



MANAGE SHARED ACCESS THROUGH eFILING

TABLE OF CONTENTS

1	SUMMARY	3
2	CONFIGURE SHARED ACCESS	3
3	REQUEST SHARED ACCESS	11
4	APPROVAL, REJECTION OR CANCELATION OF SHARED ACCESS	16
4.1	Registered representative of the entity with an eFiling profile	16
4.1.1	Approval and Rejections	16
4.1.2	Cancellation	19
4.2	Registered representative of an entity with no eFiling profile	22
5	REVOKE SHARED ACCESS	26
6	DEFINITIONS, ACRONYMS AND ABBREVIATIONS	29
7	DOCUMENT MANAGEMENT	30

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); and
 - ii) Selects the entity's details under Portfolio.

TAXPAYER

SQMAuto687453886785 - T AUTOMATION

SQM_Auto_Company

Taxpayer Name: T AUTOMATION

Registration Number: 1901215864081

Contact Person Details

AUTOMATION

Contact Details

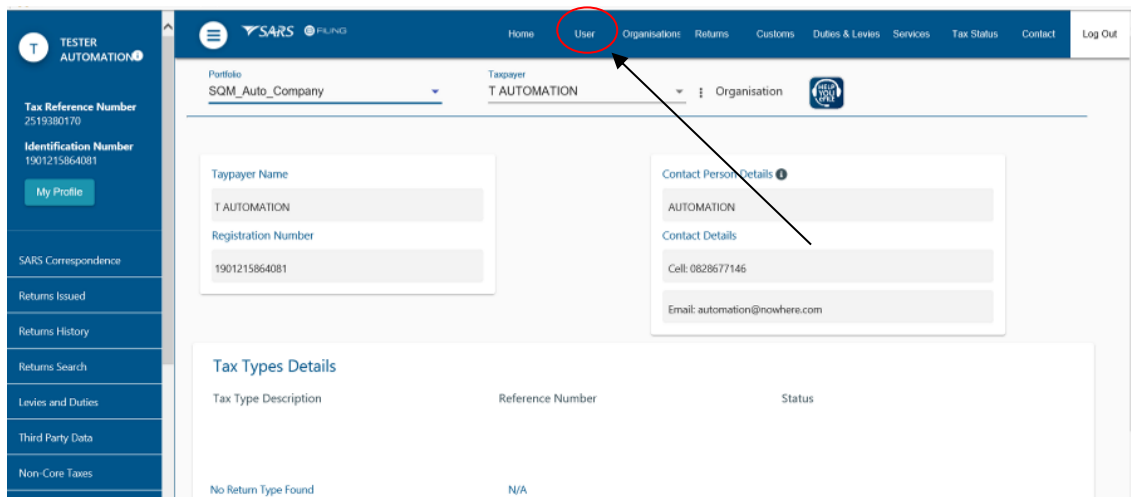
Cell: 0828677146

Email: automation@nowhere.com

Tax Types Details

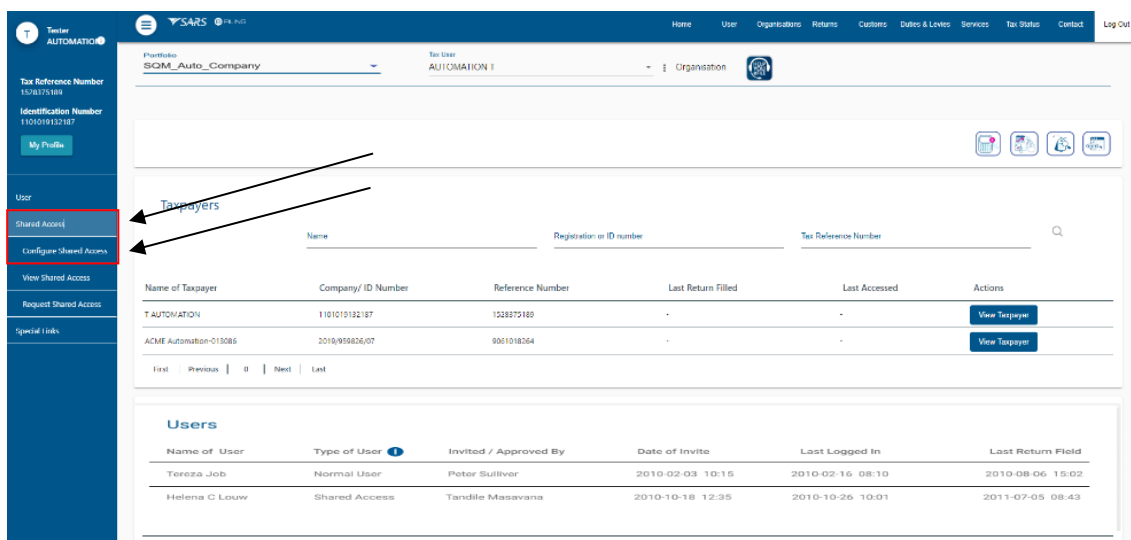
Tax Type Description	Reference Number	Status
Individual Income Tax (ITR12)	2519380170	Successfully Activated
IT Admin Penalty	2519380170	Successfully Activated

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



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

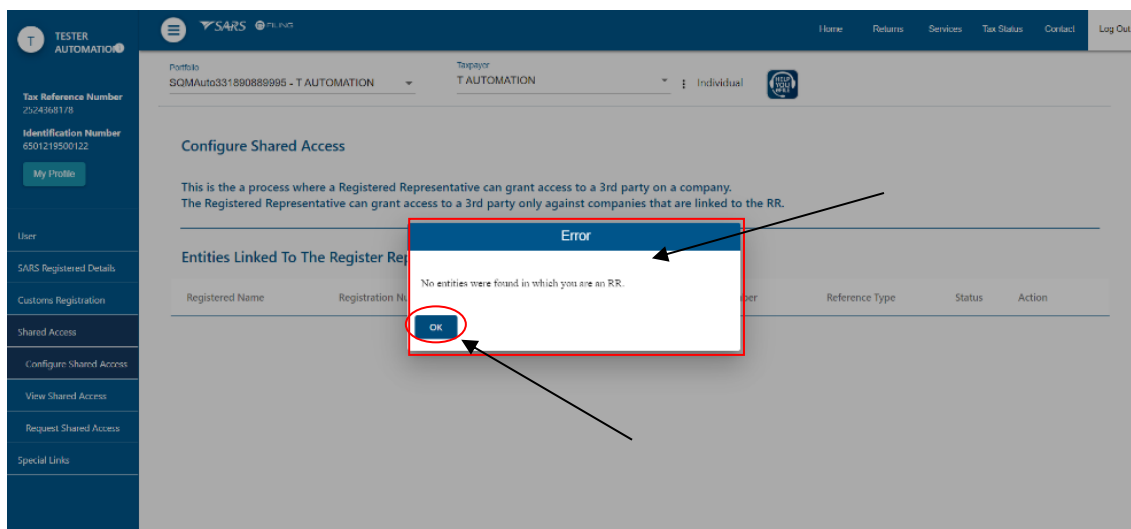
- i) Shared Access menu; and
ii) Configure Shared Access.



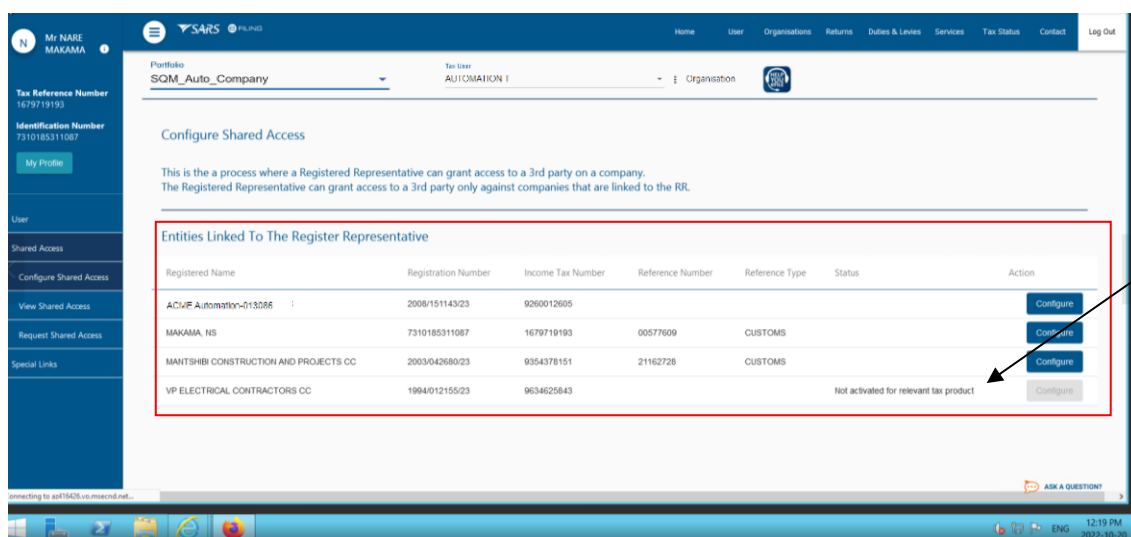
- c) A validation is done on the SARS main data base and:

- 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

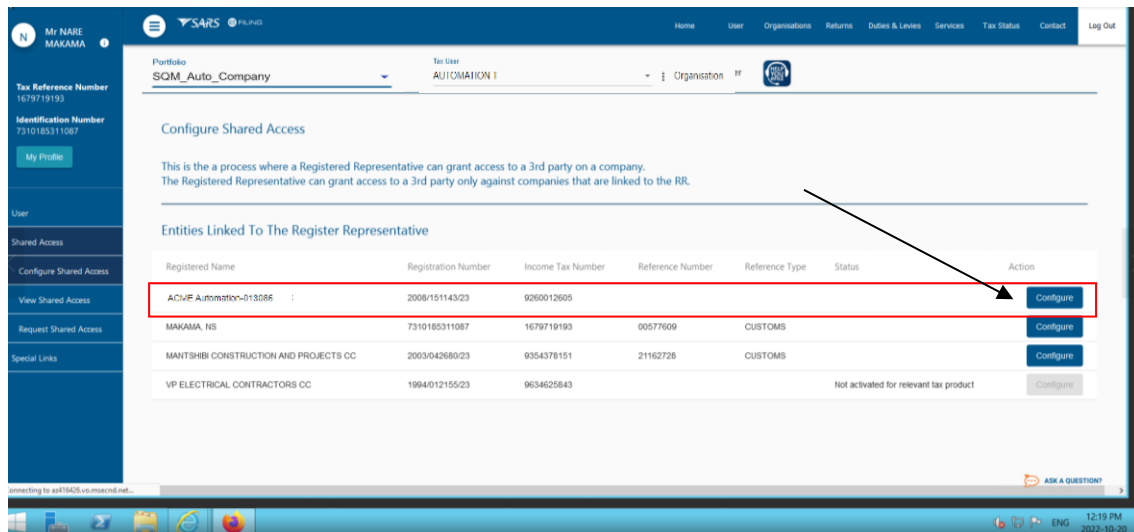
- B) The registered representative:
- I) Clicks on the Ok button; and
 - II) Updates his/her details as described in GEN-REG-01-G04.



- 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.
- 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.



- d) The registered representative:
- Selects the entity; and
 - Clicks on the Configure button next to the entity's details.



- 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.

Individual Details

Select 3rd Party Role *

☐ Trader Representative – RLA

☐ Trader Representative – RMM

Identification Type *

Surname *

Portfolio Name *

ACME Automation-013066 (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 Cancel

- e) If any of the above details has been captured:
- 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
 - Correctly, the registered representative clicks on the Invite button.

- f) The system validates if the invitee (trader representative) is a registered eFiler and if:
- Not:
 - The system displays a message that the invitee is not an eFiler; and
 - The registered representative of the entity:
 - Clicks on the Ok button; and
 - 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).

- Already linked to the entity's portfolio:
 - 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.

The screenshot shows the 'Configure Shared Access' interface. On the left is a sidebar with navigation links: 'My Profile', 'User', 'Shared Access', 'Configure Shared Access', 'View Shared Access', 'Request Shared Access', and 'Special Links'. The main area has a header 'Configure Shared Access' and a sub-header 'Individual Details'. Below this, there are fields for 'Select 3rd Party Role' (with checkboxes for 'Trader Representative - BSA' and 'Trader Representative - BMM'), 'Identification Type' (set to 'South African ID'), 'ID Number' (0704175222001), 'Surname' (Rebecca), and 'Portfolio Name' (ACME Automation-013086 (Shared Access)). A note states: '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.' Below these fields is the 'Access Duration' section with a checked 'Indefinite' option and a 'To Date' field. At the bottom are 'Back' and 'Invite' buttons. A red-bordered 'Message' dialog box is overlaid on the screen, containing the text 'The sub-user already exists on this Portfolio' and an 'OK' button. Arrows point from the 'OK' button in the dialog to the 'Trader Representative - BSA' checkbox and the 'Indefinite' option in the 'Access Duration' section.

- 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
 - 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 shows the 'Details of the Requestor' interface. On the left is a sidebar with navigation links: 'New Test', 'Tax Reference Number', 'Identification Number', 'My Profile', 'User', 'SARS Registration Details', 'Customs Registration', 'Shared Access', 'Configure Shared Access', 'View Shared Access', 'Request Shared Access', and 'Special Links'. The main area has a header 'Details of the Requestor' and fields for 'First Name' (New Test), 'Surname' (New Test), 'ID Number' (4401015628067), 'Entity Type' (Company/CC/Organisation), 'Registered Name' (ACME Automation 013086), 'Registration Number' (2019/559626/07), 'Tax Reference Number' (9601016264), and 'Customs Reference Number'. Below these fields is the 'Access Duration' section with a checked 'Indefinite' option and a 'To Date' field. At the bottom are 'Cancel' and 'Submit' buttons. A red-bordered 'Error' dialog box is overlaid on the screen, containing the text 'The entity is not activated for the relevant tax product required to link the Trader Representative to' and an 'OK' button. Arrows point from the 'OK' button in the dialog to the 'Entity Type' field and the 'Indefinite' option in the 'Access Duration' section.

- 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.

Details of the Requestor

First Name
New Test

Surname
New Test

ID Number
4401015628067

Entity Type *
Company/CC/Organisation

Company Details

Registered Name *
ACIAL Automation 012086

Registration Number *
2019/59926/07

Tax Reference Number
9601016264

Customs Reference Number

Access Duration

☒ Indefinite

To Date

Cancel Submit

Thank You

This invite was submitted an SMS will be sent.

OK

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

- Logs in to eFiling;
- Clicks on My Profile; and
- Clicks on Portfolio Management.

My Profile

Tax Reference Number
9601015628067

Identification Number
4401015628067

My Profile

Portfolio Management

Taxpayer Details

Taxpayer Name
T AUTOMATION

Registration Number
2019/59926/07

Contact Details

Cell: 0827089811

Email: shareaccess@requested.gov.za

Tax Types Details

Tax Type Description	Reference Number	Status
No Return Type Found	N/A	

Edit Contact Details Manage Tax Types

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.

Portfolio Management

[Add Portfolio](#)

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
SQMAuto_QR_342072764208069062 - 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 555150 (Shared Access)	2022 (R 30) 07:36:21:483	Accept

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link
---------------------	----------------	------

- 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.

SARS
South African Revenue Service

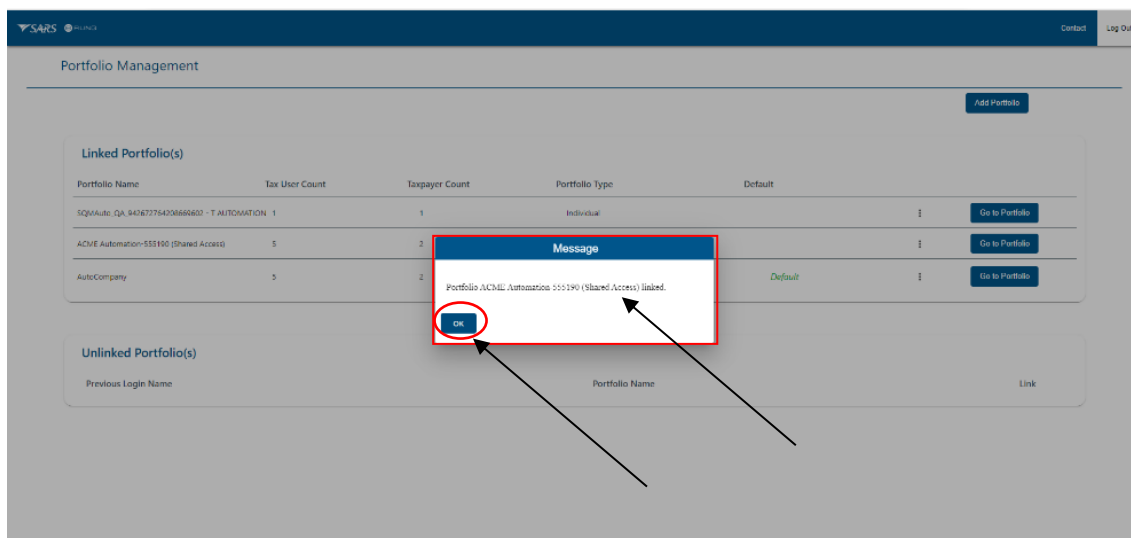
25 YEARS
A COMMITMENT
At Your Service
1997 - 2022

One Time Pin

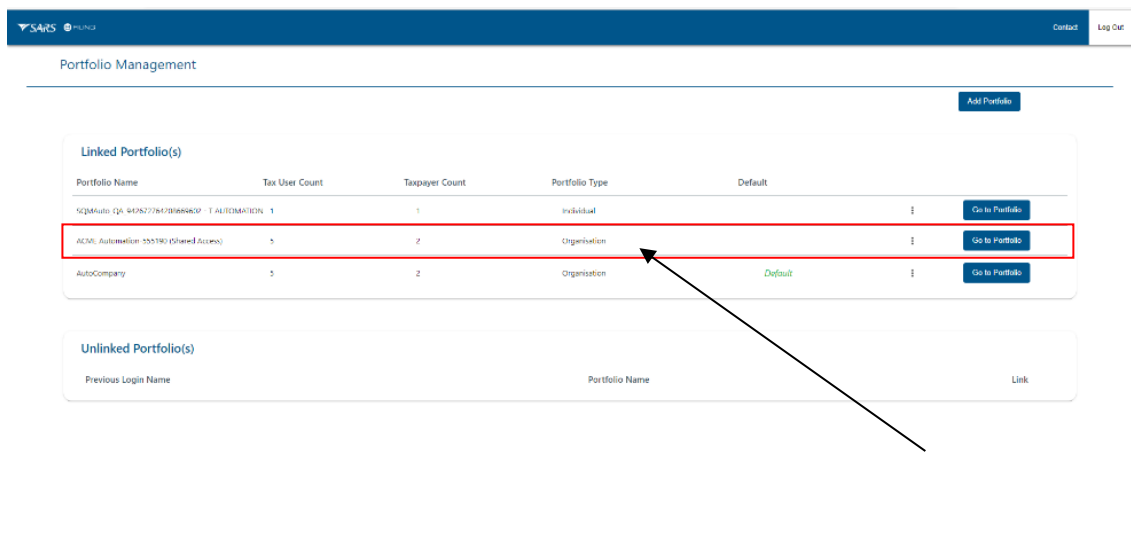
OTP has been sent to the following cellphone number: 082*****11
Pin expires in 00:02:55

[Resend OTP](#) [Submit](#)

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



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



3 REQUEST SHARED ACCESS

- This function is used by eFilers (trader representatives) to complete the details of the entity they want shared access with.
- 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.

Tax Type Description	Reference Number	Status
Individual Income Tax (ITR12)	2519380170	Successfully Activated
IT Admin Penalty	2519380170	Successfully Activated

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

Registered Name	Registration Number	Income Tax Number	Reference Number	Reference Type	Status	Action
AC/IE Automation-013088	2019/000806/07	9061018264				Configure

- d) If the eFiler (trader representative):
- Has not been successfully authenticated the system displays a message that the process cannot be continued.
 - Has been successfully authenticated the system displays the Request Shared Access page:
 - The eFiler (trader representative) ticks the applicable box Third-Party Role under Selected Third-Party Role;
 - 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:

Request Shared Access

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

Select Third Party Role

☒ Trader Representative - RLA
☐ Trader Representative - RMM

Details of the Requester

First Name
Joanne

Surname

Busarie

ID Number
7102195810254

Entity Details

Entity Type
Individual

Company/CC/Organisation

Individual

Trust

- 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**.

Request Shared Access

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

Details of the Requester

First Name
Joanne

Surname

Busarie

Tax Reference Number
8056584235

Roles

Trader Representative RLA

Company Details

Registration Number
2010/584625/56

Registered Name

Maiden Landing

Tax Reference Number
0856842012

Access Duration

☐ Indefinitely ☒ Specify Date

Cancel Submit

- e) The eFiler (trader representative):
- Indicate the duration of the shared access by either:
 - Ticking the Indefinite tick box under Access Duration; or
 - Clicking on the Specify Date icon to select the specific date when the shared access request must expire; and
 - Clicks on the Submit button.

Mr. JOHANNES MARTINIUS ANDRIES STEENKAMP
Tax Reference Number: 1855041644
Identification Number: 601214518088
My Profile

Portfolio: Steenkamp7707 - Mr JMA STEENKAMP | Tax User: Mr JMA STEENKAMP | Organisation: [Logo]

Request Shared Access

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

Details of the Requester

First Name: Joanne
Surname: [Field]
Busarie: [Field]
Tax Reference Number: 8056584235
Roles: Trader Representative RLA

Company Details

Registration Number: 2010/584625/56
Registered Name: [Field]
Maiden Landing: [Field]
Tax Reference Number: 0856842012

Access Duration:
☒ Indefinitely
☐ Specify Date

Buttons: Cancel, Submit

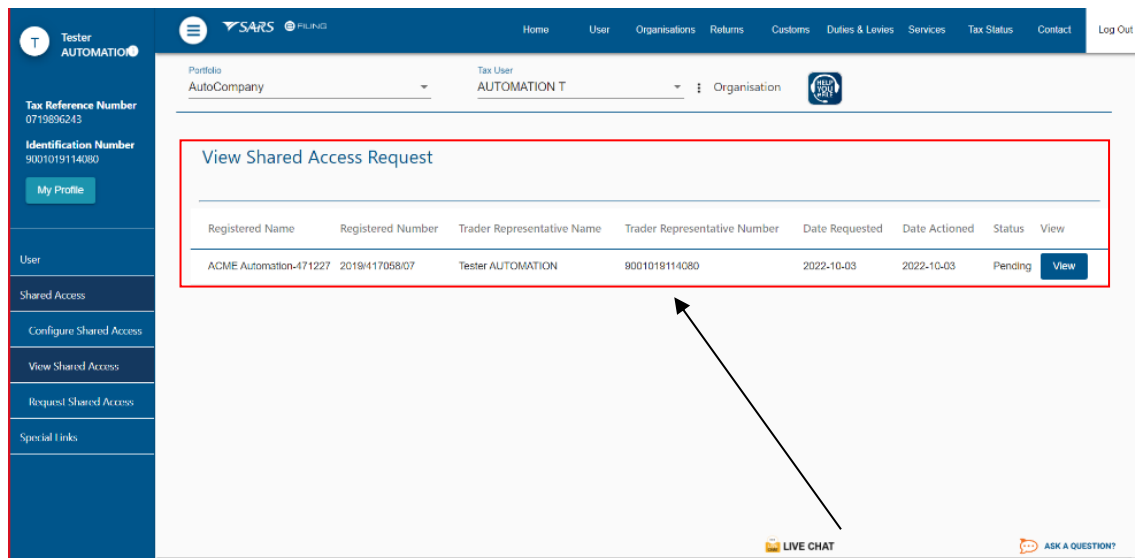
- f) The system displays a message that the shared access request has been successfully submitted and a notification is sent to the registered representative of the entity for acceptance. The eFiler (trader representative) clicks on the Ok button.

Message

Your shared access request has been successfully submitted, a notification will be sent to the Registered Representative to action.

Buttons: OK, Cancel, Submit

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



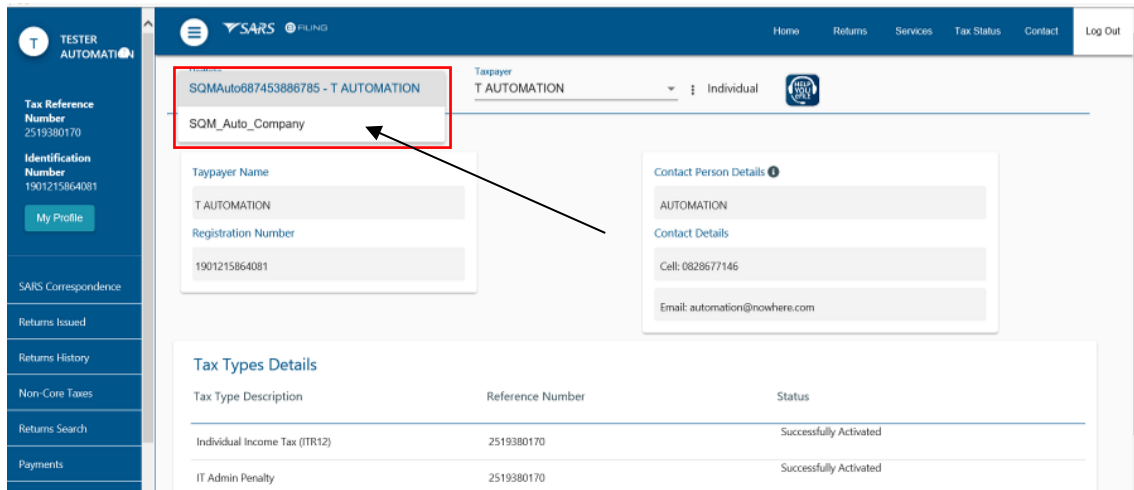
- h) If an eFiler (trader representative) already has access the system confirms this and displays a message that the eFiler must contact the eFiling Profile Administrator on the portfolio to grant him/her RLA user rights as prescribed in SC-CF-42.
- i) If the entity is not registered for eFiling a message 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:
- 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.
 - Where the eFiler who requests shared access is the registered representative of the entity the system automatically approves the shared access.
 - 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

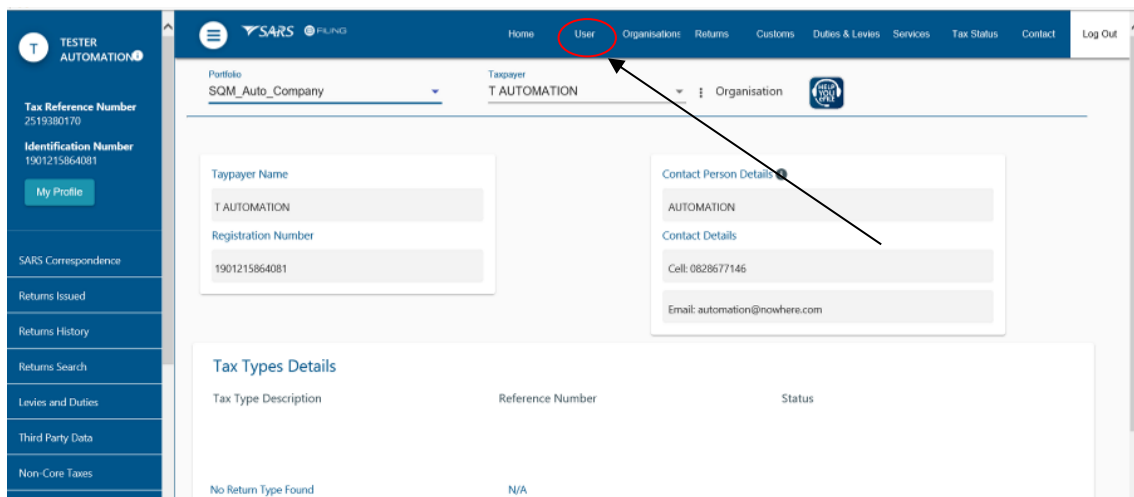
- a) In order to perform this function, the registered representative must ensure that the correct user rights have been assigned to his/her portfolio as described in SC-CF-42.
- b) The registered representative of the entity:
 - i) Logs into eFiling (as described in SC-CF-42);
 - ii) Selects the entity's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



The screenshot shows the SARS eFiling portal interface. On the left is a sidebar with navigation links. The main content area displays the 'Portfolio' dropdown menu, which is open, showing two options: 'SQMAuto687453886785 - T AUTOMATION' and 'SQM_Auto_Company'. An arrow points to the 'SQM_Auto_Company' option. Below the dropdown, the 'Taxpayer' information is displayed, including the name 'T AUTOMATION', registration number '1901215864081', and contact details. The 'Tax Types Details' table shows two entries: 'Individual Income Tax (ITR12)' and 'IT Admin Penalty', both with a status of 'Successfully Activated'.

Tax Type Description	Reference Number	Status
Individual Income Tax (ITR12)	2519380170	Successfully Activated
IT Admin Penalty	2519380170	Successfully Activated

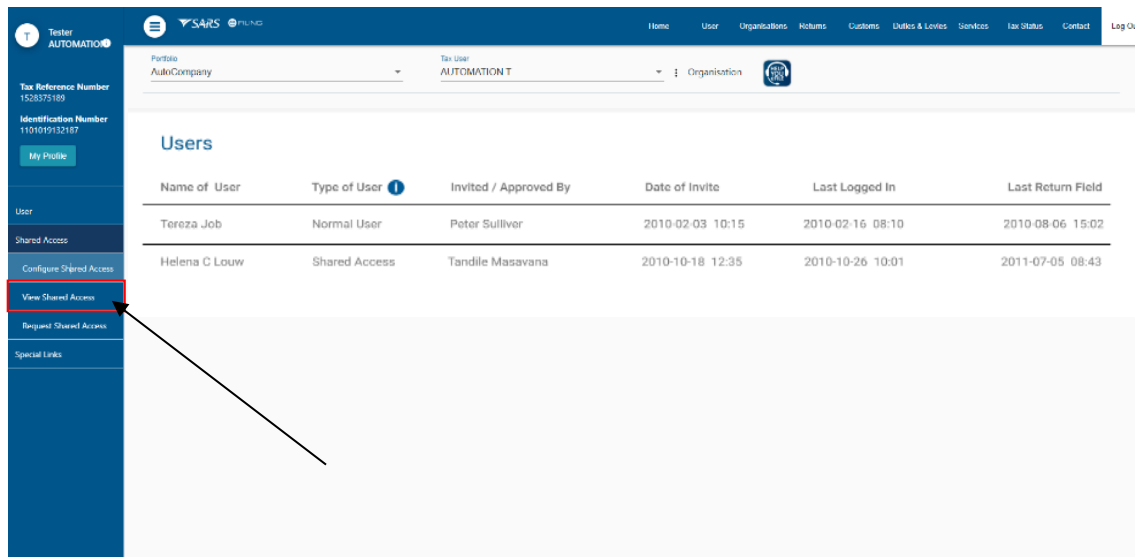
- iii) Selects User in the top-level menu.



The screenshot shows the SARS eFiling portal interface. The top navigation bar is visible, with the 'User' menu item highlighted. An arrow points to the 'User' menu item. The main content area displays the 'Portfolio' dropdown menu, which is open, showing two options: 'SQMAuto687453886785 - T AUTOMATION' and 'SQM_Auto_Company'. Below the dropdown, the 'Taxpayer' information is displayed, including the name 'T AUTOMATION', registration number '1901215864081', and contact details. The 'Tax Types Details' table shows two entries: 'Individual Income Tax (ITR12)' and 'IT Admin Penalty', both with a status of 'Successfully Activated'.

Tax Type Description	Reference Number	Status
Individual Income Tax (ITR12)	2519380170	Successfully Activated
IT Admin Penalty	2519380170	Successfully Activated

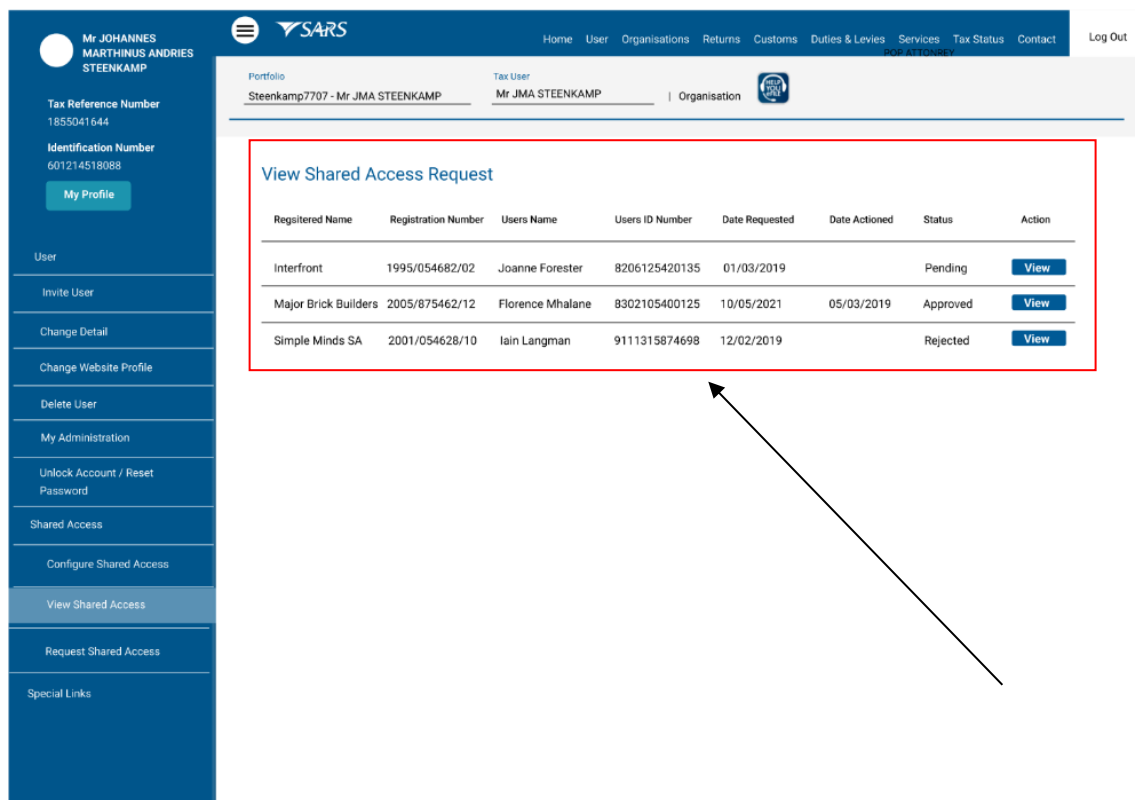
- c) The system displays the User menu option and the registered representative of the entity clicks on:
- Shared Access menu; and
 - View Shared Access.



The screenshot shows the SARS eFiling interface. On the left, the 'View Shared Access' option in the sidebar is highlighted with a red box and an arrow. The main area displays a table of users.

Name of User	Type of User	Invited / Approved By	Date of Invite	Last Logged In	Last Return Filed
Tereza Job	Normal User	Peter Sullivan	2010-02-03 10:15	2010-02-16 08:10	2010-08-06 15:02
Helena C Louw	Shared Access	Tandile Masavana	2010-10-18 12:35	2010-10-26 10:01	2011-07-05 08:43

- 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.



The screenshot shows the SARS eFiling interface. On the left, the 'View Shared Access' option in the sidebar is highlighted with a red box and an arrow. The main area displays a table of shared access requests.

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.

Mr. JOHANNES MARTINUS ANDRIES STEENKAMP
Tax Reference Number: 1855041644
Identification Number: 601214518088
My Profile

User
Invite User
Change Detail
Change Website Profile
Delete User
My Administration
Unlock Account / Reset Password
Shared Access
Configure Shared Access
View Shared Access
Request Shared Access
Special Links

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

- 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:
- Not to continue with the acceptance he/she clicks on the Cancel button and returns to paragraph e) above; or
 - 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.

- g) The system:
- 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
 - Updates the Automated Tax Processor System.
- h) If the status of a shared access request is displayed as:
- Approved a registered representative of the entity is allowed to revoke the shared access as described in paragraph 5 below.
 - 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:
- The eFiler (this could be either the trader representative or the registered representative of the entity):
 - Identifies the shared access to be cancelled; and

B) Clicks on the View button.

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

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](#)

- 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.

MARTINUS ANDRIES STEENKAMP

Tax Reference Number: 1855041644
Identification Number: 601214518088
[My Profile](#)

User

Invite User

Change Detail

Change Website Profile

Delete User

My Administration

Unlock Account / Reset Password

Shared Access

Create Shared Access

Configure Shared Access

Request Shared Access

Special Links

Portfolio: Steenkamp7707 - Mr JMA STEENKAMP | Tax User: Mr JMA STEENKAMP | Organisation: [SARS Logo]

View Shared Access Request

Status: **PENDING**

Company Details

Entity Type: Company

Registration Number: 2010/584625/56

Registered Name: [Redacted]

Maiden Landing: [Redacted]

Tax Reference Number: 9856842012

Details of the Requester

First Name: Joanne

Surname: Busarie

Tax Reference Number: 7102195810254

Roles: [Redacted]

Trader Representative RLA: [Redacted]

☐ Indefinitely ☒ Specify Date: 30/05/2022

[Back](#) [Cancel](#)

Mr. JOHANNES MARTINUS ANDRIES STEENKAMP

Tax Reference Number: 1855041644
Identification Number: 601214518088
[My Profile](#)

User

Invite User

Change Detail

Change Website Profile

Delete User

My Administration

Unlock Account / Reset Password

Shared Access

Configure Shared Access

View Shared Access

Request Shared Access

Special Links

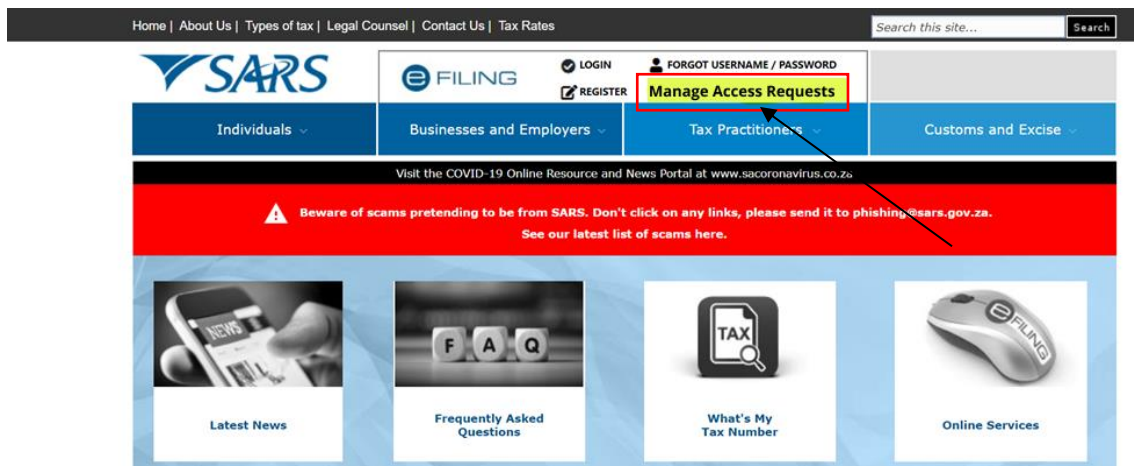
Portfolio: Steenkamp7707 - Mr JMA STEENKAMP | Tax User: Mr JMA STEENKAMP | Organisation: [SARS Logo]

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	8202105400125	10/05/2021	05/03/2019	Revoked	View
Simple Minds SA	2001/054628/10	Iain Langman	9111315874698	12/02/2019		Rejected	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:
 - 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.

- d) The system:
 - i) Checks if there is any shared access pending 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
Dd*****@s***.gov.za

Send OTP

- 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
Dd*****@s***.gov.za

Send OTP

- 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.

- 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

e FILING

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

e FILING

Tax Type Transer / Shared Access Request

Request successfully authorised.

Return to SARS Website

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

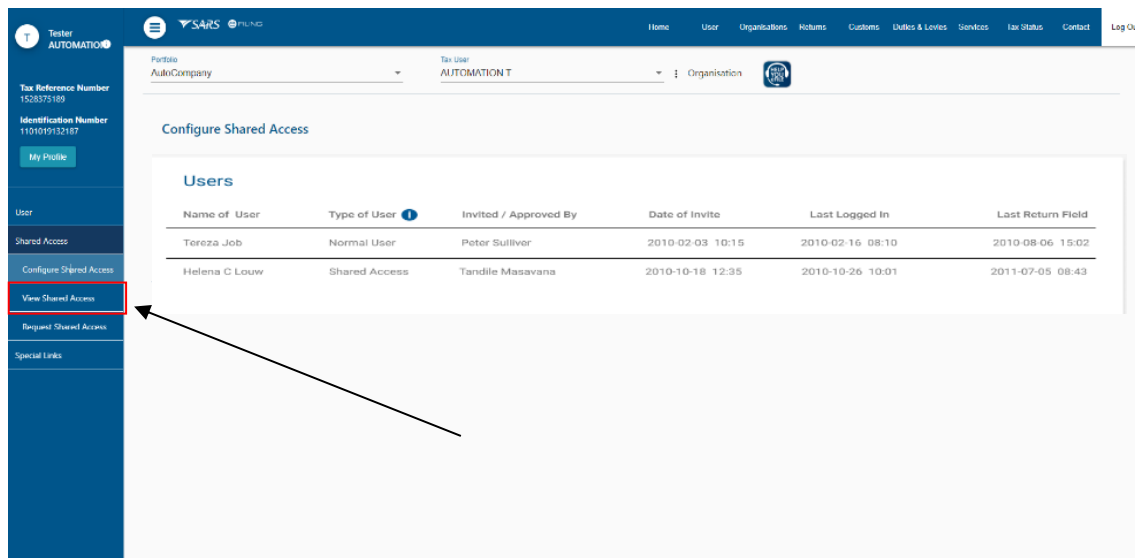
The screenshot shows the SARS eFiling portal interface. The top navigation bar includes 'Home', 'Returns', 'Services', 'Tax Status', 'Contact', and 'Log Out'. The left sidebar contains 'TESTER AUTOMATION' and various menu items like 'SARS Correspondence', 'Returns Issued', 'Returns History', 'Non-Core Taxes', 'Returns Search', and 'Payments'. The main content area displays the entity details for 'SQMAuto687453886785 - T AUTOMATION'. A red box highlights the entity name, and an arrow points to it from the 'User' menu item in the top navigation bar. The entity details include 'Taxpayer Name: T AUTOMATION', 'Registration Number: 1901215864081', 'Contact Person Details: AUTOMATION', 'Contact Details: Cell: 0828677146, Email: automation@nowhere.com', and a table of 'Tax Types Details' showing 'Individual Income Tax (ITR12)' and 'IT Admin Penalty' both 'Successfully Activated'.

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

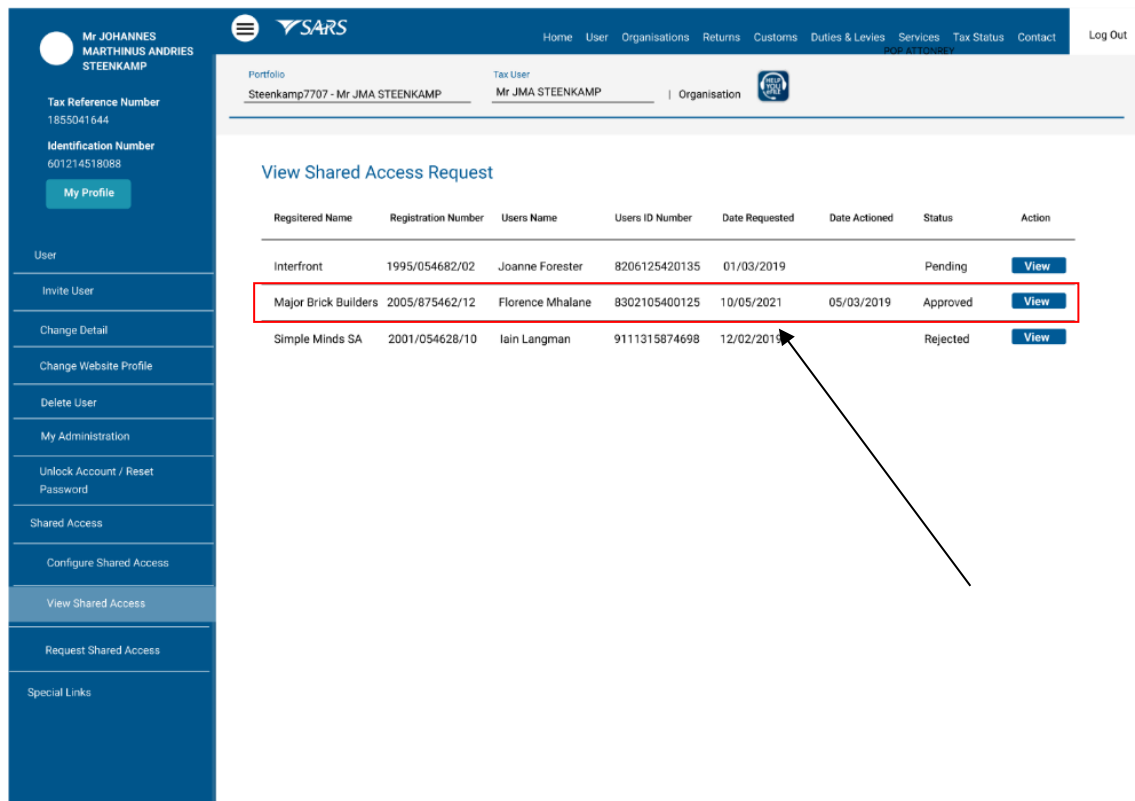
The screenshot shows the SARS eFiling portal interface. The top navigation bar includes 'Home', 'User', 'Organisations', 'Returns', 'Customs', 'Duties & Levies', 'Services', 'Tax Status', 'Contact', and 'Log Out'. The left sidebar contains 'TESTER AUTOMATION' and various menu items like 'SARS Correspondence', 'Returns Issued', 'Returns History', 'Returns Search', 'Levies and Duties', 'Third Party Data', and 'Non-Core Taxes'. The main content area displays the entity details for 'SQMAuto687453886785 - T AUTOMATION'. A red box highlights the 'User' menu item in the top navigation bar, and an arrow points to it from the 'User' menu item in the top navigation bar. The entity details include 'Taxpayer Name: T AUTOMATION', 'Registration Number: 1901215864081', 'Contact Person Details: AUTOMATION', 'Contact Details: Cell: 0828677146, Email: automation@nowhere.com', and a table of 'Tax Types Details' showing 'No Return Type Found' with 'N/A'.

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 menu; and
B) View Shared Access.



- 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.



- 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.

Mr. JOHANNES MARTINUS ANDRIES STEENKAMP

Tax Reference Number: 1855041644
Identification Number: 601214518088

My Profile

User

Invite User

Change Detail

Change Website Profile

Delete User

My Administration

Unlock Account / Reset Password

Shared Access

Configure Shared Access

View Shared Access

Request Shared Access

Special Links

Portfolio: Steenkamp7707 - Mr JMA STEENKAMP

Tax User: Mr JMA STEENKAMP

Organisation: [SARS Logo]

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:
 - 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.

Tester AUTOMATION

Tax Reference Number: 1528375189
Identification Number: 1101019132187

My Profile

User

Shared Access

Configure Shared Access

View Shared Access

Request Shared Access

Special Links

Approved

Details Of The Entity

Requested Role(s): Trader Representative - RMD4

Registration Number: 2019/969826/07

Registered Name: ACME Automation-013098

Tax Reference Number: 0061010264

Details Of The Representative

Traders Representative Surname: HARIPARASAD

Traders Representative ID: 7808180168097

Access Duration: ☒ Indefinite ☐ Expiry Date

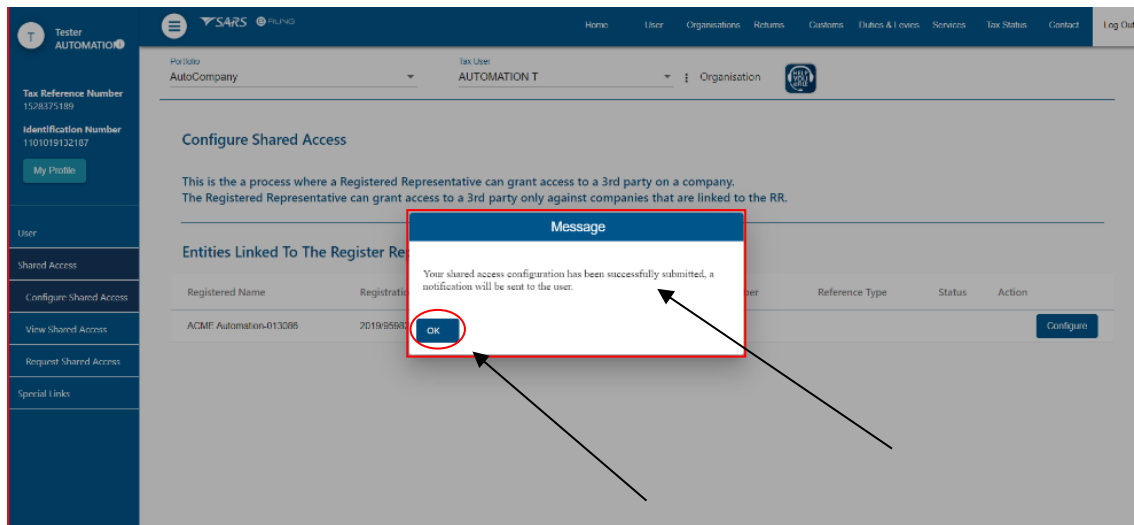
Back **Revoke**

Please confirm if you want to revoke shared access from this user.

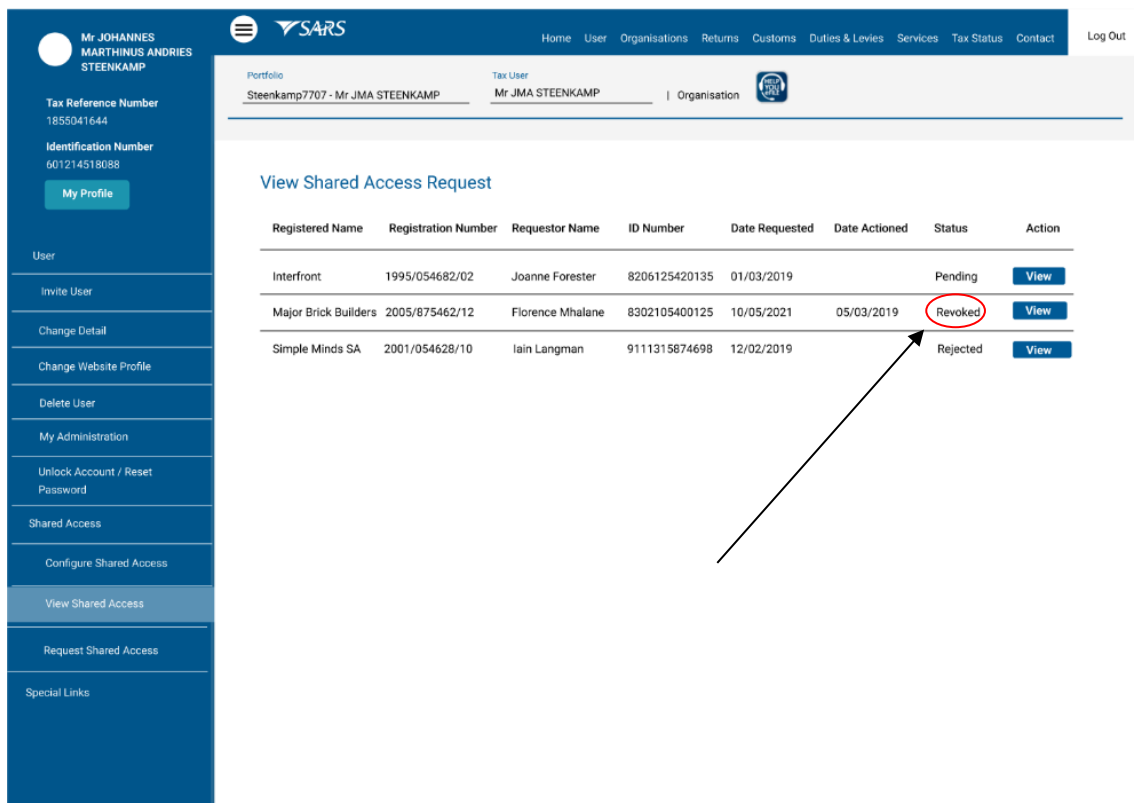
OK **Cancel**

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;



- 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.



6 DEFINITIONS, ACRONYMS AND ABBREVIATIONS

The definitions, acronyms and abbreviations can be accessed via the following link: [Glossary A-M | South African Revenue Service \(sars.gov.za\)](https://www.sars.gov.za/glossary)

7 DOCUMENT MANAGEMENT

Business Owner	Head: Accreditation and Licensing
Author	Frans Williams
Detail of Change	a) Changed the definitions, acronyms and abbreviations link; and b) Added the disclaimer paragraph

8 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).