



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

				Home Returns Services Tax Status Contact	Log Out
Tax Reference Number		SQMAuto687453886785 - T AUTOMATION SQM_Auto_Company	Taxpayer T AUTOMATI ON	🝷 🖞 Individual 🛞	_
2519380170 Identification Number 1901215864081	ľ	Taypayer Name		Contact Person Details	
My Profile		T AUTOMATION Registration Number		AUTOMATION Contact Details	
SARS Correspondence		1901215864081		Cell: 0828677146	
Returns Issued				Email: automation@nowhere.com	
Returns History		Tax Types Details			
Non-Core Taxes		Tax Type Description	Reference Number	Status	
Returns Search		Individual Income Tax (ITR12)	2519380170	Successfully Activated	-
Payments		IT Admin Penalty	2519380170	Successfully Activated	



iii) Selects User in the top-level menu.

	SARS @Fung	Home User Organ	nisation: Returns Customs Duties & Levies Servic	ces Tax Status Contact Log Out
Tax Reference Number 2519380170	Portfolio SQM_Auto_Company	Taxpayer T AUTOMATION	- : Organisation	
Identification Number 1901215864081	Taypayer Name		Contact Person Qetails	
My Profile	T AUTOMATION Registration Number		AUTOMATION Contact Details	
SARS Correspondence	1901215864081		Cell: 0828677146	
Returns Issued			Email: automation@nowhere.com	
Returns History				
Returns Search	Tax Types Details			
Levies and Duties	Tax Type Description	Reference Number	Status	
Third Party Data				
Non-Core Taxes	No Return Type Found	N/A		

- 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.

Tester	SARS @FLNG			Home User Or	iganisations Returns Customs Duties & L	evies Services Tax Status Contact
AUTOMATION	Portfolio SQM_Auto_Company	~	Tection AUTOMATION T	- E Organisation	0	
Tax Reference Number 1528375189					•	
dentification Number 101019132187						
My Profile						🕞 🚯 🚳
a	Taxpayers					
ared Access		Name	Recistration	a ID number	Tex Reference Number	Q
Configure Shared Access						
View Shared Access	Name of Taxpayer	Company/ ID Number	Reference Number	Last Return Filled	Last Accessed	Actions
Request Shared Access	TAUTOMATION	1101019132187	1528875189			View Texpeyer
ecial Links	ACME Automation-013086	2019/959826/07	9051018254			View Taxpayer
	First Previous 0 Ne	st Last				
	Users					
	Name of User	Type of User 🌗	Invited / Approved By	Date of Invite	Last Logged In	Last Return Field
	Tereza Job	Normal User	Peter Sulliver	2010-02-03 10:15	2010-02-16 08:10	2010-08-06 15:02

- 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



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

	SARS On M	Home	Returns	Services	Tax Status	Contact	Log Out
Tax Reference Number 2524368178	Totals Tappy SQMAuto331880889995 - TAUTOMATION TAUTOMATION Individual						
Identification Number 6501219500122	Configure Shared Access						
My Protile	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.		_				
User	Error	-					-
SARS Registered Details	Entities Linked To The Register Reg						
Customs Registration	Registered Name Registration N.	Referer	се Туре	Stat	us Act	ion	_
Shared Access							
Configure Shared Access							
View Shared Access							
Request Shared Access							
Special Links							

- 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.

	Portfolio SQM Auto Company	AUTOMATION		- E Organisatio			
_					una.		
	Configure Shared Access						
	This is the a process where a Renistered Renre	centative can grant access	to a 3rd party on a com	Daby			
	The Registered Representative can grant acces	s to a 3rd party only again	st companies that are li	nked to the RR.			
	Entities Linked To The Register Repres	entative					
	Registered Name	Registration Number	Income Tax Number	Reference Number	Reference Type	Status	Action
	ACME Automation-013086	2008/151143/23	9260012605				Configure
	MAKAMA, NS	7310185311087	1679719193	00577609	CUSTOMS		Configure
	MANTSHIBI CONSTRUCTION AND PROJECTS CC	2003/042680/23	9354378151	21162728	CUSTOMS		Configure
	VP ELECTRICAL CONTRACTORS CC	1994/012155/23	9634625843			Not activated for relevant tax product	Configure



d) The registered representative:

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

•				Home L	User O	rganisations	Returns	Duties & Levies	Services	Tax Status	Contact	Log Ou
umber	Portfolio SQM_Auto_Company	AUTOMATION T		- E Organisation	H							_
mber	Configure Shared Access											
	This is the a process where a Registered Represe The Registered Representative can grant access	ntative can grant access to a 3rd party only again:	to a 3rd party on a comp st companies that are lin	oany. ked to the RR.								
							$\overline{\ }$					-
	Entities Linked To The Register Represe	ntative										
Access	Registered Name	Registration Number	Income Tax Number	Reference Number	Refere	nce Type	Status			Action		
	ACME Automation-013086	2008/151143/23	9260012605								Configure	
	MAKAMA, NS	7310185311087	1679719193	00577609	CUST	DMS					Configure	
	MANTSHIBI CONSTRUCTION AND PROJECTS CC	2003/042680/23	9354378151	21162728	CUST	OMS					Configure	
	VP ELECTRICAL CONTRACTORS CC	1994/012155/23	9634625843				Not act	vated for relevant	tax product			
o.msecnd.net										5	ASK A QUES	TION?
2	🗎 🙆 📦									6 12 1	ENG	12:1

- iii) Must on the Configure Shared Access page:
 - A) 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
 - II) Trader Representative RMM: this role enables the eFiler to only Manage a Customs and Excise Client RLA relationship (see SC-CF-50);
 - B) Capture the eFiler's (trader representative's):
 - I) South African ID or passport number; and
 - II) Surname; and
 - C) Indicate the date when the request for shared access must expire by either:
 - I) Ticking the Indefinite tick box; or
 - II) Clicking on the Specify Date icon and selecting the expiry date.

Tester AUTOMATION	AutoCompany AUTOMATION T <u>E</u> Organisation
leference Number 875189	Configure Shared Access
ification Number 019132187	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.
Piolite	Individual Details
	Select 3rd Party Role *
I Access	Trader Representative - RLA
igure Shared Access	Inader representative - know
Shared Access	Identification Type *
est Shared Access	Surnamo *
Links	Pertolia Name * ACME Automation-013066 (Shared Access)
	NOTC: The partfolio name filed in will be shown to the user. This name will default to their partfolio name upon acceptance of the invitation.
	Access Duration
	To Date
	Hock and the second sec



- 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.

	AutoCompany AUTOMATION T Corpanisation
Tax Reference Number 1528375189	Configure Shared Access
Identification Number 1101019132187	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.
My Profile	Individual Details
User	Select 3rd Party Role *
Shared Access	Trader Representative - RLA
Configure Shared Access	I mater respected name – knim
View Shared Access	Identification Type *
Request Shared Access	Suname *
Special Links	Perfolu Name *
	ACME Automation-013066 (Shared Access)
	NOIL: The parties in runner hits if will be shown to the user. The name will default to their possible ranner user association of the invitation.
	Access Duration
	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
 - 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).

	Configure Shared Access
Tax Reference Number 1528375189 Identification Number	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.
1101019132187 My Profile	Individual Details
	Select 3rd Party Role *
User	Trader Representative – RLA Trader Representative – RMM
Shared Access	tentrator type " South African D Message
Configure Shared Access	D Number*
View Shared Access	7102265010000 The person being invited is not an effler
Request Shared Access	Burnarna '
Special Links	Portia luns -
	ACIME Automation-013085 (Shared Access)
	NOTE: The portfalle name filed 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
	Book Invite

- 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



- 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
Tax Reference Number 1528375189 Identification Number	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.
1101019132187 My Profile	Individual Details
	Select 3rd Party Role *
User	🕐 Trader Representativo - RLA
Shared Access	Isentrator Type * South African ID Message
Configure Shared Access	ID Number*
View Shared Access	6704175220061 The sole user already exists on this Portfolio
Request Shared Access	Sumana *
Special Links	Porteino Name *
	ACIME Automation-013086 (Shared Access)
	NOTE: The portfolio news filled in still be shown to the user. This name will default to their portfolio name upon accostance of the invitation.
	Access Duration
	To Date
	Back Invite

- 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.

	Details of the Requestor
New 0	Fitt Name
less	New Test
Tax Reference Number	Sumane
4401015628087	1D Number
My Profile	4401015628067
	Emp fixe" Company/CC/Crganisation ~
User	Company Details
SARS Registered Details	Eng
Customs Registration	Registered Name * Lintxi ACNE Automation 013006
Shared Access	Regaritator Number* The entry is not activated for the relevant tax product required to link the Taxler Regressment to the tax of the relevant tax product required to link the Tax of the relevant tax product required to link the tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product required to link tax of the relevant tax product tax of the relevant
Configure Shared Access	2019/95902007 Tax Reference Namber
View Shared Access	96010/9264
Request Shared Access	Customs Reference Number
Special Links	
	Access Duration
	📓 Indefnis
	To Date
	Cannot Budant



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

New Test	Details of the Requestor	
New O Test	Fist Name	
	New Test	
Tax Reference Number	Surname	
4401015628087	ID Number	
My Profile	4401015628087	
	Ently Type * Company/CC/Organisation	<u> </u>
User	Company Details	
SARS Registered Details		
Customs Registration	Registered Name *	Thank You
Customs Negistration	ACME Automation 013086	
Shared Access	Registration Number *	This invite was submitted an SMS will be sent
Configure Shared Access	2019/959626/07	
	Tax Reference Number	
View Shared Access	9601018264	
Request Shared Access	Customs Reference Number	
Special Links		
	Access Duration	
	🛃 Indefinite	
	To Date	n
	Cancel	Submi

- g) The invitee [eFiler (trader representative)]:
 - Logs in to eFiling; i)
 - Clicks on My Profile; and ii)
 - Clicks on Portfolio Management. iii)

Tester	SARS @FLNG			Home	Returns	Services	Tex Status	Contect	Log Out
Tax Reference Number	Pertole SQMAuto_QA_9426727642006699602 T AUTOMATIC	Tropayar TAUTOMATION	🛀 i Individual 🛞						
0707000263 Identification Number									
My Profile	Taxpayer Name		Contact Details 🚯						
	T AUTOMATION		Cell: 0825089811						
Profile and Preference Setup	Registration Number		Email: shareaccess@requested.gov.za						
Portfolio Management	801017530187								
Special Links	Tax Types Details								
	Tax type Description	Reference Number	Status						
	$\langle \rangle$								
	No Return Type Found	N/A							
	Edit Contact Details		Manage Tax Types						



h) The system:

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.

ortfolio Management						
						Add Portfolio
Linked Portfolio(s)						
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default		
SQMAuto_QA_94267276420866960	- T AUTOMATION 1	1	Individual		1	Go to Portfolio
AutoCompany	5	2	Organisation	Default	I	Go to Portfolio
liser invitation(s) you	r invitation will expire automatically	if not accented within 5 working	udaur			
oser invitation(s) roo	i minauon win expire automatically	in not accepted within 5 working	Request Date			Accept
Portfolio Name				01.460		
Portfolio Name	d Access)		2022 09 30107:39	21/103		Accept
Portfolio Name ACME Automation 555190 (Share	d Arcess)		2022 09 30107:39	< :7003		Accept
Portfolio Name ACM(Automation 355190 (Share Unlinked Portfolio(s)	d Access)		2022 09 30(07:39	< (783)		Accept

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

South African Revenue Service	Cone Time Pin DIP has been sent to the following orthogone number B224411 Pin expires in 000255	
25 YEARS	1.5.1.1.1.0 Interfeatures Press anterthe last 6 lags on your OTD. Interfeatures Int	



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

▼SARS @RUNG							Contact	Log Out
Portfolio Mana	gement							
							Add Portfolio	
Linked Portf	olio(s)							
Portfolio Name	Tax I	User Count Taxpa	ayer Count	Portfolio Type	Default			
SQMAuto_QA_94267	2764208669602 - T AUTOMATION 1	1		Individual		:	Ge to Portfolio	
ACME Automation-5	55190 (Shared Access) 5	2		Message		: (Ge to Portfolio	
AutoCompany	3	2	Portfolio ACME Automation	n 555190 (Shared Access) linked.	Default		Go to Partfolio	
Unlinked Po	rtfolio(s)		K					
Previous Login	Name			Portfolio Name	<		Link	
					$\overline{\}$			
				\sim	`			

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



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):

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

	Î			Home Returns Services Tax Status Contact Log Out
Tax Reference Number 2519380170	-	SQMAuto687453886785 - T AUTOMATION SQM_Auto_Company	Taxpayer T AUTOMATION	- Individual
Identification Number 1901215864081	Ľ	Taypayer Name		Contact Person Details
My Profile		T AUTOMATION		AUTOMATION
My Profile		Registration Number		Contact Details
		1901215864081		Cell: 0828677146
SARS Correspondence				Email: automatico/@neusbare.com
Returns Issued				CHRIE BAUSTRAUSTRAUSTRAUMITERSCOTT
Returns History		Tax Types Details		
Non-Core Taxes		Tax Type Description	Reference Number	Status
Returns Search		Individual Income Tax (ITR12)	2519380170	Successfully Activated
Payments		IT A dasle Density	2510200170	Successfully Activated
		11 Admin Penaity	2519580170	

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

				Home User Organisation	s Returns Custorns Dut	ties & Levies – Services	Tax Status Contact	Log Out
Number	Portolio AutoCompany	+ AUTOM	ATION T	• I Organisation				
łumber	Configure Shared Acces	s			\backslash			
	This is the a process where a The Registered Representation	Registered Representative can gran ve can grant access to a 3rd party on	t access to a 3rd party on a cor ly against companies that are	npany. inked to the RR.				
					`			-
	Entities Linked to The H	legister Representative						
5	Registered Name	Registration Number	Income Tax Number	Reference Number	Reference Type	Status	Action	
	ACME Automation-013086	2019/050826/07	9061018254				Configure	
ĸ	×							

- 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:

Mr JOHANNES	E YSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
	Pertfolio Tax User Steenkamp7707 - Mr JMA STEENKAMP Organisation
Tax Reference Number 1855041644 Identification Number 601214518088 My Profile	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.
User Invite User	Select Third Party Role Image: Select Third Party Role Image: Trader Representative - RLA Image: Trader Representative - RMM
Change Detail	Details of the Requester First Name
Delete User	Joanne Surname
My Administration Unlock Account / Reset	Busarie ID Number
Password Shared Access	7102195810254
Configure Shared Access	Entity Type
View Shared Access Access Permissions	Company/CC/Organisation
Request Shared Access	Individual
Special Links	

- 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.

Mr JOHANNES MARTHINUS ANDRIES	E YSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
STEENKAMP Tax Reference Number	Portfolio Tax User Steenkamp7707 - Mr JMA STEENKAMP Organisation
1855041644 Identification Number 601214518088	Request Shared Access As a Trader / Taxpayer Representative requesting shared access to another entity, permissions will have to be granted by the
My Profile	Registered Representative of the specific entity.
User	Details of the Requester
Invite User	First Name
Change Detail	Joanne
Change Website Profile	suname Busarie
Delete User	Tax Reference Number
My Administration	8056584235
Unlock Account / Reset Password	Roles Trader Representative RLA
Shared Access	Company Details
Configure Shared Access	Registration Number 2010/584625/56
View Shared Access	Registered Name
Access Permissions	Maiden Landing
Request Shared Access	Tax Reference Number 0856842012
Special Links	Access Duration
	Indefinitely
	Carroel



- 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
 - ii) Clicks on the Submit button.

	E YSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
Tax Reference Number	Portfolio Tax User Steenkamp7707 - Mr JMA STEENKAMP Organisation
1855041644 Identification Number	Request Shared Access
My Profile	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.
User	Details of the Requester
Invite User	First Name
Change Detail	Joanne
Change Website Profile	Surname Busarie
Delete User	Tax Reference Number
My Administration	8056584235
Unlock Account / Reset Password	Roles Trader Representative RLA
Shared Access	Company Details
Configure Shared Access	Registration Number 2010/SR4625/56
View Shared Access	Registered Name
Access Permissions	Maiden Landing
Request Shared Access	Tax Reference Number 0856842012
Special Links	Access Durinon
	Indefinitely
	Cancel

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.

	12 Number
Tester	9001013114080
	Entity Type "
	Company/CC/Organisation 👻
Tax Reference Number	
0719896243	Company Details
I den differenting a Marriage	
9001019114080	
	Registered Name *
My Profile	ACME Automation-471227
	Redistration Number *
	Message
	2019/417058/07
User	Tax Reference Number
	8458355188 Your shared access request has been successfully submitted, a
Shared Arrees	notification will be sent to the Registered Representative to action.
5/10/00/20	Customs Reference Number
Configure Charad Assass	25014270
Conligure shared Access	
No. 21 . 14	
View Shared Access	Access Duration
Request Shared Access	
Special Links	
	To Date
	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:
 - i) SC-CF-42 for the registration and licensing of Customs and Excise purposes; and
 - ii) 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.
- I) The system also checks whether the details of the entity's registered representative is on the SARS main data base:
 - 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

			Home Returns Services Tax Status Con	lact Log
Tax Reference Number 2519380170	SQMAuto687453886785 - T AUTOMATION	Taxpayer T AUTOMATION	- Individual	
Identification Number 1901215864081	Taypayer Name		Contact Person Details 0	
My Profile	T AUTOMATION		AUTOMATION	
	Registration Number		Contact Details	
	1901215864081		Cell: 0828677146	
IRS Correspondence			Email: automation@nowhere.com	
turns Issued				
turns History	Tax Types Details			
on-Core Taxes	Tax Type Description	Reference Number	Status	
turns Search	Individual Income Tax (ITR12)	2519380170	Successfully Activated	-
nyments	IT Admin Penalty	2519380170	Successfully Activated	

iii) Selects User in the top-level menu.

		Home User Organ	isation: Returns Customs Duties & Levies Services	a Tax Status Contact Log Out
Tax Reference Number 2519380170	Portfolo SQM_Auto_Company ~	Taxpayer T AUTOMATION	• : Organisation	
Identification Number 1901215864081 My Profile	Taypayer Name T AUTOMATION		Contact Person Details	
SARS Correspondence	Registration Number 1901215864081		Contact Details Cell: 0828677146	
Returns Issued Returns History			Email: automation@nowhere.com	
Returns Search Levies and Duties	Tax Types Details Tax Type Description	Reference Number	Status	
Third Party Data Non-Core Taxes	No Return Type Found	N/A		



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

Parties Parties AutoCompany Invited AutoCompany Invited AutoCompany Users Invited / Approved By Date of Invite Last Logged In Last Return Field Tereza Job Normal User Peter Sulliver 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				Home User Organisati	iens Returns Customs Dutles & Levies Se	arvices Tax Status Contact
Variable Name of User Type of User ① Invited / Approved By Date of Invite Last Logged In Last Return Field Tereza Job Normai User Peter Sulliver 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	Portolio AutoCompany	·	Tax User AUTOMATION T	- 1 Organisation		
Name of User Type of User Invited / Approved By Date of Invite Last Logged In Last Return Field Tereza Job Normal User Peter Sulliver 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	Users					
Tereza Job Normal User Peter Sulliver 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	Name of User	Type of User 🌒	Invited / Approved By	Date of Invite	Last Logged In	Last Return Field
Helena C Louw Shared Access Tandile Masavana 2010-10-18 12:35 2010-10-26 10:01 2011-07-05 08:43	Tereza Job	Normal User	Peter Sulliver	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.

Mr JOHANNES MARTHINUS ANDRIES	📄 🎔 SARS		Home User	Organisations	Returns Customs	Duties & Levies	Services Tax Status	Contact	Log Out
STEENKAMP	Portfolio Steenkamp7707 - Mr JMA S	TEENKAMP	Tax User Mr JMA STEENKAMP	Orga	anisation				
1855041644									
Identification Number 601214518088	View Shared Ac	cess Reques	t						
My Profile	Regsitered Name	Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action	
User	Interfront	1995/054682/02	Joanne Forester	8206125420135	5 01/03/2019		Pending	View	
Invite User	Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	5 10/05/2021	05/03/2019	Approved	View	
Change Detail	Simple Minds SA	2001/054628/10	lain Langman	9111315874698	3 12/02/2019		Rejected	View	
Change Website Profile									
Delete User									
My Administration									
Unlock Account / Reset Password									
Shared Access						\mathbf{i}			
Configure Shared Access									
View Shared Access							\backslash		
Request Shared Access									
Special Links							``		



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

Mr JOHANNES MARTHINUS ANDRIES	▼SARS	Home Use	er Organisations F	Returns Customs	Duties & Levies	Services Tax Statu P ATTONREY	s Contact	Log
STEENKAMP	Portfolio Steenkamp7707 - Mr JMA STEENKAMP	Tax User Mr JMA STEENKAMP	Organ	nisation				
1855041644								
Identification Number 601214518088	View Shared Access Reques	st						
My Profile	hen onaled / locoo riequee							
	Regsitered Name Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action	
User	Interfront 1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View)
Invite User	Major Brick Builders 2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Approved	View	
Change Detail	Simple Minds SA 2001/054628/10	lain Langman	9111315874698	12/02/2019		Rejected	View	
Change Website Profile								
Delete User								
My Administration								
Unlock Account / Reset Password								
Shared Access								
Configure Shared Access								
View Shared Access								
Request Shared Access								
Special Links								

- 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



- 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.

	E YSARS @relined Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
	Porticio Tax User
Tax Reference Number 0849599238	
Identification Number 0001018126084	Shared Access Request Detail
My Profile	
	Status:
User	Pending
Shared Accord	Details Of The Entity
Shareu Alless	Requested Role(s)
Configure Shared Access	Trader Representative - RLA
View Shared Access	Registration Number
Request Shared Access	2019/911/USRU/ Registered Name
Special Links	ACME Automation-471227
	Tax Reference Number
	25014270
	Details Of The Representative
	Traders Hapresentive Sumane
	AUTOMATION
	Tradens Representative ID
	9001019114C80
	Access Duration
	🜌 Indefinite
	Expiry Date
	Power Of Attorney
	Shared Access Request
	I, TESTER AUTOMATION, with Identity Number (ID): 0001018126084, 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:
 - 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.
- 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 Cancelation

- 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



Clicks on the View button.

Mr JOHANNES MARTHINUS ANDRIES	e TSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact	og O
STEENKAMP	Portfolio Tax User Steenkamp7707 - Mr JMA STEENKAMP Mr JMA STEENKAMP Organisation	
1855041644		_
Identification Number 601214518088		
My Profile	View Shared Access Request	
	Registered Name Registration Number Requestor Name ID Number Date Requested Date Actioned Status Action	
User	Interfront 1995/054682/02 Joanne Forester 8206125420135 01/03/2019 Pending	
Invite User	Major Brick Builders 2005/875462/12 Florence Mhalane 8302105400125 10/05/2021 05/03/2019 Revoked View	
Change Detail	Simple Minds SA 2001/054628/10 Iain Langman 9111315874698 12/02/2019 Rejected View	
Change Website Profile		
Delete User		
My Administration		
Unlock Account / Reset Password		
Shared Access		
Configure Shared Access		
View Shared Access		
Request Shared Access		
Special Links		

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

Mr JOHANNES MARTHINUS ANDRIES	E VSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
STEENKAMP Tax Reference Number	Portfolio Tax Uber Steenkamp7707 - Mr JMA STEENKAMP Organisation
1855041644 Identification Number 601214518088 My Profile	View Shared Access Request
User	Company Details
Invite User	Entity Type Company
Change Detail	Registration Number
Change Website Profile	2010/584625/56
Delete User	Registered Name
My Administration	Maiden Landing
Unlock Account / Reset Password	9856842012
Shared Access	Details of the Requester
Create Shared Access	First Name Joanne
Configure Shared Access	Sumame
Request Shared Access	Busarie
Special Links	Tax Reference Number 7102195810254
	Roles Trader Representative RLA
	Indefinitely the 30/05/2022
	Back



- 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.

MARTHINUS ANDRIES		
STEENKAMP	Portfolio Tax User Steenkamp 7707 - Mr. JMA STFENKAMP I Organization	
Tax Reference Number 1855041644	oreginality//// "mi Jmik STEENNAMI" I Urganisation	
Identification Number		
601214518088	View Shared Access Request	
My Profile	Status: PENDING	
licer	Company Details	
	Entity Type	
Invite User	Company	
Change Detail	Registration Number	
Change Website Profile	2010/584625/56	
Delete User	Registered Name Cancel	
My Administration	Maiden Landing	
Unlock Account / Reset	Tax Reference Number Do you wish to cancel your request?	
Password	9856842012 NO YES	
Shared Access	Details of the Requester	
Create Shared Access	Joanne	
Configure Shared Access	Surname	
Permet Shared Access	Busarie	
Request Shared Access	Tax Reference Number	
Special Links	7102195810254	
	Roles	
	Trader Representative RLA	
	Indefinitely	
	Back	
	_	
Mr JOHANNES MARTHINUS ANDRIES	E VSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP	Fortfolo Tax User Trax User Mr. JMA STEENKAMP	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644	Portfolo Tex User Mr JMA STEENKAMP I Organisation Returns Customs Duties & Levies Services Tax Status Contact Log	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601914510089	Forfolio Tax User Mr JMA STEENKAMP I Organisation	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile	Portfolio Tax User If y JMA STEENKAMP I Organisation Torganisation Torganisation Torganisation Log View Shared Access Request View Shared Access Request View Shared Access Request View Shared Access Request	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile	Portfolio Tax User If y runs and the run of the r	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP TASSO41644 Identification Number 601214518088 My Profile	Portfolio Tax User If ganisations Returns Oustoms Duties & Levies Services Tax Status Contact Log Portfolio Tax User If ganisation If ganis ganisation If ganisation<	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile User	Portfolo Tax User I Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Portfolo Tax User I Organisation IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile User Invite User	€ ✓ SARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Portions Tax User I Organisation I Organisation IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile User Invite User Change Detail	With the second seco	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas Reference Number 1855041644 Identification Number 601214518088 My Profile User Invite User Change Detail Change Website Profile	Pertoice Tex User I Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Vertoice Steenkamp7707 - Mr JMA STEENKAMP I Organisation Imr JMA STEENKAMP Imr JMA STEENKAMP <t< th=""><th>g Out</th></t<>	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas Reference Number 1855041644 Identification Number 601214518088 My Profile User User Invite User Change Detail Change Website Profile Delete User	Perfolic Tac User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Verticio Steenkamp7707- Mr JMA STEENKAMP I Organisation Mr JMA STEENKAMP I Organisation View Cancelled Date Accesss Request View Shared Accesss Request Mr JMA STEENKAMP ID Number Cancelled Date Actioned Status Action Interfront 1995/054682/02 Joanne Forester 8206125420135 01/03/2019 Cancelled View Major Brick Builders 2005/875462/12 Florence Mhalane 62105400125 10/05/2021 05/03/2019 Revoked View Simple Minds SA 2001/054628/10 Iain Langman 911131 874698 12/02/2019 Rejected View	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas Reference Number 1855041644 Identification Number 601214518088 My Profile User User Invite User Change Detail Change Website Profile Delete User My Administration	Perform Year Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Perform Tex User Mr JMA STEENKAMP I Organisation I Organisation IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	g Out
Mr JOHANNES MARTINIUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile User Invite User Change Detail Change Detail Change Website Profile Delete User My Administration Unlock Account / Reset Password	VSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Portices Tax User I Organisation I Organisation IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tax Reference Number 1855041644 Identification Number 601214518088 My Profile User Invite User Change Detail Change Detail Change Website Profile Defete User My Administration Unlock Account / Reset Password	YSARS Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Perticie Tax User I Organisation I Organisation I Organisation IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas 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	Pertole Tex User Mr. User Organisations Returns Outsoms Duties & Levies Stervices Tax Status Contact Log Pertole Tex User Mr. JMA STEENKAMP I Organisation Difference View Shared Access Request Mr. JMA STEENKAMP I Organisation 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 812/105400125 10/05/2021 05/03/2019 Revoked View Simple Minds SA 2001/054628/10 Iain Langman 911131/1874698 12/02/2019 Rejected View	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas 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	Yestel	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP TasS641644 Identification Number 1855041644 Identification Number 601214518088 My Profile User User Invite User Change Detail Change Website Profile Delete User My Administration Unlock Account / Reset Password Shared Access Configure Shared Access	Vertice Tax User Tax User Mr JMA STEENKAMP I Organisation Services Tax Status Control Contro Control Control	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas Reference Number 1855041644 Identification Number 601214518088 My Profile User User User Change Detail Change Detail Change Website Profile Delete User My Administration Unlock Account / Reset Password Shared Access Configure Shared Access	Verticie Tar User Organisation Return Custors Dutles & Levie Services Tar Status Control Lor Verticie Tar User Mr JMA STEENKAMP Is User Isogenisation Isogenisogenisation	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas Reference Number 1855031644 Identification Number 601214518088 My Profile User User Invite User Change Detail Change Detail Change Website Profile Delete User My Administration Unlock Account / Reset Password Shared Access Configure Shared Access View Shared Access	Vertice Yes Use Organisations Returns Cutore Service Service Service Cutore Cutore Vertice Service Service Service Cutore	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP Tas Reference Number 1855041644 Identification Number 601214518088 My Profile User 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	Vertices Year (Vertices) Year (Year	g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP TassGol1644 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		g Out
Mr JOHANNES MARTHINUS ANDRIES STEENKAMP TasS601644 Identification Number 601214518088 My Profile User 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		g Out



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 appliable 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.

South African Revenue Service	 Tax Type Transer / Shared Access Request Are you a South African citizen? 	€ FILING
NEW LOOK New SARS	Ves Ves No Identification Number Tax Reference Number Submit	

- 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.

South African Revenue Service	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	
NEW LOOK New SARS	Send OTP	

- e) The registered representative:
 - i) Selects the preferred channel;
 - ii) Clicks on the Send OTP button;

		FILING
South African Revenue Service	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	
NEW LOOK New SARS	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.



- 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.

		FILING
South African Revenue Service	Tax Type Transer / Shared Access Request Request successfully authorised.	
	Return to SARS Website	
NEW LOOK New SARS		



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

	(≡) ▼SARS @PRUNG Home Returns Services Tax SI	tatus Contact Log
Tax Reference Number 2519380170	SQMAuto687453886785 - T AUTOMATION TAUTOMATION Individual	
Identification Number 1901215864081	Taypayer Name Contact Person Details 🛈	
My Profile	TAUTOMATION AUTOMATION	
	Registration Number Contact Details	
64.00 0	1901215864081 Cell: 0828677146	
SARS Correspondence	Email: automation@nowhere.com	
Returns Issued	Control development of the second	
Returns History	Tax Types Details	
Non-Core Taxes	Tax Type Description Reference Number Status	
Returns Search	Individual Income Tax (ITR12) 2519380170 Successfully Activated	
Payments	IT Admin Penalty 2519380170 Successfully Activated	

iii) Selects User in the top-level menu.

		Home User Organ	isation: Returns Customs Duties & Levies	Services Tax Status Contact	Log Out
Tax Reference Number 2519380170	Portfolio SQM_Auto_Company ~	Taxpayer T AUTOMATION	• I Organisation		-
Identification Number 1901215864081	Taypayer Name		Contact Person Details 💿		_
	T AUTOMATION Registration Number		AUTOMATION Contact Details		_
SARS Correspondence	1901215864081		Cell: 0828677146		
Returns Issued			Email: automation@nowhere.com		
Returns History					
Returns Search	Tax Types Details				
Levies and Duties	Tax Type Description	Reference Number	Status		
Third Party Data					
Non-Core Taxes	No Return Type Found	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.

Tester	SARS OFFING			Home User Organisati	ens Returns Custerns Dutles & Levies	Services lax Status Contact
AUTOMATION	Portfolio AutoCompany	*	Tax User AUTOMATION T	- i Organisation	<u>8</u>	
Reference Number 1375189 tification Number 019132187	Configure Shared Acce	ss		_	-	
Profile	Users					
	Name of User	Type of User 🌗	Invited / Approved By	Date of Invite	Last Logged In	Last Return Field
d Access	Tereza Job	Normal User	Peter Sulliver	2010-02-03 10:15	2010-02-16 08:10	2010-08-06 15:02
igure Shøred Access	Helena C Louw	Shared Access	Tandile Masavana	2010-10-18 12:35	2010-10-26 10:01	2011-07-05 08:43
/ Shared Access						
uest Shared Access						
i Links						
			<			

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.

Mr JOHANNES MARTHINUS ANDRIES	📄 🎔 SARS		Home Use	r Organisations	Returns Customs	Duties & Levies	Services Tax Status	Contact	Log
STEENKAMP	Portfolio Steenkamp7707 - Mr JMA S	TEENKAMP	Tax User Mr JMA STEENKAMP	Orga	anisation				
1855041644									
Identification Number 601214518088	View Shared Ac	cess Reques	t						
My Profile	Regsitered Name	Registration Number	Users Name	Users ID Number	Date Requested	Date Actioned	Status	Action	
User	Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View	-
Invite User	Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Approved	View	1
Change Detail	Simple Minds SA	2001/054628/10	lain Langman	9111315874698	12/02/2019		Rejected	View	-
Change Website Profile					```	\backslash			
Delete User						\backslash			
My Administration									
Unlock Account / Reset Password						\	\backslash		
Shared Access							\backslash		
Configure Shared Access							\backslash		
View Shared Access							,		
Request Shared Access									
Special Links									

B) Displays the shared access details (ready only) and the registered representative of the entity views the shared access details and if:



- 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 MARTHINUS ANDRIES	▼SARS	-lome User Organisations	Returns Customs	Duties & Levies Services	Tax Status Contact	Log Out
STEENKAMP	Portfolio Tax User		(HIP)			
Tax Reference Number 1855041644	Steenkamp7707 - Mr JMA STEENKAMP Mr JMA S	TEENKAMP Org	anisation			
Identification Number 601214518088	Shared Access Request Details					
My Profile	Status: APPROVED					
	Details of the entity			_		
User	Registration Number					
Invite User	2005/875462/12					
	Registered Name	4				
Change Detail	Major Brick Bulders					
Change Website Profile	Tax Reference Number					
Delete User	905426875462					
My Administration	Details of the individual					
Unlock Account / Reset Password	Surname					,
Shared Access	Minaiane					
Configure Shared Access	ID Number 7506162549004					
View Shared Access	Roles					
Request Shared Access	Trader Representative RRA					
	Access Duration				/	
Special Links						
	Specify Date				¥	
	Back	Print Pow	er 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	Approved	
	Details Of The Entity	
Tax Reference Number 1528375189	Requested Role(s)	
Identification Number	Trader Representative – RMM Registration Number	
My Protie	2019/959826/07	
	Registered Name ACME Automation-013008	
User	Tax Reference Number	
Shared Access	9061018264	Please confirm if you want to provide alurad access from this user
Configure Shared Access	Details Of The Representative	
View Shared Access	Traders Representitive Sumame HARIPARSAD	Cancel
Request Shared Access	Traders Represent/live ID	
Special Links	7809180189097	
	-	\backslash
		\backslash
	Expiry Date	
	Back	Rovoko



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;

	E TSARS @ =U.V.O Home Liser Organisations Returns Customs Duties & Leves Services Tex Status Contact Log Ou
Tax Reference Number	Particio Iax User AutoCompany AUTOMATION T Cirganisation
Identification Number 1101019132187	Configure Shared Access
My Profile	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.
User	Message
Shared Access	Entities Linked To The Register Re Your shared access configuration has been successfully submitted, a
Configure Shared Access	Registered Name Registratic notification will be seat to the user.
View Shared Access	ACME Automators-013286 2019/3580 CK
Request Shared Access	
Special Links	

- 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.

	🖨 🏹 SARS		Home User	Organisations Retu	urns Customs D	uties & Levies Serv	ices Tax Status	Contact	Log Out
STEENKAMP	Portfolio	Та	x User						
Tax Reference Number 1855041644	Steenkamp7707 - Mr JMA ST	EENKAMP N	Ir JMA STEENKAMP	Organisa	ition				
Identification Number 601214518088									
My Profile	View Shared Acc	cess Request							
	Registered Name	Registration Number	Requestor Name	ID Number	Date Requested	Date Actioned	Status	Action	
User	Interfront	1995/054682/02	Joanne Forester	8206125420135	01/03/2019		Pending	View	
Invite User	Major Brick Builders	2005/875462/12	Florence Mhalane	8302105400125	10/05/2021	05/03/2019	Revoked	View	
Change Detail	Simple Minds SA 2	2001/054628/10	lain Langman	9111315874698	12/02/2019	1	Rejected	View	
Change Website Profile		1001/004020/10	turi curiginari	5111010074050	12,02,2015		nejeetee	VIEW	
Delete User									
My Administration									
Unlock Account / Reset Password									
Shared Access									
Configure Shared Access				,	/				
View Shared Access									
Request Shared Access									
Special Links									

6 DEFINITIONS, ACRONYMS AND ABBREVIATIONS

The definitions, acronyms and abbreviations can be accessed via the following link: <u>Glossary A-M | South</u> <u>African Revenue Service (sars.gov.za)</u>



7 DOCUMENT MANAGEMENT

Business Owner	Head: Accreditation and Licensing					
Author	Frans Williams					
Detail of Change	a) Changed the definitions, acronyms and abbreviations link; andb) 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 gualified 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).