



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 NEW LOOK

- a) SARS redesigned eFiling in an effort to embrace the benefits of emerging technologies and provide an optimized and secure digital environment. The new look is also intended to help promote voluntary compliance, reduce the administrative burden and provide you, our valued client, with a more intuitive and user-friendly experience.
- b) Changes include:
 - i) Alignment to SARS' corporate identity
 - ii) Improved security to safeguard against fraud
 - iii) Implementation of a primary user-id (single login) to access all profiles
 - iv) Profile management (e.g. Organisations and Tax Practitioners)
 - v) A dashboard providing the eFiler with a visual summary of his/her tax affairs at a glance.

2.1 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.

2.2 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**

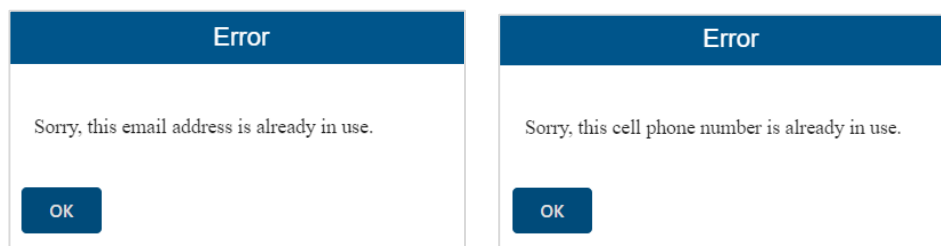
- iii) **Specify a descriptive name** for each group (for ease of reference).
- c) If you registered different portfolio types prior to 1 July 2019, you would have accessed each of the abovementioned portfolios with a unique username and password. As from 1 July 2019, you only require one username and password (referred to as the primary login) to login to eFiling. You can then choose the portfolio that you want to access.

3 PASSWORD RULES

- a) When creating or changing a password on eFiling please ensure that the password contains a minimum of 8 characters and at least one of the following:
 - i) uppercase letter
 - ii) lowercase letter
 - iii) special character
 - iv) numeric digit.

4 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.
- b) Note: 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 with a SARS office for further assistance.



5 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 an OTP via SMS or via an email address. Your preferred method of communication for the OTP can be maintained via 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.

6 CHAT WITH SARS

6.1 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
 - vi) Request Call Back

6.2 LIVE CHAT

- a) The Live Chat service allows you to chat with a SARS service agent in real-time via eFiling and the SARS MobiApp instead of having to call the SARS Contact Centre, visiting a Branch Office, or sending an email.
- b) The Live Chat icon appears on the bottom right side of your screen.

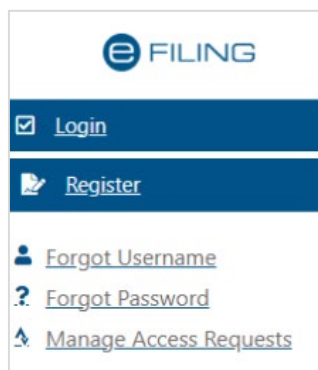


- c) For more information please refer to the following guide on the SARS website: "IT-AE-50-G01 - How to Resolve Queries via SARS Live Chat"

7 REGISTRATION ON EFILING

7.1 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) Once the registration information you have entered is successfully matched with the SARS records, you will be presented with the One-Time-Pin (OTP) screen
- v) Please enter the [OTP](#) sent to either your cell number or your email address
- vi) If the time period to enter the OTP expires you can click on **<Resend OTP>**. Note: for your security you can only select this option twice
- vii) If you do not complete the OTP process successfully, you will have to start the registration process again
- viii) Once you have successfully entered the OTP, the eFiling Login Screen will display (refer to the section on [‘First Time Login’](#) below).

The image displays three sequential screenshots of the SARS eFiling registration process:

- Register (Personal Details):** A form titled 'Register' with the instruction 'Please enter personal details.' It includes fields for Name* (JOHN), Surname* (TAXPAYER), Are you a South African Citizen?* (Yes selected), Identification Number* (8008120908950), and Date of Birth* (1980/08/12). A 'Next' button is at the bottom.
- Register (Contact and Login Details):** A form titled 'Register' with the instruction 'Please enter contact and login details. Note that your contact details will be used as your security contact details going forward.' It includes fields for Cell Number* (082123456789), Email* (TEST@SARS.GOV.ZA), Use Email as Username? (checked), Username* (TEST@SARS.GOV.ZA), Password* (*****), and Confirm Password* (*****). A 'Submit' button is at the bottom.
- One Time Pin:** A screen titled 'One Time Pin' with the instruction 'OTP has been sent to the following cellphone number 078****91. Pin expires in 02:09'. It shows a 6-digit pin input field with the first three digits '1 1 1' and the last three digits '1 2 3'. Below the input field is the instruction 'Please enter the last 6 digits of your OTP.' and two buttons: 'Resend OTP' and 'Submit'.

Please Note:

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

7.2 REQUEST FOR ADDITIONAL INFORMATION TO FINALISE REGISTRATION

- a) If we are unable to finalise your eFiling registration immediately we may request additional information before we issue an OTP to you. Please follow the steps below in order for us to finalise your eFiling registration as soon as possible.

- b) A message will display confirming your registration request and prompting you to upload supporting documents in order to finalise your eFiling registration.
- i) 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.
 - ii) If you are logged out, please use the username and password that you provided during the registration process.
 - iii) 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

131621865
📎

Continue

Save for Later

- c) The Registration Workpage will display. Click on **<Upload>** to upload the required supporting documents.
- i) The file size may not exceed 5mb.
 - ii) The following file types will be accepted:
 - A) .doc
 - B) .jpeg
 - C) .png
 - D) .docx
 - E) .jpg
 - F) .xls
 - G) .jiff
 - H) .pdf
 - I) .xlsx
 - iii) Follow the screen prompts to upload the documents.
 - iv) The document file names must be unique. If you upload more than one file with the same name, an error message will display.
 - v) 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
 - vi) 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).

The screenshot shows the 'Registration Workpage' interface. On the left, a 'Welcome' sidebar for 'Johnny John' displays the status 'Supporting Documents Submitted', the tax reference number '3****442**', and the registration ID '51102751511027'. The main area is divided into two sections: 'Case Details' and 'Document Details'. 'Case Details' shows Case Number '131621865' and Case Requested Date '2021-03-11' with a 'Query Status' button. 'Document Details' shows a table with columns for Document Type, Status, Upload, and View. The first row shows 'Upload Registration Documents' with a status of 'Submitted' and a checked 'Upload' box, with a 'View' button. A 'Close' button is at the bottom right.

- e) Once SARS has verified your details, the status will change to 'Request Successful' and you will be notified via email and SMS.
- i) Click on the **<Complete Registration>** button.
- ii) Select your preferred method of communication and click on **<Continue>**. The method you select will serve as your eFiling security contact details and will be used to send a One-Time-Pin (OTP) to authenticate you. Please enter the OTP sent to either your cell number or your email address.

This screenshot shows the 'Registration Workpage' after the status change. The sidebar now shows 'Request Successful' and a red 'Complete Registration' button. The 'Case Details' and 'Document Details' sections remain the same as in the previous screenshot.

The screenshot shows the 'Welcome To SARS eFiling' screen. It contains a message about enhanced security and a form for 'eFiling Security Contact Details' and 'Preferred Method of communication'. The 'eFiling Security Contact Details' section has input fields for 'Cell Number' (0833333333) and 'Email' (TEST@TEST.CO.ZA). The 'Preferred Method of communication' section has two toggle switches: 'Cell Number' (off) and 'Email' (on). A 'Continue' button is at the bottom right.

- f) When you have successfully entered the OTP, 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.

7.3 AUTOMATIC REGISTRATION FOR INCOME TAX

- When you [register as a new eFiler](#), SARS will do the work for you and automatically issue a personal income tax number to you if:
 - You are not yet registered for income tax
 - You have a valid South African ID number.
- 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.
- 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:
 - Select **<Home>** from the menu on the top
 - Select **<SARS Registered Details>** from the menu on the left
 - Select **<Notice of Registration>**
 - Click on **<Request New>**.

The screenshot displays the SARS eFiling user interface. On the left, the 'SARS Registered Details' and 'Notice of Registration' menu items are highlighted with red boxes. The main content area shows the 'Notice of Registration' section with a table listing taxpayer information. The table has columns for Name of Taxpayer, Reference Number, Tax Type, Issue Date, and Actions. A single row is shown for 'JT Taxpayer' with a 'Request New' button in the Actions column.

Name of Taxpayer	Reference Number	Tax Type	Issue Date	Actions
JT Taxpayer	0308918267	Individual Income Tax (ITR12)	2020/03/25	Request New View



JT TAXPAYER
299 BRONKHORST
BROOKLYN
PRETORIA
0001

INCOME TAX

Notice of Registration

Enquiries should be addressed to SARS


Contact Detail

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

Details

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

Electronic Certification



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

8 FIRST TIME LOGIN

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

- a) Log on to the [SARS website](http://www.sars.gov.za). 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>

The diagram illustrates the login process. On the left, the 'Welcome, please login to SARS eFiling' screen shows a 'Username' field with 'johntaxpayer' entered. Below the field are links for 'Forgot Your Username?' and 'Forgot Your Password?'. At the bottom, there is a 'Next' button and a 'Register' link for users without an account. A red arrow points from the 'Next' button to the right-hand screen. The right-hand screen is the password entry page, featuring a 'Password' field with masked characters (dots). It also includes links for 'Forgot Your Username?' and 'Forgot Your Password?'. At the bottom of this screen is a 'Login' button.

- 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.

The diagram shows the 'Welcome to SARS eFiling' screen. The header includes the SARS eFiling logo and links for 'Contact' and 'Log Out'. Below the header, the 'SARS EFILING TERMS & CONDITIONS' are displayed. The terms state that the use of the website is regulated by the Rules for Electronic Communication prescribed under Section 255(1) of the Tax Administration Act, 2011 (Act No. 28 of 2011). It also mentions that the rules were issued in Public Notice GN 644 IN GG 37940 OF THE 25TH OF AUGUST 2014. A red arrow points from the bottom of the terms and conditions section to a box containing two buttons: 'I Decline' and 'I Accept'.

- 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>**.

My Details

Name & Surname
Elizabeth BALDWIN

ID Number
EB123456789

Activate Your Return Types

Please select the return types you want to activate on your profile

Return Type Description	Reference No.	Selected
Individual Income Tax (ITR12)	0707207072	<input type="checkbox"/>

[Link](#)

[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.

John Taxpayer

Tax Reference Number: 0308918267
Identification Number: JT213456789
[My Profile](#)

User
SARS Registered Details
Customs Registration
Special Links

Portfolio: JohnTaxpayer - JT Taxpayer
Taxpayer: JT Taxpayer
Individual

Tax Compliance Status [Refresh](#)

Tax Period	Return Status	Due Date
2021	Filed through branch	2021-11-30
2019	Filed through eFiling on 2021-04-12	2019-12-04

Account Balance: [Refresh](#)

Not Available

Refund Status: [Refresh](#)

Tax Period	Return Status	Date
2020	Filed through eFiling on 2021-03-09	2020-02-28

Notification

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.

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

8.2.1 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.
 - i) Enter your eFiling Username and click on **<Next>**
 - ii) Enter your Password and click on **<Login>**.
 - iii) The eFiling welcome screen will display.
 - iv) Please read the terms and conditions. At the bottom of the screen click on **<I Accept>** to continue with the log in process.

The screenshot shows the SARS eFiling welcome screen. At the top, there is a header with the SARS logo and 'eFILING' text. Below the header, the main heading is 'Welcome to SARS eFiling'. Underneath, there is a section titled 'SARS EFILING TERMS & CONDITIONS'. The text in this section states: 'THE USE OF THIS WEB SITE IS REGULATED BY THE RULES FOR ELECTRONIC COMMUNICATION PRESCRIBED UNDER SECTION 255(1) OF THE TAX ADMINISTRATION ACT, 2011 (ACT NO. 28 OF 2011) (the "Rules").' and 'THE RULES WERE ISSUED IN PUBLIC NOTICE GN 644 IN GG 37940 OF THE 25TH OF AUGUST 2014, available here'. At the bottom of the terms section, it says: 'THE RULES AS WELL AS THE TERMS AND CONDITIONS HEREUNDER ARE BINDING AND ENFORCEABLE AGAINST ALL PERSONS THAT ACCESS THIS WEB SITE OR ANY PART THEREOF. IF YOU DO NOT AGREE TO THE RULES OR THESE TERMS AND CONDITIONS, YOU MUST LEAVE THIS WEB SITE NOW, AS FURTHER USE SHALL AUTOMATICALLY BIND YOU.' Below this text, there are two buttons: 'I Decline' and 'I Accept'. A red arrow points from the 'I Accept' button to the next screen.

- 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.

The screenshot shows the 'Welcome To SARS eFiling' screen. It has a heading 'Welcome To SARS eFiling' and a paragraph: '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.' Below this, there are two columns. The left column is titled 'eFiling Security Contact Details' and contains two input fields: 'Cell Number' with the value '0833333333' and 'Email' with the value 'TEST@TEST.CO.ZA'. The right column is titled 'Preferred Method of communication' and contains two toggle switches. The first toggle switch is turned off, and the second toggle switch is turned on. At the bottom right of the screen, there is a blue button labeled 'Continue'.

- 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.

8.2.2 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.

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.

Set Default Security Contact

Please enter the password for taxpayer111111

Password

[Forgot Password?](#)

Submit **Cancel**

- 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

Cell Number

Email

0833333333

TEST@TEST.CO.ZA

Preferred Method of communication

☐

☒

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>**.

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.”

8.3 ACCESS TO MY PROFILE

- 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.
- Select the type of access you require (see below) and click on **<Submit>**:
 - <Obtain View Only Shared Access>** - this option will only allow you to view transactions done on your behalf on eFiling
 - <Obtain Full Shared Access>** - this option will allow you to have full shared access and the other party will still retain access rights to the tax type
 - <Remove Tax Practitioner Access>**
 - <Remove My Access>** - This option will display if you currently have shared access with your tax practitioner
 - <Deactivate Tax Type>**

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 ID '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 ID '0009000900'. It also provides the same three buttons. At the bottom right, there is a blue 'Submit' button and a small SARS logo.

9 PROFILE AND PREFERENCE SETUP

- 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.

9.1 CHANGE SECURITY CONTACT DETAILS:

- a) 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 & Save>**
 - 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.

9.2 CHANGE USER NAME 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.

9.3 TWO-FACTOR AUTHENTICATION USING A ONE TIME PIN

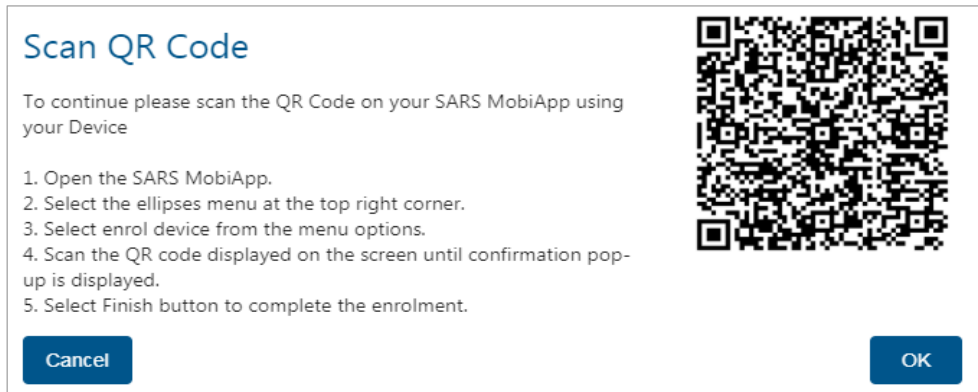
- a) Two-factor authentication is an additional security measure and requires you to provide your password as well as a second factor of authentication to login to eFiling. If you prefer to use the [OTP](#) method for additional authentication follow the steps below:

- b) Select **<My Profile>** from the menu on the left and click on **<Profile and Preference Setup>**
- Click on the button to switch 'Two-factor authentication' on
 - Select **<One time pin to preferred method of communication>**
 - Click on **<Update and Save>**
 - An OTP will be sent to your preferred method of communication
 - After you have entered the correct OTP, a pop-up message will display confirming that your two-factor authentication has been successfully activated.
 - Going forward, you will be required to do the following each time you log on to your profile via the eFiling website:
 - Enter username
 - Enter password
 - Enter OTP.

9.4 TWO-FACTOR AUTHENTICATION USING THE EFILING MOBILE APP

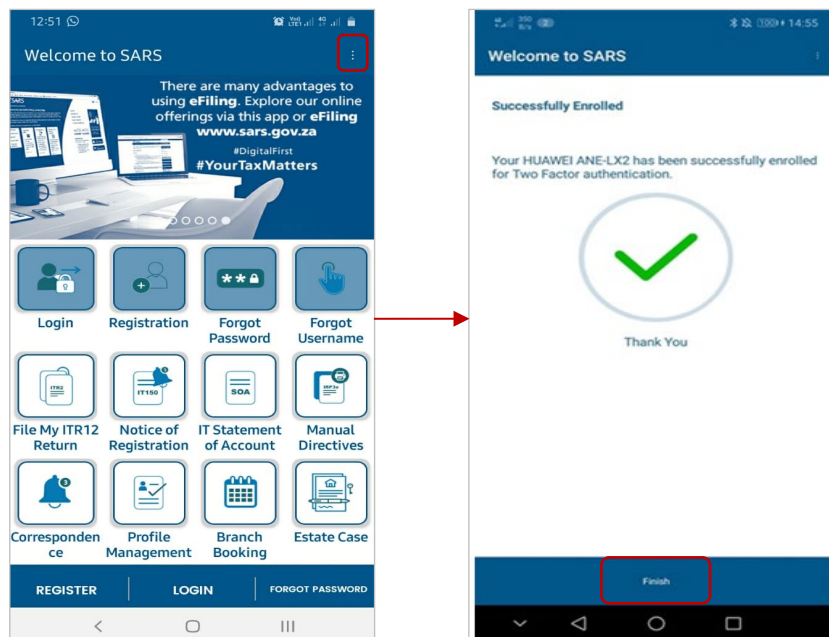
- If you prefer to use the mobile app for additional authentication, please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.
- Log on to the eFiling website:
 - Select **<My Profile>** from the menu on the left and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

- You will be issued with an OTP to confirm the device you want to enrol
- 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.



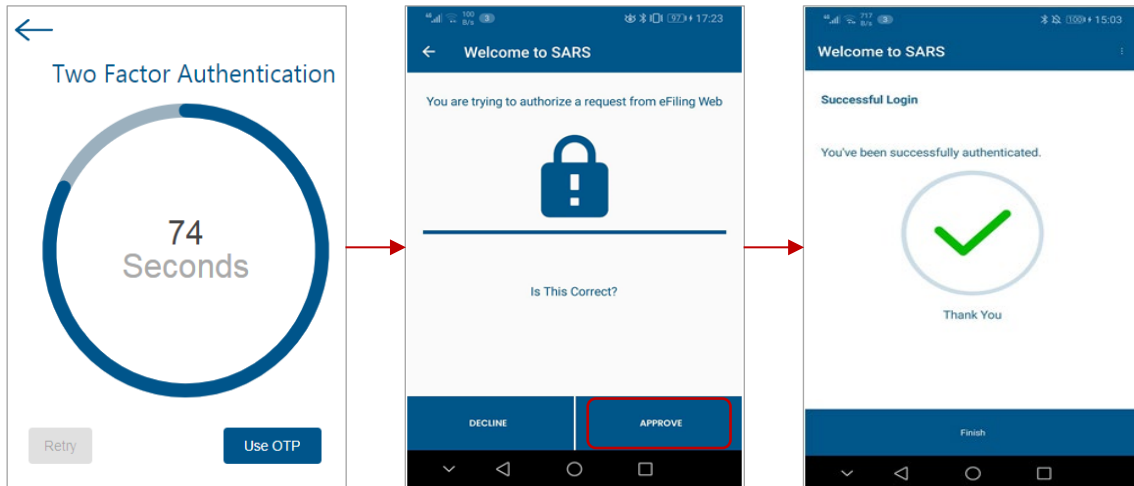
c) Launch the mobile app on your device:

- 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.

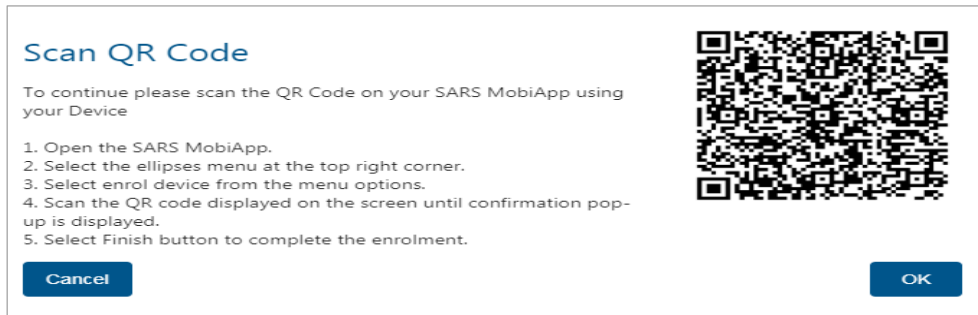


Please Note:

- 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.

9.5 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.



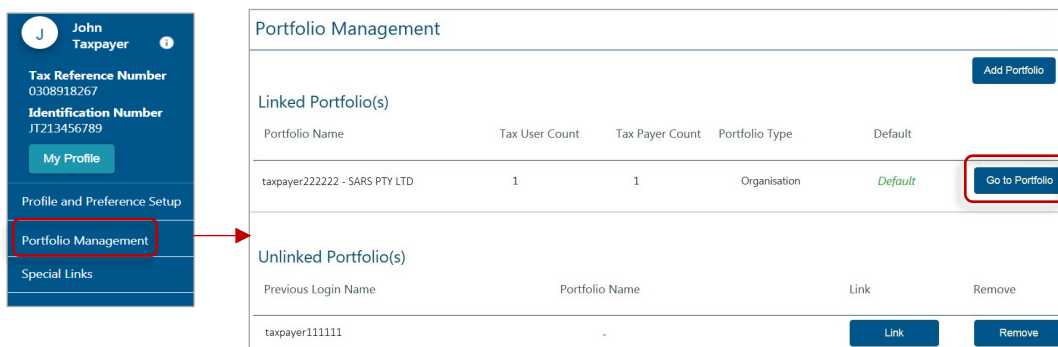
- d) Launch the mobile app on your device. Follow the steps described in the section “[Two-Factor Authentication Using the eFiling Mobile App](#)” to enrol your device.

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.

10 PORTFOLIO MANAGEMENT

- a) The Portfolio Management function is used to link, and add various [portfolios](#) (roles) on your eFiling profile, such as:
- i) Your **individual** portfolio to manage your own personal taxes
 - ii) Multiple **company** portfolios if you are the registered representative (e.g. public officer) or employee and you manage the taxes of those companies
 - iii) 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:
- i) Select **<My Profile>** from the menu on the left
 - ii) Select **<Portfolio Management>**.
 - iii) 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.
- i) If you do not remember the password, click on [<Forgot Password>](#) to reset it
 - ii) 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 message box is displayed in the center with the text: 'Portfolio taxpayer111111 linked.' and an 'OK' button. The background interface is partially obscured but shows sections for 'Linked Portfolio(s)' and 'Unlinked Portfolio(s)'.

- 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.

The screenshot shows the 'Portfolio Management' interface. The 'Linked Portfolio(s)' table has two rows: 'Test345 - SARS Pty Ltd' (Organisation) and 'Test123 - Mr Taxpayer' (Individual, marked as Default). The ellipsis menu icon for 'Test123 - Mr Taxpayer' is highlighted with a red box. A context menu is open to the right, showing options: 'Rename', 'Change Portfolio Type', 'Set As Default' (highlighted with a red box), 'Remove Default' (highlighted with a red box), 'Rename', 'Change Portfolio Type', and 'Remove Default'.

- 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.

The screenshot shows the 'Portfolio Management' interface. The 'Linked Portfolio(s)' table is the same as in the previous screenshot. The ellipsis menu icon for 'Test123 - Mr Taxpayer' is highlighted with a red box. A context menu is open to the right, showing options: 'Rename', 'Change Portfolio Type' (highlighted with a red box), 'Set As Default', and 'Remove Default'. Below this, a 'Portfolio Type' dropdown menu is shown with three options: 'Individual' (highlighted with a red box), 'Tax Practitioner', and 'Organisation'.

- 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' interface. It has a table for 'Linked Portfolio(s)' with columns: Portfolio Name, Tax User Count, Tax Payer Count, Portfolio Type, and Default. Two portfolios are listed: 'Test345 - SARS Pty Ltd' (Organisation) and 'Test123 - Mr Taxpayer' (Individual, Default). The ellipsis menu (⋮) for 'Test123 - Mr Taxpayer' is highlighted with a red box. A red arrow points from this menu to a separate box showing the options: 'Rename', 'Change Portfolio Type', and 'Set As Default'. Another red arrow points from 'Rename' to a second screenshot showing a 'Linked Portfolio(s)' form with 'Mr Taxpayer' entered in the 'Portfolio Name' field, 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' and a section 'Please add Portfolio Information'. There are two input fields: 'portfolioName' with the value 'Test123' and 'Portfolio Type' with a dropdown menu showing 'Tax Practitioner'. At the bottom is an 'Add Portfolio' button.

11 MANAGE USERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

11.1 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:
- The Requestor** – this refers to an existing user that has the 'Manage User' role assigned to him/her and wants to invite another person to be a user and have access to the organisation or tax practitioner portfolio.
 - The User** – this 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:
- Select **<My Profile>** and **<Portfolio Management>** from the menu on the left
 - 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. At the top, the 'User' menu item is highlighted in the navigation bar. On the left sidebar, the 'Invite User' option is highlighted. 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' (filled with 'JD213456789'), 'Reference Number', 'Tax Reference Number', 'Surname', 'DAY', and 'Portfolio Name' (filled with '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.

Portfolio

Tax User

My Company Portfolio

Ras (Awaiting Confirmation)

Organisation

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.

John Taxpayer
Tax Reference Number: 0308918267
Identification Number: JT213456789

Change Details

Identification Type: South African ID
ID Number: 5502275017085
Surname: Nel
Portfolio Name: My Company Portfolio

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

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

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.

11.2 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>**.

- 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 message will display to confirm that the organisation/tax practitioner profile will be linked to your profile.

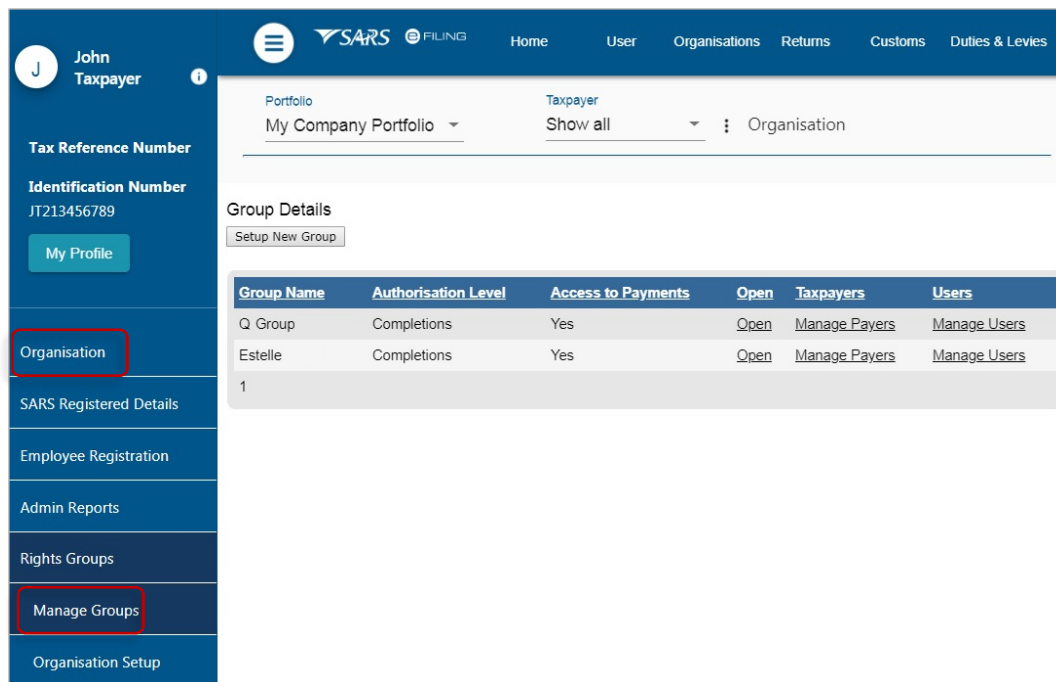
Please Note:

- 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.

12 MANAGE GROUPS

- In order to activate the tax type functions and services on eFiling (e.g. Tax Directives, Tax Compliance Status, etc) you must ensure that the correct rights and authorisation levels have been allocated to users on your organisation's portfolio.
- To activate the tax type functions and services:
 - Select **<Organisations>** from the menu on the top
 - Select **<Organisation>** again from menu on the left
 - Click on **<Rights Group>**
 - Click on **<Manage Groups>**
 - 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](#)).



- 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>**.

The screenshot shows the 'UPDATE GROUP DETAILS' form in the SARS eFiling system. The form is divided into sections: 'Group Name' (SARS Group), 'Authorisation Level' (Submissions), 'Access To Payments' (checked), and 'Tax Types' (a list of checkboxes). The 'Update' button at the bottom is highlighted with a red box.

13 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'.

- 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:

f) Information required to add a Company:

The screenshot shows the SARS eFiling portal interface. At the top, there is a blue header with the SARS logo and 'eFILING' text. Below the header, there are navigation links: 'Home', 'User', and 'Organisations'. The main content area is divided into two sections. The first section is titled 'Registered Representative' and contains a link to a list of entities. The second section is titled 'Capture Entity Details' and contains a warning message: 'Please be aware that a tax type transfer for this entity cannot be finalised without the authorisation of the Registered Representative of the entity'. Below the warning, there is a dropdown menu labeled 'Select Entity Type *' with 'Company' selected. There are also input fields for 'Registered Name *', 'Registration Number *', and 'Tax Reference Number *'.

g) Information required to add a Fund/Other

The screenshot shows the SARS eFiling portal interface, similar to the one above. The 'Capture Entity Details' section is highlighted. The dropdown menu labeled 'Select Entity Type *' now has 'Fund/Other' selected. The input fields for 'Fund Name *', 'Fund Number', and 'Tax Reference Number *' are visible.

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

The screenshot shows the 'Capture Entity Details' form in the SARS eFiling system. The 'Select Entity Type *' dropdown is highlighted with a red box and contains the option 'Individual - Non SA'. Below this, there are input fields for 'Passport Number *', 'Initials *', 'First Name *', 'Surname *', and 'Tax Reference Number *'. The form is titled 'Registered Representative' and includes a link to view a list of entities.

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)

The screenshot shows the 'Capture Entity Details' form for a trust. The 'Select Entity Type *' dropdown is highlighted with a red box and contains the option 'Trust'. Below this, there is a 'Select Trust Type *' dropdown, which is also highlighted with a red box. A red arrow points from this dropdown to a list of trust types: Intervivos Trust, Testamentary Trust, Estate CGT Trust, Non Resident Foreign Trust, Special Trust, and Collective Investment Scheme. The form also includes input fields for 'Trust Name *', 'Trust Deed Number *', and 'Tax Reference Number *'. The form is titled 'Registered Representative' and includes a link to view a list of entities.

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

14 MANAGE TAX TYPES

- a) The purpose of this function is to enable the following:
- 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
 - 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.

14.1 INDIVIDUALS

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

The screenshot shows the SARS eFiling interface for user LOIS LANE. The left sidebar contains a menu with 'Manage Tax Types' highlighted. The main content area displays the 'Manage Tax Types' section with a table of tax types and their status.

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Successfully Deactivated.	<input type="checkbox"/> Activate
Individual Income Tax (ITR12)	0945105229	Successfully Deactivated.	<input type="checkbox"/> Activate

At the bottom of the table is a 'Submit' button.

- 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>**

Portfolio: loislane - L LANE | Taxpayer: L LANE | Individual

Tax Reference Number: 0945105229
Identification Number: LL123456789

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 <input type="checkbox"/> Remove practitioner Access <input type="checkbox"/> Obtain Full shared access <input type="checkbox"/> Obtain View only shared access
Individual Income Tax (ITR12)	0945105229	Successfully Activated.	

Submit

14.2 ORGANISATIONS AND TAX PRACTITIONERS

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

Portfolio: My Company Portfolio | Taxpayer: L LANE | Organisation

Tax Reference Number: 0308918267
Identification Number: JT213456789

Taxpayer Name: L LANE
Registration Number: LL123456789

Tax Types Details

No active types for this taxpayer

Edit Contact Details

Taxpayers

Search by: Name, Registration or ID num..., Tax Reference Number

Name of Taxpayer	Company/ ID Number	Reference Number	Last Return Filled	Last Accessed	Actions
L LANE	LL123456789	-	-	-	View Taxpayer

First | Previous | 0 | Next | Last

- b) The 'Tax Types Details' screen will display with the following buttons:
 - i) **<Edit contact details>** – used to update eFiling correspondence details only. To update your security contact details please use the [<Profile and preference setup>](#) function
 - ii) **<Manage Tax Types>** – used to activate/deactivate specific taxes that you represent the client for
 - iii) **<Access Rights>** – used to add the taxpayer to a group if you have the manage taxpayer rights.

John Taxpayer
Tax Reference Number: 0308918267
Identification Number: JT213456789
My Profile

SARS Correspondence
Returns Issued
Returns History
Returns Search
Levies and Duties
Third Party Data
Non-Core Taxes

Portfolio: My Company Portfolio
Taxpayer: L LANE
Organisation: Organisation

Taxpayer Name
L LANE
Registration Number
LL123456789

Contact Details
Cell: 0833333333
Email: test@sars.gov.za

Tax Types Details

Tax Type Description	Reference Number	Status
No active types for this taxpayer		

Edit Contact Details | Manage Tax Types | Access 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

14.2.1 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 (ITI)	094510522	Not Active	<input type="checkbox"/> Request Activation

[ASK A QUESTION](#)

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](#)

- b) 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

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

- c) If the owner/representative approves the request, the status will change to “Successfully Activated”.

Mr TEST TEST

Tax Reference Number
0477611842

Identification Number

[My Profile](#)

Organisation

[Register New](#)

[Change Details](#)

Tax Types

[Manage Tax Types](#)

[View Request History](#)

[Legacy: Activation Requests](#)

Portfolio: Mrs E C Taxpayer: L LANE Tax Practitioner

Taxpayer Name
L LANE

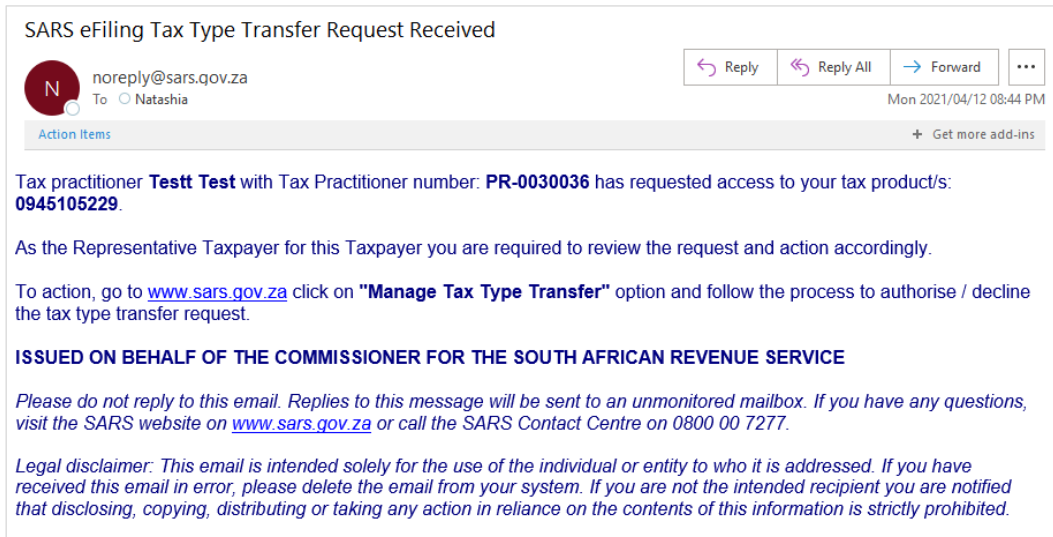
Registration Number
LL123456789

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

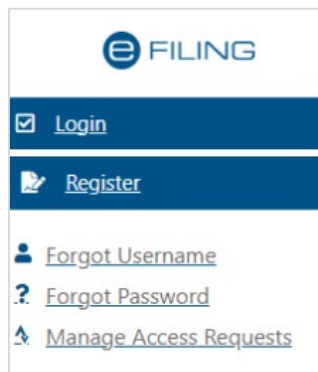
14.2.2 Approve Request for Tax Type Activation or Transfer

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



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>**



- 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

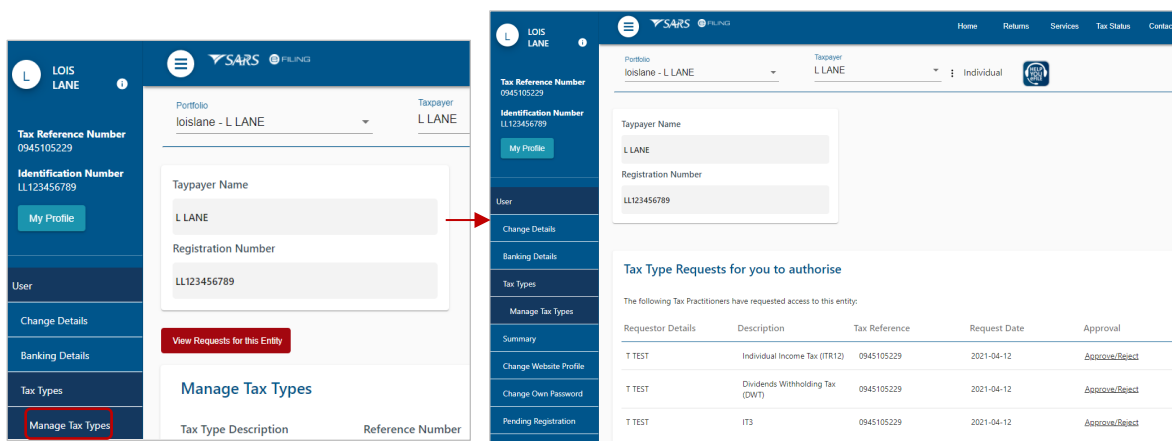
Print Power of Attorney

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>**



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.

14.2.3 Tax Types Legacy

- 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).
- To access the legacy requests
 - Select **<Organisations>** from the menu on the top.
 - Select **<Organisation>** from the menu on the left
 - Select **<Tax Types>** from the menu on the left
- <Legacy Activation Requests>** - this function is read-only and allows you to view tax types previously activated for a particular taxpayer

Mr TESTT TEST

Tax Reference Number

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

SARS eFILING

Home User Organisations Returns Duties & Levies Services

Portfolio: Mrs E C Taxpayer: Mr T TEST Tax Practitioner

☐ **VAT Admin Penalty**

Reference Number: Tax Office: ALBERTON

☐ **Provisional Tax (IRP6)**

Reference Number: Tax Office: ALBERTON

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

☒ **Individual Income Tax (ITR12)**

Reference Number: 0477604776 Tax Office: PRETORIA

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.

Status: Successfully Activated

☒ **IT Admin Penalty**

Reference Number: 0477604776 Tax Office: HEAD OFFICE

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

Status: Successfully Activated

☐ **Dividends Withholding Tax (DWT)**

Reference Number:

- d) **<Legacy Transfer Requests>** - this function allows you to access the list of previous tax type transfer requests.
- You can open individual requests
 - 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)
 - You will not be able to create any new tax type transfer requests.

Mr TESTT TEST

Tax Reference Number

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

SARS eFILING

Home User Organisations Returns Duties & Levies Services Tax Status

Portfolio: Mrs E C Taxpayer: Mrs WILSON Tax Practitioner

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: Select All Request Type: All

Request Reference: Search

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

The screenshot shows the SARS eFiling portal interface. On the left sidebar, the 'Legacy: Pending Registration' option is highlighted with a red box. The main content area displays a table of pending registrations for 'Mrs WILSON'.

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

15 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.
- Select **<Organisations >** from the menu on the top.
 - Select **<SARS Registered Details>** from the menu on the left
 - Select **<Activate Registered Representative>**
 - Select the applicable option (i.e. Tax Practitioner or Registered Representative)
 - Agree to the declaration confirming that you are the authorised representative for the taxpayer and click on **<Continue>**
 - Complete the applicable fields and select the representative capacity (e.g. accounting officer, curator, public officer, parent guardian, etc.)
 - Click the on the activate button at the bottom of the screen

John Taxpayer
Tax Reference Number: 0308918267
Identification Number: JT213456789
My Profile

Portfolio: My Company Portfolio | Taxpayer: JT Taxpayer | Organisation

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

16 TAX PRACTITIONER CONFIGURATION

- 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.
- 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.
- To access this functionality, click on **<Services>** on the menu on the top and select **<My TP Configuration>** from the menu on the left.

16.1 PRACTITIONER ACTIVATION

- Select **<Practitioner Activation>** from the menu on the left
 - The **Tax Practitioner Declaration** will display. Read the declaration, select **<I agree>** click on the **<Continue>** button
 - On the **<Activate Tax Practitioner>** screen enter a valid practitioner number in the tax practitioner number field and click on the **<Confirm My Tax Practitioner Status>** button.

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.

16.2 DELEGATE PRACTITIONER AUTHORITY

- 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.
 - Select **< Delegate Practitioner Authority >** from the menu on the left
 - 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.

- 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:

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"/>

16.3 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.

- 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

OK

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

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

Security PIN 192247

Verify Security PIN Search

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 PR-00 (e.g. PR-0000000)

Security PIN 9445A1

Verify Security PIN Search

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

17 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:
- i) Log on to eFiling and select **<SARS Correspondence>** from the menu on the left

- ii) Click on **<Search Correspondence>**
- iii) The correspondence grid will display
- iv) You can use one or more of the following filters to search for correspondence:
 - A) Tax type
 - B) Tax year
 - C) Received from date (i.e. start date)
 - D) Received to date (i.e. end date)
 - E) Correspondence Type (such as Letters, Notices and Text Messages issued by SARS)
- v) Click on **<Search>**.

The screenshot shows the SARS eFiling interface. On the left, the 'SARS Correspondence' menu item is highlighted. The main content area is titled 'Search Correspondence' and includes several filter sections: 'Tax Types' (set to All), 'Tax Year' (set to All), 'Received Date From' (2019/08/17), 'Received Date To' (2020/02/13), 'Letter Type' (set to All), 'Notice Types' (set to All), 'Message Type' (set to All), and 'Reference Number'. At the bottom right, there are 'Clear' and 'Search' buttons, with the 'Search' button being highlighted.

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.

18 FORGOT PASSWORD

- a) On the eFiling login in screen click on **<Forgot Password>** and then enter your user name.

The diagram illustrates the process of forgetting a password. It starts with a 'Welcome, please login to SARS eFiling' screen. On this screen, there are links for 'Forgot Your Username?' and 'Forgot Your Password?'. The 'Forgot Your Password?' link is highlighted with a red box. A red arrow points from this link to the 'Forgot Password' screen. On the 'Forgot Password' screen, the user is prompted to 'Please enter your username' and a text field contains 'EFILING TEST3'. There is also a 'Forgot Your Username?' link and a 'Next' button at the bottom.

- b) Indicate if you want your [OTP](#) to be sent to your email or your cell number. Click on **<Send OTP>**.
- c) Insert your new [password](#) and retype it to confirm.

- i) Click on **<Submit>**
- ii) A pop-up message will display confirming that your password has been changed successfully.

The screenshot shows a 'Forgot Password' form with the title 'Forgot Password' and the instruction 'Please enter your new password'. The form has two input fields: 'New Password' and 'Confirm Password', both with masked characters (dots). A blue 'Submit' button is at the bottom. To the right, a 'Message' pop-up box displays the text 'Your password has been successfully changed.' with an 'OK' button. A red arrow points from the 'Submit' button to the message box.

- d) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be required to enter your cell number and email address.

- 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 screenshot shows a 'Forgot Password' form with the title 'Forgot Password' and the instruction 'Please enter your contact details'. The form has two input fields: 'Cell Number' (with the example '0833333330') and 'Email' (with the example 'Test1@sars.gov.za'). A blue 'Next' button is at the bottom. To the right, an 'Error' pop-up box displays 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. A red arrow points from the 'Next' button to the error box.

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

Forgot Username

Please enter ID or Passport number and contact details

Cell Number
0833333333

Email
cena@test.co.za

Are you a South African Citizen?*

☐ Yes ☒ No

Foreign ID / Passport Number
123456789CE

Tax Number Linked to the Username

Continue

One Time Pin

OTP has been sent to the following email
CE**@T***.CO.ZA
Pin expires in 02:50

1 1 1 1 - 1 2 3 4 5 6

Please enter the last 6 digits of your OTP.

Resend OTP **Submit**

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

Forgot Username

Please enter your new password

Your username is:
CENA@TEST.CO.ZA

New Password

Confirm Password

Message

Your password has been successfully changed.

OK

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

20 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
	22-04-2024	14	Contact Details Validation

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).