

Effective Date: 30 September 2025



MANAGE SHARED ACCESS THROUGH eFILING

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1 SUMMARY

- a) The registered representative of an entity is able to, through eFiling:
 - i) Invite other eFilers (trader representative) who has been mandated by a Customs and Excise client;
 - ii) Grant eFilers shared access to the entity's portfolio on eFiling (see paragraph 2 below);
 - iii) View the details and the status of shared access requests (see paragraph 4 below);
 - iv) Accept or reject a shared access request (see paragraph 4 below);
 - v) Cancel a shared access request [see paragraph 4.1 a) below]; or
 - vi) Revoke shared access (see paragraph 5 below).
- b) A trader representative who is mandated by a Customs and Excise client can submit a request for shared access through eFiling (see paragraph 3 below).
- c) The registered representative or the trader representative will be able to:
 - i) Capture and submit Customs or Excise applications (see SC-CF-42 on the SARS website) on behalf of an applicant;
 - ii) Make necessary follow-ups (including providing supporting documents, correcting errors and making enquiries) in relation to the client's application; and
 - iii) Manage the client's relationship.

2 CONFIGURE SHARED ACCESS

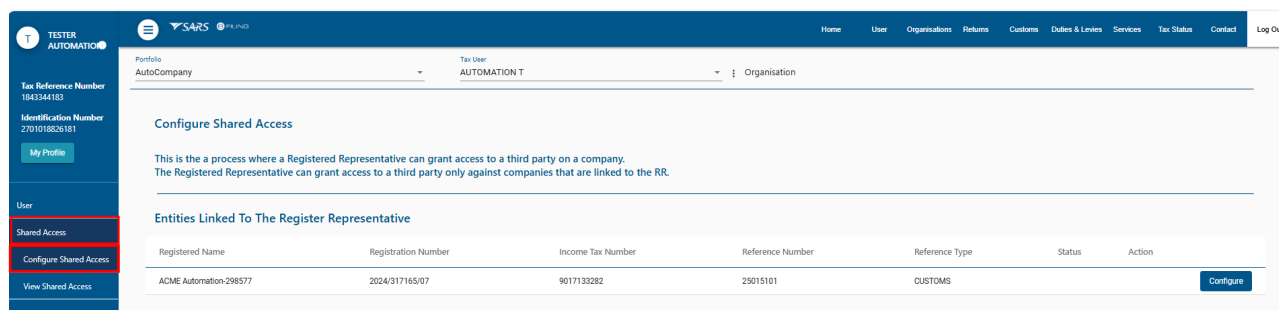
- a) In order to invite another eFiler (trader representative) who has been mandated by a Customs and Excise client to act on his / her behalf, the registered representative of the entity:
 - i) Logs into eFiling (as described in SC-CF-42).
 - ii) Selects the entity's details under Portfolio.

- iii) Selects User in the top-level menu.

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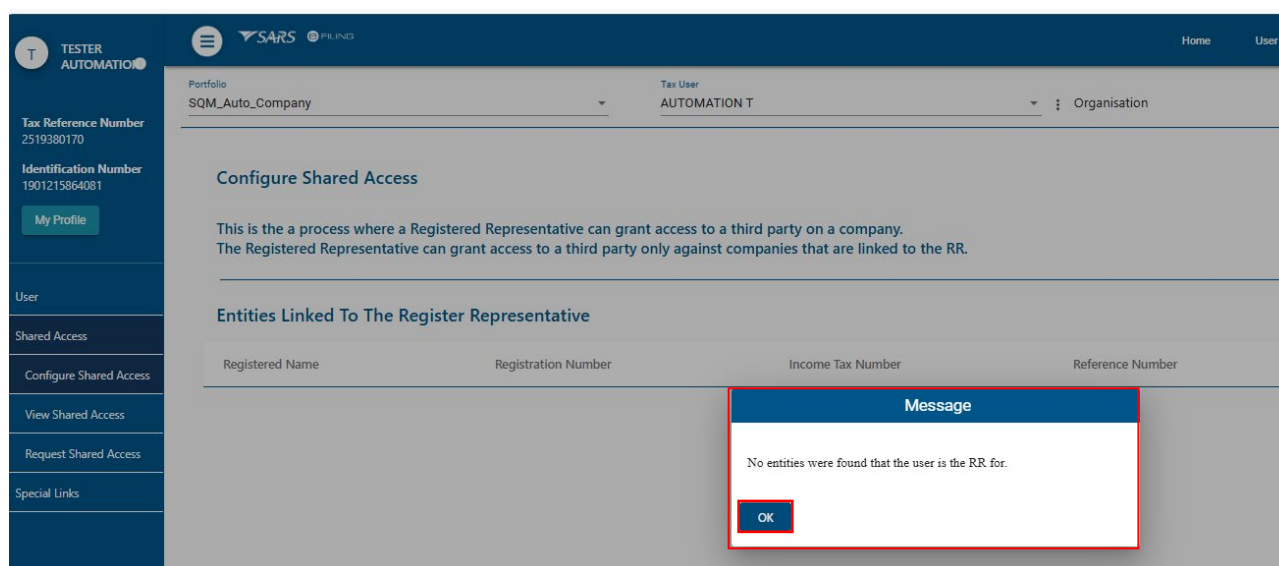
b) The system displays the User menu option on the left side of the screen and the registered representative of the entity clicks on:

- i) Shared Access; and
- ii) Configure Shared Access.



c) A validation is done on the SARS main data base and:

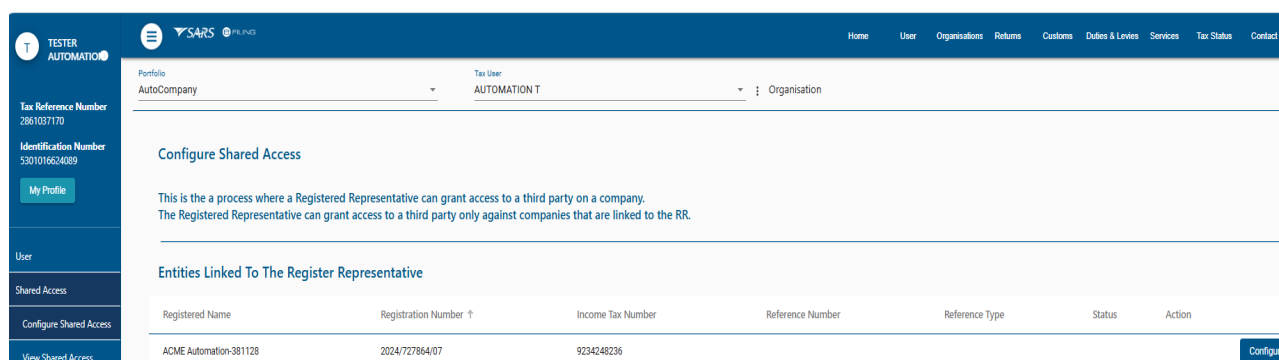
- i) If the registered representative is not linked to the entity:
 - A) The system displays a message that no entities are linked to the registered representative; and
 - B) The registered representative:
 - I) Clicks on the Ok button; and
 - II) Updates his / her details as described in GEN-REG-01-G04.



- ii) If an entity is not activated for the relevant tax product the registered representative will not be able to invite any other eFilers to be the trader representative. In order to activate the relevant tax product the registered representative of the entity must request that the entity register his/her tax product as prescribed in:
 - A) SC-CF-42 for the registration and licensing of Customs and Excise purposes; and
 - B) GEN-REG-01-G04 for the registration of the various tax products.

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- iii) If the registered representative is linked the system displays a list of all the entities linked to the registered representative under Entities Linked to the Registered Representative.



Configure Shared Access

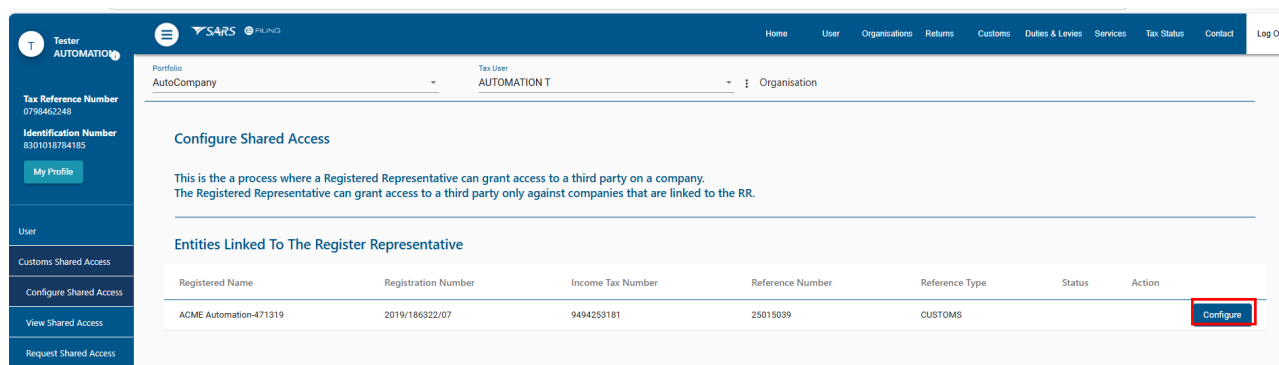
This is the a process where a Registered Representative can grant access to a third party on a company.
The Registered Representative can grant access to a third party only against companies that are linked to the RR.

Entities Linked To The Register Representative

Registered Name	Registration Number ↑	Income Tax Number	Reference Number	Reference Type	Status	Action
ACME Automation-381128	2024/727864/07	9234248236				Configure

- d) The registered representative:

- i) Selects the entity; and
ii) Clicks on the Configure button next to the entity's details.



Configure Shared Access

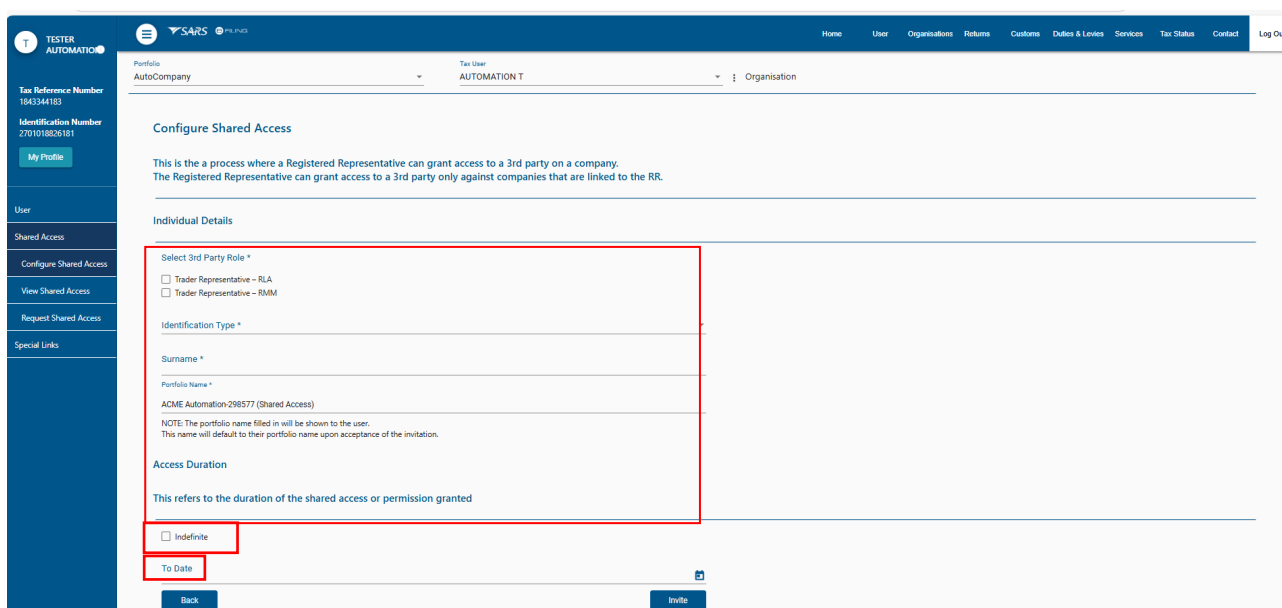
This is the a process where a Registered Representative can grant access to a third party on a company.
The Registered Representative can grant access to a third party only against companies that are linked to the RR.

Entities Linked To The Register Representative

Registered Name	Registration Number	Income Tax Number	Reference Number	Reference Type	Status	Action
ACME Automation-471319	2019/186322/07	9494253181	25015039	CUSTOMS		Configure

- iii) Must on the Configure Shared Access page:
- Indicate the RLA roles to be assigned to the eFiler (trader representative) by ticking the applicable Third Party Role:
 - Trader Representative – RLA: this role enables the eFiler to only submit RLA applications on behalf of the Customs and Excise Client type (see SC-CF-42); or
 - Trader Representative – RMM: this role enables the eFiler to only Manage a Customs and Excise Client RLA relationship (see SC-CF-50);
 - Capture the eFiler's (trader representative's):
 - South African ID or passport number; and
 - Surname; and
 - Indicate the date when the request for shared access must expire by either:
 - Ticking the Indefinite tick box; or
 - Clicking on the Specify Date icon and selecting the expiry date.

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Configure Shared Access

This is the process where a Registered Representative can grant access to a 3rd party on a company. The Registered Representative can grant access to a 3rd party only against companies that are linked to the RR.

Individual Details

Select 3rd Party Role *

☐ Trader Representative - RLA
☐ Trader Representative - RMM

Identification Type *

Surname *

Portfolio Name *

ACME Automation-298577 (Shared Access)

NOTE: The portfolio name filled in will be shown to the user. This name will default to their portfolio name upon acceptance of the invitation.

Access Duration

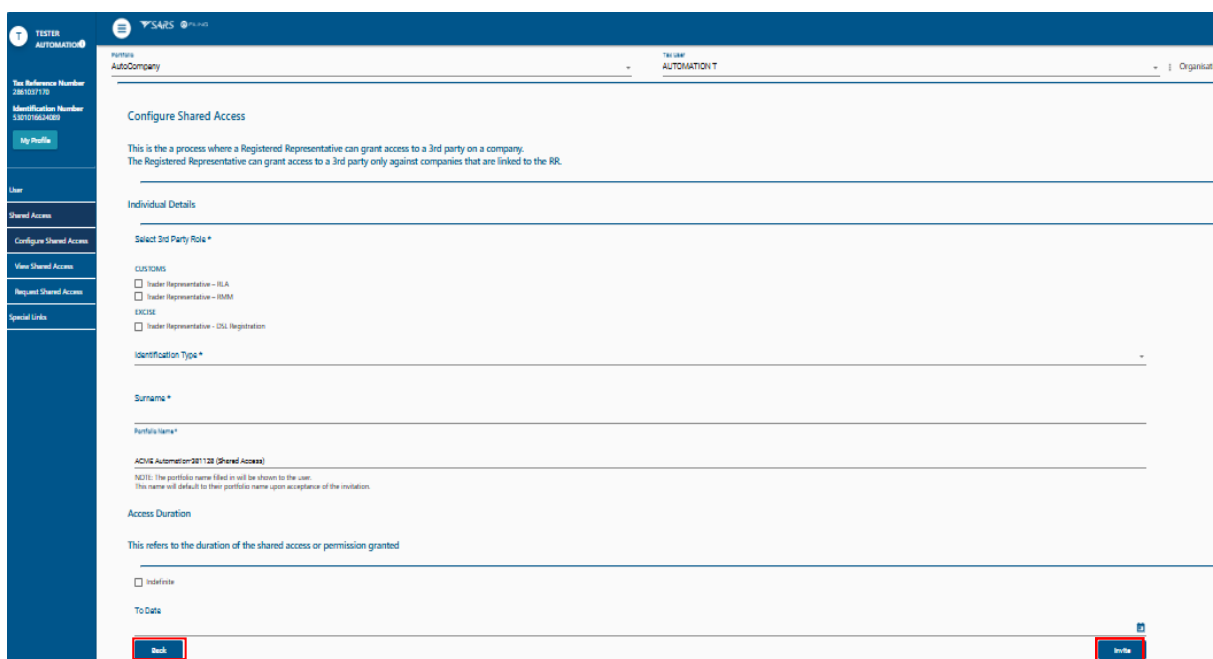
This refers to the duration of the shared access or permission granted

☐ Indefinite
☐ To Date

[Back](#) [Invite](#)

e) If any of the above details has been captured:

- i) Incorrectly, the registered representative clicks on the Back button and the system returns to paragraph d)iii) above and he/she recaptures the incorrect information; or
- ii) Correctly, the registered representative clicks on the Invite button.



Configure Shared Access

This is the process where a Registered Representative can grant access to a 3rd party on a company. The Registered Representative can grant access to a 3rd party only against companies that are linked to the RR.

Individual Details

Select 3rd Party Role *

☐ CUSTOMER
☐ Trader Representative - RLA
☐ Trader Representative - RMM
☐ EXCISE
☐ Trader Representative - CUA Registration

Identification Type *

Surname *

Portfolio Name *

ACME Automation-281128 (Shared Access)

NOTE: The portfolio name filled in will be shown to the user. This name will default to their portfolio name upon acceptance of the invitation.

Access Duration

This refers to the duration of the shared access or permission granted

☐ Indefinite
☐ To Date

[Back](#) [Invite](#)

f) The system validates if the invitee (trader representative) is a registered eFiler and if:

- i) Not:
 - A) The system displays a message that the invitee is not an eFiler; and
 - B) The registered representative of the entity:
 - I) Clicks on the Ok button; and
 - II) Informs the eFiler (trader representative) via an e-mail that he/she is not a registered eFiler and therefore shared access cannot be granted until he/she is registered for eFiling purposes (see GEN-ELEC-18-G01).

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Configure Shared Access

This is the process where a Registered Representative can grant access to a 3rd party on a company. The Registered Representative can grant access to a 3rd party only against companies that are linked to the RR.

Individual Details

Select 3rd Party Role *

- ☒ Trader Representative – RLA
- ☒ Trader Representative – RMM

Identification Type *

South African ID

ID Number *

6704175223061

Surname *

Rebecca

Portfolio Name *

ACME Automation-381128 (Shared Access)

NOTE: The portfolio name filled in will be shown to the user. This name will default to their portfolio name upon acceptance of the invitation.

Access Duration

This refers to the duration of the shared access or permission granted

☒ Indefinite

To Date

Back Invite

Message

The person being invited is not an eFiler

OK

- ii) Already linked to the entity's portfolio:
 - A) The system displays a message that the eFiler (trader representative) already exists on this portfolio; and
 - B) The registered representative of the entity:
 - I) Clicks on the Ok button; and
 - II) Informs the eFiler (trader representative) via an e-mail that he/she already has shared access to the entity's portfolio.

Configure Shared Access

This is the process where a Registered Representative can grant access to a 3rd party on a company. The Registered Representative can grant access to a 3rd party only against companies that are linked to the RR.

Individual Details

Select 3rd Party Role *

- ☒ Trader Representative – RLA
- ☒ Trader Representative – RMM

Identification Type *

South African ID

ID Number *

6704175223061

Surname *

Rebecca

Portfolio Name *

ACME Automation-013085 (Shared Access)

NOTE: The portfolio name filled in will be shown to the user. This name will default to their portfolio name upon acceptance of the invitation.

Access Duration

☒ Indefinite

To Date

Back Invite

Message

The sub-user already exists on this Portfolio

OK

- iii) The entity is not activated or linked to a SARS tax product:
 - A) The system displays a message that the entity is not activated for the relevant SARS tax product (see SC-CF-19) and is required to be linked to the eFiler (trader representative).
 - B) The registered representative of the entity:
 - I) Clicks on the Ok button; and

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- II) Informs the invitee [the eFiler (trader representative)] via an email that the client is not activated for the relevant SARS tax product and therefore he/she cannot be linked to the entity's portfolio.

The screenshot displays the SARS eFiling interface. On the left is a navigation menu with options like 'New Test', 'My Profile', 'SARS Registered Details', 'Customs Registration', 'Shared Access', 'Configure Shared Access', 'View Shared Access', 'Request Shared Access', and 'Special Links'. The main area is titled 'Details of the Requestor' and contains several sections: 'First Name' (New Test), 'Surname', 'ID Number' (4401015628087), 'Entity Type' (Company/CC/Organisation), 'Company Details' (Registered Name: ACME Automation 012009, Registration Number: 2019/59926/07, Tax Reference Number: 9601016264, Customs Reference Number), and 'Access Duration' (with a checkbox for 'Indefinite' and a 'To Date' field). An error dialog box is overlaid on the form, stating: 'Error. The entity is not activated for the relevant tax product required to link the Trader Representative to'. The dialog has an 'OK' button.

- iv) He/she is a registered eFiler:
- The system displays a message that the invite has been submitted and sends an SMS to the invitee [the eFiler (trader representative)];
 - The registered representative of the entity clicks on the Ok button; and
 - The system returns to paragraph d) above.

This screenshot shows the same SARS eFiling interface as the previous one, but with a 'Thank You' dialog box overlaid. The dialog box contains the text: 'Thank You. This invite was submitted an SMS will be sent.' and has an 'OK' button. The background form remains the same, showing the details of the requester and company details.

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g) The invitee [eFiler (trader representative)]:

- i) Logs in to eFiling;
- ii) Clicks on My Profile; and
- iii) Clicks on Portfolio Management.

TESTER AUTOMATION

Tax Reference Number: 1643344183
Identification Number: 2701018626181

My Profile

Profile and Preference Setup
Portfolio Management
Special Links

Portfolio: AutoCompany Taxpayer: T AUTOMATION Organisation

Configure Shared Access

This is the a process where a Registered Representative can grant access to a 3rd party on a company.
The Registered Representative can grant access to a 3rd party only against companies that are linked to the RR.

Individual Details

Select 3rd Party Role *

☐ Trader Representative – RLA
☐ Trader Representative – RMM

Identification Type *

h) The system:

- i) Displays the Portfolio Management page and the invitee must Accept the invitation within five (5) working days by clicking on the Accept button (to link the portfolio) under User Invitation(s). Failure to do this within the prescribed time period, the invitation will expire automatically.

SARS eFiling Contact Log Out

Portfolio Management

[Add Portfolio](#)

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
SQMAuto_QR_342072764208069002 - T AUTOMATION	1	1	Individual		Go to Portfolio
AutoCompany	5	2	Organisation	Default	Go to Portfolio

User Invitation(s) Your invitation will expire automatically if not accepted within 5 working days.

Portfolio Name	Request Date	Accept
ACME Automation 555190 (Shared Access)	2022-09-30 08:39:27.483	Accept

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link
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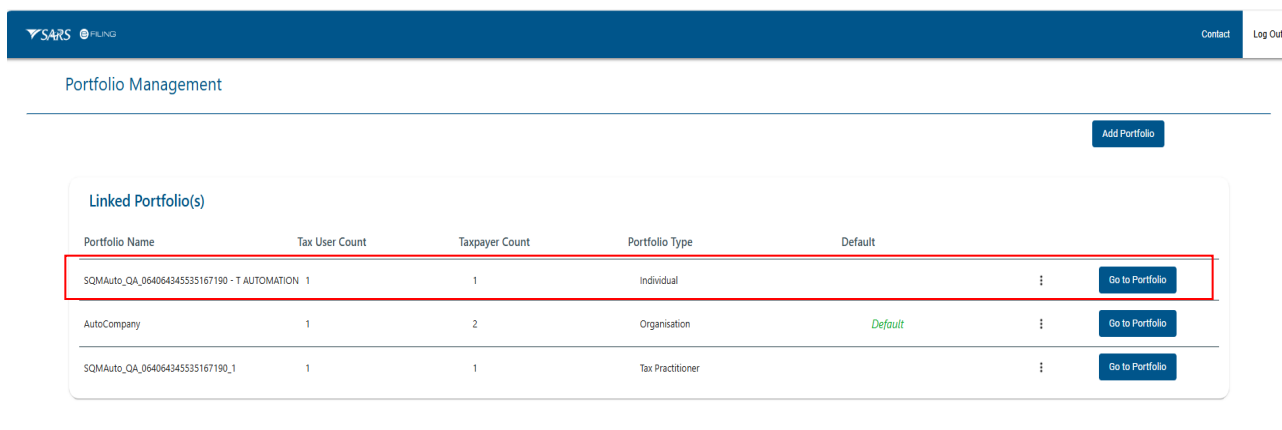
- ii) Sends an SMS with a One Time Pin (OTP) number to the invitee's cell phone number. The invitee [eFiler (trader representative)]:
- Captures the OTP number; and
 - Clicks on the Submit button.

- iii) Displays a message that the invitee has been linked to the eFiler portfolio and the invitee clicks on the Ok button.

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
SQAuto: QA 947877540068680 - T AUTOMATION	1	1	Individual		Go to Portfolio
ACME Automation-555190 (Shared Access)	5	2			Go to Portfolio
AutoCompany	5	2		Default	Go to Portfolio

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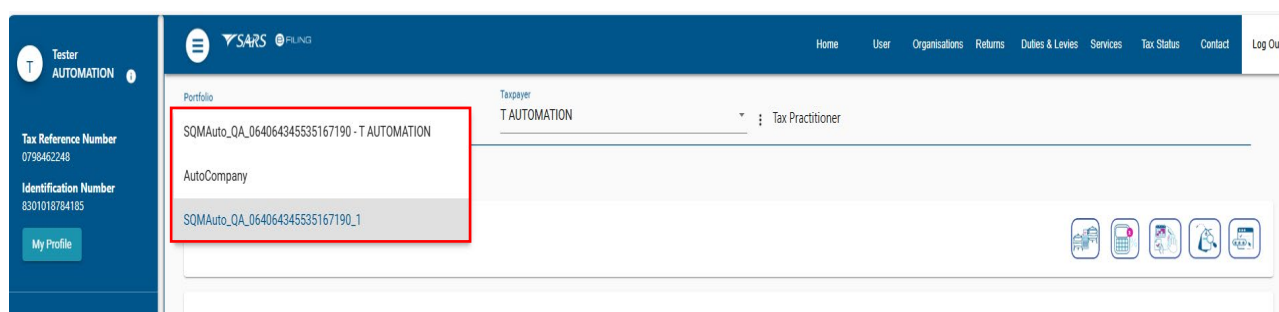
- iv) Adds the client's details under Linked Portfolio(s) on the invitee's Portfolio Management page.



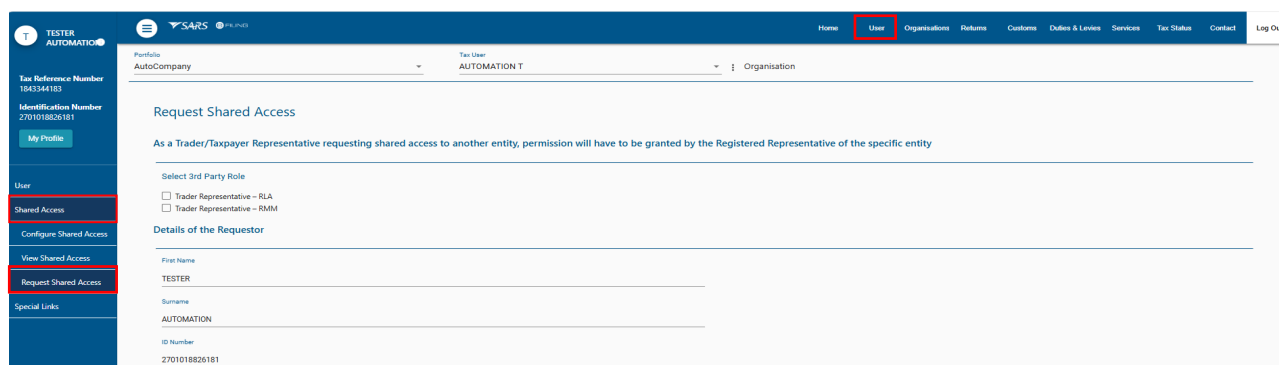
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default
SQMAuto_QA_064064345535167190 - T AUTOMATION	1	1	Individual	
AutoCompany	1	2	Organisation	Default
SQMAuto_QA_064064345535167190_1	1	1	Tax Practitioner	

3 REQUEST SHARED ACCESS

- a) This function is used by eFilers (trader representatives) to complete the details of the entity they want shared access with.
- b) In order to perform this function, the eFiler (trader representative) must ensure that the correct user rights have been assigned to his/her portfolio as described in SC-CF-42.
- c) The eFiler (trader representative):
- Logs into eFiling (as described in SC-CF-42); and
 - Selects the entity's details under Portfolio.



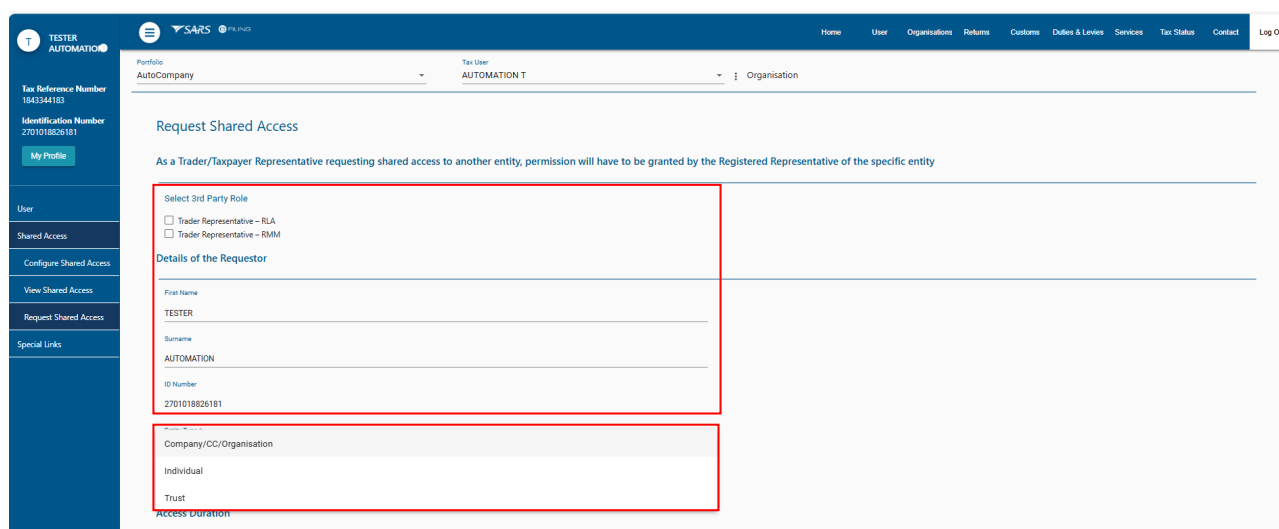
- iii) Selects User in the top-level menu and the system displays the User menu option and the eFiler (trader representative) clicks on:
- User;
 - Shared Access; and
 - Request Shared Access.



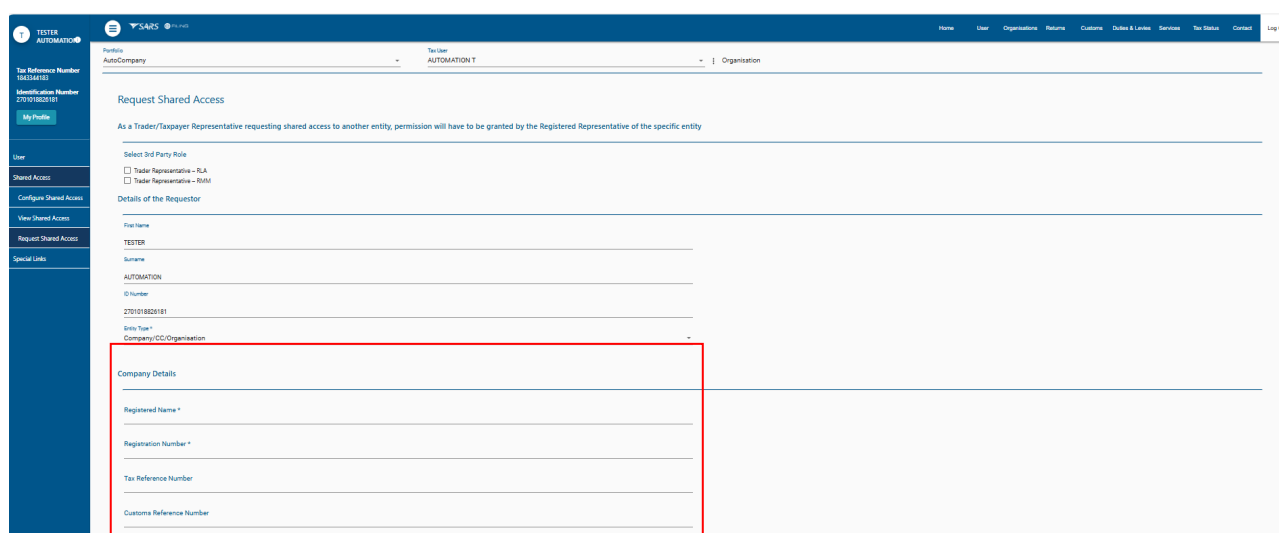
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d) If the eFiler (trader representative):

- i) Has not been successfully authenticated the system displays a message that the process cannot be continued.
- ii) Has been successfully authenticated the system displays the Request Shared Access page:
 - A) The eFiler (trader representative) ticks the applicable box Third-Party Role under Selected Third-Party Role;
 - B) The system displays the eFiler's (trader representative's) details under Details of the Requester;
 - C) The eFiler (trader representative) clicks on the drop-down arrow to select the entity type he/she wants shared access with and if the entity type is:



- I) A company the eFiler (trader representative) captures the company's details;
- II) An individual the eFiler (trader representative) captures the individual's details; or
- III) A trust the eFiler (trader representative) captures the trust details.



e) The eFiler (trader representative):

- i) Indicate the duration of the shared access by either:
 - A) Ticking the Indefinite tick box under Access Duration; or
 - B) Clicking on the Specify Date icon to select the specific date when the shared access request must expire; and

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ii) Clicks on the Submit button.

T

TESTER
AUTOMATION

Tax Reference Number
1843344183

Identification Number
2701018826181

My Profile

User

Shared Access

Configure Shared Access

View Shared Access

Request Shared Access

Special Links

Request Shared Access

As a Trader/Taxpayer Representative requesting shared access to another entity, permission will have to be granted by the Registered Representative of the specific entity

Select 3rd Party Role

☐ Trader Representative – RLA
☐ Trader Representative – RMM

Details of the Requestor

First Name

TESTER

Surname

AUTOMATION

ID Number

2701018826181

Entity Type *

Company/CC/Organisation

Company Details

Registered Name *

Registration Number *

Tax Reference Number

Customs Reference Number

Access Duration

This refers to the duration of the shared access or permission granted

☐ Indefinite

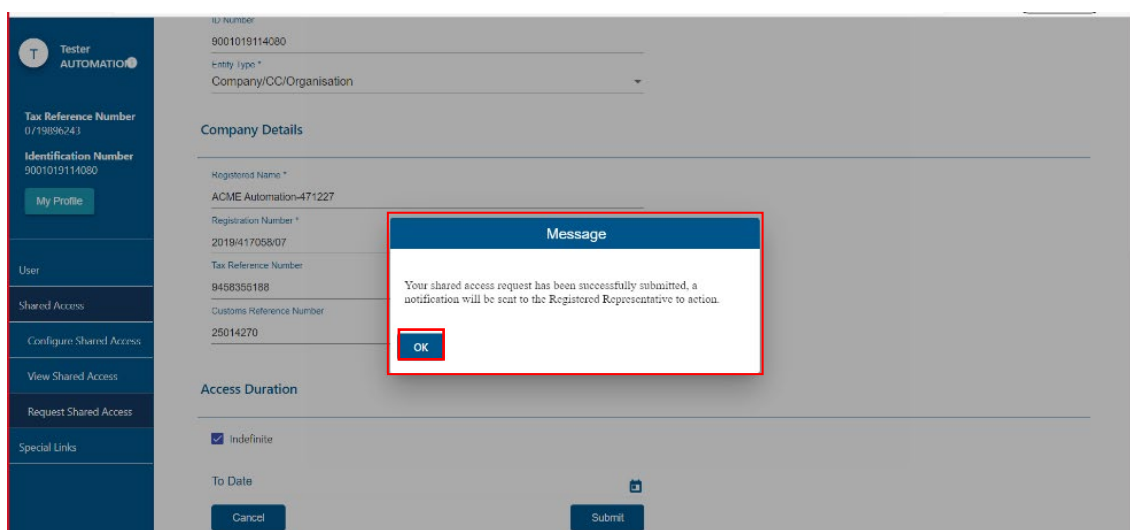
To Date

Cancel

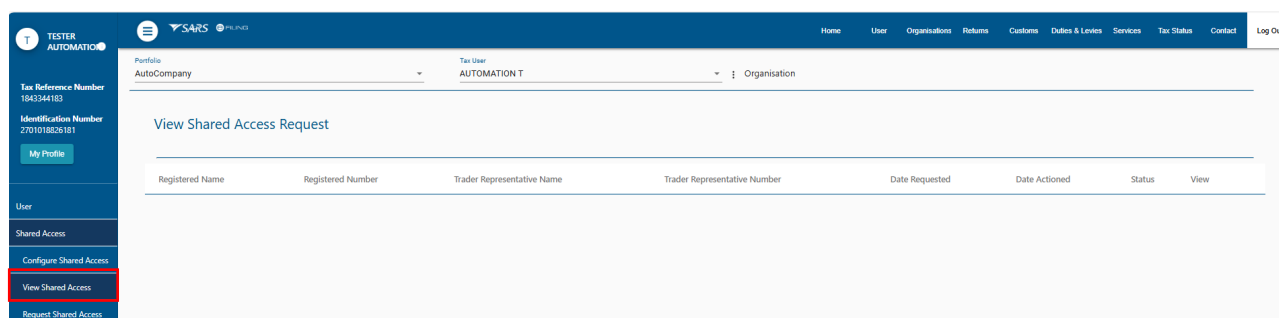
Submit

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- f) The system displays a message that the shared access request has been successfully submitted and a notification is sent to the registered representative of the entity for acceptance. The eFiler (trader representative) clicks on the Ok button.



- g) The system returns to the View Shared Access Request Page and displays the details of the Shared Access Request.



- h) If an eFiler (trader representative) already has access the system confirms this and displays a message that the eFiler must contact the eFiling Profile Administrator on the portfolio to grant him/her RLA user rights as prescribed in SC-CF-42.
- i) If the entity is not registered for eFiling a message is displayed requesting the eFiler (trader representative) to first register the entity (see GEN-ELEC-18-G01 How to register for eFiling) and resubmit his/her request for shared access.
- j) If the entity is not registered for any of the SARS tax products the system displays a message confirming this and that the eFiler (trader representative) cannot be linked to the entity's portfolio. The entity must register his/her tax product as prescribed in:
- SC-CF-42 for the registration and licensing of Customs and Excise purposes; and
 - GEN-REG-01-G04 for the registration of the various tax products.
- k) If the entity's details captured in paragraph d)ii)C) above do not match with SARS records the system displays a message requesting the eFiler (trader representative) to review the entity's registration details and to recreate the request for Shared Access.
- l) The system also checks whether the details of the entity's registered representative is on the SARS main data base:

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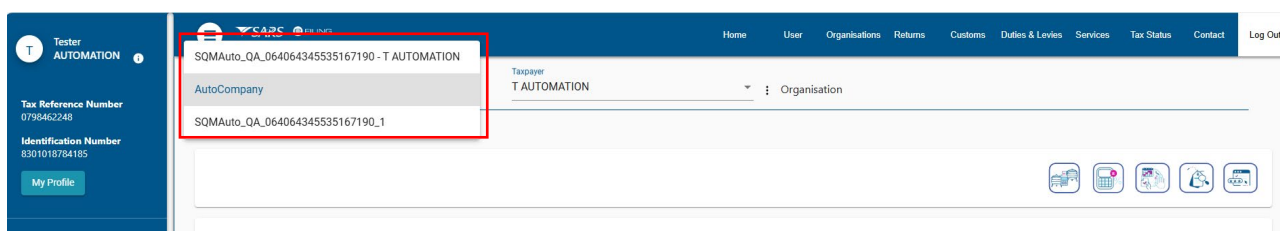
- i) Where the registered representative of the entity is linked to the entity's portfolio but no contact details have been provided the system displays a message that the request could not be submitted. The eFiler (trader representative) must contact the registered representative of the entity and request him/her to update his/her details on SARS records.
- ii) Where the eFiler who requests shared access is the registered representative of the entity the system automatically approves the shared access.
- iii) Where the registered representative of the entity is linked to the entity with contact details the system displays a message that the shared access request has been successfully submitted and a notification is sent to the registered representative of the entity to action the request as per paragraph f) above.

4 APPROVAL, REJECTION OR CANCELATION OF SHARED ACCESS

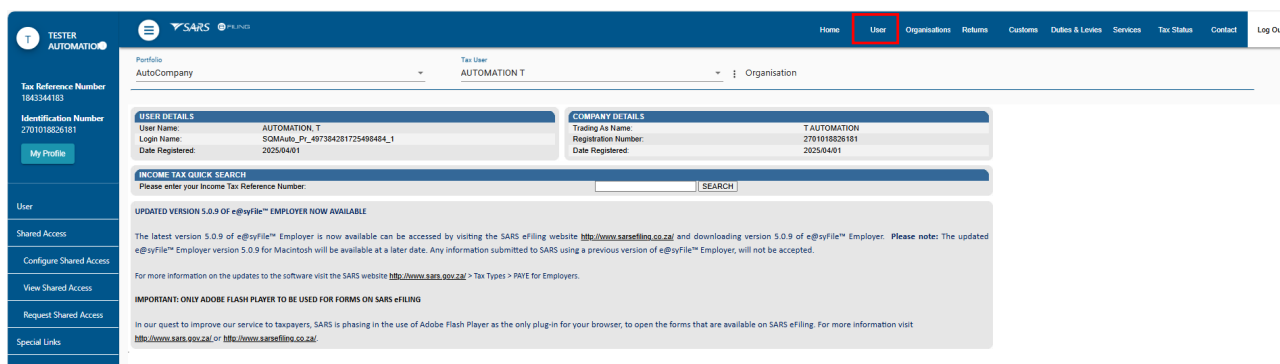
4.1 Registered representative of the entity with an eFiling profile

4.1.1 Approval and Rejections

- a) In order to perform this function, the registered representative must ensure that the correct user rights have been assigned to his/her portfolio as described in SC-CF-42.
- b) The registered representative of the entity:
 - i) Logs into eFiling (as described in SC-CF-42);
 - ii) Selects the entity's details under Portfolio; and

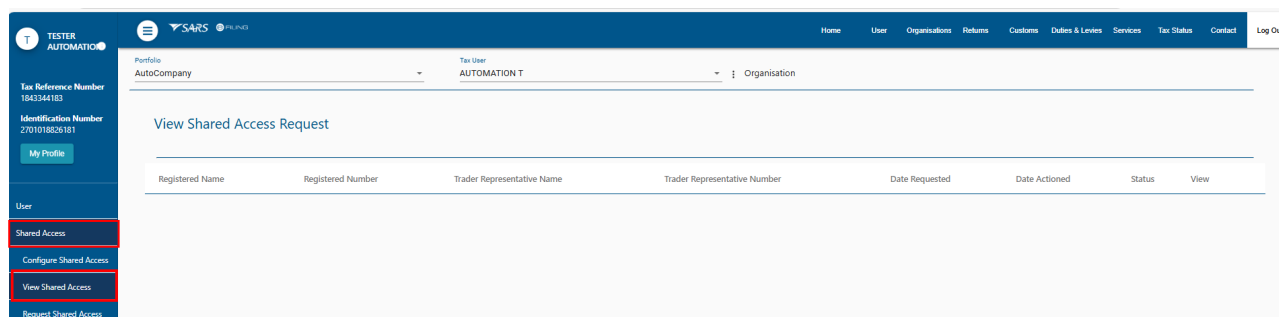


- iii) Selects User in the top-level menu.



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- c) The system displays the User menu option and the registered representative of the entity clicks on:
- Shared Access; and
 - View Shared Access.



- d) The system displays a list of all the shared access to be approved. The list may include entities that he/she does not represent. In these instances the registered representative must cancel the shared access as prescribed in paragraph a) below.

View Shared Access Request

Registered Name	Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action
Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View
Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Approved	View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Rejected	View

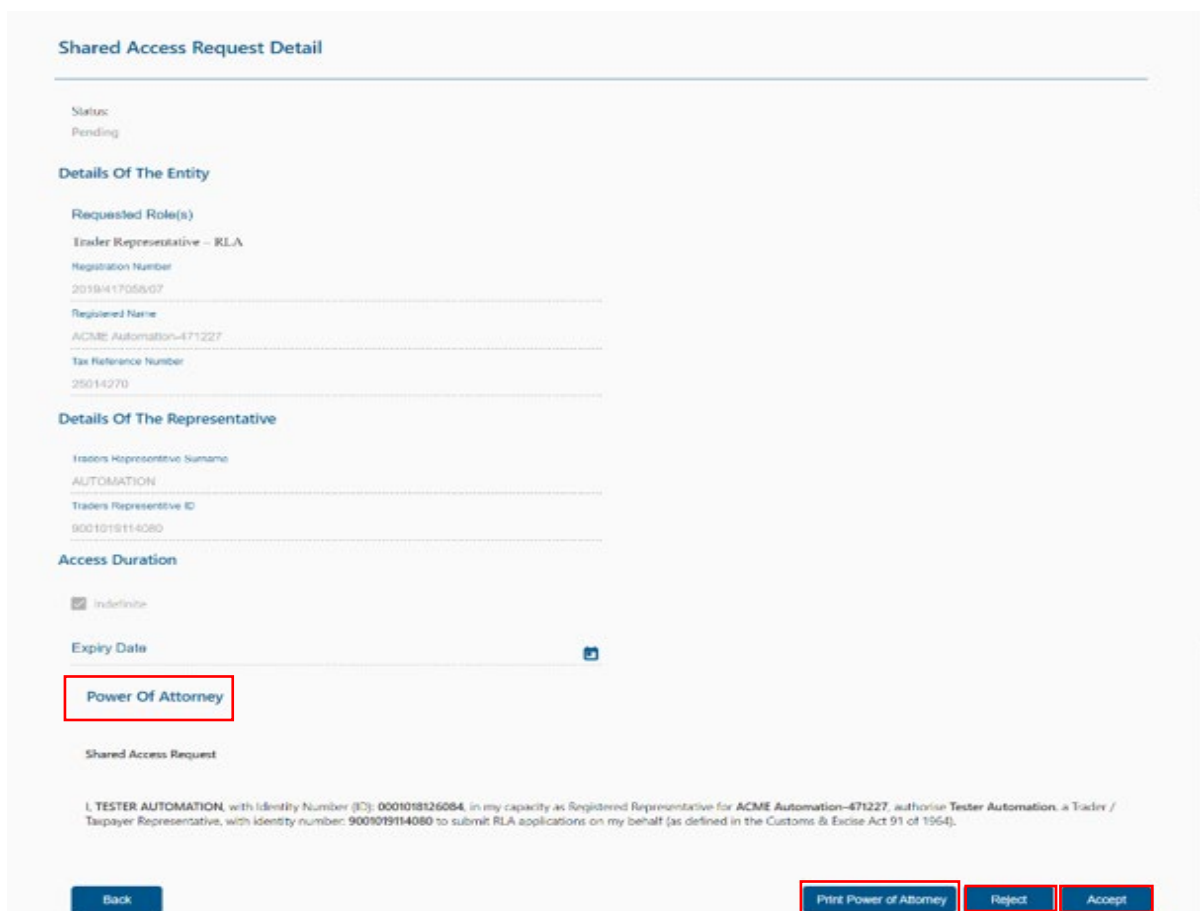
- e) The registered representative of the entity clicks on the View button.

View Shared Access Request

Registered Name	Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action
Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View
Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Approved	View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Rejected	View

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- f) The system displays the Shared Access Request Details page (which is read only) and if the registered representative of the entity:
- i) Wishes to print the power of attorney he/she clicks on the Print Power of Attorney button;
 - ii) Disagrees with the shared access he/she clicks on the Reject button. The system displays a message enquiring whether he/she wishes to continue with the rejection of the shared access and if he/she wishes:
 - A) Not to continue with the rejection:
 - I) The registered representative clicks on the Cancel button; and
 - II) Returns to paragraph e) above.
 - B) To continue with the rejection:
 - I) The registered representative clicks on the Ok button; and
 - II) The system updates the status of the shared access from Pending to Rejected.
 - iii) Agrees with the shared access:
 - A) He/she clicks on the Accept button; and
 - B) The system displays a message enquiring whether he/she wishes to continue with the acceptance of the shared access. If he/she wishes:
 - I) Not to continue with the acceptance he/she clicks on the Cancel button and returns to paragraph e) above; or
 - II) To continue with the acceptance he/she clicks on the Ok button and the system updates the status of the shared access from Pending to Approved.



Shared Access Request Detail

Status:
Pending

Details Of The Entity

Requested Role(s)
Trader Representative – RLA

Registration Number
2019/417056/07

Registered Name
ACME Automation-471227

Tax Reference Number
25014270

Details Of The Representative

Traders Representative Surname
AUTOMATION

Traders Representative ID
9001019114080

Access Duration

☒ Indefinite

Expiry Date

Power Of Attorney

Shared Access Request

I, TESTER AUTOMATION, with Identity Number (ID): 0001019126084, in my capacity as Registered Representative for ACME Automation-471227, authorise Tester Automation, a Trader / Taxpayer Representative, with Identity number: 9001019114080 to submit RLA applications on my behalf (as defined in the Customs & Excise Act 91 of 1964).

Back Print Power of Attorney Reject Accept

- g) The system:
- i) Sends an SMS and/or email notification to the registered representative of the entity and the eFiler (trader representative) notifying him/her that the shared access request has been accepted or rejected; and
 - ii) Updates the Automated Tax Processor System.

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- h) If the status of a shared access request is displayed as:
- i) Approved a registered representative of the entity is allowed to revoke the shared access as described in paragraph 5 below.
 - ii) Revoked, Rejected, Cancelled or Expired no further actions can be taken by the registered representative of the entity. In these instances a new application would be required in order to appoint a new trader representative.

4.1.2 Cancellation

- a) In order to cancel a shared access request the status of the request must be Pending or Approved:
- i) The eFiler (this could be either the trader representative or the registered representative of the entity):
 - A) Identifies the shared access to be cancelled; and
 - B) Clicks on the View button.

View Shared Access Request

Registered Name	Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action
Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View
Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Approved	View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Rejected	View

- ii) The system:
 - A) Displays the View Shared Access Request page and the user clicks on the Cancel button.

View Shared Access Request

Status: **PENDING**

Company Details

Entity Type

Company

Registration Number

2010/584625/56

Registered Name

Maiden Landing

Tax Reference Number

9856842012

Details of the Requester

First Name

Joanne

Surname

Busarile

Tax Reference Number

7102195810254

Roles

Trader Representative RLA

☐ Indefinitely



Specify Date 30/05/2022

[Back](#)

[Cancel](#)

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- B) Displays a message enquiring whether the eFiler wants to cancel the shared access. If the eFiler wishes:
- I) Not to continue with the cancellation of the shared access he/she clicks on the No button and the system returns to paragraph A) above; or
 - II) To continue with the cancellation of the shared access he/she clicks on the Yes button. The system returns to the View Shared Access Request page and updates the shared access request status from pending to cancelled.

View Shared Access Request

Status: **PENDING**

Company Details

Entity Type

Company

Registration Number

2010/584625/56

Registered Name

Maiden Landing

Tax Reference Number

9856842012

Details of the Requester

First Name

Joanne

Surname

Busarie

Tax Reference Number

7102195810254

Roles

Trader Representative RLA

☐ Indefinitely

☒ Specify Date 30/05/2022

[Back](#)



[Cancel](#)

Cancel

Do you wish to cancel your request?

NO
YES

View Shared Access Request

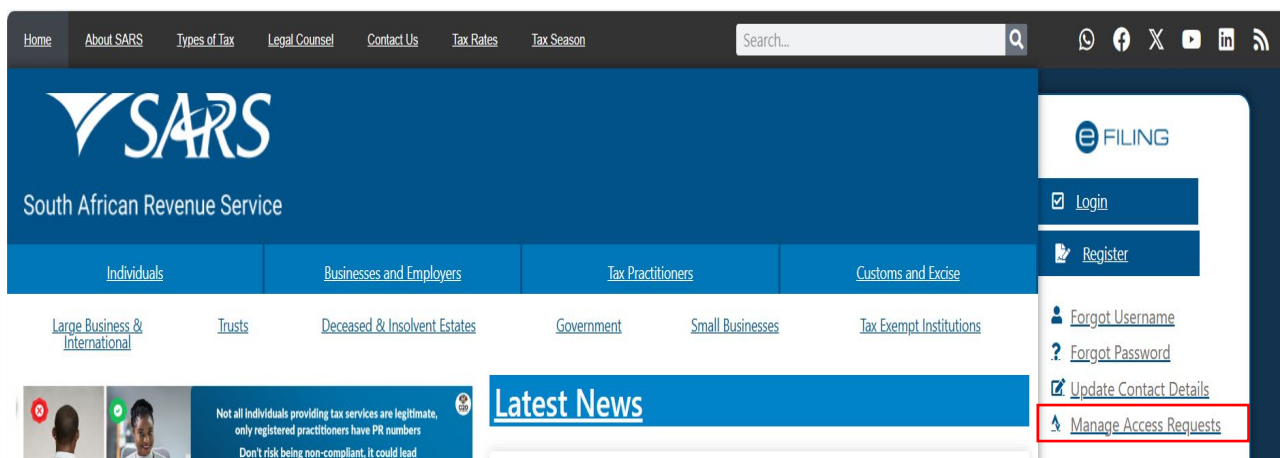
Registered Name	Registration Number	Requestor Name	ID Number	Cancelled Date Requested	Date Actioned	Status	Action
Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Cancelled	View
Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/0	Cancelled	05/03/2019	Revoked View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Reinstated Cancelled	View

4.2 Registered representative of an entity with no eFiling profile

- a) The registered representative of the entity receives an SMS and / or email notification to go to the SARS website.
- b) If a registered representative of the entity does not action the shared access within five (5) working days the system sends a reminder. A total of three (3) reminder notifications will be sent with five (5) working days after each reminder. If the request is not actioned after the last reminder the system automatically cancels the shared access.
- c) The registered representative must:

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- i) Click on the Manage Access Request on SARS eFiling;



- ii) Indicate if his/she is a South African citizen by selecting the applicable radio button;
 iii) Capture the applicable information required:
 A) ID number; or
 B) Passport number; and
 C) Tax reference number; and
 iv) Click on the Submit button.

The screenshot shows the 'Tax Type Transer / Shared Access Request' form. The form includes a question 'Are you a South African citizen?' with 'Yes' and 'No' radio buttons. Below this, there are two text input fields: 'Identification Number' and 'Tax Reference Number'. At the bottom of the form, there is a 'Submit' button. The 'Yes' radio button, the 'Identification Number' field, the 'Tax Reference Number' field, and the 'Submit' button are all highlighted with red boxes.

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d) The system:

- i) Checks if there is any shared access pended against the eFiler's ID or passport number; and
- ii) Displays a message requesting the registered representative of the entity to select the preferred channel where the One Time Pin (OTP) number must be sent to.

SARS
South African Revenue Service

NEW LOOK
New SARS

**One Time Pin (OTP)
Contact Details**

SARS would like to send you an OTP. Please indicate your preferred channel and click Send OTP.

Email Cell Number

Your Preferred Contact
Dg*****@s***.gov.za

Send OTP

e FILING

e) The registered representative:

- i) Selects the preferred channel;
- ii) Clicks on the Send OTP button;

SARS
South African Revenue Service

NEW LOOK
New SARS

**One Time Pin (OTP)
Contact Details**

SARS would like to send you an OTP. Please indicate your preferred channel and click Send OTP.

Email Cell Number

Your Preferred Contact
Dg*****@s***.gov.za

Send OTP

e FILING

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- iii) Receives the OTP number via the selected channel;
- v) Captures the OTP number; and
- vi) Clicks on the Submit button.

- f) The system displays the power of attorney declaration and the authorisation options. If the registered representative:

- i) Wishes to print the power of attorney he/she clicks on the Print Power of Attorney button;
- ii) Disagrees with the shared access he/she:
 - A) Ticks the Customs Number tick box; and
 - B) Clicks on the Decline button. The shared access is cancelled and the eFiler (trader representative) is notified via email or SMS.

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- iii) Agrees with the request for shared access, he/she:
 - A) Ticks the Customs Number Tick box; and
 - B) Clicks on the Approve button.

SARS
South African Revenue Service

NEW LOOK
New SARS

Tax Type Transer / Shared Access Request

Please authorise or reject the shared access request by approving or declining the following **Power of Attorney** within 5 minute/s:

I, **Dumisani Tshothe**, with Identity Number (ID): **1001015470161** in my capacity as the Registered Representative for **FinMed Financial Services**, Registration Number: **1998/007658/07**, authorise **Vernon Morgan**, a Trader Representative, Name: **Joe Soap** with Identity Number (ID): **7903157555088** to have shared access against the taxpayer: **FinMed Financial Services**, Registration Number: **1998/007658/07** for the Role of Trader Represe receive, to read, conclude, and deliver electronic filing transactions as defined in the rules for electronic communication prescribed under the section 255 of the Tax Administration Act.

Customs Number: ☐ 85967412

Approve **Decline**
Print Power of Attorney

- g) The system:
 - i) Sends an approval notification to the registered representative of the entity and the eFiler (trader representative) notifying him/her that the shared access has been successfully authorised; and
 - ii) Displays a message that the request has been successfully authorised.
- h) The registered representative of the entity clicks on the Return to SARS website button.

SARS
South African Revenue Service

NEW LOOK
New SARS

Tax Type Transer / Shared Access Request

Request successfully authorised.

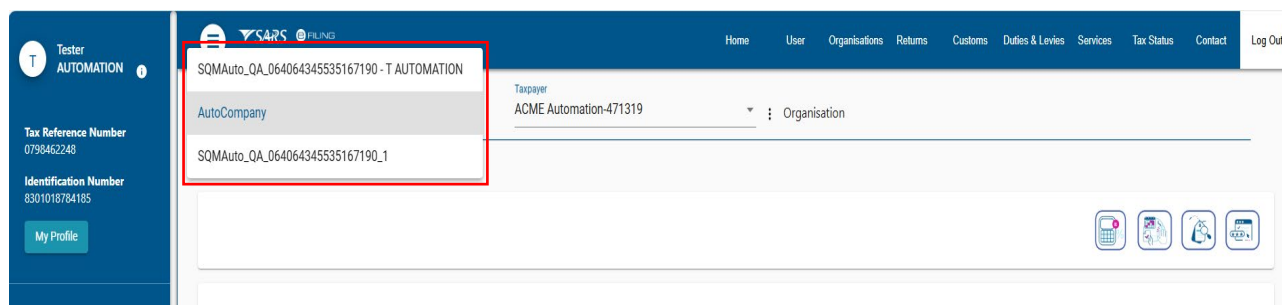
Return to SARS Website

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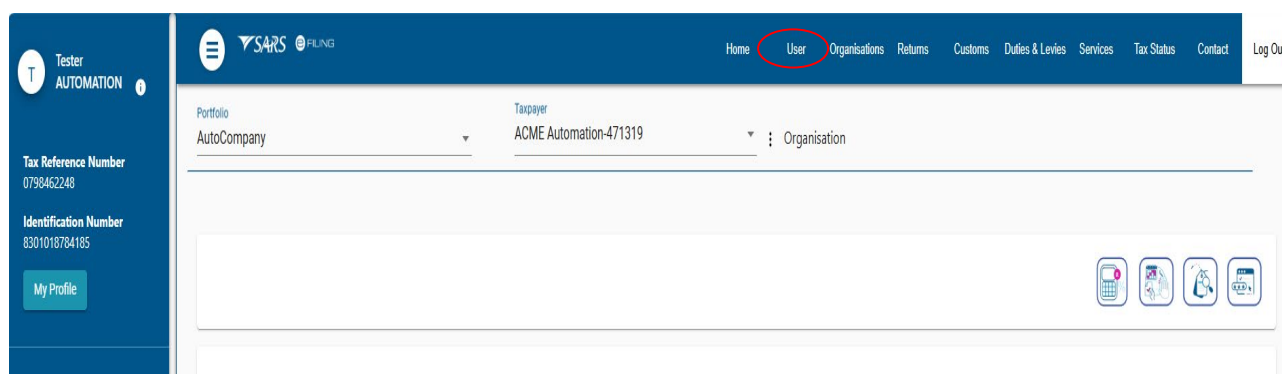
5 REVOKE SHARED ACCESS

a) In order to revoke a shared access the registered representative of the entity:

- i) Logs into eFiling (as described in SC-CF-42);
- ii) Selects the entity's details under Portfolio; and
- iii) Selects User in the top-level menu.

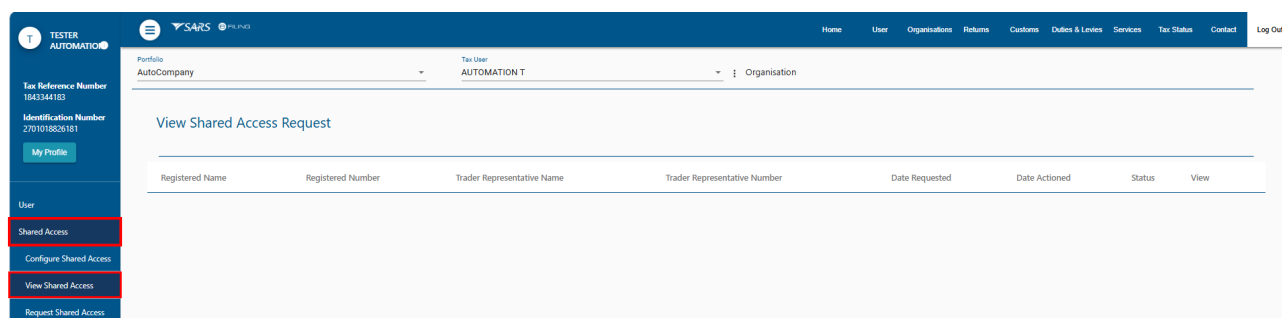


iv) Selects User in the top-level menu.



b) The system displays the User menu option on the left side of the screen.

- i) The registered representative of the entity clicks on:
 - A) Shared Access; and
 - B) View Shared Access.



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- ii) The system:
- A) Checks if there are any shared access records listed for the registered representative and if:
- I) Not, the system displays a message that no records are found; or
- II) Yes, the system displays a list of all the shared access records linked to the registered representative of the entity and he/she clicks on the View button to select the shared access to be revoked.

View Shared Access Request

Registered Name	Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action
Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View
Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Approved	View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Rejected	View

- B) Displays the shared access details (ready only) and the registered representative of the entity views the shared access details and if:
- I) The registered representative of the entity selected the incorrect request to be revoked he/she clicks on the Back button and the system returns to paragraph A) above;
- II) The registered representative of the entity wishes to continue to revoke the shared access he/she clicks on the Revoke button.

Shared Access Request Details

Status: **APPROVED**

Details of the entity

Registration Number
2005/875462/12

Registered Name
Major Brick Builders

Tax Reference Number
905426875462

Details of the individual

Surname
Mhalane

ID Number
7506162549004

Roles
Trader Representative RRA

Access Duration
☒ Indefinitely
 ☐ Specify Date

[Back](#)
[Print Power of Attorney](#)
[Revoke](#)

- c) The system displays a message requesting the registered representative of the entity to confirm whether the shared access should be revoked and if the registered representative wishes:

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- i) Not to revoke the shared access he/she clicks on the Cancel button and the system returns to paragraph b)ii) above; or
- ii) To continue with the revoking of the shared access he/she clicks on the Ok button.

The screenshot shows the 'Configure Shared Access' interface. A modal dialog box is centered on the screen, asking for confirmation to revoke shared access. The dialog has an 'OK' button and a 'Cancel' button. The background interface includes a sidebar with navigation options like 'My Profile', 'User', 'Shared Access', and 'Special Links'. The main content area displays 'Details Of The Entity' and 'Details Of The Representative' information, including tax reference numbers, registration numbers, and access duration.

d) The system:

- i) Displays a message that the shared access configuration has been successfully submitted and the registered representative of the entity clicks on the Ok button;

The screenshot shows the 'Configure Shared Access' interface. A modal dialog box is centered on the screen, displaying a success message: 'Your shared access configuration has been successfully submitted, a notification will be sent to the user.' The dialog has an 'OK' button. The background interface includes a sidebar with navigation options and a main content area with a table titled 'Entities Linked To The Register Rep'. The table lists entities with columns for Registered Name, Registration Number, Reference Type, Status, and Action. A 'Configure' button is visible at the bottom right of the table.

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- ii) Updates the status of the shared access from approved to revoked; and
- iii) Sends a notification to the eFiler (trader representative) notifying him/her that the shared access has been revoked.

View Shared Access Request

Registered Name	Registration Number	Requestor Name	ID Number	Date Requested	Date Actioned	Status	Action
Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View
Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Revoked	View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Rejected	View

DISCLAIMER

- a) 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.
- b) **For more information about the contents of this publication you may:**
 - i) Visit the SARS website at www.sars.gov.za;
 - ii) Make a booking to visit the nearest SARS branch;
 - iii) Contact your own tax advisor / tax practitioner;
 - iv) If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277);
or
 - v) If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).