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.

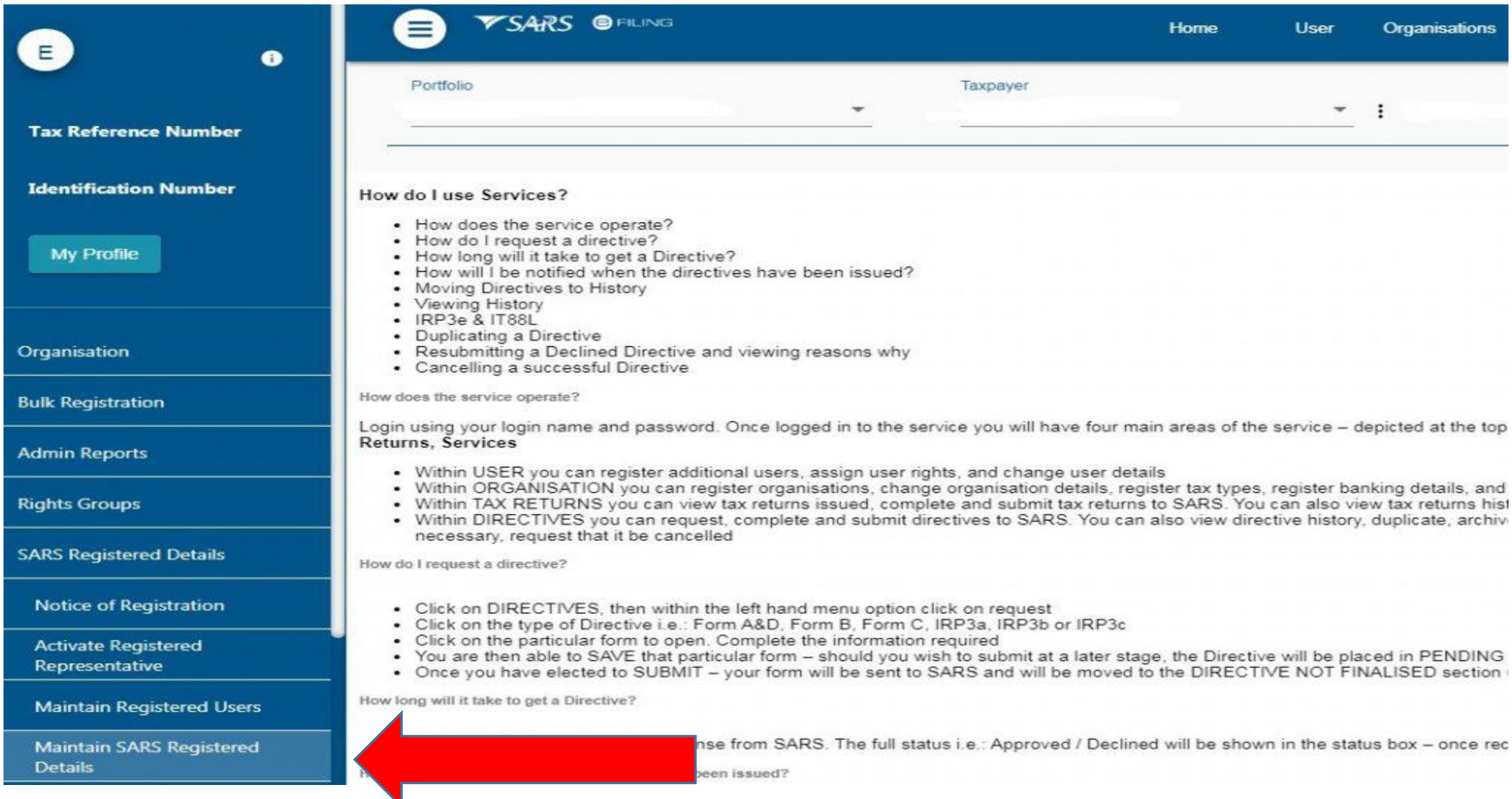
Tax Practitioner Registration Process via eFiling

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)



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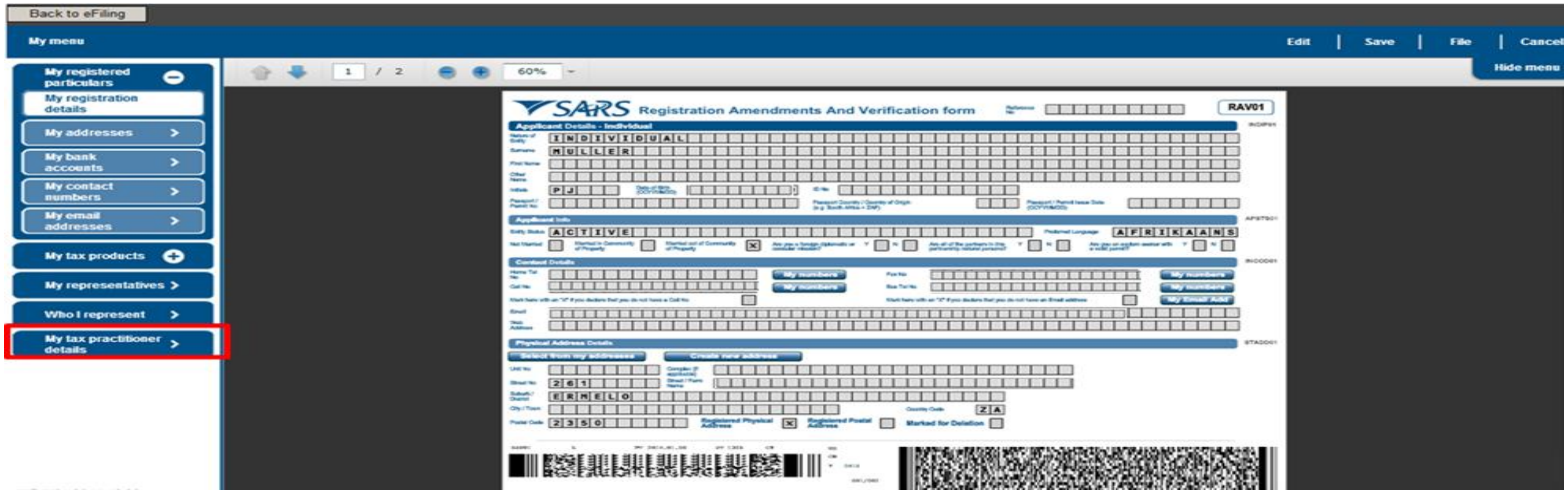
SARS South African Revenue Service

Tax Practitioner Registration Process via eFiling

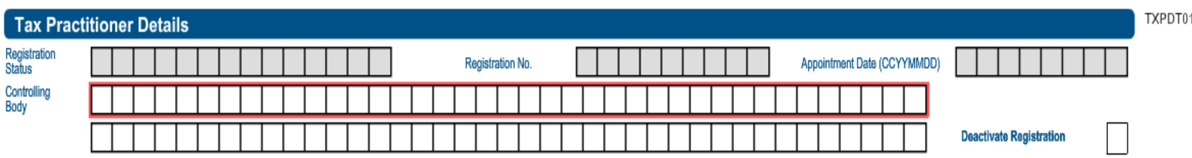
The RAV01 form will generate with the fields that need to be completed

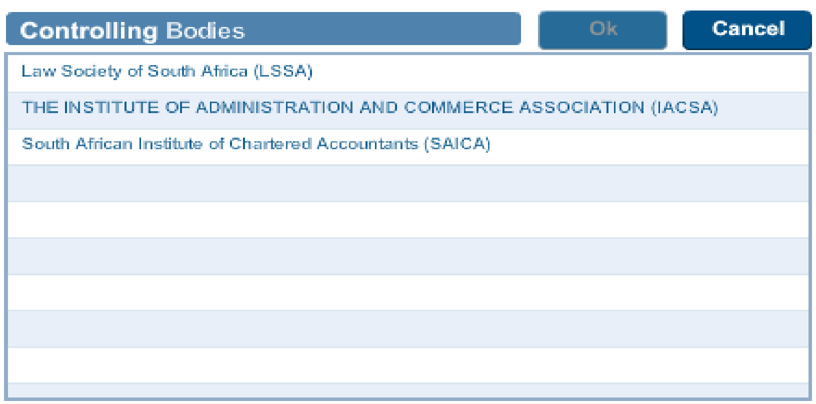


- Registration Status – Registered or Unregistered
- Registration Number
- Appointment Date (CCYYMMDD) – indicates the date the tax practitioner was officially registered as a tax practitioner.
- Controlling Body
- Deactivate Registration

Tax Practitioner Registration Process via eFiling

- If you are registered with a Recognised Controlling Body (RCB) and the RCB has submitted your information to SARS, you need to select your RCB from the list of 11 RCBs in the Controlling body field. However, if you are not registered with a RCB or the RCB has not submitted your information to SARS, you will not be able to select a RCB, hence not able to complete the tax practitioner registration process.



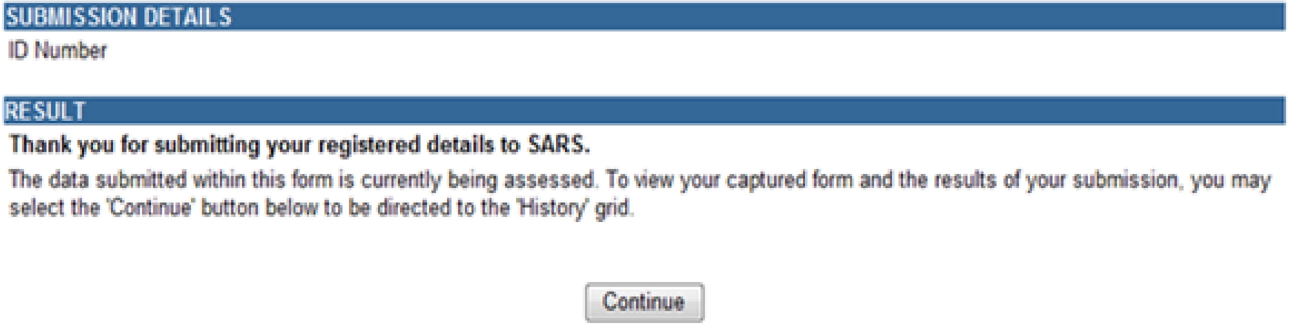


Top tip: The tax practitioner’s status will only reflect as “Registered” on SARS systems once the RCB and the practitioner have successfully submitted information to SARS and the details match.

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”:


SUBMISSION DETAILS

ID Number

RESULT

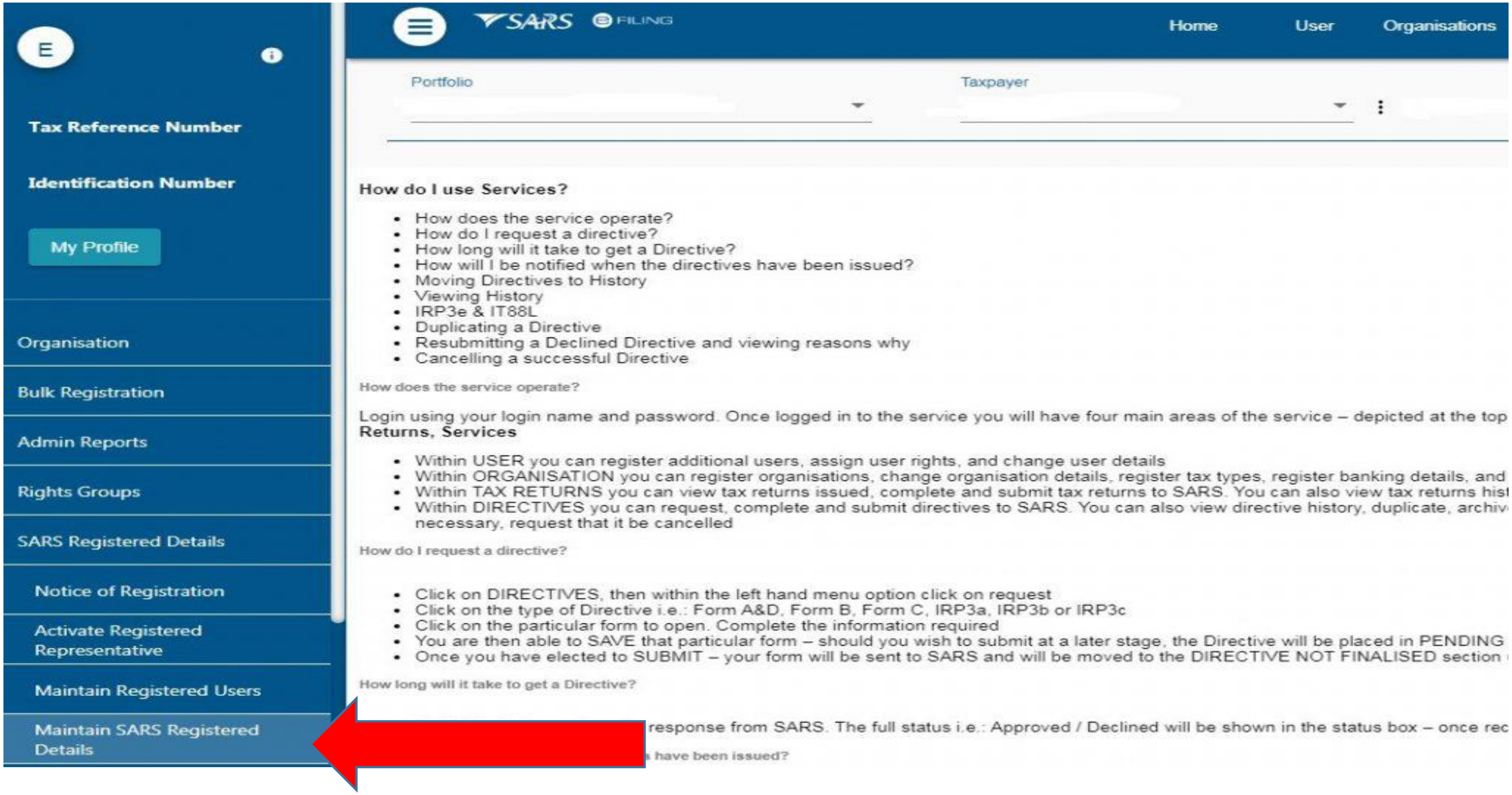
Thank you for submitting your registered details to SARS.

The data submitted within this form is currently being assessed. To view your captured form and the results of your submission, you may select the 'Continue' button below to be directed to the 'History' grid.

Continue

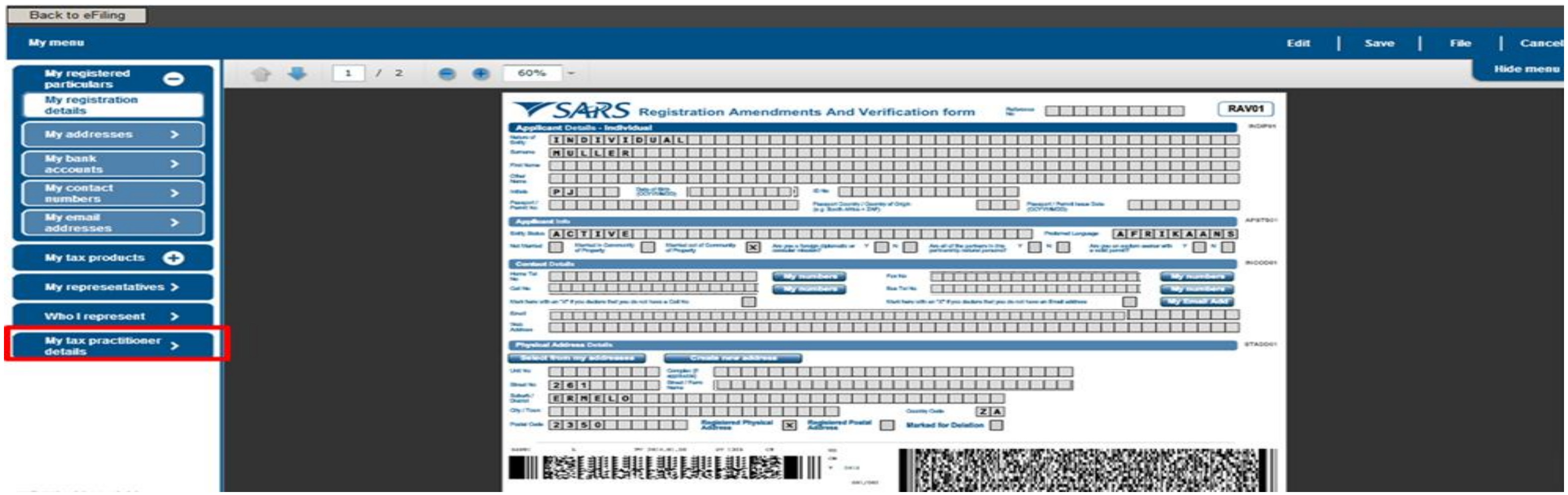
Obtaining my PR Number

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



Obtaining My PR Number

- Click on my Tax practitioner details:



- The PR number will be prepopulated.
- The tax practitioner can now copy the PR number in order to Configure it.

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'***

Add Portfolio

Please add Portfolio Information

portfolioName

Test123

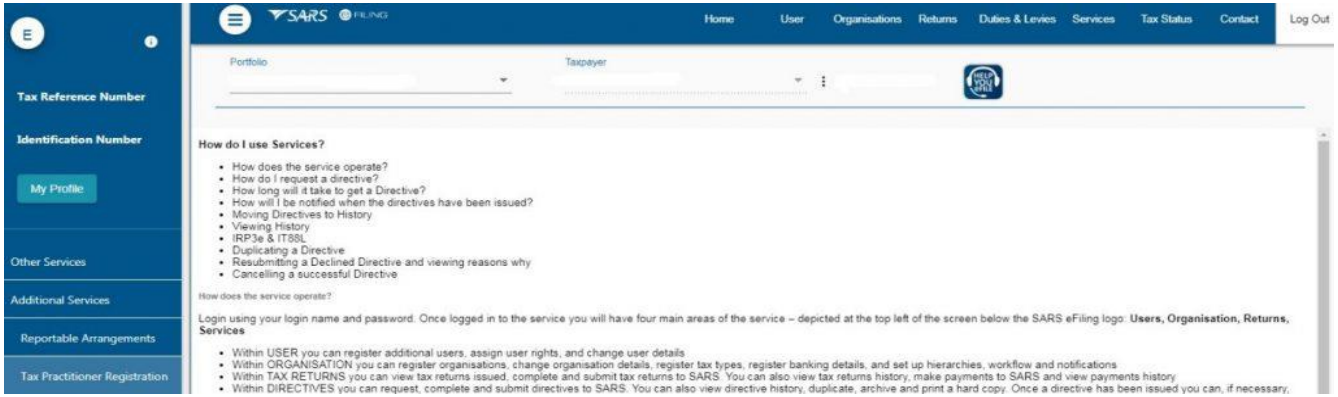
Portfolio Type

Tax Practitioner

Add Portfolio

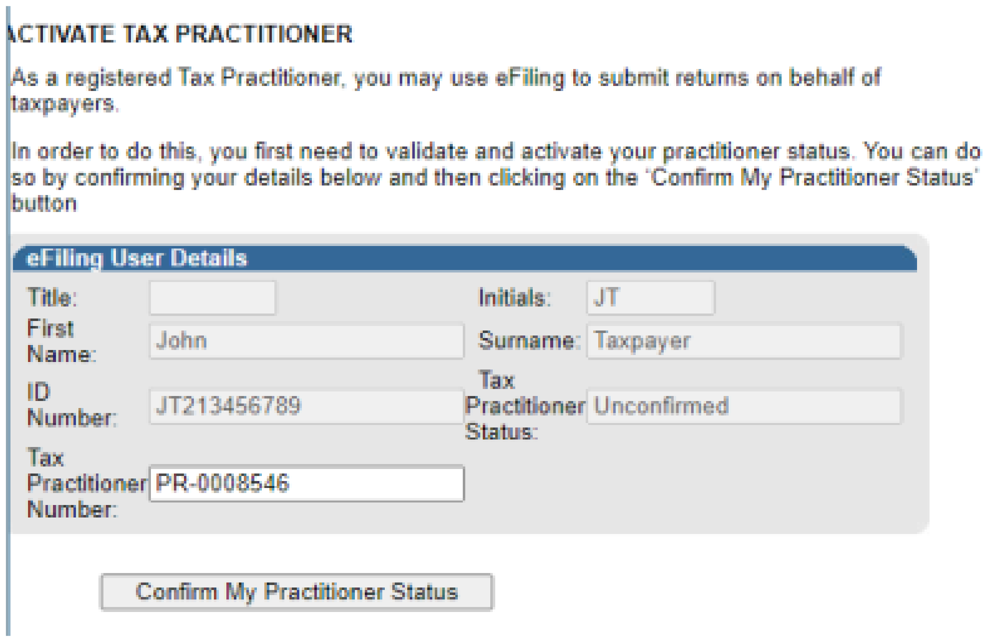
Tax Practitioner Registration Process via eFiling

- 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:		Initials:	JT
First Name:	John	Surname:	Taxpayer
ID Number:	JT213456789	Tax Practitioner Status:	Unconfirmed
Tax Practitioner Number:	PR-0008546		

Confirm My Practitioner Status

Thank you

www.sars.gov.za

SARS Contact Centre 0800 00 SARS (7277)

Visit your nearest SARS branch (to locate a branch visit www.sars.gov.za)

Open: Monday, Tuesday, Thursday & Friday 08:00 to 16:00;
Wednesday 09:00 to 16:00

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Thank you

Re a leboha

Re a leboga

Ndza Khensa

Dankie

Ndi a livhuwa

Ngiyabonga

Enkosi

Ngiyathokoza

South African Revenue Service