiling profile at a time. If you try to enrol a device that is already linked to another eFiling profile, an error message will display. If you would like to enrol the device on another eFiling profile:
 - Logon to the existing eFiling profile > Navigate to the Two Factor Authentication function > click on the ellipses (:) menu and select the option to **remove** the device.
 - Logon to the new eFiling profile > Navigate to the Two Factor Authentication function > Follow the steps above to **enrol** the device.
- If two factor authentication is activated on your eFiling profile and you uninstall the mobile app or clear the app data, you will no longer receive the authorisation notification on your mobile device (even though the eFiling website will display the two factor authentication “timer”). In this instance:
 - Select **<Use OTP>** on the two factor authentication timer screen to log on
 - Remove the device from your profile
 - Reinstall the mobile app and enrol the device again.

11.4 PASSWORDLESS LOGIN

- a) Passwordless Login enables you to use your mobile device to approve the eFiling login request instead of typing in your password.
- b) Please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.
- c) Log on to the eFiling website:
 - i) Click on **<My Profile>** on the menu on the left and select **<Profile and Preference Setup>**
 - ii) Select the button to switch on **<Passwordless Login>**
 - iii) Select **<eFiling Mobile App Authentication>**
 - iv) Click on the **<Enrol Device>** button. A pop-up screen will display with a QR Code and instructions.



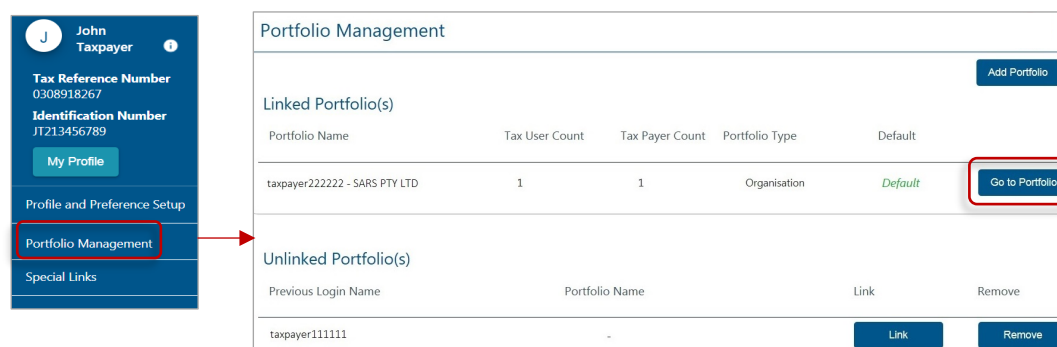
- d) Launch the mobile app on your device. Follow the steps described in the section [“Two-Factor Authentication Using the eFiling Mobile App”](#) to enrol your device.

Please Note:

- You can either switch on Passwordless Login or Two-factor Authentication on your profile, however both can never be switched on at the same time.

12 PORTFOLIO MANAGEMENT

- a) The Portfolio Management function is used to link, and add various [portfolios](#) (roles) on your eFiling profile, such as:
- Your **individual** portfolio to manage your own personal taxes
 - Multiple **company** portfolios if you are the registered representative (e.g. public officer) or employee and you manage the taxes of those companies
 - Multiple **tax practitioner** portfolios if you manage the taxes of multiple individuals/entities as a tax practitioner.
- b) You can also opt to have all your roles merged into one company or tax practitioner profile.
- c) Once you have logged on to eFiling:
- Select **<My Profile>** from the menu on the left
 - Select **<Portfolio Management>**.
 - The Portfolio Management screen will display for you to link, unlink, or add portfolios.



- d) You will be prompted to enter the password for each portfolio that you want to link.
- If you do not remember the password, click on [“Forgot Password”](#) to reset it
 - After you enter the correct password, a message will display to confirm that the portfolio has been linked.

The screenshot shows the 'Portfolio Management' interface. A modal dialog box titled 'Message' is displayed in the center, containing the text 'Portfolio taxpayer111111 linked.' and an 'OK' button. In the background, the 'Linked Portfolio(s)' table is visible, showing two entries: 'taxpayer222222 - SARS PTY LTD' (marked as Default) and 'taxpayer111111 - TAX PTY LTD'. The 'Unlinked Portfolio(s)' section is also visible below.

- e) You can set a default portfolio for the system to automatically display this portfolio when you login to eFiling. To change the default portfolio, click on the ellipses (\vdots) menu icon and then either select **<Set as Default>** or **<Remove Default>**.
- i) You can only have one default portfolio
 - ii) Portfolios that are not linked cannot be set as a default profile.

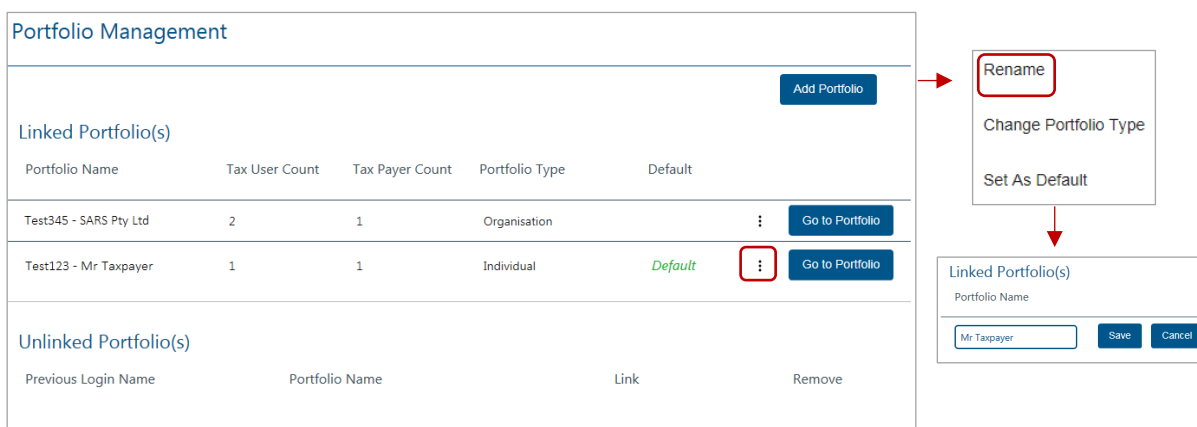
This screenshot shows the 'Portfolio Management' interface with a context menu open for the 'Test123 - Mr Taxpayer' portfolio. The menu options are: 'Rename', 'Change Portfolio Type', 'Set As Default' (highlighted with a red box), 'Remove Default' (highlighted with a red box), and 'Go to Portfolio'. The 'Linked Portfolio(s)' table shows two entries: 'Test345 - SARS Pty Ltd' (Organisation) and 'Test123 - Mr Taxpayer' (Individual, marked as Default). The 'Unlinked Portfolio(s)' section is also visible.

- f) To change the portfolio type, click on the ellipses (\vdots) menu icon and select **<Change Portfolio Type>**.
- i) Select the portfolio type (i.e. Individual / Tax Practitioner / Organisation) from the drop down menu and click on **<Save>**
 - ii) You can have multiple Tax Practitioner and Organisation portfolios on your profile
 - iii) You can only have one Individual portfolio linked to your profile.

This screenshot shows the 'Portfolio Management' interface with the 'Change Portfolio Type' dropdown menu open. The menu options are: 'Individual' (highlighted with a red box), 'Tax Practitioner', and 'Organisation'. The 'Linked Portfolio(s)' table shows two entries: 'Test345 - SARS Pty Ltd' (Organisation) and 'Test123 - Mr Taxpayer' (Individual, marked as Default). The 'Unlinked Portfolio(s)' section is also visible.

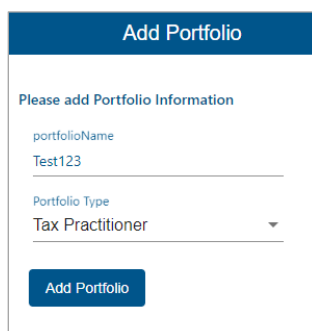
Effective Date: 25 August 2025

- iv) You can rename your portfolios for your ease of reference. Click on the ellipses (⋮) menu icon and select **<Rename>**. Insert the new description for the portfolio and click on **<Save>**.



The screenshot shows the 'Portfolio Management' page. It has a table for 'Linked Portfolio(s)' with columns: Portfolio Name, Tax User Count, Tax Payer Count, Portfolio Type, and Default. The first row is 'Test345 - SARS Pty Ltd' (Organisation, 2 users, 1 taxpayer). The second row is 'Test123 - Mr Taxpayer' (Individual, 1 user, 1 taxpayer, marked as 'Default'). A red box highlights the ellipsis menu icon for the 'Test123' portfolio. A red arrow points from this icon to a dropdown menu with three options: 'Rename', 'Change Portfolio Type', and 'Set As Default'. Another red arrow points from the 'Rename' option to a 'Linked Portfolio(s)' form. This form has a 'Portfolio Name' field with 'Mr Taxpayer' entered, and 'Save' and 'Cancel' buttons.

- g) To link a new portfolio to your profile, click on the **<Add Portfolio>** button. On the pop-up screen, insert the portfolio name, select the **<Portfolio Type>** and click on **<Add Portfolio>**
- i) You can choose to set the new portfolio as your default
- ii) You can add taxpayers and users to this portfolio.



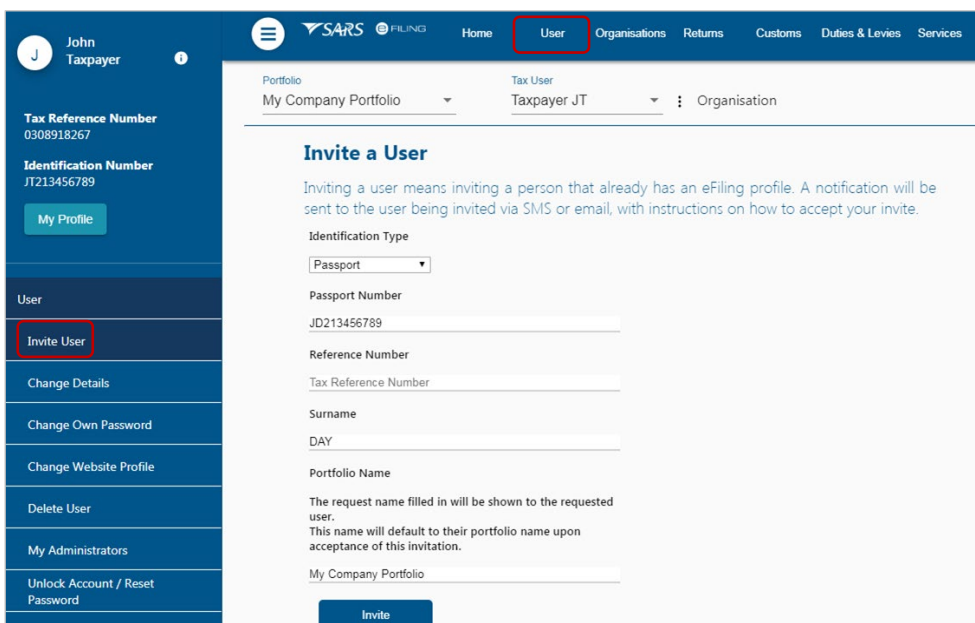
The screenshot shows the 'Add Portfolio' pop-up form. It has a title bar 'Add Portfolio'. Below it, the text 'Please add Portfolio Information' is followed by two input fields: 'portfolioName' with 'Test123' entered, and 'Portfolio Type' with 'Tax Practitioner' selected from a dropdown menu. At the bottom is an 'Add Portfolio' button.

13 MANAGE USERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

13.1 INVITE, EDIT AND DELETE A USER ON A PORTFOLIO

- a) This function is used to add new users to a portfolio, grant access to tax types, set the required levels of authorisation for each user and delete users.
- b) To successfully **add** users to portfolios, actions are required from both the following parties:
- i) **The Requestor** – this refers to an existing user that has the 'Manage User' role assigned to him/her and wants to invite another person to be a user and have access to the organisation or tax practitioner portfolio.
- ii) **The User** – this refers to the person (e.g. a tax practitioner's employee) who has been invited to have access to one or more taxpayers that are managed by the requestor.
- c) To access the required Organisation or Tax Practitioner portfolio:
- i) Select **<My Profile>** and **<Portfolio Management>** from the menu on the left
- ii) Click on **<Go to Portfolio>**.
- d) Once you have selected the required Portfolio:
- i) Select **<User>** from the menu on the top

- ii) Select **<User>** again from menu on the left
- iii) Select **<Invite User>**
- iv) Complete the following information for the user you are inviting
 - A) Identification Type
 - B) Passport or ID Number
 - C) Tax Reference Number (only applicable if identification type is passport)
 - D) Surname
 - E) The default Organisation or Tax Practitioner Portfolio name that you want the user to view on his/her portfolio upon accepting your invite
- v) Click on **<Invite>**.



The screenshot shows the SARS eFiling interface. On the left, the 'User' menu is expanded, and 'Invite User' is selected. The main content area is titled 'Invite a User'. It includes a description: 'Inviting a user means inviting a person that already has an eFiling profile. A notification will be sent to the user being invited via SMS or email, with instructions on how to accept your invite.' Below this are several input fields: 'Identification Type' (set to 'Passport'), 'Passport Number' (JD213456789), 'Reference Number', 'Tax Reference Number', 'Surname' (DAY), and 'Portfolio Name' (My Company Portfolio). A note states: 'The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation.' At the bottom is an 'Invite' button.

- e) Select the roles (i.e. permissions) that you want to assign to the user.
 - i) Examples of roles:
 - A) 'Manage Transfer Duty Financial Account' (*allows users to maintain all financial detail against the Transfer Duty account*)
 - B) 'SARS Registration' (*allows users to register taxpayers with SARS to obtain tax reference numbers*)
 - C) 'RLA – View Customs Product information' (*allows users to only view information such as address, contact and bank account details and information relating to their specific client type(s) e.g. importer/exporter*)
 - D) 'RLA - View Client Type' (*allows users to only view information relating to their specific client type(s) e.g. importer/exporter*)
 - E) 'RLA – Manage Customs Product information' (*allows users to view and change information such as address, contact and bank account details and also change information relating to their specific client type(s) e.g. importer/exporter*)
 - F) 'RLA - Manage Client Type' (*allows users to only view and change information relating to their specific client type(s)*)
 - G) 'Manage Users' (*allows users to add & change users and assign them to groups*)
 - H) 'Manage Taxpayers' (*allows users to add & change taxpayers and assign them to groups*)
 - I) 'Manage Groups' (*allows users to create & change groups and assign users and payers to groups*)
 - J) 'Manage Excise Financial Account' (*allows users to maintain all financial detail against an Excise Account*)
 - K) 'Manage Deferment Account'
 - L) 'ISV Activation' (*allows users access to the ISV activation screen*)
 - M) 'Directives' (*allows users to access the tax directives functionality*)
 - N) 'Perform Bulk and Additional Payments' (*allows users without full admin rights access to perform bulk and additional payments*).
 - ii) Click on **<Continue>**

- iii) A summary of the roles selected will display. Click on **<Continue>**.
- iv) The invite will be sent to the user. You will be notified via email or SMS once the user accepts the invite.

USER ROLES

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

Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.

[Continue](#) [Back](#)

- f) Select **<Change Details>** from the menu on the left to do any of the following:
 - i) **Send Reminder** – this option will resend the notification to the user to remind him/her to accept the invite.
 - ii) **Cancel Invitation** – this option will delete the invite, remove the user on the requestor's portfolio and also remove the requestor's profile from the user's portfolio management screen.
 - iii) **Update User Rights** – use this option to edit roles (permissions) assigned to the user.

Change Details

Identification Type
South African ID

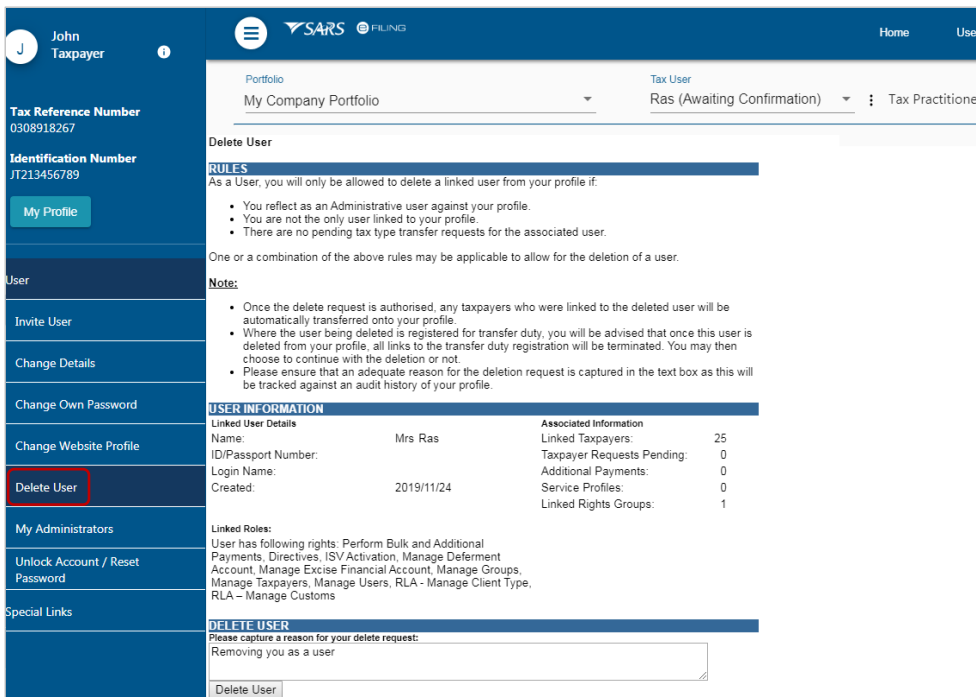
ID Number
5502275017085

Surname
Nel

Portfolio Name
The request name filled in will be shown to the requested user.
This name will default to their portfolio name upon acceptance of this invitation.
My Company Portfolio

[Send Reminder](#) [Cancel Invitation](#) [Update User Rights](#)

- g) Select **<Delete User>** from the menu on the left to remove a user from an existing portfolio.
- i) Insert a reason for deleting the user
- ii) Click on **<Delete User>**
- iii) On the pop-up message click on **<OK>** to confirm your request.



John Taxpayer

Tax Reference Number: 0308918267

Identification Number: JT213456789

My Profile

User

Invite User

Change Details

Change Own Password

Change Website Profile

Delete User

My Administrators

Unlock Account / Reset Password

Special Links

Portfolio

My Company Portfolio

Tax User

Ras (Awaiting Confirmation)

Tax Practitioner

Delete User

RULES

As a User, you will only be allowed to delete a linked user from your profile if:

- You reflect as an Administrative user against your profile.
- You are not the only user linked to your profile.
- There are no pending tax type transfer requests for the associated user.

One or a combination of the above rules may be applicable to allow for the deletion of a user.

Note:

- Once the delete request is authorised, any taxpayers who were linked to the deleted user will be automatically transferred onto your profile.
- Where the user being deleted is registered for transfer duty, you will be advised that once this user is deleted from your profile, all links to the transfer duty registration will be terminated. You may then choose to continue with the deletion or not.
- Please ensure that an adequate reason for the deletion request is captured in the text box as this will be tracked against an audit history of your profile.

USER INFORMATION

Linked User Details		Associated Information	
Name:	Mrs Ras	Linked Taxpayers:	25
ID/Passport Number:		Taxpayer Requests Pending:	0
Login Name:		Additional Payments:	0
Created:	2019/11/24	Service Profiles:	0
		Linked Rights Groups:	1

Linked Roles:

User has following rights: Perform Bulk and Additional Payments, Directives, ISV Activation, Manage Deferment Account, Manage Excise Financial Account, Manage Groups, Manage Taxpayers, Manage Users, RLA - Manage Client Type, RLA - Manage Customs

DELETE USER

Please capture a reason for your delete request:

Removing you as a user

Delete User

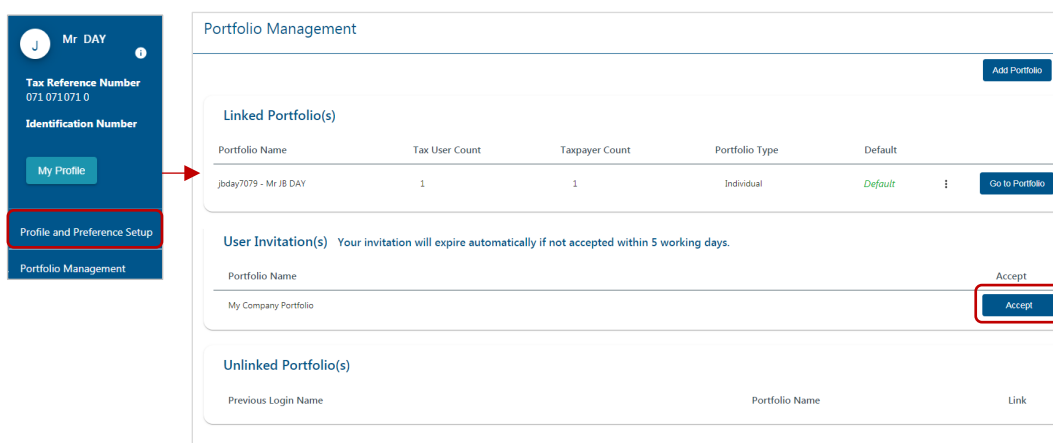
Please Note:

- Only a person with an existing eFiling profile can be added as a user on a portfolio. Once an invite is sent by the requestor, the user will receive an SMS and email notification with instructions on how to accept the invite.
- A requestor will not be allowed to invite a user should any of the following conditions apply:
 - SARS cannot find a match for the user details entered
 - The user [registered for eFiling prior to 1 July 2019](#) and has not yet logged in to set up his/her profile on the new eFiling website
 - The user has not yet [completed his/her eFiling registration](#)
 - The user already exists on the portfolio he/she is being invited to.

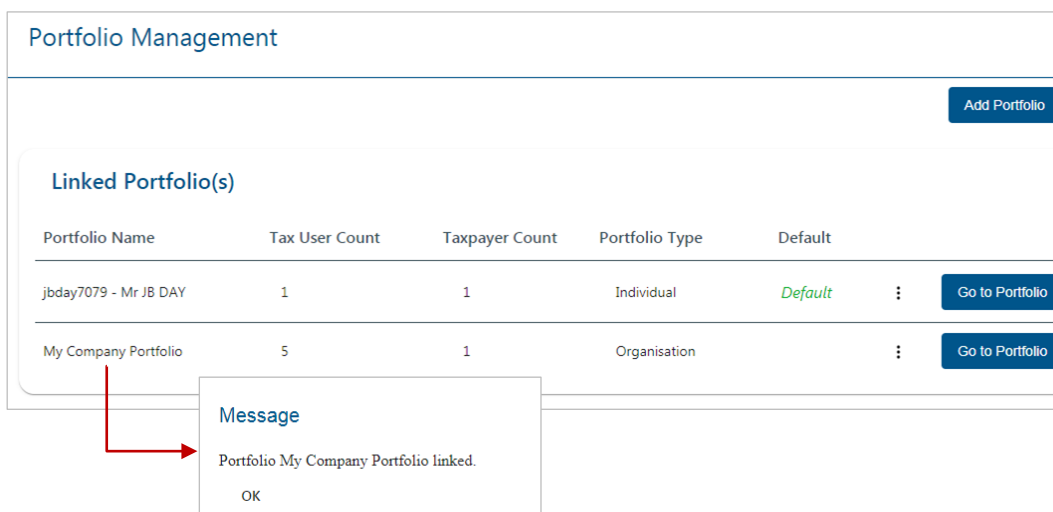
13.2 ACCEPT INVITE TO BE A USER ON A PORTFOLIO

- a) SMS and email notifications will be sent to the person who has been invited to be a user on an organisation or tax practitioner's portfolio.
- b) Log on to your eFiling profile.
 - i) Select **<My Profile>**
 - ii) Select **<Portfolio Management>**
 - iii) The User Invitation will display. Click on **<Accept>**.

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- c) As part of the authentication process, you will be prompted to enter the [One-Time-Pin \(OTP\)](#) sent to your preferred method of contact. Once the OTP is successfully entered, a pop-up message will display to confirm that the organisation/tax practitioner profile will be linked to your profile.



Please Note:

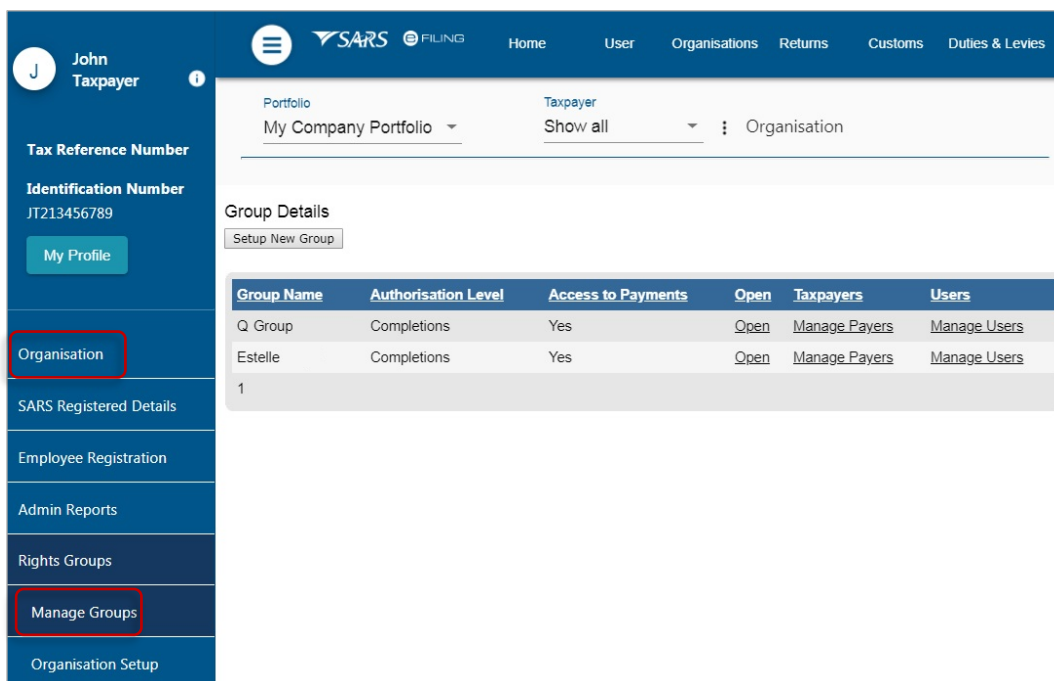
- The invite from the requestor will automatically expire if not accepted by the user within 5 working days.
- If the invite expires, the record will be deleted on both the requestor's and user's portfolio.
- A notification will be sent to the requestor to notify him/her that the invite has expired. The requestor can opt to send a new invite.

14 MANAGE GROUPS

- a) 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.
- b) 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>**

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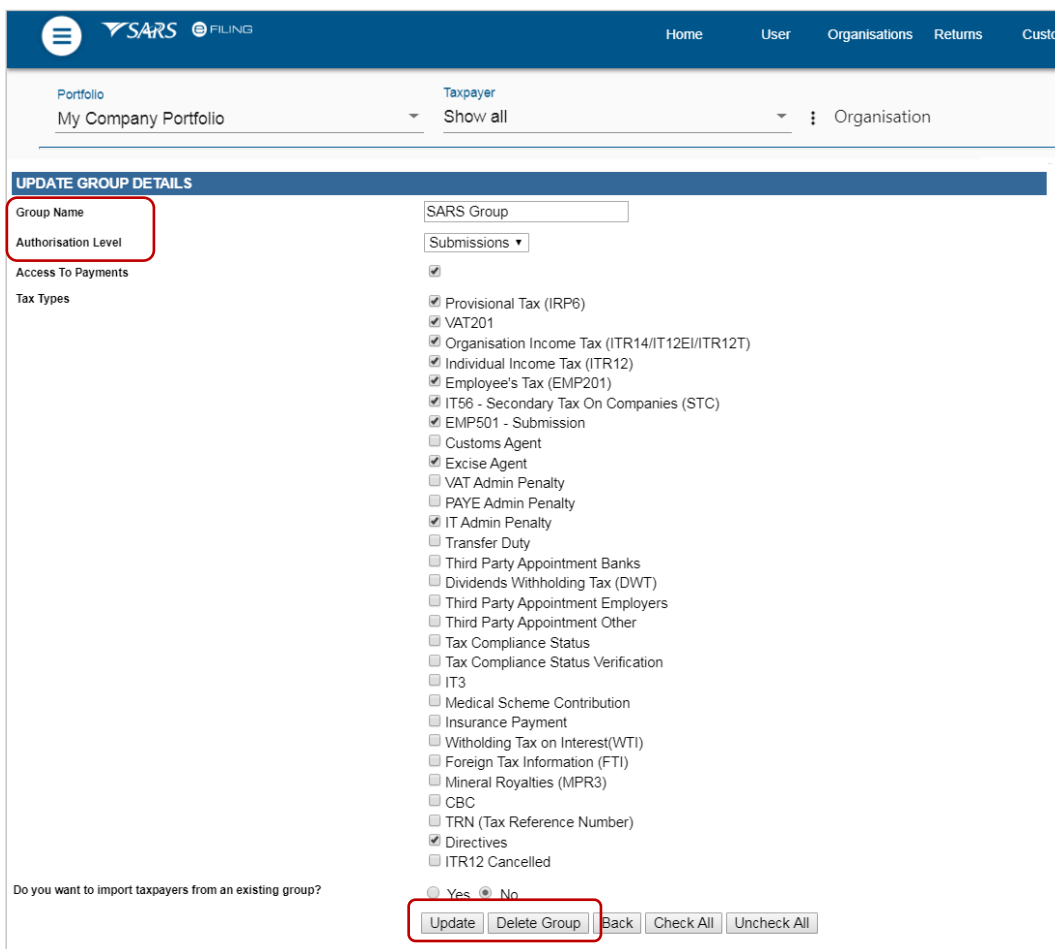
- v) The <Group Details> screen will display.
- Click on the <Setup New Group> button to create a new group (e.g. Return Submissions)
 - Click on the <Manage Payers> hyperlink to add Taxpayers (activated on your organisation's portfolio) to a specific group
 - Click on the <Manage Users> hyperlink to add users on your organisation's portfolio to a specific group (for more information refer to the section on [manage users](#)).



The screenshot shows the SARS eFiling 'Group Details' screen. The sidebar on the left contains navigation links: 'Organisation' (highlighted with a red box), 'SARS Registered Details', 'Employee Registration', 'Admin Reports', 'Rights Groups', 'Manage Groups' (highlighted with a red box), and 'Organisation Setup'. The main content area shows the 'Group Details' section with a 'Setup New Group' button. Below this is a table with the following data:

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

- c) To amend the details of an existing group click on the <Open> hyperlink:
- Edit the <Group Name> where applicable
 - Select the applicable <Authorisation Level>:
 - View Only:** This will allow you to only have view access
 - Completions:** You will only be able to view and complete forms or applications
 - Submissions:** You will be allowed to view, complete and submit forms (e.g. tax directive applications)
 - Select the applicable tax types to be activated (e.g. Directives, Tax Reference Number, Tax Compliance Status, etc.)
 - Click <Update> to activate the specific tax type functionality required. You also have the option to <Delete Group>.



Portfolio: My Company Portfolio Taxpayer: Show all Organisation

UPDATE GROUP DETAILS

Group Name: SARS Group

Authorisation Level: Submissions

Access To Payments: ☒

Tax Types:

- ☒ Provisional Tax (IRP6)
- ☒ VAT201
- ☒ Organisation Income Tax (ITR14/IT12E/ITR12T)
- ☒ Individual Income Tax (ITR12)
- ☒ Employee's Tax (EMP201)
- ☒ IT56 - Secondary Tax On Companies (STC)
- ☒ EMP501 - Submission
- ☐ Customs Agent
- ☒ Excise Agent
- ☐ VAT Admin Penalty
- ☐ PAYE Admin Penalty
- ☒ IT Admin Penalty
- ☐ Transfer Duty
- ☐ Third Party Appointment Banks
- ☐ Dividends Withholding Tax (DWT)
- ☐ Third Party Appointment Employers
- ☐ Third Party Appointment Other
- ☐ Tax Compliance Status
- ☐ Tax Compliance Status Verification
- ☐ IT3
- ☐ Medical Scheme Contribution
- ☐ Insurance Payment
- ☐ Withholding Tax on Interest (WTI)
- ☐ Foreign Tax Information (FTI)
- ☐ Mineral Royalties (MPR3)
- ☐ CBC
- ☐ TRN (Tax Reference Number)
- ☒ Directives
- ☐ ITR12 Cancelled

Do you want to import taxpayers from an existing group? ☐ Yes ☒ No

Update Delete Group Back Check All Uncheck All

15 MANAGE TAXPAYERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

- a) To manage taxpayer types linked to a portfolio:
 - i) Select **<Organisations>** from the menu on the top
 - ii) Select **<Organisation>** from menu on the left.
- b) To amend details of an existing taxpayer on your portfolio select **<Change Details>** from the menu on the left.
- c) To add a new taxpayer/entity type to your portfolio:
 - i) Select **<Register New>** from the menu on the left
 - ii) Select the **<Entity Type>** from the drop down list (e.g. Individual, Company, Trust, Individual Non-SA, Fund/Other)
 - iii) If you are registering a **Trust** and the **Trust Type** is 'Intervivos Trust' or 'Testamentary Trust' or 'Estate CGT Trust' or 'Special Trust', you must provide the trust registration number issued by the Master of the High Court. A trust registration number is not required if the **Trust Type** is 'Non Resident Foreign Trust' or 'Collective Investment Scheme'.

Registered Representative

For a list of entities that you are recorded as their Registered Representative at SARS, please click [here](#)

Capture Entity Details

Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity

Select Entity Type *

Tax Reference Number *

Add Taxpayer

d) The registration fields displayed will differ according to the type of entity selected (see screens below)

- Complete the applicable fields and click on **<Add Taxpayer>**
- On the pop-up screen select the group(s) to which the taxpayer should be added (for more information refer to the section on [Manage Groups](#))
- A summary of the new taxpayer's details will display. Click on **<Done>**
- Refer to the section on [Manage Tax Types](#) for more information on how to activate return/tax types for a taxpayer.

e) Information required to add an Individual:

Registered Representative

For a list of entities that you are recorded as their Registered Representative as SARS, please click [here](#)

Capture Entity Details

Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity

Select Entity Type
Individual

ID Number *

Initials *

First Name

Surname

Tax Reference Number

Add Taxpayer

Please select the group/s the taxpayer should be added to:

☒ System Default
☐ Test Group

Continue

Portfolio: My Company Portfolio Taxpayer: L LANE Organisation:

Taxpayer Summary

Company Name: L LANE
Registration Number: LL123456789
Group Selected: System Default

Back Manage Tax Types Done

f) Information required to add a Company:

Registered Representative
For a list of entities that you are recorded as their Registered Representative at SARS, please click [here](#)

Capture Entity Details
Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity

Select Entity Type *
Company

Registered Name *

Registration Number *

Tax Reference Number *

g) Information required to add a Fund/Other

Registered Representative
For a list of entities that you are recorded as their Registered Representative at SARS, please click [here](#)

Capture Entity Details
Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity

Select Entity Type *
Fund/Other

Fund Name *

Fund Number

Tax Reference Number *

h) Information required to add an Individual who is a non-South African

Registered Representative
For a list of entities that you are recorded as their Registered Representative at SARS, please click [here](#)

Capture Entity Details
Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity

Select Entity Type *
Individual - Non SA

Passport Number *

Initials *

First Name *

Surname *

Tax Reference Number *

i) Information required to add a Trust and Trust Type.

- i) A trust deed number is not applicable to Non-resident (Foreign) Trusts or Collective Investment Schemes)

Registered Representative

For a list of entities that you are recorded as their Registered Representative at SARS, please click [here](#)

Capture Entity Details

Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity

Select Entity Type *
Trust

Select Trust Type *
▼

Trust Name *

Trust Deed Number *

Tax Reference Number *

Intervivos Trust
 Testamentary Trust
 Estate CGT Trust
 Non Resident Foreign Trust
 Special Trust
 Collective Investment Scheme

Please Note:

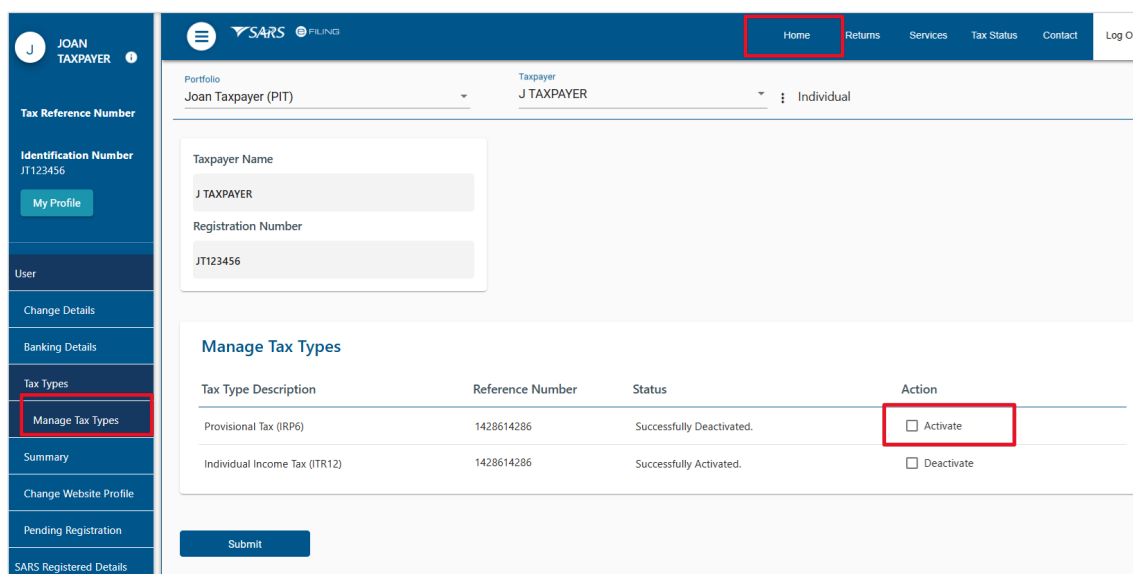
- You will only have access to the 'Register New' function if the Manage Taxpayer rights have been assigned to you
- The system will display a message if the taxpayer you want to add already exists on another portfolio where you also have the "manage taxpayer rights". You will have the option to add the taxpayer to the current portfolio

16 MANAGE TAX TYPES

- a) The purpose of this function is to enable the following:
 - i) **Activation/Deactivation** of specific tax types – In order to transact on eFiling (e.g. submit returns, make payments, request statement of account) the applicable tax type must be activated on your profile
 - ii) **Transfer of tax types** (personal income tax and provisional tax) between taxpayers, tax practitioners and registered representatives on eFiling.
- b) The owner/registered representative of that tax number must approve the transfer in order to complete the process.

16.1 INDIVIDUALS

- a) To activate/deactivate tax types on your individual portfolio:
 - i) Click on **<Home>**
 - ii) Select **<User>** from the menu on the left
 - iii) Select **<Tax Types>** and then click on **<Manage Tax Types>**
 - iv) A list of taxes you are registered for will display.
 - v) Select the items that you want to activate/deactivate. Click on **<Submit>**.
 - vi) A summary of the actions will display. Click on **<Continue>** to confirm the action.



JOAN TAXPAYER

Tax Reference Number: JT123456

Identification Number: JT123456

My Profile

User

Change Details

Banking Details

Tax Types

Manage Tax Types

Summary

Change Website Profile

Pending Registration

SARS Registered Details

Portfolio: Joan Taxpayer (PIT)

Taxpayer: J TAXPAYER

Individual

Taxpayer Name: J TAXPAYER

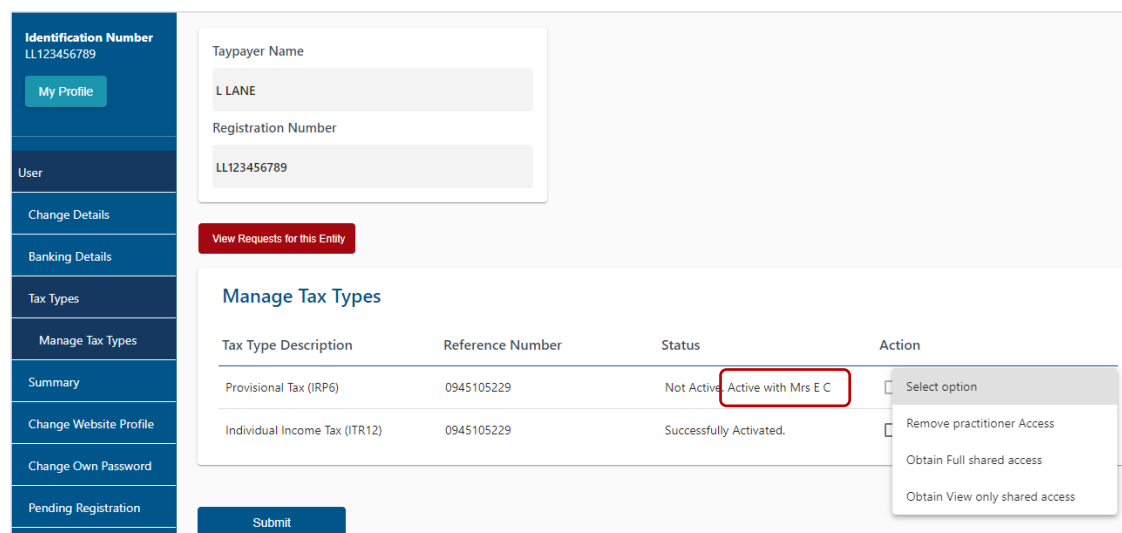
Registration Number: JT123456

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	1428614286	Successfully Deactivated.	<input type="checkbox"/> Activate
Individual Income Tax (ITR12)	1428614286	Successfully Activated.	<input type="checkbox"/> Deactivate

Submit

- b) If your tax type is activated with another party (e.g. tax practitioner), you can navigate to the **<Manage Tax Types>** function and select one of the following options at any time:
- <Remove Tax Practitioner Access>
 - <Obtain Full Shared Access>
 - <Obtain View Only Shared Access>



Identification Number: LL123456789

My Profile

User

Change Details

Banking Details

Tax Types

Manage Tax Types

Summary

Change Website Profile

Change Own Password

Pending Registration

Taxpayer Name: L LANE

Registration Number: LL123456789

View Requests for this Entity

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Not Active - Active with Mrs E C	<input type="checkbox"/> Select option
Individual Income Tax (ITR12)	0945105229	Successfully Activated.	<input type="checkbox"/> Remove practitioner Access

Submit

16.2 ORGANISATIONS AND TAX PRACTITIONERS

- a) To activate/deactivate tax types for taxpayers on your portfolio, click on the ellipses (:) menu icon
- Search for the specific taxpayer using the name, registration number, ID number or tax reference number
 - Click on the **<View Taxpayer>** button. This option will load the existing taxpayer details.

b) The '**Tax Types Details**' screen will display with the following buttons:

- <Edit contact details>** – used to update eFiling correspondence details only. To update your security contact details please use the [<Profile and preference setup>](#) function
- <Manage Tax Types>** – used to activate/deactivate specific taxes that you represent the client for
- <Access Rights>** – used to add the taxpayer to a group if you have the manage taxpayer rights.

c) Click on **<Manage Tax Types>**. A table will display with the following information:

- List of tax types linked to the selected taxpayer
- Reference numbers
- Activation Status
- Action that can be selected for that number (e.g. request activation, request tax type transfer, deactivate)

Taxpayer Name

L LANE

Registration Number

LL123456789

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Individual Income Tax (ITR12)	0945105229	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Dividends Withholding Tax (DWT)	0945105229	Not Active.	<input type="checkbox"/> Request Activation
IT3	0945105229	Not Active.	<input type="checkbox"/> Request Activation
Medical Scheme Contribution	0945105229	Not Active.	<input type="checkbox"/> Request Activation
Insurance Payment	0945105229	Not Active.	<input type="checkbox"/> Request Activation
Foreign Tax Information (FTI)	0945105229	Not Active.	<input type="checkbox"/> Request Activation

16.2.1 Request Activation or Transfer of Tax Type

- Select the tick-boxes for the applicable actions required (example: "Request Activation" or "Request Tax Type Transfer")
 - Click on the **<Submit>** button.
 - A screen will display with the summary of the actions you selected. Click on **<Continue>**

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	094510522	Successfully Activated.	<input type="checkbox"/> Deactivate
Individual Income Tax (ITR12)	094510522	Not Active. Active on an individual profile.	<input checked="" type="checkbox"/> Request Tax Type Transfer
Dividends Withholding Tax (DWT)	094510522	Not Active.	<input checked="" type="checkbox"/> Request Activation
IT3	094510522	Not Active.	<input type="checkbox"/> Request Activation
Medical Scheme Contribution	094510522	Not Active.	<input type="checkbox"/> Request Activation
Insurance Payment	094510522	Not Active.	<input type="checkbox"/> Request Activation
Foreign Tax Information (FTI)	094510522	Not Active.	<input type="checkbox"/> Request Activation

Submit

Portfolio: Mrs E C Taxpayer: L LANE Tax Practitioner

Tax Type Request Summary

The following action has been taken against these tax products

Tax Type Description	Reference Number	Action
Individual Income Tax (ITR12)	094510522	Requested
Dividends Withholding Tax (DWT)	094510522	Requested

Continue

- The status of the request will change to awaiting authorisation and will require the current owner/representative of the tax number to [approve the request](#) in order to complete the process.

Taxpayer Name

L LANE

Registration Number

LL123456789

Contact Details

Cell: 0830000000

Email: qa@sarsfiling.co.za

Tax Types Details

Tax Type Description	Reference Number	Status
Individual Income Tax (ITR12)	0945105229	Awaiting Authorisation
Dividends Withholding Tax (DWT)	0945105229	Awaiting Authorisation
IT3	0945105229	Awaiting Authorisation

Taxpayer Name

L LANE

Registration Number

LL123456789

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Individual Income Tax (ITR12)	0945105229	Not Active. Active on an individual profile. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request
Dividends Withholding Tax (DWT)	0945105229	Not Active. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request
IT3	0945105229	Not Active. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request
Medical Scheme Contribution	0945105229	Not Active.	<input type="checkbox"/> Request Activation

- If the owner/representative approves the request, the status will change to "Successfully Activated".

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Identification Number
[My Profile](#)

Organisation
[Register New](#)
[Change Details](#)
Tax Types
[Manage Tax Types](#)
[View Request History](#)
[Legacy: Activation Requests](#)

Taxpayer Name

L LANE

Registration Number

LL123456789


Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Successfully Activated.	<input type="checkbox"/> Deactivate
Individual Income Tax (ITR12)	0945105229	Not Active. Active on an individual profile. Requested by you and waiting for the owner of the tax type to approve.	<input type="checkbox"/> Cancel Request

16.2.2 Approve Request for Tax Type Activation or Transfer

- a) A notification will be sent to the current owner/representative to inform him/her:
 - i) Of the transfer request, and
 - ii) The steps to follow to action the request

SARS eFiling Tax Type Transfer Request Received



noreply@sars.gov.za
To: Natasha

[Reply](#)
[Reply All](#)
[Forward](#)
[...](#)

Mon 2021/04/12 08:44 PM

[Action Items](#) [Get more add-ins](#)

Tax practitioner **Testt Test** with Tax Practitioner number: **PR-0030036** has requested access to your tax product/s: **0945105229**.

As the Representative Taxpayer for this Taxpayer you are required to review the request and action accordingly.


To action, go to www.sars.gov.za click on "**Manage Tax Type Transfer**" option and follow the process to authorise / decline the tax type transfer request.

ISSUED ON BEHALF OF THE COMMISSIONER FOR THE SOUTH AFRICAN REVENUE SERVICE

Please do not reply to this email. Replies to this message will be sent to an unmonitored mailbox. If you have any questions, visit the SARS website on www.sars.gov.za or call the SARS Contact Centre on 0800 00 7277.

Legal disclaimer: This email is intended solely for the use of the individual or entity to who it is addressed. If you have received this email in error, please delete the email from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

- b) The owner/registered representative must follow the steps below to action the request and complete the process.
 - i) Log on to the SARS website and select on **<Manage Access Requests>**



[Login](#)
[Register](#)

[Forgot Username](#)
[Forgot Password](#)
[Manage Access Requests](#)

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- ii) On the **<Tax Type Transfer/ Shared Access Request>** screen select yes or no to indicate if you are a South Africa Citizen
 - A) Insert your own identification number
 - B) Insert the tax number for which the transfer is requested.
 - C) Click on **<Submit>**
- iii) As part of the authentication process, you will be required to enter a [One-Time-Pin \(OTP\) to authorise or decline the transaction.](#)
- iv) Insert the OTP sent to your email or cell number

Tax Type Transfer / Shared Access Request

Are you a South African citizen?

☒ Yes ☐ No

Identification Number *

Tax Reference Number *

Submit

Approve Online Request

SARS would like you to approve your online request.

Please indicate your preferred channel and click OK to authorize.

Email

Cell Number

Please select a method of communication

Your Preferred Contact

OK

- c) Read the declaration and the details of the party requesting the tax type transfer and print the Power of Attorney
 - i) Select **<Authorise>** or **<Decline>**
 - ii) Click on **<Submit>**
 - iii) After you have authorised or declined the request, click on **<Return to SARS Website>**.

Tax Type Transfer

Please action the tax type transfer request by authorising or declining the following **Power Of Attorney** within 5 minute/s:

I, JOHN TAXPAYER with Identity Number (ID): JT123456789, in my capacity as Representative TaxPayer for LOIS LANE, with Identity Number (ID): LL123456789 hereby authorise Testt Test, a Registered Tax Practitioner, Number: PR-0036308, to access, receive, read, conclude and deliver electronic filing transactions as defined in the rules for electronic communication prescribed under section 255 of the Tax Administration Act for the tax(es) listed below.

I declare that as the registered representative I remain fully accountable for any action taken by, Testt Test or person under his / her direct supervision as a result of the access granted.

Provisional Tax (IRP6) - 0945105229

☐ Authorise ☐ Decline

Cancel

Submit

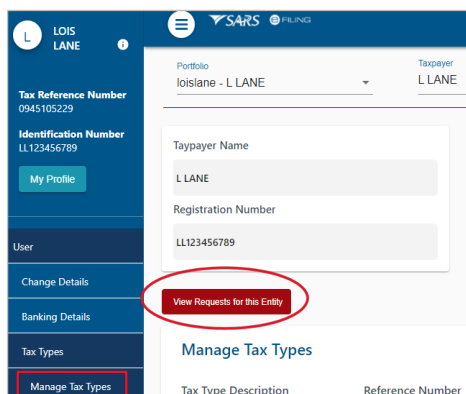
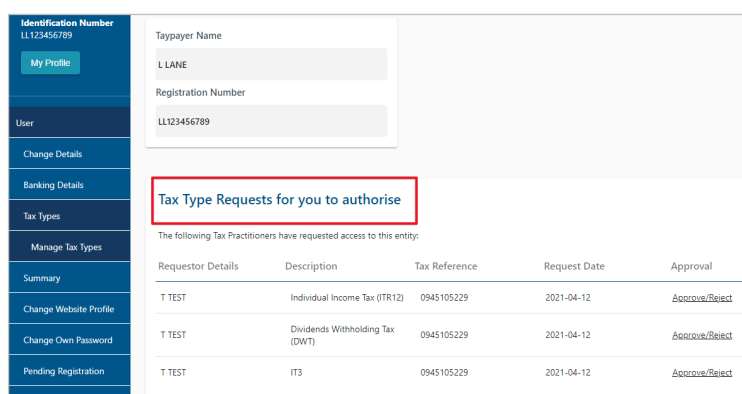
Print Power of Attorney

Tax Type Transfer

Request successfully actioned.

Return to SARS Website

- d) If you are a registered eFiler, you can log on to eFiling to view a list of tax type requests that require your *authorisation*:
 - i) Navigate to the **<Manage Tax Types>** function
 - ii) Click on **<View Requests for this Entity>**

Requestor Details	Description	Tax Reference	Request Date	Approval
T TEST	Individual Income Tax (ITR12)	0945105229	2021-04-12	Approve/Reject
T TEST	Dividends Withholding Tax (DWT)	0945105229	2021-04-12	Approve/Reject
T TEST	IT3	0945105229	2021-04-12	Approve/Reject

Please Note:

- When a taxpayer or registered representative authorises the transfer request, the tax type will move from the holding party (e.g. old tax practitioner) to the requesting party (e.g. new tax practitioner). If the taxpayer or registered representative has shared access with the holding party, shared access will be established with the requesting party.
- When a taxpayer or registered representative rejects the initial transfer request the requesting tax practitioner will be allowed up to two more retry options to request the tax type transfer. If the two retries are exhausted, the tax practitioner will not be allowed to submit any further tax type transfer requests for that particular taxpayer for a period of 21 business days
- If you have multiple portfolios, you can transfer tax types between portfolios:
 - We will check if the portfolio/profile has 'Manage Payer Rights' on both the requesting and holding portfolio. Once verified the tax type will be transferred immediately.
- Where the owner or registered representative does not approve the request for tax type transfer after 5 working days, 3 reminders will be sent. If there is no action from the owner or registered representative after the last reminder is sent, the request to transfer the tax type will expire.
- A tax type transfer will be disallowed if:
 - You are not a registered tax practitioner
 - You are not the registered representative for that taxpayer
 - You are a user with the 'Manage Payer Rights' but you are not the registered representative/valid tax practitioner of the individual whose provisional tax or personal income tax type is being requested.

16.2.3 Tax Types Legacy

- a) The legacy menu items will be available for a temporary period and is intended to allow users to view/monitor requests made via the previous Tax Type Transfer functionality (prior to the implementation of the [Manage Tax Type](#) function).
- b) To access the legacy requests
 - i) Select **<Organisations>** from the menu on the top.
 - ii) Select **<Organisation>** from the menu on the left
 - iii) Select **<Tax Types>** from the menu on the left
- c) **<Legacy Activation Requests>** - this function is read-only and allows you to view tax types previously activated for a particular taxpayer

Identification Number

[My Profile](#)

[Organisation](#)

[Register New](#)

[Change Details](#)

[Tax Types](#)

[Manage Tax Types](#)

[View Request History](#)

[Legacy: Activation Requests](#)

[Legacy: Transfer Requests](#)

[Legacy: Pending Registration](#)

☐ **VAT Admin Penalty**

Reference Number

Tax Office

☐ **Provisional Tax (IRP6)**

Reference Number

Tax Office

Please note that you will automatically be activated to receive SARS notices for this tax type online.

☒ **Individual Income Tax (ITR12)**

Reference Number

Tax Office

Please note that you will automatically be activated to receive SARS notices for this tax type online.

Note: [Click Here](#) to activate/deactivate individual Income Tax activation for deceased estate purposes.

Note: [Click Here](#) to activate/deactivate individual Income Tax activation for insolvent estate purposes.

☒ **IT Admin Penalty**

Reference Number

Tax Office

Please note that you will automatically be activated to receive SARS notices for this tax type online.

☐ **Dividends Withholding Tax (DWT)**

Reference Number

Status:
Successfully Activated

d) **<Legacy Transfer Requests>** - this function allows you to access the list of previous tax type transfer requests.

- i) You can open individual requests
- ii) Where applicable you can capture an override code that was sent for a legacy request (prior to the implementation of the Manage Tax Types function)
- iii) You will not be able to create any new tax type transfer requests.

Identification Number

[My Profile](#)

[Organisation](#)

[Register New](#)

[Change Details](#)

[Tax Types](#)

[Manage Tax Types](#)

[View Request History](#)

[Legacy: Activation Requests](#)

[Legacy: Transfer Requests](#)

[Legacy: Pending Registration](#)

Requests for Taxpayer's Return Types

The 'Request Tax Types' functionality allows for the transfer of a taxpayer's return types between tax practitioners.

To request a new tax type transfer, select the 'Create New' Button at the bottom of the table below.

To view the details of a previously created request, click on 'View' against the appropriate request from the list below.

Please note: Prior to requesting a transfer of return types the taxpayer must have been registered by the requesting tax user and then selected from the drop down menu on the left of the screen.

Status

Request Type

Request Reference:

Name	Request Type	Request Reference	Request Date	Last Action Date	Status	View	Cancel
Miss S	Requested	19121937	07 Nov 2019	07 Nov 2019	Authorised by Individual TaxPayer	View	
Mrs BL	Requested	19121937	07 Nov 2019	07 Nov 2019	Authorised by Individual TaxPayer	View	
Mrs EC	Received	19121940	11 Nov 2019	13 Nov 2019	Cancelled	View	
Miss S	Received	19121942	12 Nov 2019	12 Nov 2019	Cancelled	View	
Miss S	Received	19121942	12 Nov 2019	14 Nov 2019	Cancelled	View	
Mrs EC	Received	19121943	12 Nov 2019	14 Nov 2019	Cancelled	View	
Mr TR	Requested	19121949	18 Nov 2019	20 Nov 2019	Cancelled	View	
Mr GA	Requested	20121953	24 Jan 2020	29 Jan 2020	Cancelled	View	
Mrs BL	Received	20121954	28 Jan 2020	28 Jan 2020	Request Unsuccessful	View	

e) **<Legacy Pending Registration>** - There may be cases where SARS needs to review a request before activating the particular tax type for eFiling. In this instance the status of the tax type activation will be "Awaiting Registration Verification" and a case number will be allocated to you. You can use this function to view the pending registration requests.

- i) Select the option for all taxpayers
- ii) Click on the **<Open>** hyperlink
- iii) You can view the taxpayer's details and click on **<Query Status>** to view the progress of the eFiling registration.

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Identification Number
My Profile

Organisation
Register New
Change Details
Tax Types
Manage Tax Types
View Request History
Legacy: Activation Requests
Legacy: Transfer Requests
Legacy: Pending Registration

Select all Tax Payers: ☒

Search

Name	Registration Number	Return Type	TaxReference Number	Status	Open
Mr QAY	730116730116	Individual Income Tax (ITR12)	0004935000	Case Created	Open

17 ACTIVATE REGISTERED REPRESENTATIVE

- a) If you are the appointed registered representative for an entity, you must activate the status on eFiling in order to transact on behalf of your client.
 - i) Select **<Organisations >** from the menu on the top.
 - ii) Select **<SARS Registered Details>** from the menu on the left
 - iii) Select **<Activate Registered Representative>**
 - iv) Select the applicable option (i.e. Tax Practitioner or Registered Representative)
 - v) Agree to the declaration confirming that you are the authorised representative for the taxpayer and click on **<Continue>**
 - vi) Complete the applicable fields and select the representative capacity (e.g. accounting officer, curator, public officer, parent guardian, etc.)
 - vii) Click the on the activate button at the bottom of the screen

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
Confirmation of Registered User
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 **not** intended for use by **Tax Practitioners**.
Are you a Registered Representative?
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).

Are you a Registered Tax Practitioner?
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.

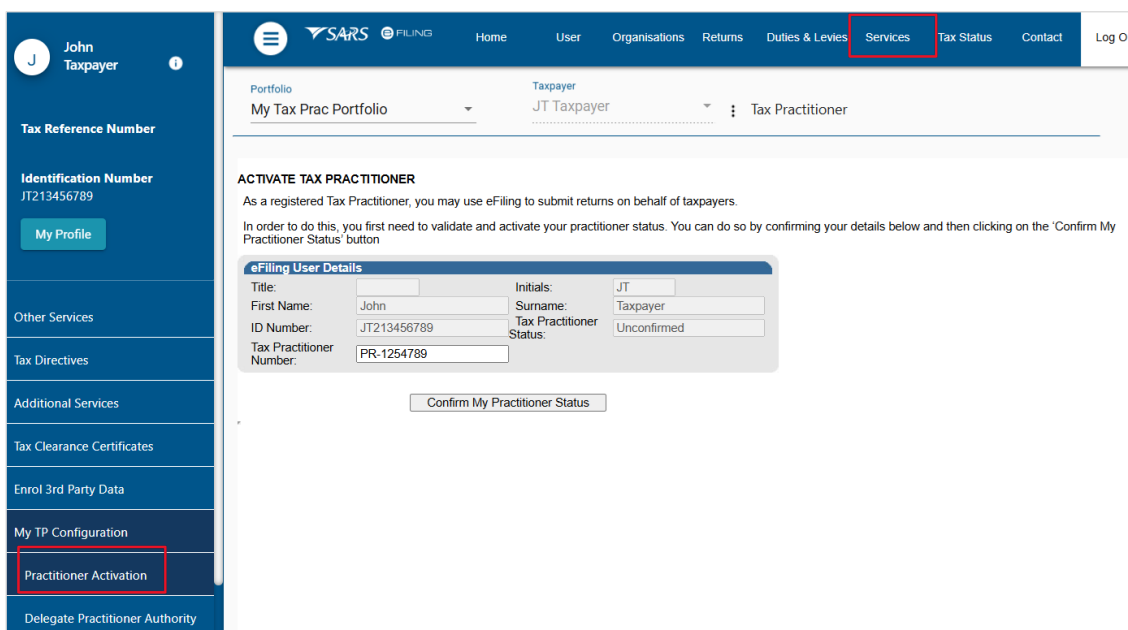
Activate Registered Representative
Activate Tax Practitioner

18 TAX PRACTITIONER CONFIGURATION

- a) This functionality enables tax practitioners to confirm their tax practitioner status at SARS and allow tax practitioners to link practitioner users to other activated practitioner user profiles.
- b) If a user is not a confirmed practitioner or has not been linked to a practitioner user, access to ITR12 returns will be limited to only a “SAVE” functionality. This means that the tax practitioner or practitioner user will not be able to submit the ITR12 returns to SARS and the taxpayer will have to either submit the return via eFiling (if he/she has shared access to the ITR12 with the tax practitioner) or the taxpayer will have to contact a SARS branch office for assistance to submit the return.
- c) To access this functionality:
 - i) Click on **<Services>** on the menu on the top
 - ii) Select **<My TP Configuration>** from the menu on the left.

18.1 PRACTITIONER ACTIVATION

- a) Select **<Practitioner Activation>** from the menu on the left
 - i) On the **<Activate Tax Practitioner>** screen enter a valid practitioner number in the tax practitioner number field
 - ii) Click on the **<Confirm My Tax Practitioner Status>** button.



The screenshot displays the SARS eFiling interface for activating a tax practitioner. The left-hand navigation menu is visible, with 'Practitioner Activation' selected. The main content area is titled 'ACTIVATE TAX PRACTITIONER' and includes instructions for registered practitioners. Below the instructions is the 'eFiling User Details' form. The form contains the following fields and values:

eFiling User Details	
Title:	
First Name:	John
ID Number:	JT213456789
Tax Practitioner Number:	PR-1254789
Initials:	JT
Surname:	Taxpayer
Tax Practitioner Status:	Unconfirmed

A 'Confirm My Practitioner Status' button is located at the bottom of the form.

Please Note:

- If the tax practitioner number is inactive and does not match with SARS, the status field will indicate “**Unconfirmed**”. Tax practitioners are encouraged to register with RCB’s and ensure that they are registered as a tax practitioner with SARS.
- If the tax practitioner number is valid and matches with SARS, the status field will indicate “**Registered**”.
- If you wish to validate the status of an existing PR number on the profile, select the “**Reconfirm Status**” button. A message will display indicating that you have been successfully confirmed as a registered tax practitioner.

18.2 DELEGATE PRACTITIONER AUTHORITY

- a) Tax practitioners are allowed to link practitioner users to other activated practitioner users and thereby delegate authority. This is typically in cases whereby staff members of an organisation are performing functions on eFiling on behalf of the tax practitioner.
 - i) Select **< Delegate Practitioner Authority >** from the menu on the left
 - ii) If the tax practitioner has not been activated against the eFiling profile, the following message will display. To activate, refer to "[Practitioner Activation](#)" step above.

Delegate User Authority

Our records indicate that a Registered Tax Practitioner has not been activated against this eFiling profile.

To assign additional registered users, you must first activate as the Registered Tax Practitioner using the 'Practitioner Activation' menu alongside.

Alternatively, please visit a SARS branch office for assistance.

- b) If the tax practitioner has been activated and the status indicates "**Registered**", the **<Delegate User Authority>** page will display.

Delegate User Authority

Actions on the page below are only available to the Site Administrator and to the Registered Tax Practitioner. It displays the Registered Tax Practitioner who was activated via eFiling and lists all the registered eFiling users. Only the registered practitioner may assign and remove practitioner rights to other users. To assign or remove rights, select the checkbox alongside the user and then click on the 'Save' button. To activate as the Registered Tax Practitioner, please use the 'Practitioner Activation' menu on the left.

Please select PR number you would like to delegate authority to:

Login Name: Surname:

First Name:

First Name	Initials	Surname	ID Number	Login Name

- c) Choose the "PR number" that you want to delegate authority to:
 - i) Administrators or the registered tax practitioner may perform actions on this page
 - The admin user on eFiling will be able to view all linked practitioners in the dropdown.
 - If it is the user on eFiling, only his/her practitioner (PR) number will display on the dropdown list for selection.
 - ii) Once the PR number has been chosen, click on **<Select>**
 - iii) A list of users will display. Select the users and click on the **<Save>** button to continue
 - iv) Click on **<OK>** to confirm the selection. A message will display to indicate that the users have been successfully updated.

Delegate User Authority

Actions on the page below are only available to the Site Administrator and to the Registered Tax Practitioner. It displays the Registered Tax Practitioner who was activated via eFiling and lists all the registered eFiling users. Only the registered practitioner may assign and remove practitioner rights to other users. To assign or remove rights, select the checkbox alongside the user and then click on the 'Save' button. To activate as the Registered Tax Practitioner, please use the 'Practitioner Activation' menu on the left.

Please select PR number you would like to delegate authority to: KIM - PR-003

Login Name: Surname:
First Name:

First Name	Initials	Surname	ID Number	Login Name	
Col	C	A	620	col	<input checked="" type="checkbox"/>
Sim	S	B	570	S	<input type="checkbox"/>
sive	s	d	010	d	<input type="checkbox"/>
s	sd	d	010	d	<input checked="" type="checkbox"/>
Pat	P	K	470	pat	<input type="checkbox"/>
BON	BL	M	711	M	<input type="checkbox"/>
Ing	I	S	760	I	<input type="checkbox"/>

18.3 CONFIRM PRACTITIONER REGISTRATION STATUS

- a) Select **<Confirm Practitioner Registration Status>** from the menu on the left
 - i) The tax practitioner registration status page will display.
 - ii) Enter the tax practitioner number. Complete and verify the security pin displayed on the screen
 - iii) Click the **"Search"** button to continue.

Tax Reference Number

Identification Number
JT213456789

Other Services

Tax Directives

Additional Services

Tax Clearance Certificates

Enrol 3rd Party Data

My TP Configuration

Practitioner Activation

Delegate Practitioner Authority

Confirm Practitioner Registration Status

TAX PRACTITIONER REGISTRATION STATUS

Portfolio: My Tax Prac Portfolio Taxpayer: JT Taxpayer Tax Practitioner

Tax Practitioner Number: (e.g. PR-0000000)

Security PIN:

Verify Security PIN:

- b) If the tax practitioner number is incorrect, the following error message will display.

Please ensure that your Tax Practitioner Number is correct. eg. Number PR-0000000

- c) If no registered tax practitioner can be found, a message will display on the screen.

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Tax Practitioner Number (e.g. PR-0000000)

Security PIN

Verify Security PIN

No registered tax practitioner can be found for this number.

- d) If the tax practitioner is registered, the practitioner's name, surname, practitioner number and registration status indicated as **"Registered"** will display.

TAX PRACTITIONER REGISTRATION STATUS

Tax Practitioner Number (e.g. PR-0000000)

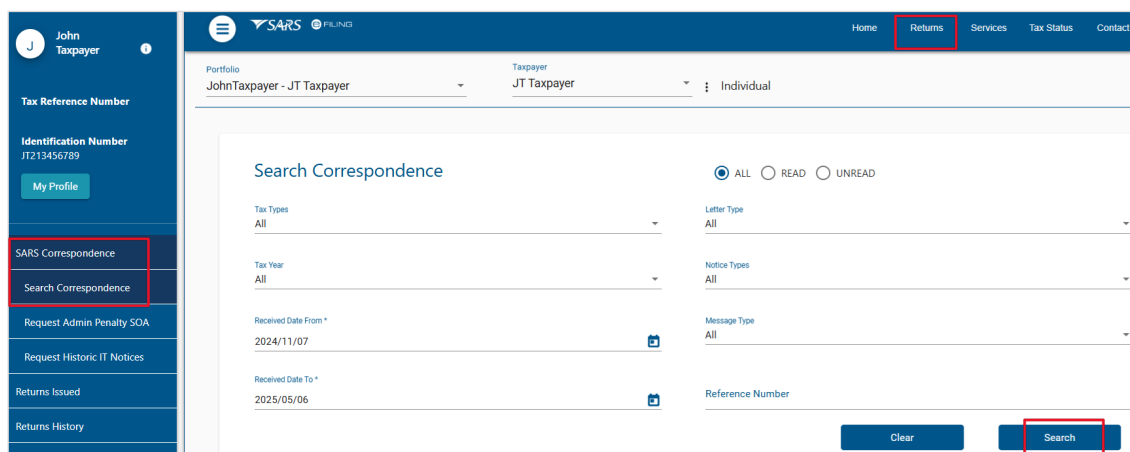
Security PIN

Verify Security PIN

Full Names	Surname	Practitioner Number	Registration Status
FRAN	MOS	PR-00	REGISTERED

19 SARS CORRESPONDENCE

- a) For your convenience all letters, notices and messages issued by SARS is available in one place under 'SARS Correspondence'.
- b) To search for correspondence:
- Log on to eFiling and select **<SARS Correspondence>** from the menu on the left
 - Click on **<Search Correspondence>**
 - The correspondence grid will display
 - You can use one or more of the following filters to search for correspondence:
 - Tax type
 - Tax year
 - Received from date (i.e. start date)
 - Received to date (i.e. end date)
 - Correspondence Type (such as Letters, Notices and Text Messages issued by SARS)
 - Click on **<Search>**.



Please Note:

If you navigate to other eFiling pages after logging on, you will no longer see **<SARS Correspondence>** on the menu on the left. To navigate back to **<SARS Correspondence>** select **<Returns>** from the menu on the top.

20 FORGOT PASSWORD

- a) On the eFiling login in screen click on **<Forgot Password>** and then enter your username.
- b) Select your preferred channel to receive the [OTP](#).
 - i) An [OTP](#) will be sent to the email address or cell number saved on your eFiling profile.
 - ii) Insert the OTP and click on **<Submit>**.

- c) Insert your new [password](#) and retype it to confirm.
 - i) Click on **<Submit>**
 - ii) A pop-up message will display confirming that your password has been changed successfully.

- d) If you registered for eFiling prior to 1 July 2019 and did not provide contact details, you will be required to enter your cell number and email address.
 - i) If we can match your details with our records, an OTP will be sent to you
 - ii) If we cannot match your details, we will ask you a few questions to authenticate you
 - iii) If we are still unable to match your details, please call the SARS Contact Centre for further assistance.

The 'Forgot Password' form is titled 'Forgot Password' and asks the user to 'Please enter your contact details'. It has two input fields: 'Cell Number' with the value '0833333330' and 'Email' with the value 'Test1@sars.gov.za'. A red arrow points from the 'Next' button to an error message box. The error message box is titled 'Error' and contains the text: 'We could not verify your details at the moment. Please try again later or call the SARS Contact Centre on 0800 00 7277 for assistance.' with an 'OK' button.

21 FORGOT USERNAME

- a) On the eFiling login in screen click on **<Forgot Your Username>**. Insert the following particulars:
 - i) Cell number
 - ii) Email
 - iii) Indicate if you are a South African citizen
 - iv) ID number (or Passport number if you are not a South African citizen)
 - v) Tax number (if you have one)
- b) Select your preferred channel for the [OTP](#)
 - i) An [OTP](#) will be sent to the email address or cell number saved on your eFiling profile.
 - ii) Insert the OTP and click on **<Submit>**.

The first screenshot is the 'Forgot Username' form. It asks the user to 'Please enter ID or Passport number and contact details'. It has three input fields: 'Cell Number *' with the value '0831122334455', 'Email *' with the value 'jd@sars.gov.za', and 'Are you a South African Citizen?*' with 'No' selected. Below these are fields for 'Foreign ID / Passport Number *' with the value 'JD123456789' and 'Tax Number Linked to the Username'. A 'Continue' button is at the bottom. A link 'Need to update Contact Details? Click here' is at the bottom right.

The second screenshot is the 'Approve Online Request' screen. It says 'SARS would like you to approve your online request. Please indicate your preferred channel and click OK to authorize.' There are two buttons: 'Email' and 'Cell Number'. Below them, it says 'Your Preferred Contact' and '083*****20'. An 'OK' button is at the bottom. A link 'Need to update Contact Details? Click here' is at the bottom right.

The third screenshot is the 'One Time Pin' screen. It says 'OTP has been sent to the following cellphone number' and '083*****20'. It also says 'Pin expires in 00:02:42'. There is a field for the pin with the value '3 2 4 7 -'. Below it, it says 'One Time Pin is required' and 'Please enter the last 6 digits of your OTP.' There are three buttons: 'Resend OTP', 'Send OTP to Email', and 'Submit'.

- b) Once you have entered the correct OTP, your username will display. You will be prompted to insert a password and retype it to confirm.
 - i) Click on **<Submit>**
 - ii) A pop-up message will display confirming that your password has been changed successfully.

The image shows two screenshots from the SARS eFiling system. The first screenshot is titled 'Forgot Username' and contains the text 'Please enter your new password'. It has a text box for 'Your username is:' with the value 'CENA@TEST.CO.ZA', and two text boxes for 'New Password' and 'Confirm Password'. A red arrow points from this form to a second screenshot titled 'Message' which says 'Your password has been successfully changed.' with an 'OK' button.

- c) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be prompted to select a preferred channel to receive your OTP.
- i) If we can match your details with our records, an OTP will be sent to you
 - ii) If we cannot match your details, we will ask you a few questions to authenticate you
 - iii) If we are still unable to match your details, please call the SARS Contact Centre for further assistance.

22 UPDATE CONTACT DETAILS

- a) This function allows you to update your [security contact details](#) from the eFiling login page without having to log in.
- b) Please note the following:
- i) This function is only available to registered eFilers who are **South African citizens**
 - ii) You must pass the biometric verification step before you can update your security contact details
 - iii) If you have forgotten your security contact details and you are not a South African citizen, or you have failed the biometric verification, please either call the SARS Contact Centre or book an appointment (via the SARS website) for a SARS official to assist you.
- c) On the eFiling login screen click on **<Update Contact Details>**
- i) Complete your personal details (first name, surname and South African identity number) and click on **<Next>**
 - ii) Read the 'Biometrics Notice' and click on **<Next>**

The image displays three sequential screenshots of the SARS eFiling interface. The first screenshot is the login screen with the text 'Welcome, please login to SARS eFiling' and a 'Username *' field. It includes links for 'Forgot Your Username?', 'Forgot Your Password?', and 'Update Contact Details?'. The second screenshot is titled 'Update Contact Details' and asks the user to 'Please enter your personal details.' It contains fields for 'First Name *', 'Surname *', and 'Identification Number (SA Citizens Only) *'. The third screenshot is titled 'Biometrics Notice' and explains that SARS has introduced biometric facial recognition authentication. It instructs the user to 'Please select the 'Next' button to proceed with the biometric facial recognition authentication.'

- d) Follow the biometric on screen instructions. For more information refer to the section '[Biometric Authentication Process](#)' described above.

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- e) If you pass the biometric verification, the following confirmation message will display. Click on **<Continue>**.

Message

You have passed the biometric verification. Please continue to update your Security Contact Details to ensure your account remains secure.

Continue

- f) Capture your updated contact details (cell number and email address), select a preferred contact method and click on **<Submit>**

- i) Insert the [OTP](#) that has been sent to the new cell number or email address and click on **<Submit>**.
- ii) A pop up message will display to confirm that your contact details have been successfully updated.

New Contact Details

Please capture your new contact details.

Cell Number *

Email Address *

Preferred Contact Method

☐ Cell Number
 ☒ Email Address

Submit

One Time Pin

OTP has been sent to the following email
sj*****@g****.com
Pin expires in 00:02:54

9 1 8 2 - _ _ _ _ _ .

One Time Pin is required

Please enter the last 6 digits of your OTP.

Resend OTP

Submit

Message

Your contact details have been successfully updated.

OK

23 DOCUMENT MANAGEMENT

Detail of Change	Date	Version	Description
	06-12-2019	6	Added new functionality: User invitation to a portfolio; Chatbot, SARS correspondence
	26-03-2020	7	Automatic income tax registration for new eFilers (individuals with valid SA ID number)
	20-04-2020	8	Enhanced functionality: Tax Type Transfer.
	08-05-2020	9	Added: Passwordless login; Two-factor authentication
	04-12-2020	10	Capture Registration screen: 'Next' button replaced with 'Submit'; Profile and Preference Setup screen: last date and time that the profile was accessed
	23-04-2021	11	New function to Manage Tax Types, Practitioner configuration
	11-08-2021	12	Chatbot; Approve Tax Type Transfer request
	28-02-2023	13	Added Trust Types (including foreign and CIS trusts); LiveChat
	19-04-2024	14	Contact Details Validation
	01-11-2024	15	Biometric Facial Recognition Authentication
	22-11-2024	16	Updates for password criteria and two-factor authentication
	12-05-2025	17	Decommission of Help-You-eFile. Update screens
	27-05-2025	18	Update Security Contact Details
	25-08-2025	19	Updates for Security Contact Details, Biometric Authentication, Forgot Password, Forgot Username

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;
- 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).