

EXTERNAL GUIDE

GUIDE TO HELP-YOU-EFILE

REVISION HISTORY TABLE

Date	Version	Description
01-08-2020	10	Updated with filing season 2020/21 amendments

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1 PURPOSE

- The purpose of this guide is to assist taxpayers with the Help-You-eFile (HYEF) function on eFiling.
- This guide in its design, development, implementation and review phases is guided and underpinned by the SARS values, code of conduct and the applicable legislation. Should any aspect of this guide be in conflict with the applicable legislation the legislation will take precedence.

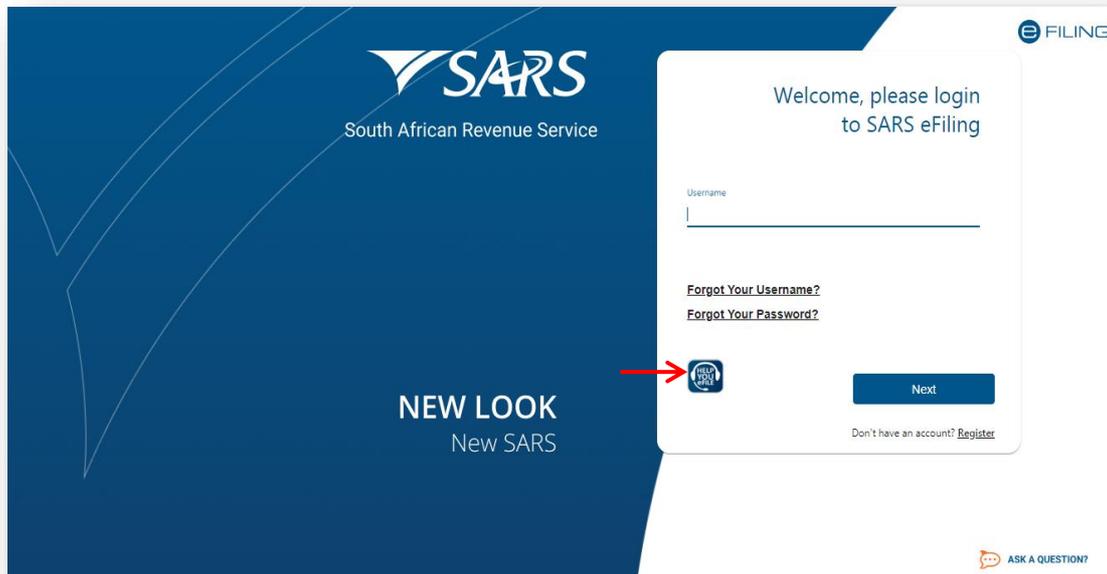
2 INTRODUCTION

- Help-You-eFile is a service on the SARS eFiling website that allows you, the taxpayer, to interact with a SARS agent while the agent shares the displayed view of your eFiling profile screen.
- This service allows the SARS agent to identify the problems you're experiencing and to help you resolve these.
- A Help-You-eFile session can only be initiated by you and is available for the following functions:
 - Individual income tax return
 - Statement of account
 - Notice of assessment (ITA34)
 - Tax calculator
 - Payments
 - Password reset
 - Change own password
 - Returns Issued
 - Returns History
 - Returns Search
 - Additional Payments
 - SARS Correspondence
 - Disputes
 - Voluntary Disclosure Search
 - User
 - Other Services
 - Additional Services
 - Registration
- Once you select the HYEF option on the website, you'll have to call the SARS Contact Centre on 0800 00 7277 and enter the unique session ID on the integrated voice response (IVR) for case enquiry (option 2), income tax enquiry (option 3) and the HYEF (option 5) or provide the unique session ID to the SARS agent when you have been transferred to an agent to join the Help-You-eFile session.
- The Help-You-eFile system works by keeping the SARS agent's internet screen in sync with yours.
- The SARS agent can only view your screen and point to or highlight text fields and information on the active eFiling screen on your computer.

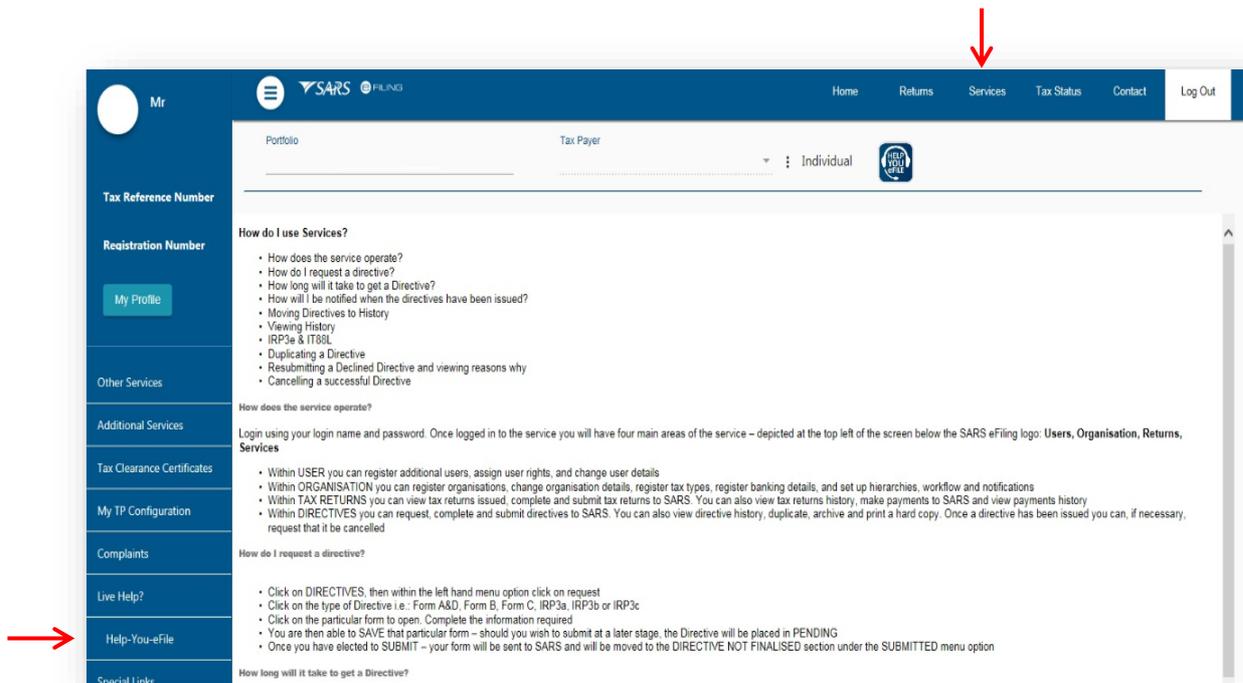
Note that the SARS agent will not be able to control or update your eFiling screen. Furthermore he/she will not be able to view sensitive information pertaining to your profile (this includes information such as login name; password; banking details and payment reference numbers). Additionally for security purposes, the SARS agent will not be able to view or access your desktop and files.

3 HOW TO USE HELP- YOU- EFILE

- You can start a Help-You-eFile session either from the SARS eFiling login page or after you've successfully logged on to the SARS eFiling website.
- Click on the <Help–You–eFile> icon, either on the login screen



- Or once you have logged into your eFiling profile. Click on the **Service** menu option displayed as the main menu and **Live Help** on the left menu.



- Once selected, you will be directed to a **Help-You-eFile** welcome screen. Note the following displayed on your screen:
 - A summary of the Help-You-eFile process
 - The SARS Help-You-eFile online standard terms and conditions
 - The toll free number for the SARS Contact Centre
 - A unique Help-You-eFile session ID
 - The status of the SARS Agent
 - An option to log out of the session (Help-You-eFile).



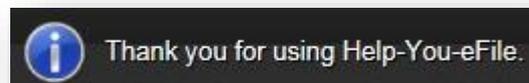
- Click on <Continue without Updating> This will populate the terms and conditions page.
- Once you agree with the terms and conditions, select the tick box to indicate that you have read the Help-You-eFile terms and conditions and then click on the <Accept> button to proceed.



- **Note:** If the <Back> button is selected, you will receive a message to ask if you are sure you want to log out of Help-You-eFile.



- If you select <No>, the welcome page will be displayed. If you select <Yes>, you will receive a thank you pop-up message and directed back to the previous screen.



- Once the Terms and Conditions have been accepted: Note the following option to engage with an agent:
 1. You can proceed by calling the SARS Contact Centre on the number 0800 00 7277 and select option 5 for **Help-You-eFile** (if you're not already on a call with a SARS agent), or
 2. Click the <Call Me> button
This will open the page displayed below for you to complete so that an agent calls you back. Complete all the fields on the <Call Me> page.

Welcome to Help-You-eFile



A SARS agent will gladly call you back.
Please complete the following to assist us in authenticating you and connecting you to an agent as soon as possible:

First Name : *

Last Name : *

ID Number : *
 Passport Number :

Tax Reference Number :

Contact Number: *

Confirm Contact Number: *

Required fields are marked with *

Estimated Time Until Agent Call: **30 seconds**

Please note that this estimate is based on the current average waiting times and can potentially increase if waiting times increase.

- If you complete invalid information on either of the ID Number, Tax Reference Number or Contact Number fields, a message will be displayed on the screen.
- The information entered into the <Confirm Contact Number> field should match the Contact Number field. A message will be displayed if it does not match.

Welcome to Help-You-eFile



A SARS agent will gladly call you back.
Please complete the following to assist us in authenticating you and connecting you to an agent as soon as possible:

First Name : *

Last Name : **Required field.**

ID Number : **Invalid ID Number.**
 Passport Number :

Tax Reference Number : **Invalid Tax Reference Number.**

Contact Number: **Invalid Telephone Number.**

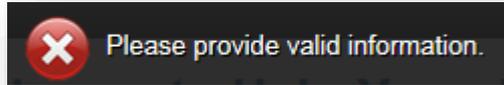
Confirm Contact Number: **Does not match the field above.**

Required fields are marked with *

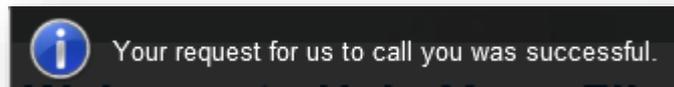
Estimated Time Until Agent Call: **30 seconds**

Please note that this estimate is based on the current average waiting times and can potentially increase if waiting times increase.

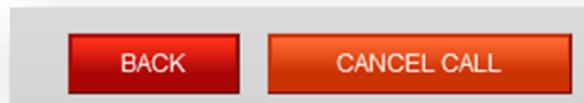
- If you submit invalid information, you will be prompted to provide valid information.



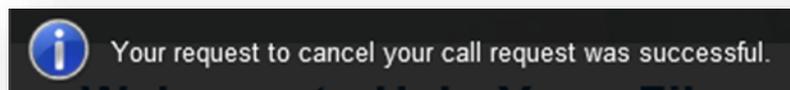
- If you select <Submit>, a pop-up message will be displayed to confirm that your request was successful.



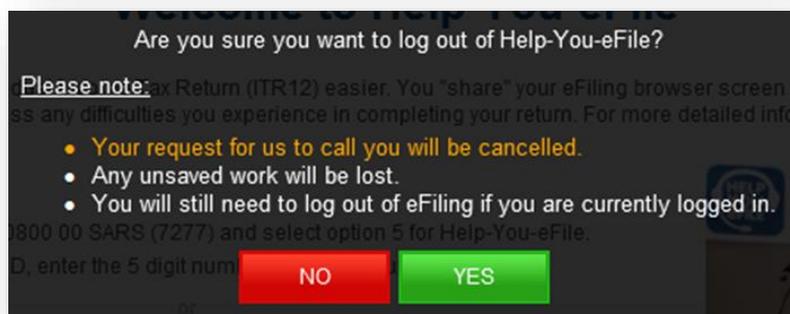
- After submitting your request you have the option to cancel the call by selecting the <Cancel Call> button.



- If you cancel the call, you will received a pop-up message



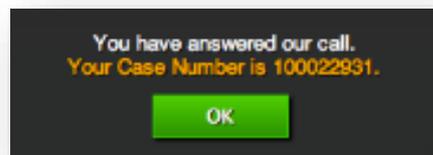
- If you log out of Help-You-eFile, while a request to call you have been submitted, the following message will be displayed, that indicate that your call will be cancelled.



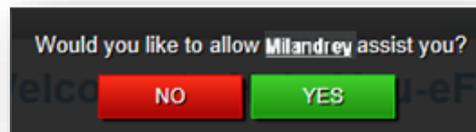
- If you select <No>, the call back will remain active and an agent will call you back. If you select <Yes>, the call back will be cancelled.
- Note that the status will update as indicated below.



- If the <Back> is selected, you will be directed back to the welcome screen.
- Once you have answered the call back from the agent, you will receive the following message that indicates your case number.



- If the SARS agent has not yet entered the unique session ID on the SARS system to connect; you will be notified that the system is waiting for the agent to connect.
- Provide the SARS agent with the unique session ID (The session ID will be on the toolbar highlighted in green. It will flash until the SARS agent is connected and also when the session is terminated).
- Help-You-eFile will also be automatically launched if a taxpayer selects option 5 on the IVR menu and successfully enters the Help-You-eFile session ID. The agent will be alerted that the Help-You-eFile session was launched automatically.
- When the SARS agent has entered the unique session ID on the SARS system, a pop-up message will be displayed with your SARS agent's name for you to confirm whether you would like the SARS agent to assist you.

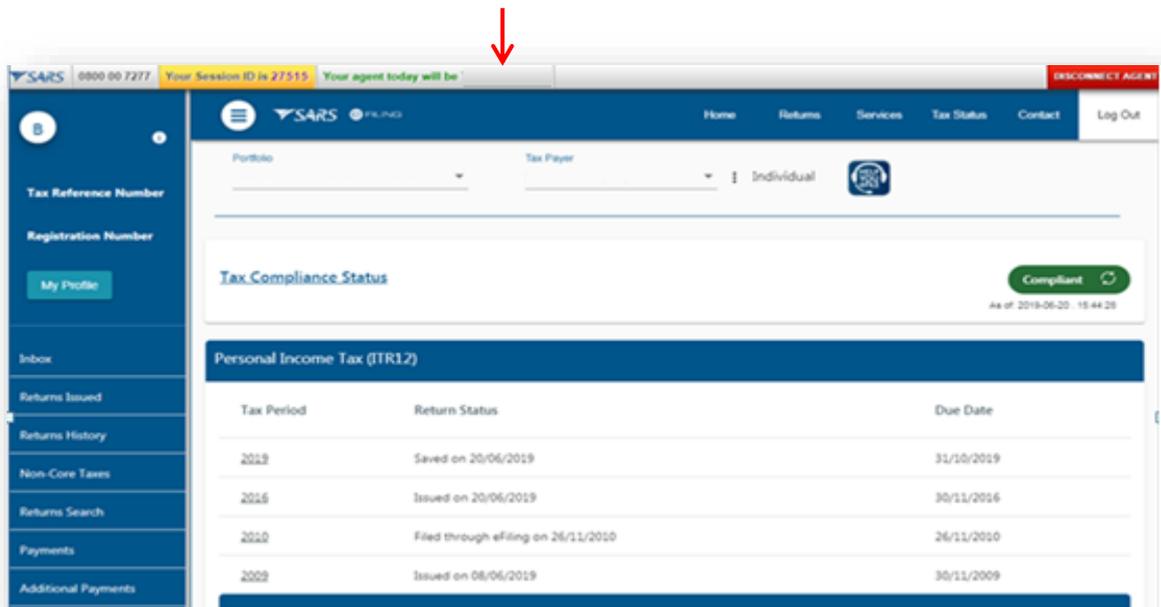


- If you select < NO>, the Help-You-eFile session will not continue but the call between you and your SARS agent will remain active.

- If you select <YES>, a pop-up message will be displayed to confirm that your SARS agent is connected.



- The name of your SARS agent will be displayed on the toolbar.



- Your SARS agent can view the actions performed by you on the eFiling site such as vertical and horizontal scrolling on a page, scrolling to new page, fields highlighted on a particular screen and information that is typed by you.
 - Sensitive information such as passwords, answers to security questions, bank details, etc. will be protected. Numeric fields (such as bank account numbers) will be displayed as zeroes to your SARS agent and alphanumeric fields (such as passwords) will be displayed as an asterisk (*) to your SARS agent.
 - If you require assistance with a form, your SARS agent will be able view what actions you perform within the Flex forms only (i.e. those forms that are opened using the adobe flash player option). The PDF forms are static and non-editable. Your SARS agent won't see what actions you perform within the PDF form and he/she also can't point to or highlight any fields on the PDF form.

INCOME TAX WORK PAGE ?

Taxpayer Name	eFiling Status
Tax Period	Issued
2019	
Tax Reference	
Return Type	
ITR12	

RETURN TYPE	STATUS	DATE	LAST UPDATED BY	VERSION	CALCULATION RESULTS
My Tax Return (ITR12)	Issued			1	Not Requested

Maintain Legal Entity Details

Refresh Data Request Historic Documents

- Once you have logged into your eFiling profile and one of the following instances occur:
 - Captured more than 3 fields on the form and then are inactive on eFiling for more than 2 minutes; or
 - Pressed the same button 3 times on a form; or
 - Pressed the calculate button 3 times on the form;
- An educational message will then be displayed providing more information on what Help-You-eFile is, with the following options available on the message:
 - **Don't show this again** – you will close the message and it will not be displayed in the future.
 - **Back to eFiling** – you will be routed back to eFiling and not to the Help-You-eFile functionality
 - **Launch Help-You-eFile** – the Help-You-eFile function will be launched.
 - **Continue with demo** – if you click this button, images will be displayed to you on how Help-You-eFile work and what is displayed to you and to the SARS agent.

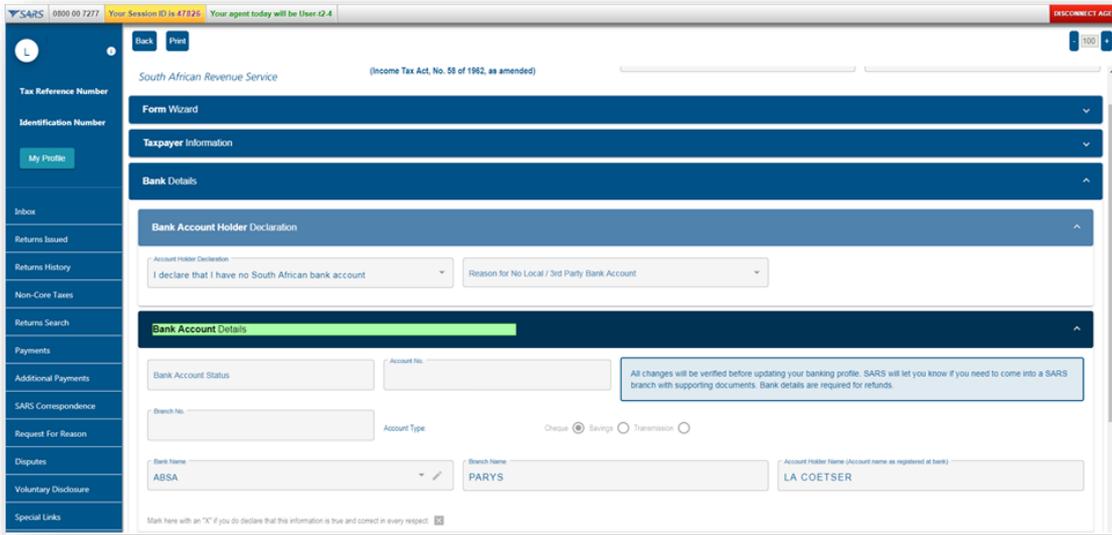
What is Help-You-eFile? x

Help-You-eFile allows you, the taxpayer, to ask a SARS agent to share your view of the eFiling screen on your personal computer.

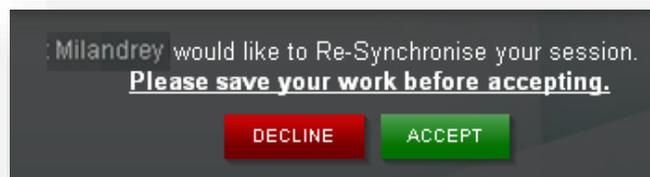
This improved service will enable a SARS agent to view the same screen as you, to assist in identifying the problems you're experiencing and to help you solve your problem.

- You can view text or fields that are selected by your SARS agent.
 - Text or fields selected by your SARS agent will be highlighted in purple on your screen.
 - Text or fields selected by you will be highlighted in green on your screen.

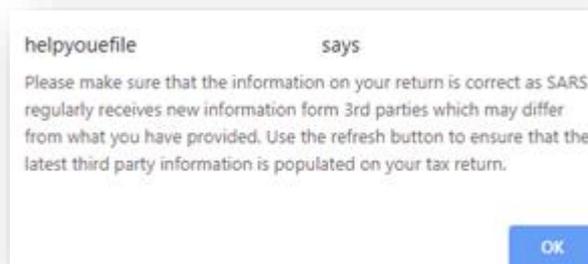
- Masked fields are highlighted in yellow and if you place the cursor over these fields you will be notified that the information displayed/entered on that field is hidden from your SARS agent.



- Your SARS agent may request a re-synchronisation should his/her screen become out of sync with your eFiling screen. In this instance, the following pop-up message will be displayed on your screen.
 - Select <Decline> if you don't wish to continue with the re-synchronisation
 - If you wish to continue with the re-synchronisation, save any work that you are busy with and then select <Accept>.

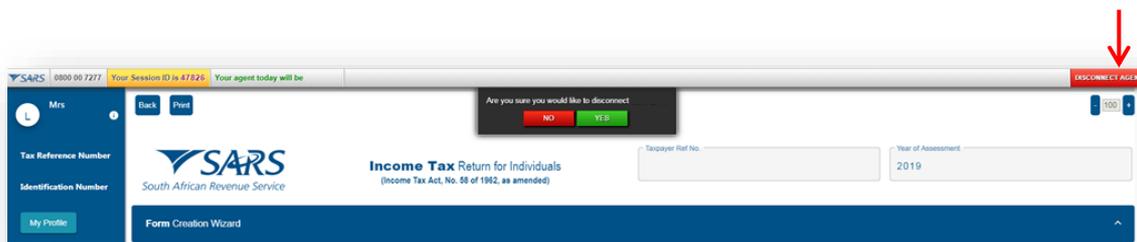


- The following pop-up messages may be displayed on your screen:

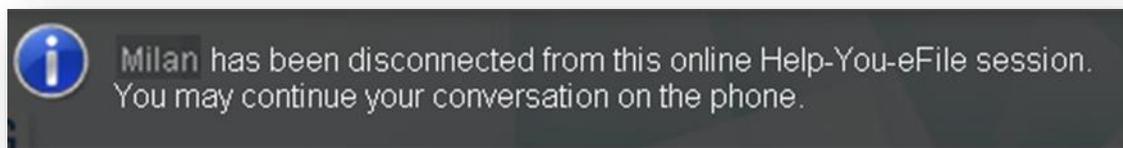


- Click on <OK> to indicate that you note the message.
- If the phone call between you and your SARS agent gets disconnected, the Help-You-eFile session will automatically end and you'll have to start the session again by clicking on the Help-You-eFile logo.
- When you no longer require assistance from your SARS agent, select the 'Disconnect Agent' button to end the Help-You-eFile session.

Note: Ending the session does not end the call.



- A pop-up message will be displayed to confirm that your SARS agent has disconnected.



4 SHARE YOUR EXPERIENCE WITH US

- SARS would really like to receive your feedback on your Help-You-eFile experience and how to improve our service. You have an option to complete an online survey which will be displayed on your screen automatically. This survey will only take one minute to complete.

1. How would you rate the Help-You-eFile process you have just experienced?
 Very Good Good Neither Good nor Bad Poor Very poor

2. How would you rate the help and guidance you received from your advisor?
 Very Good Good Neither Good nor Bad Poor Very Poor

3. How user friendly did you find the Help-You-eFile process?
 Very Good Good Neither Good nor Bad Poor Very Poor

4. Should the need arise would you use Help-You-eFile again?
 Yes No Maybe

5. Did your Help-You-eFile session resolve your query?
 Yes No Maybe

6. On a scale of 1-10, where 1 is very unlikely and 10 is very likely, how likely would you recommend Help-You-eFile to a friend?

7. We may like to follow up on your feedback to ask you further questions. Would you be willing to participate?
 Yes No

8. Any comments/suggestions on how we can improve Help-You-eFile?

5 CROSS REFERENCES

DOCUMENT TITLE	APPLICABILITY
Comprehensive Guide to the ITR12 Return for Individuals - External Guide	All
How to eFile your Personal Income Tax Return - External Guide	All
How to Register for eFiling and Manage Your User Profile - External Guide	All

DISCLAIMER

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.

For more information about the contents of this publication you may:

- Visit the SARS website at www.sars.gov.za
- Visit your nearest SARS branch
- Contact your registered tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 7277
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).