



South African Revenue Service

SARS Tax Practitioner Readiness Programme

Module 3 of 8

How to Register as A Tax Practitioner

Learning Objectives

At the end of this module, you are expected to:

- Understand how to register as a tax practitioner
- Understand how to configure your tax practitioner registration
- Understand how to add your tax practitioner portfolio to your eFiling profile

Tax Practitioner Registration Process via eFiling

The registration is a three-step process:

- First, register with a RCB as a tax practitioner. The RCB will then submit your details to SARS via eFiling platform for the RCB.
- Second, log onto eFiling using your log in details, and update your registered particulars indicating that you are a tax practitioner. This is done on the RAV01 (Registration, Amendments and Verification form).
- Third, once the information has been updated, you would need to select the RCB you belong to.

Tax Practitioner Registration Process via eFiling

Steps to Follow:

- Log into your e-filing profile using your Primary user log in credentials.
- Once logged in, navigate to the screen as shown on the next slide, in order to finalise the process of the registration.
- Click on Home tab (Top left)
- Maintain SARS registered details (left hand side tab)
- The RAV01 will be generated.
- Scroll down to “My Tax Practitioner details”

Tax Practitioner Registration Process via eFiling

Maintain SARS registered details tab (left hand side tab)

The screenshot displays the SARS eFiling user interface. On the left, a dark blue navigation menu is visible, with the 'Maintain SARS Registered Details' option highlighted. The main content area shows the 'How do I use Services?' section, which includes a list of service-related questions and instructions. A large red arrow points from the 'Maintain SARS Registered Details' menu item to the 'How do I use Services?' section.

Navigation Menu (Left Hand Side):

- Tax Reference Number
- Identification Number
- My Profile
- Organisation
- Bulk Registration
- Admin Reports
- Rights Groups
- SARS Registered Details
- Notice of Registration
- Activate Registered Representative
- Maintain Registered Users
- Maintain SARS Registered Details

Main Content Area:

Portfolio: [Dropdown] Taxpayer: [Dropdown]

How do I use Services?

- How does the service operate?
- How do I request a directive?
- How long will it take to get a Directive?
- How will I be notified when the directives have been issued?
- Moving Directives to History
- Viewing History
- IRP3e & IT88L
- Duplicating a Directive
- Resubmitting a Declined Directive and viewing reasons why
- Cancelling a successful Directive

How does the service operate?

Login using your login name and password. Once logged in to the service you will have four main areas of the service – depicted at the top **Returns, Services**

- Within **USER** you can register additional users, assign user rights, and change user details
- Within **ORGANISATION** you can register organisations, change organisation details, register tax types, register banking details, and
- Within **TAX RETURNS** you can view tax returns issued, complete and submit tax returns to SARS. You can also view tax returns hist
- Within **DIRECTIVES** you can request, complete and submit directives to SARS. You can also view directive history, duplicate, archiv

How do I request a directive?

- Click on **DIRECTIVES**, then within the left hand menu option click on request
- Click on the type of Directive i.e.: Form A&D, Form B, Form C, IRP3a, IRP3b or IRP3c
- Click on the particular form to open. Complete the information required
- You are then able to **SAVE** that particular form – should you wish to submit at a later stage, the Directive will be placed in **PENDING**
- Once you have elected to **SUBMIT** – your form will be sent to SARS and will be moved to the **DIRECTIVE NOT FINALISED** section

How long will it take to get a Directive?

...nse from SARS. The full status i.e.: Approved / Declined will be shown in the status box – once rec

...been issued?

Tax Practitioner Registration Process via eFiling

The RAV01 form will generate with the fields that need to be completed

The screenshot displays the SARS eFiling interface. On the left, a navigation menu lists various options, with 'My tax practitioner details' highlighted in red. The main area shows the 'RAV01' form, which includes sections for 'Applicant Details - Individual', 'Appointment Date', 'Controlled Entities', and 'Registered Entity Addresses'. The form contains numerous input fields for personal and professional information, such as name, ID number, and appointment date.

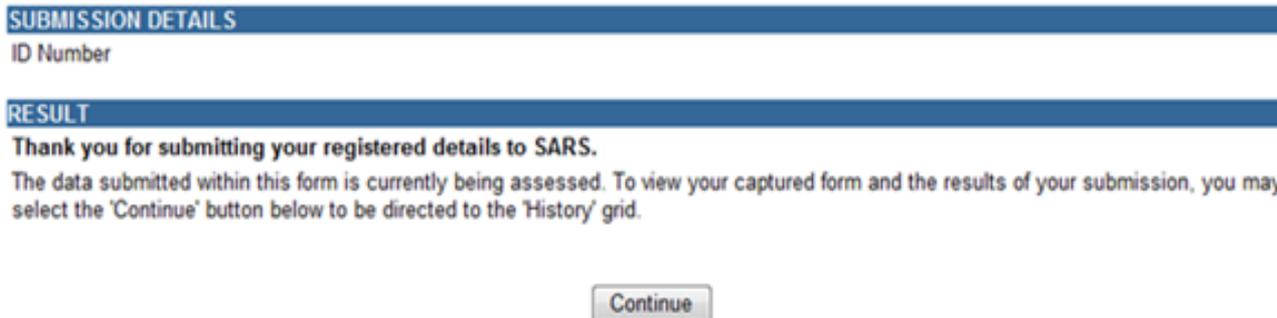
- Registration Status – Registered or Unregistered
- Registration Number
- Appointment Date (CCYYMMDD) – indicates the date the tax practitioner was officially registered as a tax practitioner.
- Controlling Body
- Deactivate Registration

Tax Practitioner Registration Process via eFiling

- After you have selected the Controlling Body, select the **“Done”** button on the RAV01 page to proceed.



- After you have submitted the RAV01 form, you will receive the following message, select **“Continue”**:



Obtaining my PR Number

- You need to repeat this step, click on Maintain SARS Registered Details

The screenshot displays the SARS eFiling user interface. On the left is a dark blue sidebar menu with the following items: 'My Profile' (highlighted in a teal box), 'Organisation', 'Bulk Registration', 'Admin Reports', 'Rights Groups', 'SARS Registered Details', 'Notice of Registration', 'Activate Registered Representative', 'Maintain Registered Users', and 'Maintain SARS Registered Details' (highlighted with a red arrow). The main content area has a top navigation bar with 'Home', 'User', and 'Organisations' links. Below this, there are dropdown menus for 'Portfolio' and 'Taxpayer'. The main content area contains a section titled 'How do I use Services?' with a list of links: 'How does the service operate?', 'How do I request a directive?', 'How long will it take to get a Directive?', 'How will I be notified when the directives have been issued?', 'Moving Directives to History', 'Viewing History', 'IRP3e & IT88L', 'Duplicating a Directive', 'Resubmitting a Declined Directive and viewing reasons why', and 'Cancelling a successful Directive'. Below this list is a heading 'How does the service operate?' followed by a paragraph: 'Login using your login name and password. Once logged in to the service you will have four main areas of the service – depicted at the top Returns, Services'. This is followed by a list of bullet points: 'Within USER you can register additional users, assign user rights, and change user details', 'Within ORGANISATION you can register organisations, change organisation details, register tax types, register banking details, and', 'Within TAX RETURNS you can view tax returns issued, complete and submit tax returns to SARS. You can also view tax returns hist', and 'Within DIRECTIVES you can request, complete and submit directives to SARS. You can also view directive history, duplicate, archiv necessary, request that it be cancelled'. Below this is another heading 'How do I request a directive?' followed by a list of bullet points: 'Click on DIRECTIVES, then within the left hand menu option click on request', 'Click on the type of Directive i.e.: Form A&D, Form B, Form C, IRP3a, IRP3b or IRP3c', 'Click on the particular form to open. Complete the information required', 'You are then able to SAVE that particular form – should you wish to submit at a later stage, the Directive will be placed in PENDING', and 'Once you have elected to SUBMIT – your form will be sent to SARS and will be moved to the DIRECTIVE NOT FINALISED section'. Below this is a heading 'How long will it take to get a Directive?' followed by a paragraph: '...response from SARS. The full status i.e.: Approved / Declined will be shown in the status box – once rec'. The text is partially cut off at the bottom.

Tax Practitioner Registration Process via eFiling

- Adding a tax practitioner portfolio to an existing Profile

A tax practitioner may register a new tax practitioner portfolio by clicking on ***'My Profile' >>> 'Portfolio Management' >>>> 'Add Portfolio'***



Please add Portfolio Information

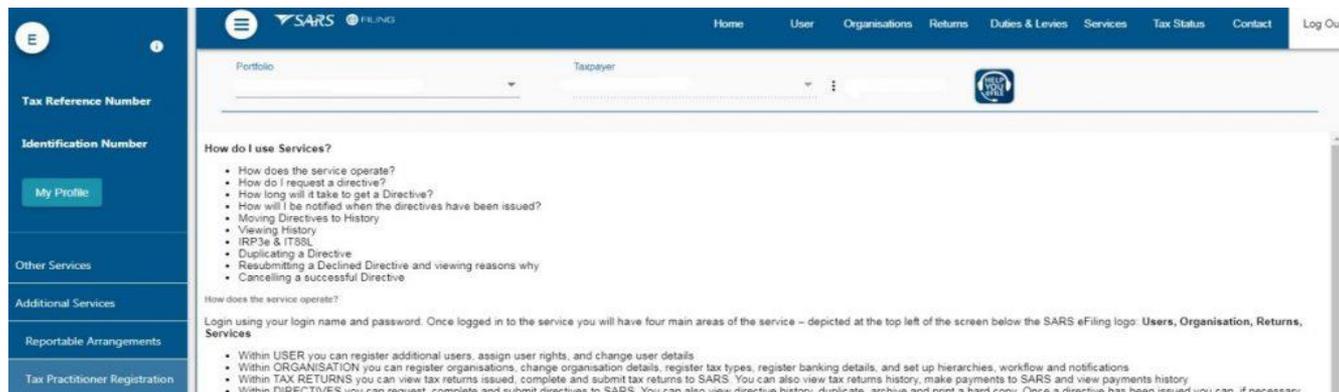
portfolioName
Test123

Portfolio Type
Tax Practitioner



Tax Practitioner Registration Process via eFiling

- 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.
 - On the Organisation profile, ensure that the correct taxpayer is selected from the taxpayer list in the event of registering an individual as a tax practitioner.
 - Select the “**Services**” menu tab and “**Additional Services**”. Click on “**Tax Practitioner Registration**”



Tax Practitioner Registration Process via eFiling

- Select: Activate Tax Practitioner

ACTIVATE TAX PRACTITIONER

As a registered Tax Practitioner, you may use eFiling to submit returns on behalf of taxpayers.

In order to do this, you first need to validate and activate your practitioner status. You can do so by confirming your details below and then clicking on the 'Confirm My Practitioner Status' button

eFiling User Details

Title:	<input type="text"/>	Initials:	<input type="text" value="JT"/>
First Name:	<input type="text" value="John"/>	Surname:	<input type="text" value="Taxpayer"/>
ID Number:	<input type="text" value="JT213456789"/>	Tax Practitioner Status:	<input type="text" value="Unconfirmed"/>
Tax Practitioner Number:	<input type="text" value="PR-0008546"/>		

Thank you



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Wednesday 09:00 to 16:00**



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