

EXTERNAL GUIDE

HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE

REVISION HISTORY TABLE

Date	Version	Description
06-12-2019	6	Added new functionality: User invitation to a portfolio; Chatbot, SARS correspondence
26-03-2020	7	Automatic income tax registration for new eFilers (individuals with valid SA ID number)
20-04-2020	8	Enhanced functionality: Tax Type Transfer.
08-05-2020	9	Added: Passwordless login; Two-factor authentication
04-12-2020	10	Capture Registration screen: 'Next' button replaced with 'Submit'; Profile and Preference Setup screen: last date and time that the profile was accessed

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1 PURPOSE

The purpose of this document is to assist clients to register for eFiling and manage their eFiling profiles.

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

The vision of SARS is to be an innovative revenue and customs agency that enhances economic growth and social development. This is in line with the legislative mandate of SARS which is to collect revenue and ensure compliance with tax laws. eFiling enables SARS to achieve its mandate by being a service channel for the collection and administration of all national taxes, duties and levies.

One of the issues that emerged from the SARS customer satisfaction research is that the public often dreads standing in long queues, filling in paperwork and visiting SARS branches. The electronic filing system (eFiling) aims to address these issues and ensure that the services SARS provides are efficient and convenient for the taxpayer.

eFiling is a free electronic tool designed by SARS to offer electronic services such as filing tax returns, making payments and accessing accounts to name a few.

eFiling allows you the benefit of direct, secure and real-time electronic access to your tax profile as well as the opportunity to manage this at any time and from anywhere.

You must be linked to a tax type (e.g. income tax) in order to have full access to the services on eFiling and to transact.

SARS values you, the taxpayer. In order to protect your tax account(s), please note that not all services are offered online. Services such as change of name and surname must be done at a SARS branch.

3 SERVICES OFFERED ON EFILING

The following services are available on eFiling:

- Pay-As-You-Earn (EMP201 return)
- Skills Development Levy (included on the EMP201 and EMP501 return)
- Value Added Tax (VAT201)
- Provisional Tax (IRP6)
- Secondary Tax on Companies (IT56)
- Individual Income Tax (ITR12)
- Trusts (IT12R)
- Advanced Tax Ruling (ATR)
- Change of Personal Details
- Payments
- Request for Tax Clearance Certificate
- Request for Tax Directive
- Transfer Duty
- Stamp Duty
- Security Transfer Tax(STT)
- VAT Vendor Search
- Notification Tool

- Tax Calculators
- Complete history of eFiling usage
- Customs payments
- Air Passenger Tax payments
- Mineral and Petroleum Resource Royalty (MPRR)

4 NEW LOOK

SARS has redesigned eFiling in an effort to embrace the benefits of emerging technologies and provide an optimized and secure digital environment. The new look is also intended to help promote voluntary compliance, reduce the administrative burden and provide you, our valued client, with a more intuitive and user-friendly experience. The redesigned functionality on eFiling will be implemented using a phased in approach.

Changes for this phase include:

- New look to align to SARS' corporate identity
- Improved security to safeguard against fraud
- Implementation of a primary user-id (single login) to access all profiles
- Profile management (e.g. Organisations and Tax Practitioners)
- A dashboard providing the eFiler with a visual summary of his/her tax affairs at a glance.

4.1 MIGRATION OF EXISTING USERS

All existing users (registered prior to 1 July 2019) will be authenticated and migrated to one single user sign on. If you have multiple login profiles linked to your identity/passport number, a list of your profiles will display (after you have been authenticated). You will be required to choose a primary login from the list. All your profiles will still be accessible once you logged in with your primary credentials. You can link your other logins as "Portfolios" to your profile.

4.2 PORTFOLIOS

A registered eFiler can act in different "roles" on eFiling (e.g. tax administrator). These "roles" are referred to as Portfolio Types. For example:

- **Individual** – a person acting as himself/herself to administer his/her own individual taxes
- **Tax Practitioner** – a person registered with SARS and a Recognised Controlling Body (RCB) and has a signed power of attorney to act on behalf of another taxpayer.
- **Organisation** – a representative of a tax paying entity acting either as the representative taxpayer (e.g. Public Officer, Executor of an estate, etc.) or an appointed representative with a signed Power of Attorney in place.

eFilers with a **Tax Practitioner** and **Organisation** portfolio type can:

- Activate multiple taxpayers against that portfolio type
- Group taxpayers under the same portfolio type
- Specify a descriptive name for each group (for ease of reference).

If you registered different portfolio types prior to 1 July 2019, you would have accessed the abovementioned portfolios by using a unique username and password for each. As from 1 July 2019, you will only use one username and password (referred to as the primary login) to login to eFiling. You can then choose the portfolio that you want to access.

5 PASSWORD RULES

When creating or changing a password on eFiling please ensure that the password contains a minimum of 8 characters and has at least one of the following:

- uppercase letter
- lowercase letter
- special character
- numeric digit.

6 ONE-TIME PIN (OTP)

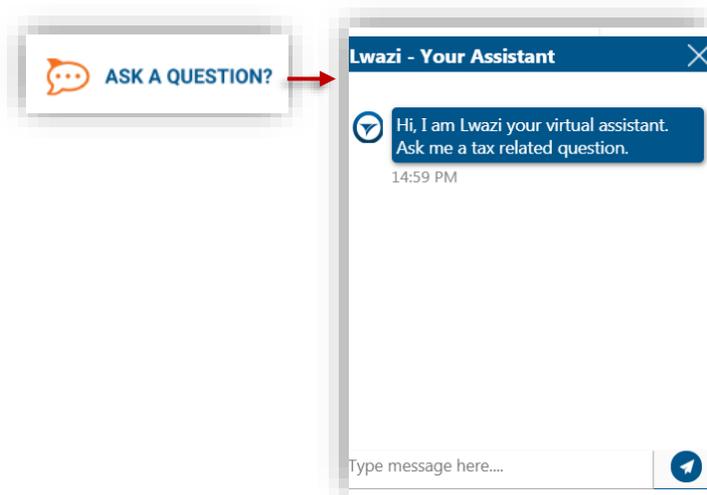
The OTP is a unique 6-digit security PIN and you will be required to enter this pin as confirmation when performing certain functions on eFiling.

- You can choose to receive an OTP via SMS or via an email address. Your preferred method of communication for the OTP can be maintained via your eFiling profile.
- For security reasons, the OTP is time-sensitive and you will be required to enter it within the time period indicated. If you are unable to enter the OTP within the specified time, you may request for it to be resent to you.
- For your security, you can only opt to resend an OTP twice.

7 CHAT BOT

The chat bot icon appears on the bottom right side of your screen. You can click on this icon to ask a question within the context of the screen that you are busy on.

- Type a question in the input text-box
- Click on the button on your screen and press <Enter> on your keyboard to submit the question
- Lwazi, the online assistant, will process your request and display the answers on your screen.



8 REGISTRATION ON EFILING

8.1 HOW TO REGISTER AS A NEW USER ON EFILING

a) Log on to the [SARS website](#).

- On the top right side of the home page is a list of SARS eFiling options. Select **<Register Now>**
- The eFiling Register screen will display.

The screenshot displays the SARS eFiling registration interface. On the left, a navigation menu includes 'Login', 'Register Now', 'Forgot Password?', 'Forgot Username?', and 'e@syFile'. The 'Register Now' option is highlighted with a red arrow pointing to the main registration form. The form is titled 'Register' and prompts the user to 'Please enter personal details.' It contains the following fields and options:

- Name*** (text input field)
- Surname*** (text input field)
- Are you a South African Citizen?*** (radio buttons for Yes and No)
- Date of Birth*** (date picker)
- Next** (blue button)

Red error messages are visible below the Name and Surname fields: 'Name is required' and 'Surname is required'. A 'NEW LOOK New SARS' banner is positioned at the bottom of the main content area.

b) Do the following:

- Complete your personal details and click on **<Next>**
- Complete your contact and login details and click on **<Submit>**
- If the details entered are successfully matched with the SARS records, you will be presented with the One-Time-Pin (OTP) screen
 - Please enter the [OTP](#) that is sent to either your cellphone number or your email address
 - If the time period to enter the OTP has expired you can click on **<Resend OTP>**. Note: for your security you can only select this option twice
 - If you do not complete the OTP process successfully, you will have to start the registration process again
 - Once you have successfully entered the OTP, the eFiling Login Screen will display.

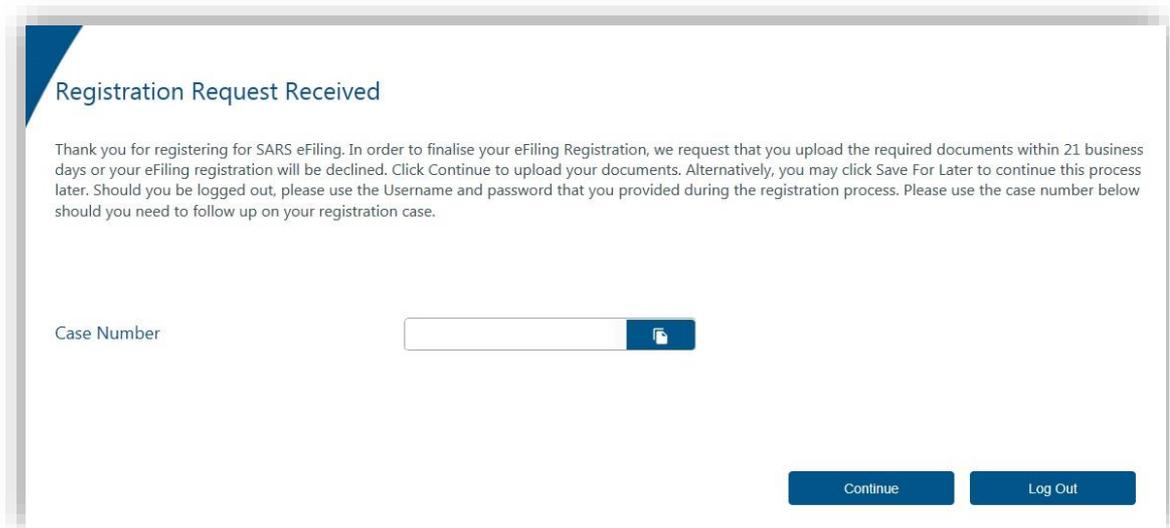
Please Note:

- If we cannot match the personal details that you entered, we may ask you a few random questions to authenticate you.
- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first visit your nearest SARS branch office to register for income tax or activate your income tax number.
- If our system identifies you as a registered eFiler, you will either have the option to login with your existing eFiling profile or recover your password (if you cannot remember it).
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party's access.

8.2 REQUEST FOR ADDITIONAL INFORMATION TO FINALISE REGISTRATION

If we are unable to finalise your eFiling registration immediately we may request additional information before we issue an OTP to you. Please follow the steps below in order for us to finalise your eFiling registration as soon as possible.

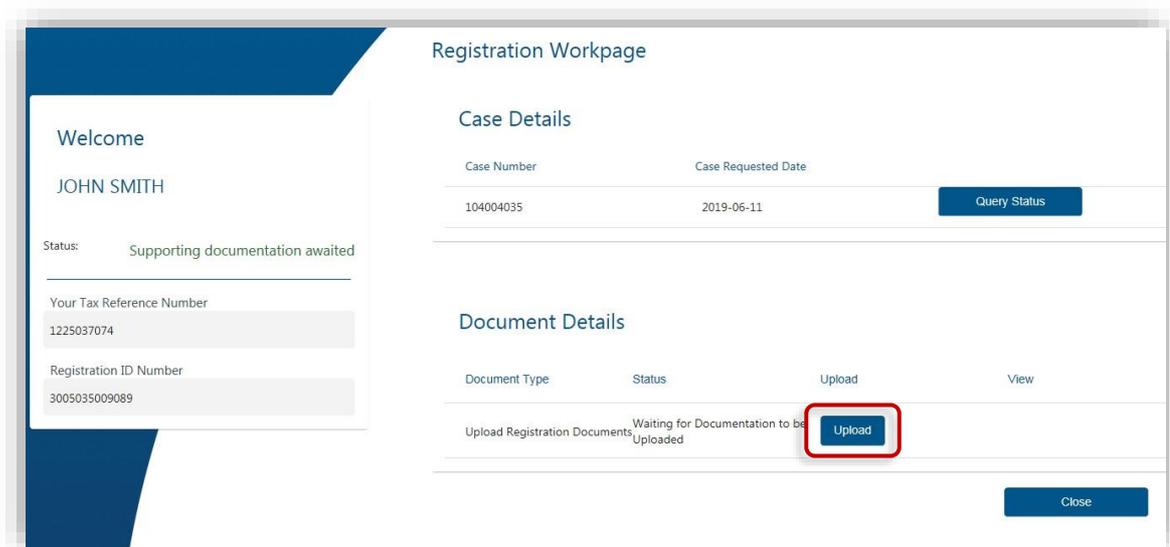
- A message will display confirming your registration request and prompting you to upload supporting documents in order to finalise your eFiling registration.
 - A case number will be allocated to you. Please quote this number when contacting SARS to follow up on the progress of your eFiling registration.
 - If you are logged out, please use the username and password that you provided during the registration process.
 - Please note: You will have 21 business days to upload the required documents.
 - Click on **<Continue>**.



b) The Registration Workpage will display.

- Click on **<Upload>** to upload the required supporting documents.
- The file size may not exceed 5mb and the following file types will be accepted:

.doc	.docx	.jiff
.jpeg	.jpg	.pdf
.png	.xls	.xlsx
- Follow the screen prompts to upload the documents
- Please ensure that you upload **all** the documents requested by SARS before you click on the **<Submit>**
 - Once the documents are submitted you will not be able to add more documents unless you receive a new request from SARS
 - If you are sure you have uploaded all the documents required, click on **<Continue>**.
 - SARS will review the case.



c) You can log in with your username and password to view the status of your registration process (e.g. awaiting supporting document, documents submitted).

- Once SARS has verified your details, the status will change to 'Request Successful' and you will be notified via email and SMS
- Click on the **<Complete Registration>** button.

- d) Select your preferred method of communication and click on **<Continue>**. The method you select will serve as your eFiling security contact details and will be used to send a One-Time-Pin (OTP) to authenticate you.

- e) Please enter the OTP sent to either your cellphone number or your email address. Once the correct OTP is entered, the eFiling Login screen will display for you to login with the user name and password that you created.

Please Note:

You may be requested to complete your address details in the following instances:

- To assist us to automatically register you for income tax
- If you are already registered for income tax and we cannot match the details that you have entered with the SARS records.

8.3 AUTOMATIC REGISTRATION FOR INCOME TAX

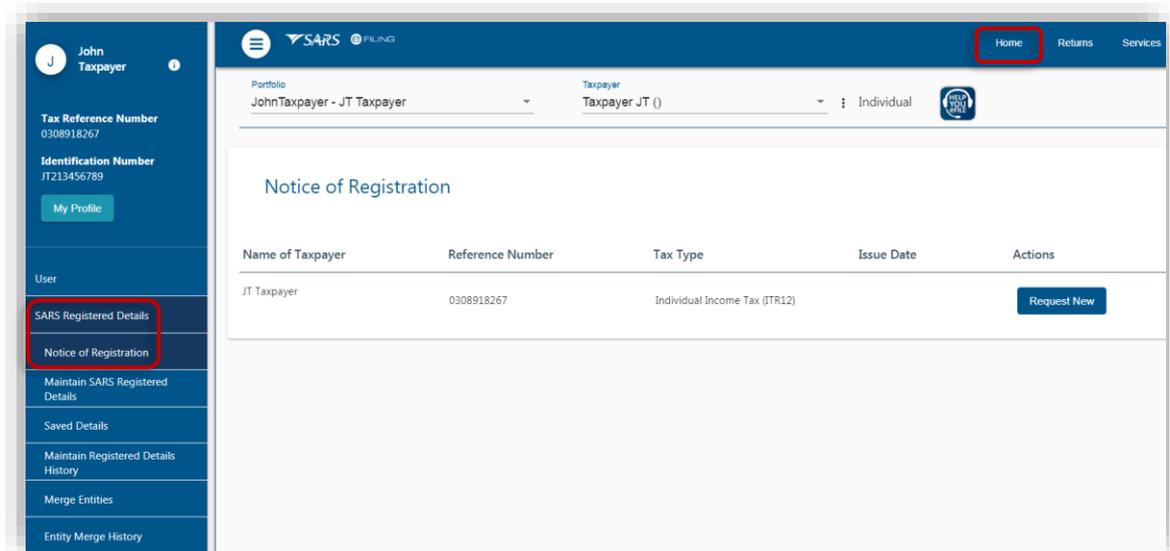
When you [register as a new eFiler](#), SARS will do the work for you and automatically issue a personal income tax number if:

- You are not yet registered for income tax
- You have a valid South African ID number.

A Notice of Registration will be available to you, should you need to provide a third party (e.g. your employer) with proof of your income tax number.

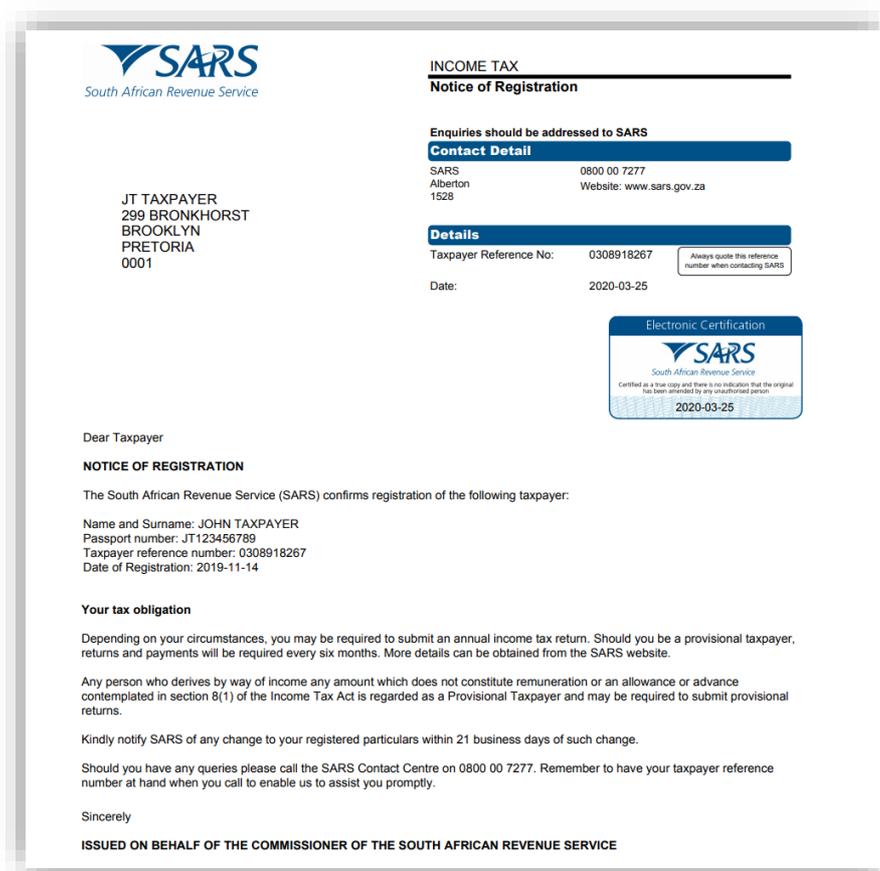
After you have successfully registered for eFiling, login with your user name and password, [link](#) the tax number to your profile and follow the steps below to access your notice of registration:

- Select **<Home>** from the menu on the top
- Select **<SARS Registered Details>** from the menu on the left
- Select **<Notice of Registration>**
- Click on **<Request New>**.



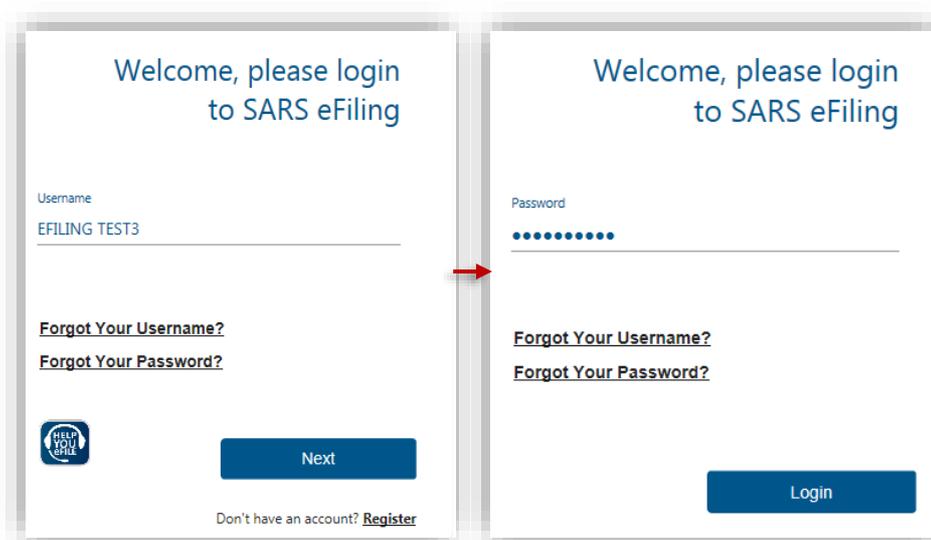
The screenshot shows the SARS eFiling portal interface. The top navigation bar includes 'Home', 'Returns', and 'Services'. The left sidebar contains a menu with 'SARS Registered Details' highlighted. The main content area displays the 'Notice of Registration' page, which includes a table with the following data:

Name of Taxpayer	Reference Number	Tax Type	Issue Date	Actions
JT Taxpayer	0308918267	Individual Income Tax (ITR12)		Request New

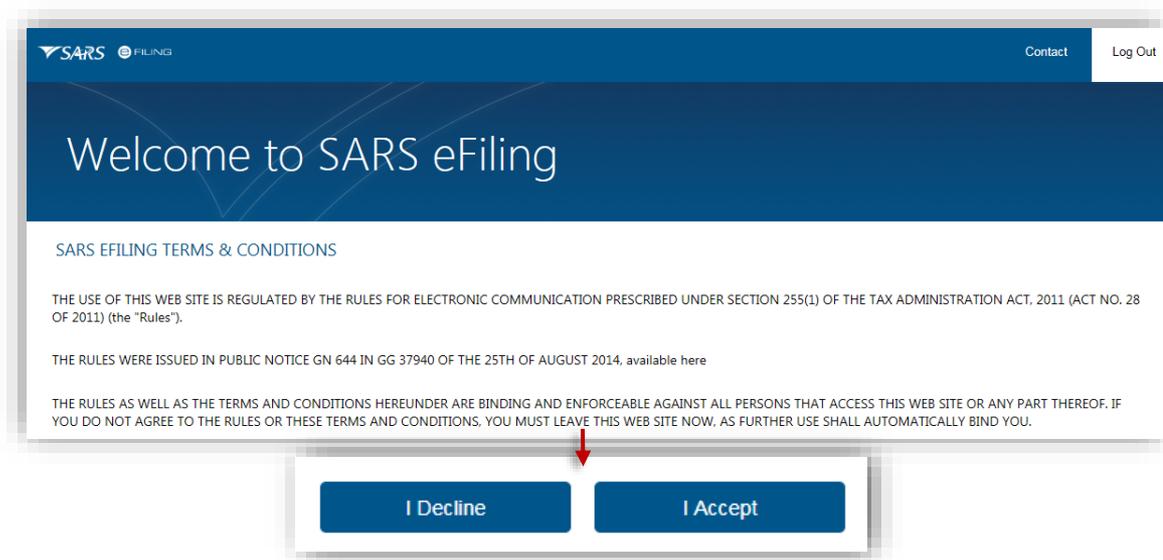


9 FIRST TIME LOGIN FOR EFILING USERS REGISTERED ON/AFTER 1 JULY 2019

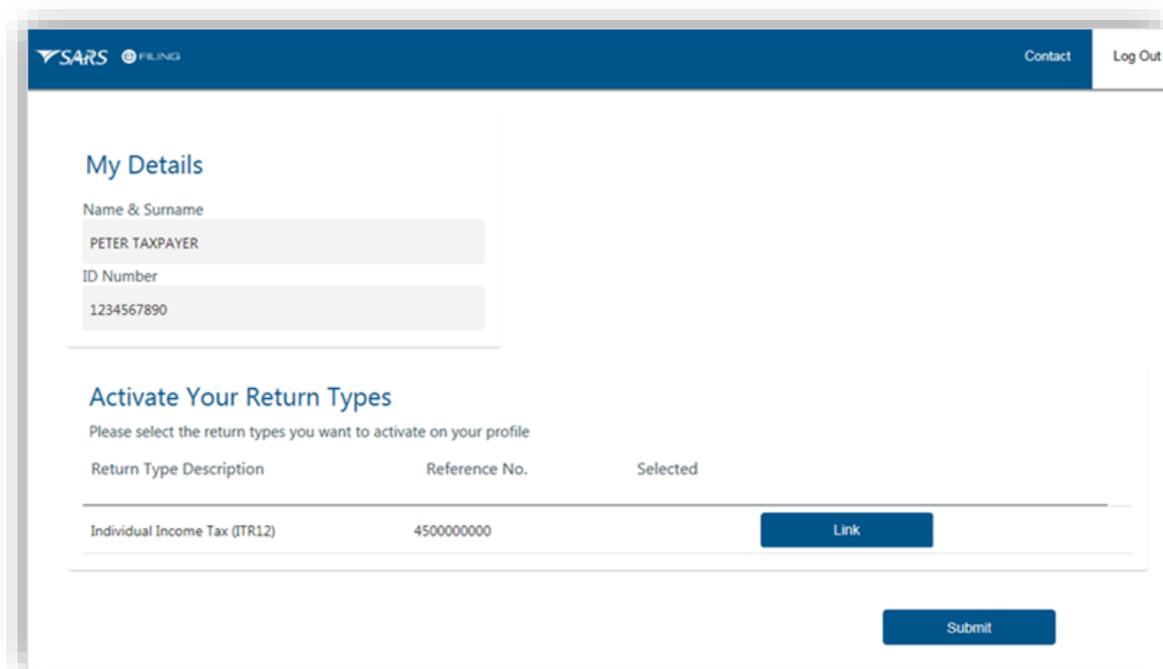
- a) Log on to the [SARS website](#). On the top right side of the home page select <Login> from the list of eFiling options.
- Enter your eFiling Username and click on <Next>
 - Enter your Password and click on <Login>.



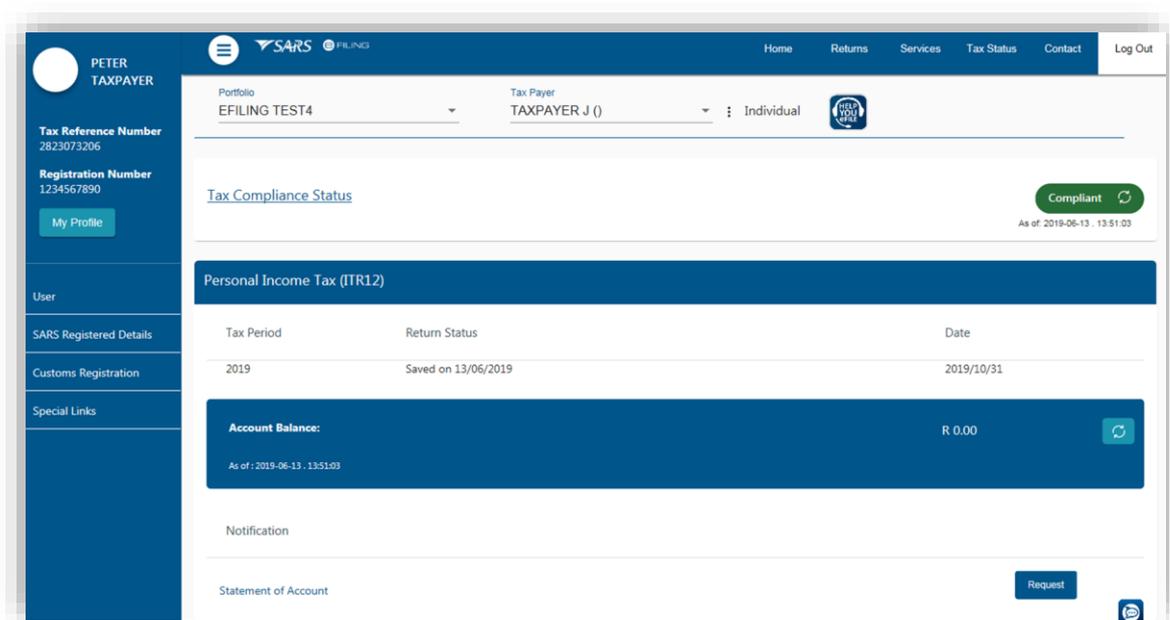
- b) The eFiling welcome screen will display.
- Please read the terms and conditions
 - At the bottom of the screen click on **<I Accept>** to continue with the log in process.



- c) You will be presented with a list of returns types as per SARS records.
- Please click on **<Link>** for each return type that you want to activate on your profile
 - Click on **<Remove>** to remove a return type from your profile
 - After you have selected the return type(s), click on **<Submit>**.



- d) The eFiling home page will display. This screen is also referred to as the **eFiling Dashboard** and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notices sent by SARS.



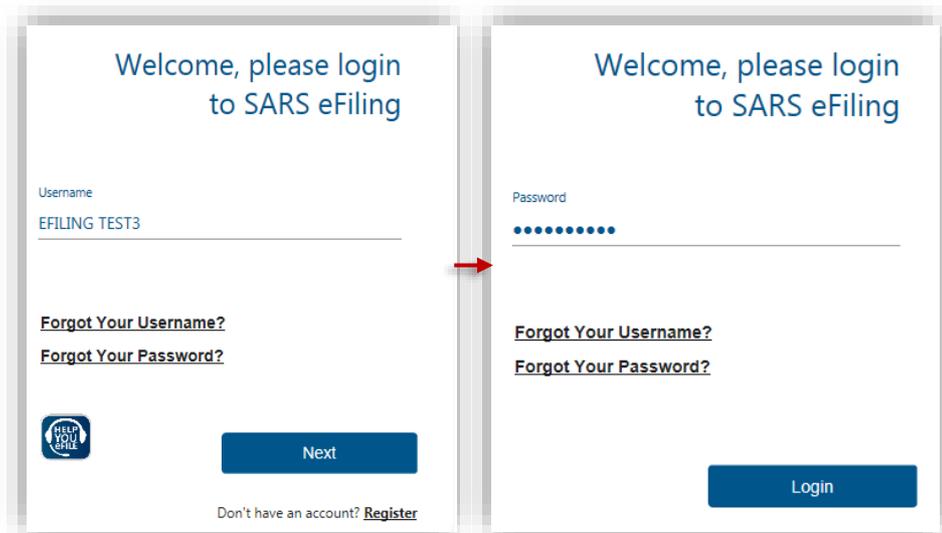
Please Note:

- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first visit your nearest SARS branch office to register for income tax or activate your income tax number.
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain [shared access](#) or revoke the other party's access.

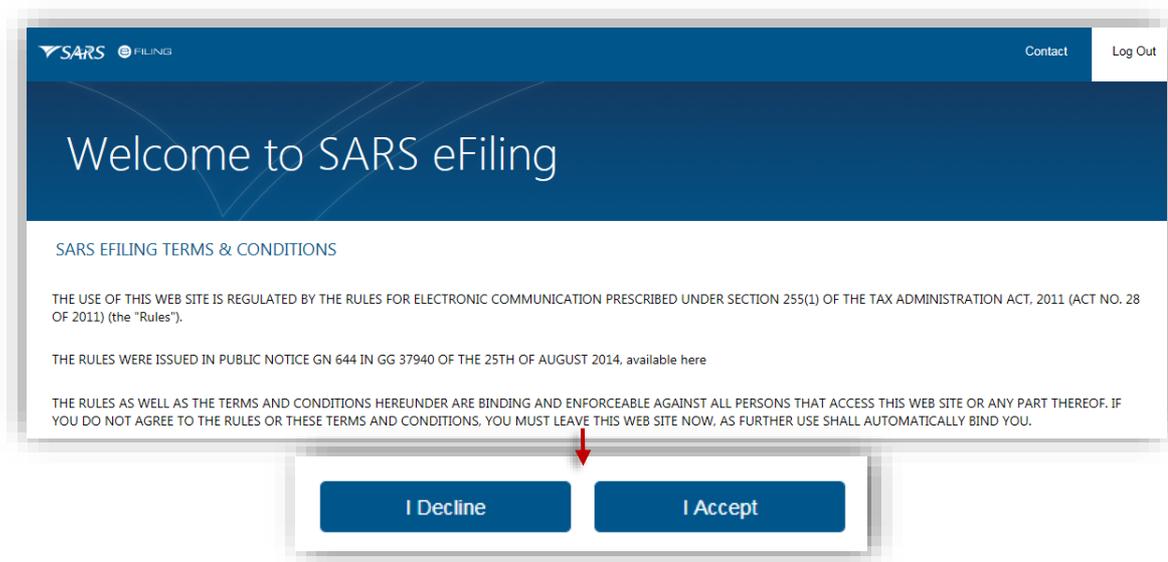
10 FIRST TIME LOGIN FOR EFILING USER REGISTERED BEFORE 1 JULY 2019

10.1 SINGLE LOGIN PROFILE

- a) Log on to the [SARS website](#). On the top right side of the home page select **<Login>** from the list of eFiling options.
- Enter your eFiling Username and click on **<Next>**
 - Enter your Password and click on **<Login>**.



- b) The eFiling welcome screen will display. Please read the terms and conditions. At the bottom of the screen click on **<I Accept>** to continue with the log in process.



- c) Select your preferred method of communication and click on **<Continue>**
- This will serve as your eFiling security contact details and we will send a One-Time-Pin (OTP) to your preferred method of communication in order to authenticate you
 - You can edit your contact details on this screen.

Welcome To SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

eFiling Security Contact Details	Preferred Method of communication
Cell Number	0833333333 <input type="checkbox"/>
Email	TEST@TEST.CO.ZA <input checked="" type="checkbox"/>

[Continue](#)

- d) Please enter the OTP sent to either your cellphone number or your email address.
- e) Once the correct OTP is entered, the eFiling home page will display. This screen is also referred to as the eFiling Dashboard and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notices sent by SARS.

PETER TAXPAYER

Tax Reference Number: 2823073206
Registration Number: 1234567890
[My Profile](#)

User

SARS Registered Details

Customs Registration

Special Links

Portfolio: EFILING TEST4 | Tax Payer: TAXPAYER J () | Individual

Tax Compliance Status: **Compliant** (As of: 2019-06-13, 13:51:03)

Tax Period	Return Status	Date
2019	Saved on 13/06/2019	2019/10/31

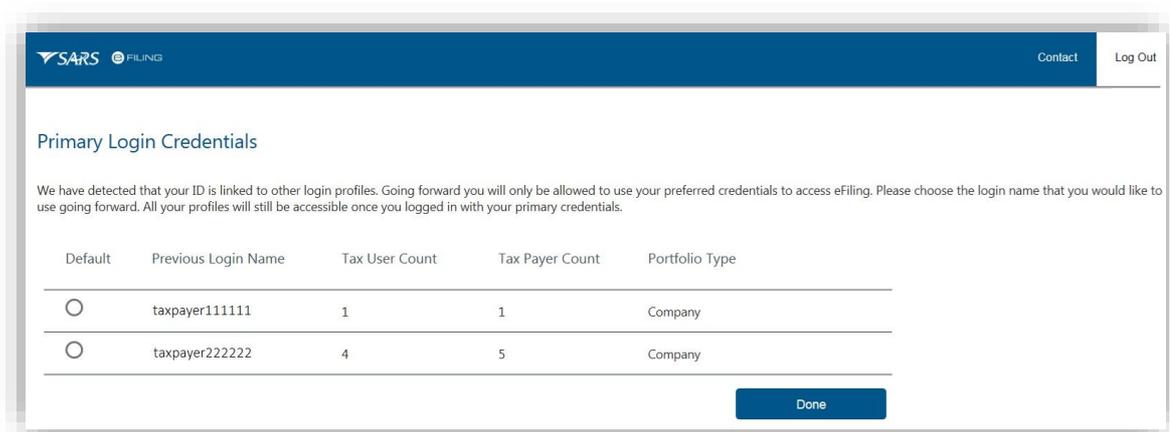
Account Balance: R 0.00 (As of: 2019-06-13, 13:51:03)

Notification

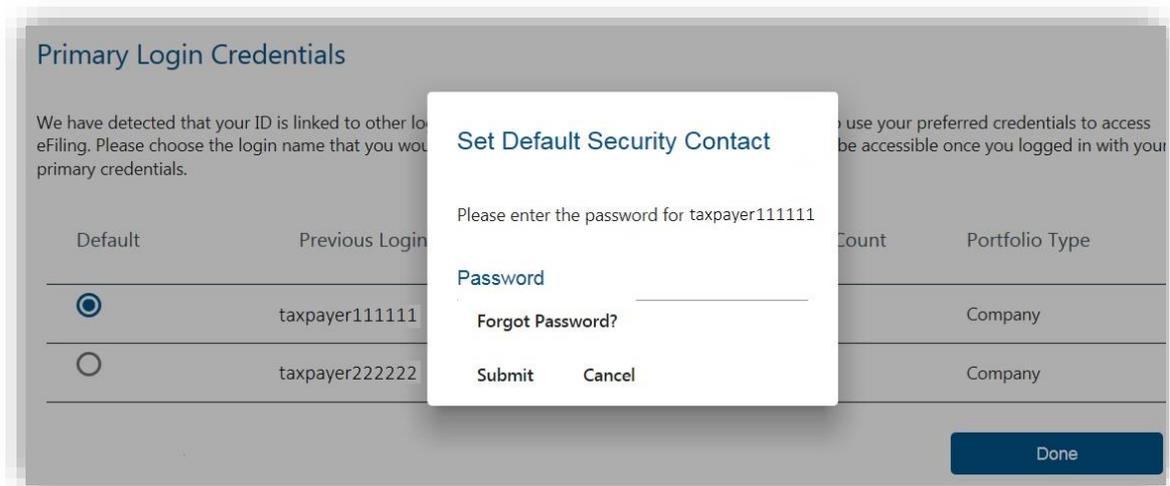
Statement of Account [Request](#)

10.2 MULTIPLE LOGIN PROFILES

- a) Log on to the [SARS website](#). On the top right side of the home page select **<Login>** from the list of eFiling options.
 - Enter your eFiling Username and click on **<Next>**
 - Enter your Password and click on **<Login>**
 - Please read and accept the terms and conditions (refer to section 7 above).
- b) After you have accepted the terms and conditions, a screen will display with a list of all the login profiles linked to your identity/passport number. Please select the [primary login](#) name that you would like to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.



- c) If you select a primary login (e.g taxpayer111111 as illustrated in the screen below) that is different from the profile that you are currently logged in with (e.g. taxpayer222222), you will be prompted to enter the password for that primary login selected (i.e taxpayer111111). If you do not remember the password, click on **<Forgot Password>** to reset it.



- d) Once you have selected the primary login, click on **<Done>**. On the next screen select your preferred method of communication and click on **<Continue>**.
- This will serve as your eFiling security contact details and we will send a One-Time-Pin (OTP) to your preferred method of communication in order to authenticate you
 - You can edit your contact details on this screen.

Welcome To SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

eFiling Security Contact Details	Preferred Method of communication
Cell Number	<input type="text" value="0833333333"/> <input type="checkbox"/>
Email	<input type="text" value="TEST@TEST.CO.ZA"/> <input checked="" type="checkbox"/>

[Continue](#)

- e) Please enter the OTP sent to either your cellphone number or your email address.
- f) A message will display confirming that your primary login has been successfully set-up. Click on **<Continue>**.

Thank you for confirming your primary login details

Please note: that going forward you will only use the primary login to access eFiling. You will have the opportunity to link your other logins as "Portfolios" to your profile.

What is a portfolio?

A registered eFiler can act in different "roles", as a tax administrator, on eFiling. These "roles" are referred to as Portfolio Types. For example:

- Individual - Acting as himself or herself when administering his or her own individual taxes,
- Tax Practitioner – Acting as a Tax Practitioner that is (registered with a Recognised Controlling Body (RCB) and in good standing) on behalf of another tax paying entity with a signed Power of Attorney in place,
- Organisation – Acting as the representative of a tax paying entity, either as the representative taxpayer (e.g. Public Officer, Executor of an estate, etc.) or an appointed representative with a signed Power of Attorney in place.

With regards to the Tax Practitioner and Organisation Portfolio Type – An eFiler will be able to activate one or more taxpayers against the Portfolio Type and will also be able to group taxpayers together under the same Portfolio Type. The eFiler will be able to specify a descriptive name for each group, for ease of reference.

Previously, an eFiler accessed his or her different Portfolios by using a unique username and password for each Portfolio. Going forward, you will only have one username and password (referred to as the primary login) and after login, you can choose the Portfolio that you want to access.

[Continue](#)

- g) The Portfolio Management screen will display for you to link, unlink or add [portfolios](#). For more information please refer to the [Portfolio Management](#) section below.

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default	
taxpayer222222 - SARS PTY LTD	1	1	Organisation	Default	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
taxpayer111111	-	Link	Remove

Please Note:

- After you have selected and confirmed your primary login, you must only use that login to access eFiling. If you attempt to login with any other portfolio that is linked to your identity/passport number, the following error message will display:

“According to our records you have already chosen your Primary Login. Please Login with your Primary Login details and then activate your other profiles in the Portfolio Management section on eFiling.”

- If you are an individual with multiple logins and you try to login with the username that is not linked to your personal income tax number, the following message will display:

“Our records indicate that your own personal income tax is associated to one of your other existing Login details. Due to improved security measures implemented, please authenticate this profile by providing the applicable password below. Note – should you not be able to authenticate this profile now, you may be required to do so at a later stage to gain access to certain online transactions.”

11 PROFILE AND PREFERENCE SETUP

This function is used to manage your primary login details, security contact details, two-factor authentication and passwordless login (each item is discussed in the sub-sections below). You cannot change your tax reference number and identity/passport number on this screen.

- a) Log on to eFiling and click on **<My Profile>** on the menu on the left
- b) Select **<Profile and Preference Setup>**.
 - Note: This screen will display the date and time that the profile was last accessed.

Profile and Preference Setup Last Login: 2020-11-19 14:28

John Taxpayer

Your Tax Reference Number

0308918267

Registration ID Number

JT213456789

Security Contact Details

Preferred method of communication

Email

Cell Number

[Update & Save](#)

Your Login Details

Username
JohnTaxpayer
You can use your email as your Username

New Password

Confirm Password

[Update & Save](#)

Two-Factor Authentication Off

Method of Authentication

[Update & Save](#)

Passwordless Login Off

Method of Authentication

[Update & Save](#)

11.1 CHANGE SECURITY CONTACT DETAILS:

a) To change your security contact details:

- Insert your new email address
- Insert your new cell number
- Select your preferred method of communication
- Click on **<Update & Save>**
- Click on **<Send OTP>** to send the One-Time-Pin number to your preferred method of communication
- After you have entered the correct OTP, a pop-up message will display confirming that your security contact details have been updated successfully.

11.2 CHANGE USER NAME AND PASSWORD:

- a) To change your username and password:
- Insert your new username (you may use your email address as your username)
 - Insert your new password
 - Insert your new password again to confirm it
 - Click on **<Update & Save>**
 - An OTP will be sent to your preferred method of communication
 - After you have entered the correct OTP, a pop-up message will display confirming that your username and password have been updated successfully.

11.3 TWO-FACTOR AUTHENTICATION USING ONE TIME PIN

Two-factor authentication is an additional security measure and requires you to provide your password as well as a second factor of authentication to login to eFiling. If you prefer to use the [OTP](#) method for additional authentication:

- Select the button to switch on two-factor authentication
- Select **<One time pin to preferred method of communication>**
- Click on **<Update and Save>**
 - An OTP will be sent to your preferred method of communication
 - After you have entered the correct OTP, a pop-up message will display confirming that your two-factor authentication has been successfully activated.

- Going forward, you will be required to do the following each time you log on to your profile via the eFiling website:
 - Enter username
 - Enter password
 - Enter OTP.

11.4 TWO-FACTOR AUTHENTICATION USING THE EFILING MOBILE APP

- If you prefer to use the mobile app for additional authentication, please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.
- On the eFiling website:
 - Select **<eFiling Mobile App Authentication>**
 - Click on the **<Enrol Device>** button
 - You will be issued with an OTP to confirm the device you want to enrol
 - A pop-up screen will display with a **QR Code** and instructions. Please ensure that you only click the **<OK>** button on this screen after the device enrolment is completed (*refer to step c below*) else the device will not be added to your eFiling profile.

Scan QR Code

To continue please scan the QR Code on your SARS MobiApp using your Device

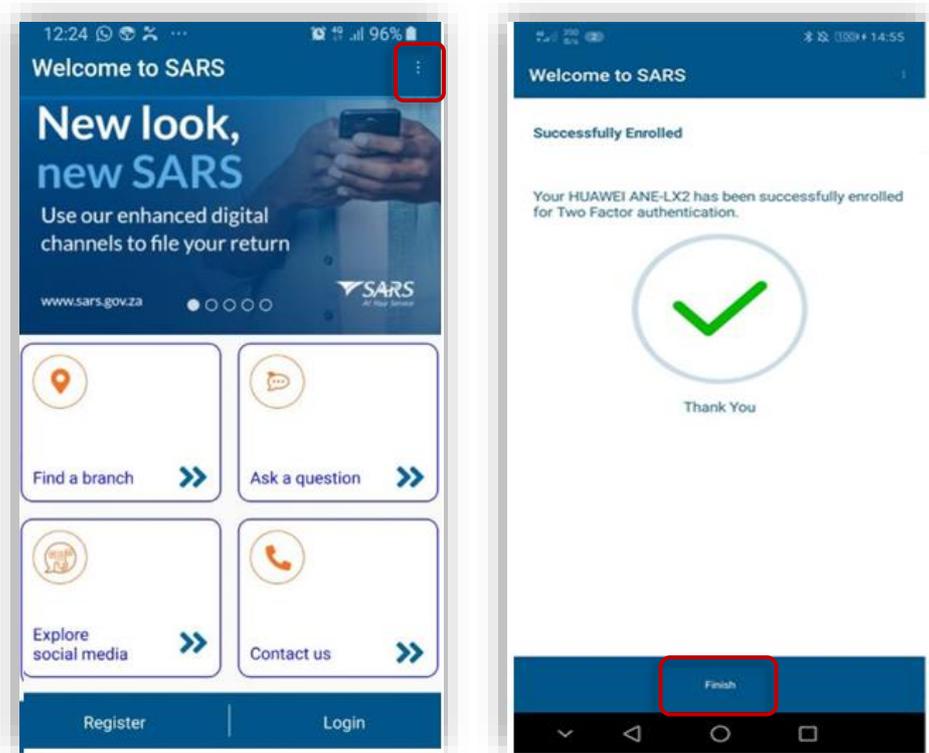
1. Open the SARS MobiApp.
2. Select the ellipses menu at the top right corner.
3. Select enrol device from the menu options.
4. Scan the QR code displayed on the screen until confirmation pop-up is displayed.
5. Select Finish button to complete the enrolment.



Cancel OK

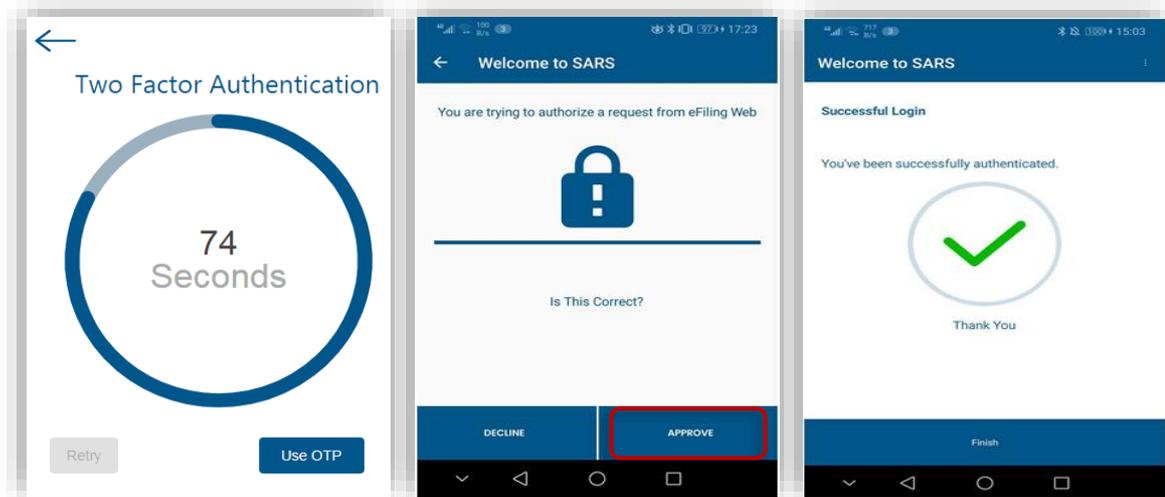
c) Launch the mobile app on your device:

- Click on the ellipses (:) on the top right corner of the screen to display the menu
- Select **<Enrol Device>**
- Use your device to scan the QR code displayed on the eFiling website
- Once the QR Code is scanned successfully, a message will display to confirm that your device has been enrolled
- Click on the **<Finish>** button to complete the enrolment
- The device will automatically be added as part of your linked devices on eFiling.
- For more information on how to use the app please refer to the 'Guide to the SARS MobiApp' which is available on the SARS website.



d) After the device has been enrolled, you will be required to do the following each time you log on to the eFiling website:

- Enter username
- Enter password (the “Two Factor Authentication” timer will display)
- Click on <Approve> on your mobile device to authorise the request before the timer expires. You will be logged in to the eFiling website.



Please Note:

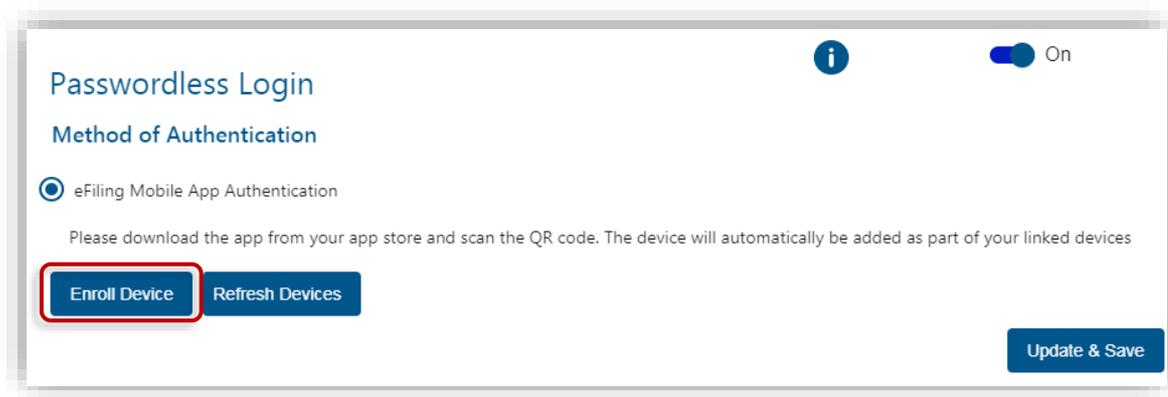
- A device can only be enrolled on one eFiling profile at a time. If you try to enrol a device that is already linked to another eFiling profile, an error message will display. If you would like to enrol the device on another eFiling profile:
 - Logon to the existing eFiling profile > Navigate to the Two Factor Authentication function > click on the ellipses (:) menu and select the option to **remove** the device.
 - Logon to the new eFiling profile > Navigate to the Two Factor Authentication function > Follow the steps above to **enrol** the device.
- If two factor authentication is activated on your eFiling profile and you uninstall the mobile app or clear the app data, you will no longer receive the authorisation notification on your mobile device (even though the eFiling website will display the two factor authentication “timer”). In this instance:
 - Select <Use OTP> on the two factor authentication timer screen to log on
 - Remove the device from your profile
 - Reinstall the mobile app and enrol the device again.

11.5 PASSWORDLESS LOGIN

Passwordless Login enables you to use your mobile device to approve the eFiling login request instead of typing in your password.

- Please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.
- On the eFiling website:
 - Select the button to switch on <Passwordless Login>

- Select **<eFiling Mobile App Authentication>**
- Click on the **<Enroll Device>** button. A pop-up screen will display with a QR Code and instructions.



- e) Launch the mobile app on your device. Follow the steps described in the section “[Two-Factor Authentication Using the Efiling Mobile App](#)” to enrol your device.

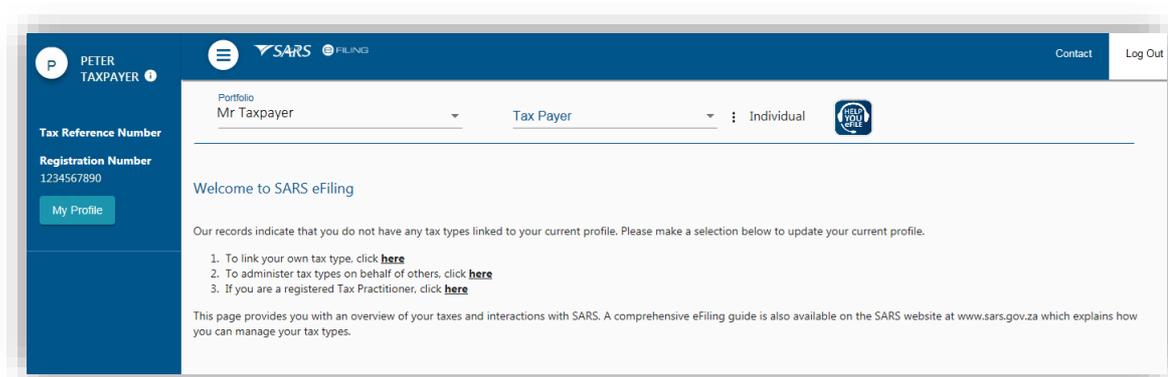
Please Note:

- You can either switch on Passwordless Login or Two-factor Authentication on your profile, however both can never be switched on at the same time.

11.6 ACCESS TO MY PROFILE

If your tax number(s) is already registered against another party’s eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party’s access.

- a) When you log on to eFiling a message will display stating that our records indicate that you do not have any tax types linked to your current profile. Select the option to link your own tax type (e.g. provisional tax or individual income tax) to your profile.



- b) Select the type of access you require (see below) and click on **<Submit>**:
- **<Obtain View Only Shared Access>** - this option will only allow you to view transactions done on your behalf on eFiling
 - **<Obtain Full Shared Access>** - this option will allow you to have full shared access and the other party will still retain access rights to the tax type
 - **<Remove Tax Practitioner Access>**

- **<Remove My Access>** - This option will display if you currently have shared access with your tax practitioner
- **<Deactivate Tax Type>**

The screenshot displays the 'My Details' page. At the top, it shows 'Name & Surname' as 'MR TAXPAYER' and 'ID Number' as '770812000000'. Below this, there are two sections for 'Activate your Return Types'. The first section is for 'Provisional Tax (IRP6)' and shows 'Mr FAC have access to this return type 0009000900'. It contains three buttons: 'Obtain View-Only Shared Access', 'Obtain Full Shared Access', and 'Remove Tax Practitioner Access'. The second section is for 'Individual Income Tax (ITR12)' and shows 'Mr FAC Goga have access to this return type 0009000900'. It also contains three buttons: 'Obtain View-Only Shared Access', 'Obtain Full Shared Access', and 'Remove Tax Practitioner Access'. At the bottom right, there is a blue 'Submit' button and a small icon for 'eFiling'.

12 PORTFOLIO MANAGEMENT

The Portfolio Management function is used to link, and add various [portfolios](#) (roles) on your eFiling profile, such as:

- Your individual portfolio to manage your own personal taxes
- Multiple company portfolios where you are the registered representative (e.g. public officer) or employee and you manage the taxes of those companies
- Multiple tax practitioner portfolios where you manage the taxes of multiple individuals/entities as a tax practitioner.

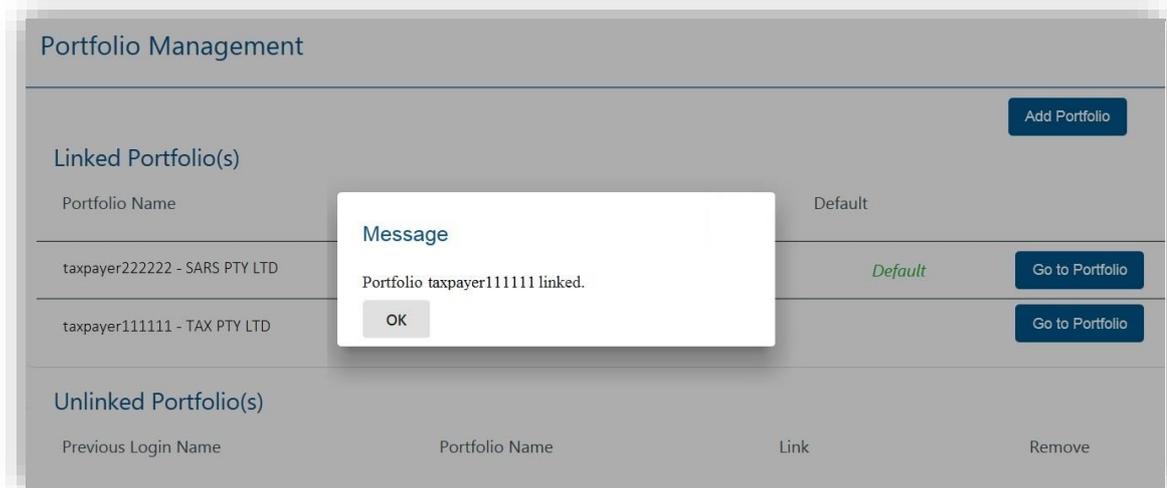
You can also opt to have all your roles merged into one company or tax practitioner profile if you so wish.

a) Once you have logged on to eFiling:

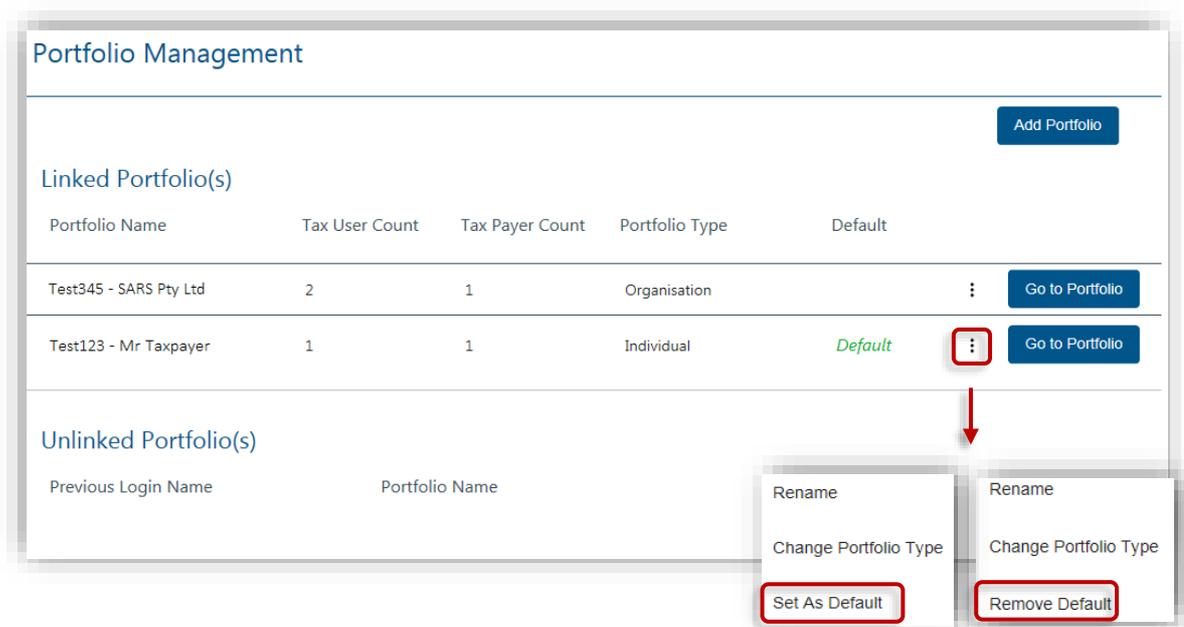
- Select **<My Profile>** from the menu on the left
- Select **<Portfolio Management>**.
- The Portfolio Management screen will display for you to link, unlink, or add portfolios.



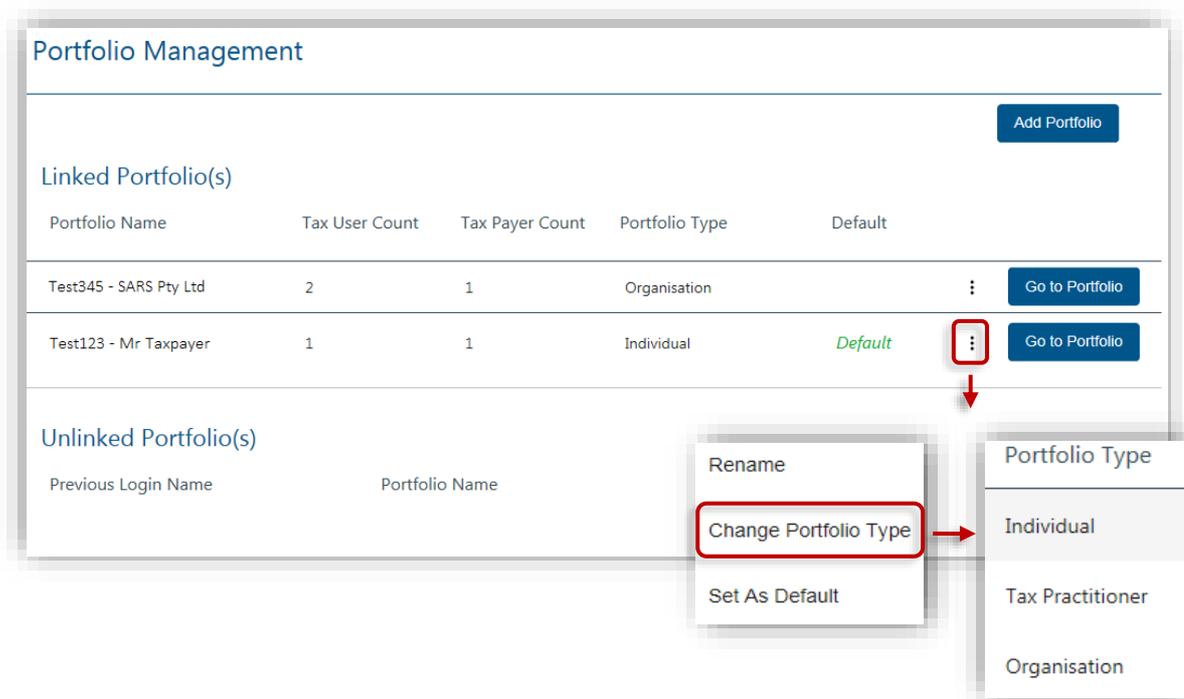
- b) You will be prompted to enter the password for each portfolio that you want to link.
- If you do not remember the password, click on [<Forgot Password>](#) to reset it
 - After you enter the correct password, a message will display to confirm that the portfolio has been linked.



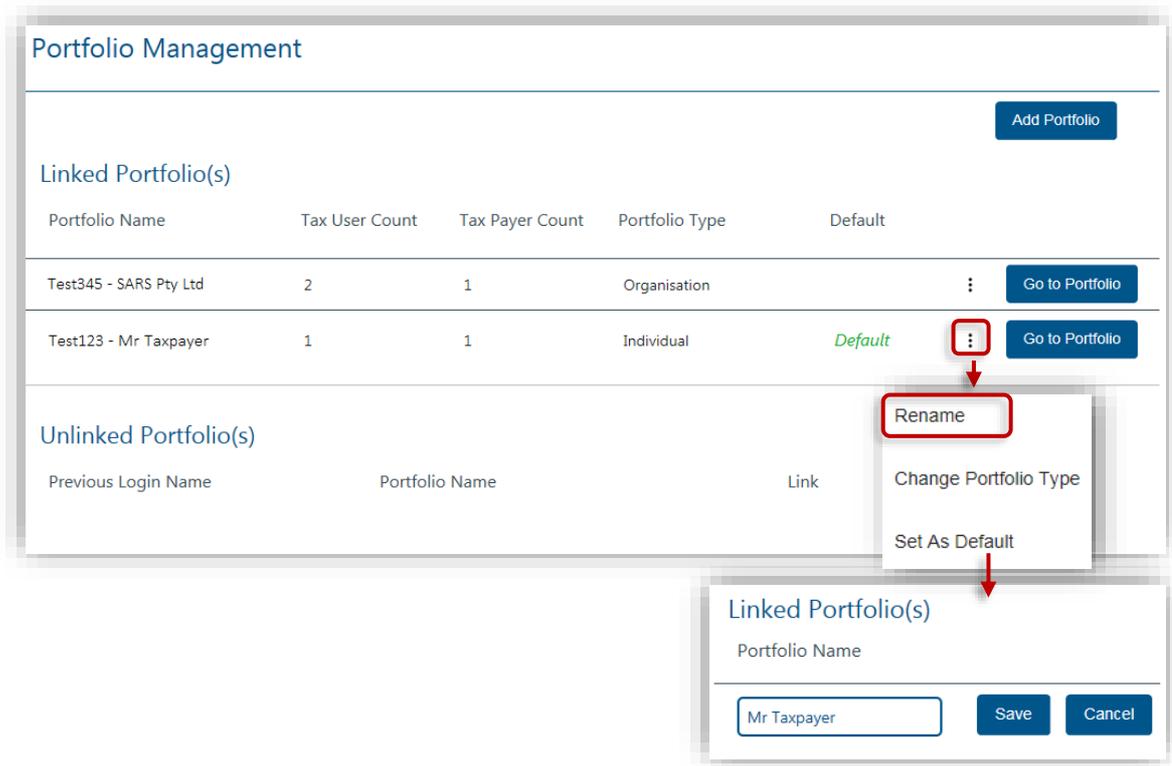
- c) You can set a **default portfolio** so that the system automatically displays this portfolio when you login instead of you having to select it each time. To change the default portfolio, click on the ellipses (\vdots) menu icon and then either select **<Set as Default>** or **<Remove Default>**.
- You cannot have more than one default portfolio
 - Portfolios that are not linked cannot be set as a default profile.



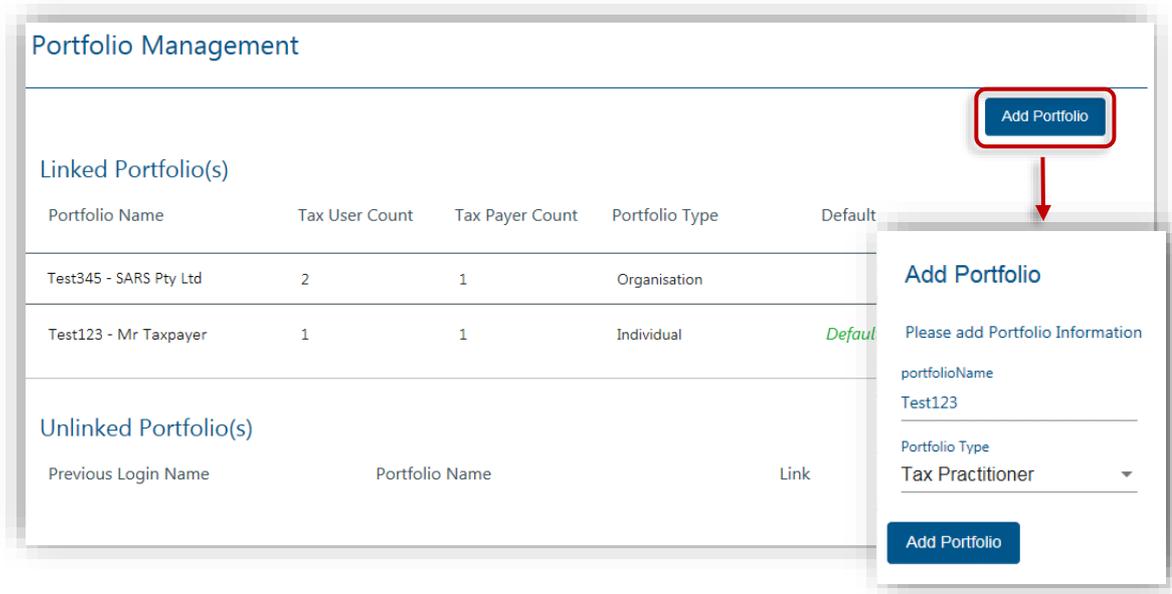
- d) To change the portfolio type, click on the ellipses (⋮) menu icon and select **<Change Portfolio Type>**.
- Select the portfolio type (i.e. Individual / Tax Practitioner / Organisation) from the drop down menu and click on **<Save>**
 - You can have multiple Tax Practitioner and Organisation portfolios on your profile
 - You can only have one Individual portfolio linked to your profile.



- e) You can rename your portfolios for your ease of reference. Click on the ellipses (⋮) menu icon and select **<Rename>**. Insert the new description for the portfolio and click on **<Save>**.



- f) To link a new portfolio to your profile, click on **<Add Portfolio>**. On the pop-up screen, insert the portfolio name, select the **<Portfolio Type>** and click on **<Add Portfolio>**
- You can choose to set the new portfolio as your default
 - You can add taxpayers and users to this portfolio.



13 MANAGE USERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

13.1 INVITE, EDIT AND DELETE A USER ON A PORTFOLIO

This function is used to add new users to a portfolio, grant access to tax types, set the required levels of authorisation for each user and delete users.

To successfully **add** users to portfolios, actions are required from both the following parties:

- **The Requestor** – this refers to an existing user that has the ‘Manage User’ role assigned to him/her and wants to invite another person to be a user and have access to the organisation or tax practitioner portfolio.
- **The User** – this is the person (e.g. a tax practitioner’s employee) who has been invited to have access to one or more taxpayers that are managed by the requestor.

a) To access the required Organisation or Tax Practitioner portfolio:

- Select **<My Profile>** and **<Portfolio Management>** from the menu on the left
- Click on **<Go to Portfolio>**.

b) Once you have selected the required Portfolio:

- Select **<User>** from the menu on the top
- Select **<User>** again from menu on the left
- Select **<Invite User>**
- Complete the following information for the user you are inviting
 - Identification Type
 - Passport or ID Number
 - Tax Reference Number (only applicable if identification type is passport)
 - Surname
 - The default Organisation or Tax Practitioner Portfolio name that you want the user to view on his/her portfolio upon accepting your invite
- Click on **<Invite>**.

The screenshot shows the SARS eFiling 'Invite a User' interface. The top navigation bar includes 'User', 'Organisations', 'Returns', 'Customs', 'Duties & Levies', and 'Services'. The left sidebar contains 'My Profile', 'User', 'Invite User', 'Change Details', 'Change Own Password', 'Change Website Profile', 'Delete User', 'My Administrators', and 'Unlock Account / Reset Password'. The main content area is titled 'Invite a User' and includes the following fields and options:

- Portfolio: My Company Portfolio
- Tax User: Taxpayer JT
- Organisation: Organisation
- Identification Type: Passport
- Passport Number: JD213456789
- Reference Number: Tax Reference Number
- Surname: DAY
- Portfolio Name: My Company Portfolio

The 'Invite' button is located at the bottom of the form.

- c) Select the roles (i.e. permissions) that you want to assign to the user.
- Examples of roles:
 - 'Manage Transfer Duty Financial Account' (*allows users to maintain all financial detail against the Transfer Duty account*)
 - 'SARS Registration' (*allows users to register taxpayers with SARS to obtain tax reference numbers*)
 - 'RLA – View Customs Product information' (*allows users to only view information such as address, contact and bank account details and information relating to their specific client type(s) e.g. importer/exporter*)
 - 'RLA - View Client Type' (*allows users to only view information relating to their specific client type(s) e.g. importer/exporter*)
 - 'RLA – Manage Customs Product information' (*allows users to view and change information such as address, contact and bank account details and also change information relating to their specific client type(s) e.g. importer/exporter*)
 - 'RLA - Manage Client Type' (*allows users to only view and change information relating to their specific client type(s)*)
 - 'Manage Users' (*allows users to add & change users and assign them to groups*)
 - 'Manage Taxpayers' (*allows users to add & change taxpayers and assign them to groups*)
 - 'Manage Groups' (*allows users to create & change groups and assign users and payers to groups*)
 - 'Manage Excise Financial Account' (*allows users to maintain all financial detail against an Excise Account*)
 - 'Manage Deferment Account'
 - 'ISV Activation' (*allows users access to the ISV activation screen*)
 - 'Directives' (*allows users to access the tax directives functionality*)
 - 'Perform Bulk and Additional Payments' (*allows users without full admin rights access to perform bulk and additional payments*).
 - Click on <**Continue**>
 - A summary of the roles selected will display. Click on <**Continue**>.
 - The invite will be sent to the user. You will be notified via email or SMS once the user accepts the invite.

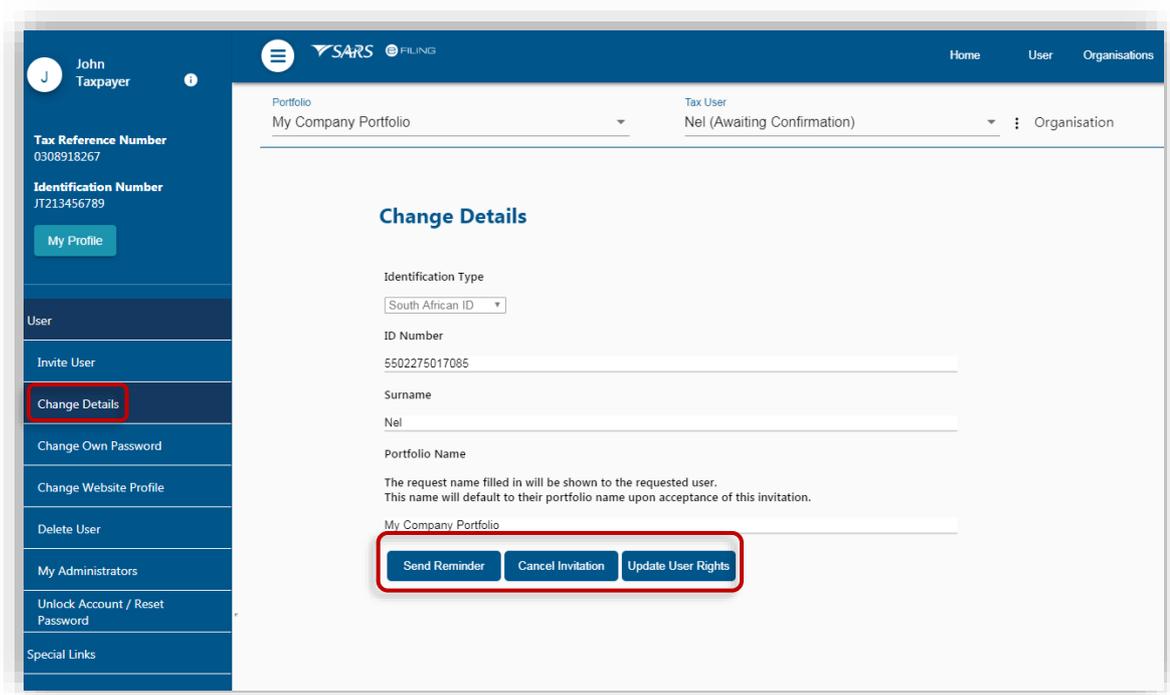
Portfolio: My Company Portfolio | Tax User: Ras (Awaiting Confirmation) | Organisation

USER ROLES

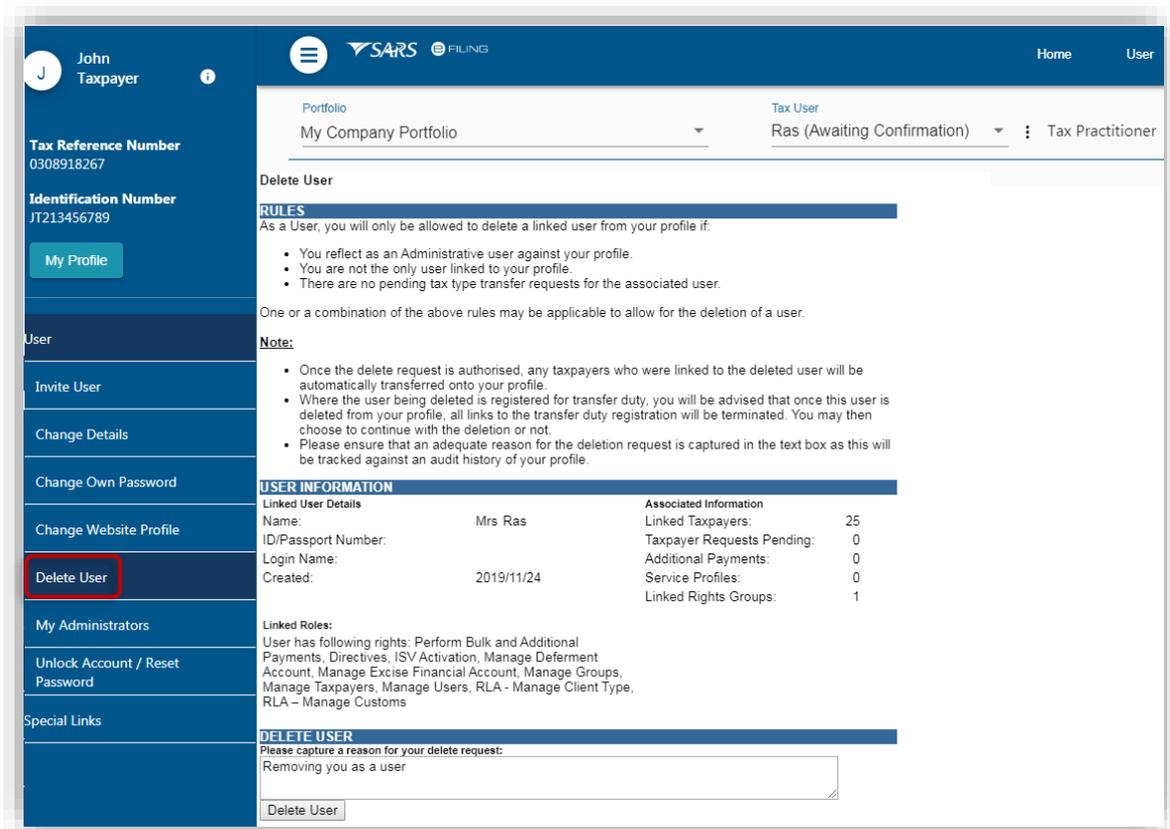
- Manage Transfer Duty Financial Account**
This role allows users to maintain all financial detail against the Transfer Duty account
- SARS Registration**
Can register taxpayers with SARS to get tax reference numbers
- RLA – View Customs Product information**
With this profile, users can only view information such as address, contact and bank account details. Users can also view information relating to their specific client type(s) eg. importer/exporter
- RLA - View Client Type**
With this profile, users can only view information relating to their specific client type(s) eg. importer/exporter
- RLA – Manage Customs Product information**
With this profile, users can view and change information such as address, contact and bank account details. Users can also view and change information relating to their specific client type(s) eg. importer/exporter
- RLA - Manage Client Type**
With this profile, users can only view and change information relating to their specific client type(s)
- Manage Users**
Can create & change users and assign them to groups
- Manage Taxpayers**
Can create & change taxpayers and assign them to groups
- Manage Groups**
Can create & change groups and assign users and payers to groups
- Manage Excise Financial Account**
This role allows users to maintain all financial detail against an Excise Account
- Manage Deferment Account**
- ISV Activation**
This role allows users access to the ISV activation screen
- Directives**
- Perform Bulk and Additional Payments**
This role allows a user without full admin rights to perform bulk and additional payments.

Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.

- d) Select **<Change Details>** from the menu on the left to do any of the following:
- **Send Reminder** – this option will resend the notification to the user to remind him/her to accept the invite.
 - **Cancel Invitation** – this option will delete the invite, remove the user on the requestor’s portfolio and also remove the requestor’s profile from the user’s portfolio management screen.
 - **Update User Rights** – use this option to edit roles (permissions) assigned to the user.



- e) Select <**Delete User**> from the menu on the left to remove a user from an existing portfolio.
- Insert a reason for deleting the user
 - Click on <**Delete User**>
 - **On the** pop-up message click on <**OK**> **to** confirm your request.



Please Note:

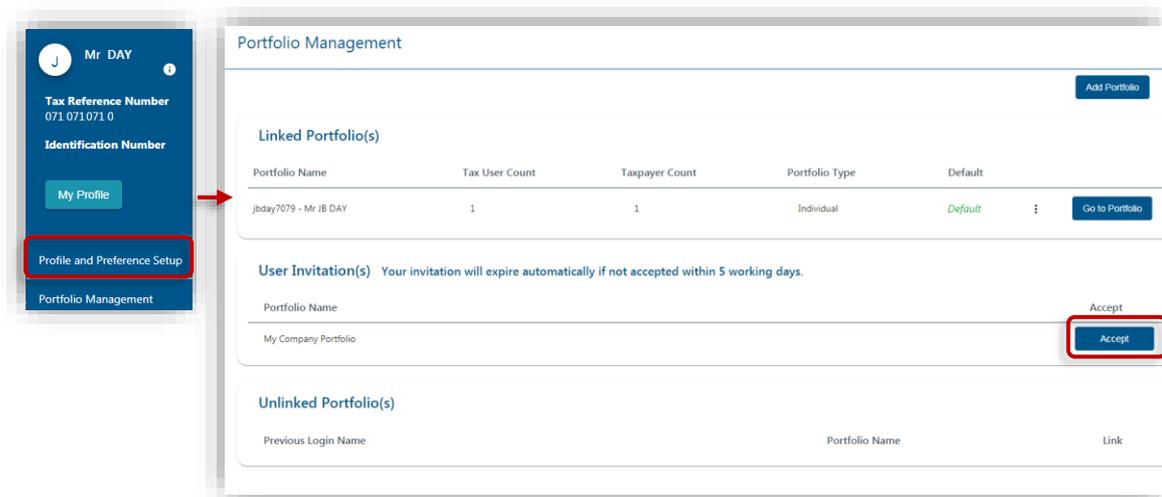
- Only a person with an existing eFiling profile can be added as a user on a portfolio. Once an invite is sent by the requestor, the user will receive an SMS and email notification with instructions on how to accept the invite.
- A requestor will not be allowed to invite a user should any of the following conditions apply:
 - SARS cannot find a match for the user details entered
 - The user [registered for eFiling prior to 1 July 2019](#) and has not yet logged in to set up his/her profile on the new eFiling website
 - The user has not yet [completed his/her eFiling registration](#)
 - The user already exists on the portfolio he/she is being invited to.

13.2 ACCEPT INVITE TO BE A USER ON A PORTFOLIO

SMS and email notifications will be sent to the person who has been invited to be a user on an organisation or tax practitioner's portfolio.

a) Log on to your eFiling profile.

- Select **<My Profile>**
- Select **<Portfolio Management>**
- The User Invitation will display. Click on **<Accept>**.



b) As part of the authentication process, you will be prompted to enter the [One-Time-Pin \(OTP\)](#) sent to your preferred method of contact. Once the OTP is successfully entered, a pop message will display to confirm that the organisation/tax practitioner profile will be linked to your profile.

Portfolio Management

[Add Portfolio](#)

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
jbdlay7079 - Mr JB DAY	1	1	Individual	Default	⋮ Go to Portfolio
My Company Portfolio	5	1	Organisation		⋮ Go to Portfolio

Message

Portfolio My Company Portfolio linked.

OK

Please Note:

- The invite from the requestor will automatically expire if not accepted by the user within 5 working days.
- If the invite expires, the record will be deleted on both the requestor's and user's portfolio.
- A notification will be sent to the requestor to notify him/her that the invite has expired. The requestor can opt to send a new invite.

14 MANAGE GROUPS

In order to activate the tax type functions and services on eFiling (e.g. Tax Directives, Tax Compliance Status, etc) you must ensure that the correct rights and authorisation levels have been allocated to users on your portfolio.

- a) To activate the tax type functions and services:
- Select <**Organisation**> from the menu on the top
 - Select <**Organisation**> again from menu on the left
 - Click on <**Rights Group**>
 - Click on <**Manage Groups**>
 - The <**Group Details**> screen will display.

The screenshot displays the SARS eFiling user interface. The top navigation bar includes the SARS eFiling logo and menu items: Home, User, Organisations, Returns, Customs, and Duties & Levies. The user profile shows 'John Taxpayer' with a 'My Profile' button. The left sidebar contains navigation options: Organisation (highlighted), SARS Registered Details, Employee Registration, Admin Reports, Rights Groups, Manage Groups (highlighted), and Organisation Setup. The main content area is titled 'Group Details' and features a 'Setup New Group' button. Below this is a table with the following data:

Group Name	Authorisation Level	Access to Payments	Open	Taxpayers	Users
Q Group	Completions	Yes	Open	Manage Payers	Manage Users
Estelle	Completions	Yes	Open	Manage Payers	Manage Users

b) Click on the <Open> hyperlink:

- Insert/edit the <Group Name> where applicable
- Select the applicable <Authorisation Level>:
 - **View Only:** This will allow you to only have view access
 - **Completions:** You will only be able to view and complete forms or applications
 - **Submissions:** You will be allowed to view, complete and submit tax directive applications
- Select the applicable tax types to be activated (e.g. Directives, Tax Reference Number, Tax Compliance Status, etc.)
- Click <Update> to activate the specific tax type functionality required. You also have the option to <Delete Group>.

The screenshot shows the 'UPDATE GROUP DETAILS' form in the SARS FILING system. The form is titled 'UPDATE GROUP DETAILS' and is located within the 'My Company Portfolio' section. The form contains the following fields and options:

- Group Name:** SARS Group
- Authorisation Level:** Submissions
- Access To Payments:**
- Tax Types:**
 - Provisional Tax (IRP6)
 - VAT201
 - Organisation Income Tax (ITR14/IT12EI/ITR12T)
 - Individual Income Tax (ITR12)
 - Employee's Tax (EMP201)
 - IT56 - Secondary Tax On Companies (STC)
 - EMP501 - Submission
 - Customs Agent
 - Excise Agent
 - VAT Admin Penalty
 - PAYE Admin Penalty
 - IT Admin Penalty
 - Transfer Duty
 - Third Party Appointment Banks
 - Dividends Withholding Tax (DWT)
 - Third Party Appointment Employers
 - Third Party Appointment Other
 - Tax Compliance Status
 - Tax Compliance Status Verification
 - IT3
 - Medical Scheme Contribution
 - Insurance Payment
 - Withholding Tax on Interest(WTI)
 - Foreign Tax Information (FTI)
 - Mineral Royalties (MPR3)
 - CBC
 - TRN (Tax Reference Number)
 - Directives
 - ITR12 Cancelled

At the bottom of the form, there is a question: "Do you want to import taxpayers from an existing group?" with radio buttons for "Yes" and "No". The "Update" button is highlighted with a red box.

15 MANAGE TAXPAYERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

- To manage taxpayer types linked to a portfolio:
 - Select **<Organisations>** from the menu on the top
 - Click **<Organisation>** from menu on the left.
- From the menu on the left:
 - Select **<Register New>** to add a new taxpayer type (e.g. individual, company, trust) to your portfolio.
 - After you have completed the relevant fields, click on **<Continue>**
 - Select the taxpayer groups and click on **<Continue>**
 - A summary of the new taxpayer's details will display. Click on **<Continue>**
 - Select the return types that you want to [activate](#) for the taxpayer. Insert the reference number and click on **<Register>**.
 - To amend a specific taxpayer's details on your portfolio, search for the taxpayer and then select **<Change Details>** from the menu on the left
 - After you have completed the relevant fields, click on **<Update Details>**
 - Select the taxpayer groups and click on **<Continue>**
 - A summary of the taxpayer's details will display. Click on **<Continue>**

- Select the return types that you want to [activate/deactivate](#) for the taxpayer and click on **<Register>**.

The screenshot shows the SARS eFiling interface for a taxpayer named Peter. The top navigation bar includes 'Home', 'User', 'Organisations', 'Returns', 'Duties & Levies', 'Services', 'Tax Status', and 'Contact'. The 'Organisations' menu item is highlighted with a red box. The left sidebar contains a 'Register New' button, also highlighted with a red box. The main content area is titled 'Register New Organisation' and includes the following fields and options:

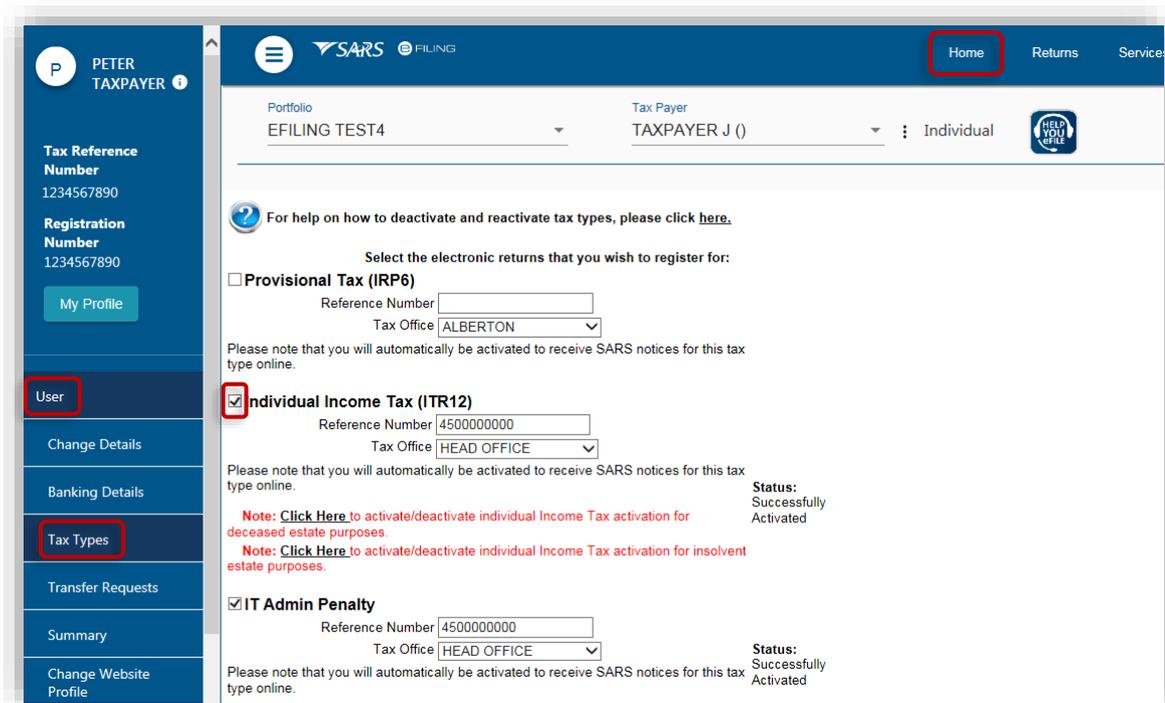
- Mandatory Details:** What type of taxpayer are you adding? (Company, Trust, Individual/Sole proprietor, Partnership, Fund/Other). 'Company' is selected.
- Organisation Name:** Text input field.
- Trading As:** Text input field with a 'Same as Above' button.
- Registration Number:** Text input field with a 'L' icon.
- Financial Year End:** Select dropdown menu.
- Please tell us how you heard about .:** Select dropdown menu.
- Are you a Tax Practitioner?:** Check box.
- Telephone Number:** Two input fields.
- Fax Number:** Two input fields.
- Physical Address:** Three input fields.
- Postal Address:** Three input fields.
- Bank:** ABSA (selected) dropdown menu.
- Branch Name:** Text input field.

16 ACTIVATE/ DEACTIVATE TAX TYPES

In order to transact (e.g. submit returns, make payments, request statement of account) on specific tax types (e.g. provisional tax), you will need to activate that specific tax type.

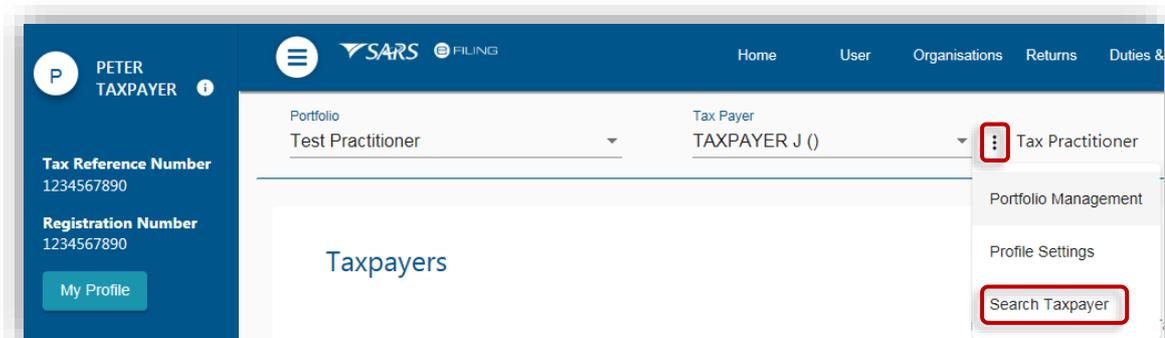
16.1 INDIVIDUALS

- To activate/deactivate tax types on your own individual profile.
 - Select **<Home>** from the menu on the top
 - Select **<User>** from the menu on the left
 - Select **<Tax Types>** from the menu on the left
 - Select the check box for the tax type you want to activate (or deactivate)
 - Insert the tax reference number
 - Click on **<Register>**
 - Once SARS has verified your details, the status will change to 'successfully activated'.



16.2 ORGANISATIONS AND TAX PRACTITIONERS

- a) To activate/deactivate tax types for taxpayers on your portfolio, click on the ellipses (:) menu icon and then search for the specific taxpayer.



- b) Select **<Organisations>** from the menu on the top.
- Select **<Organisation>** from the menu on the left
 - Select **<Organisation Tax Types>** from the menu on the left
 - Select the check box for the tax type you want to activate (or deactivate)
 - Insert the tax reference number
 - Click on **<Register>**
 - Once SARS has verified the details, the status will change to 'successfully activated'.

The screenshot displays the SARS eFiling portal interface. At the top, the user is identified as 'PETER TAXPAYER'. The navigation menu on the left includes 'Organisation Tax Types', which is currently selected. The main content area is titled 'Select the electronic returns that you wish to register for:' and lists four tax types, each with a checkbox and a 'Register' button:

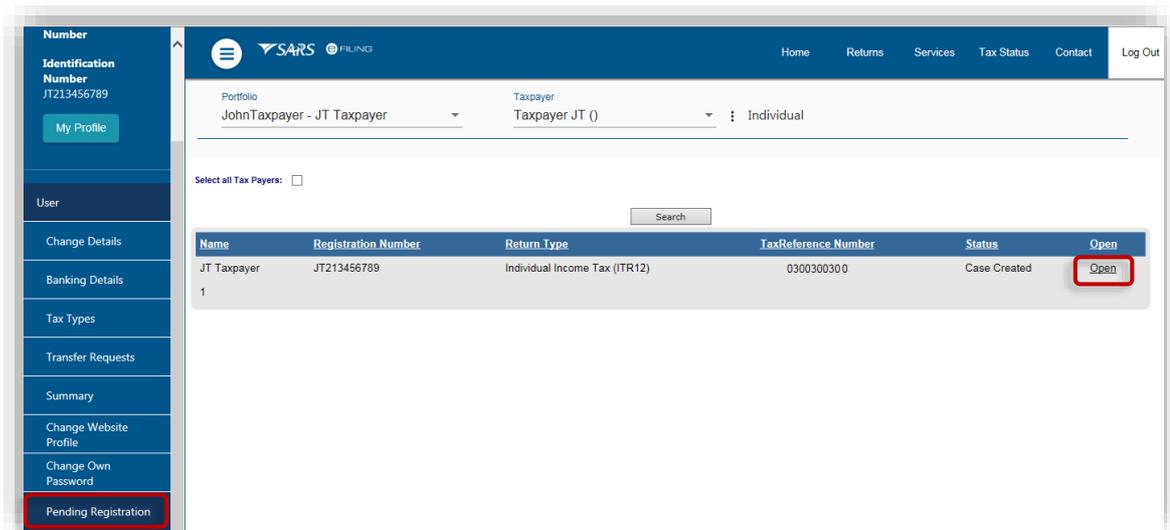
- Provisional Tax (IRP6)**: Reference Number [], Tax Office [ALBERTON].
- Individual Income Tax (ITR12)**: Reference Number [], Tax Office [ALBERTON].
- IT Admin Penalty**: Reference Number [], Tax Office [ALBERTON].
- Mineral Royalties (MPR3)**: Reference Number [], Tax Office [ALBERTON].

Each registration option includes a note: 'Please note that you will automatically be activated to receive SARS notices for this tax type online.' There are also two red notes regarding activation for deceased and insolvent estate purposes. A 'Register' button is highlighted at the bottom of the form.

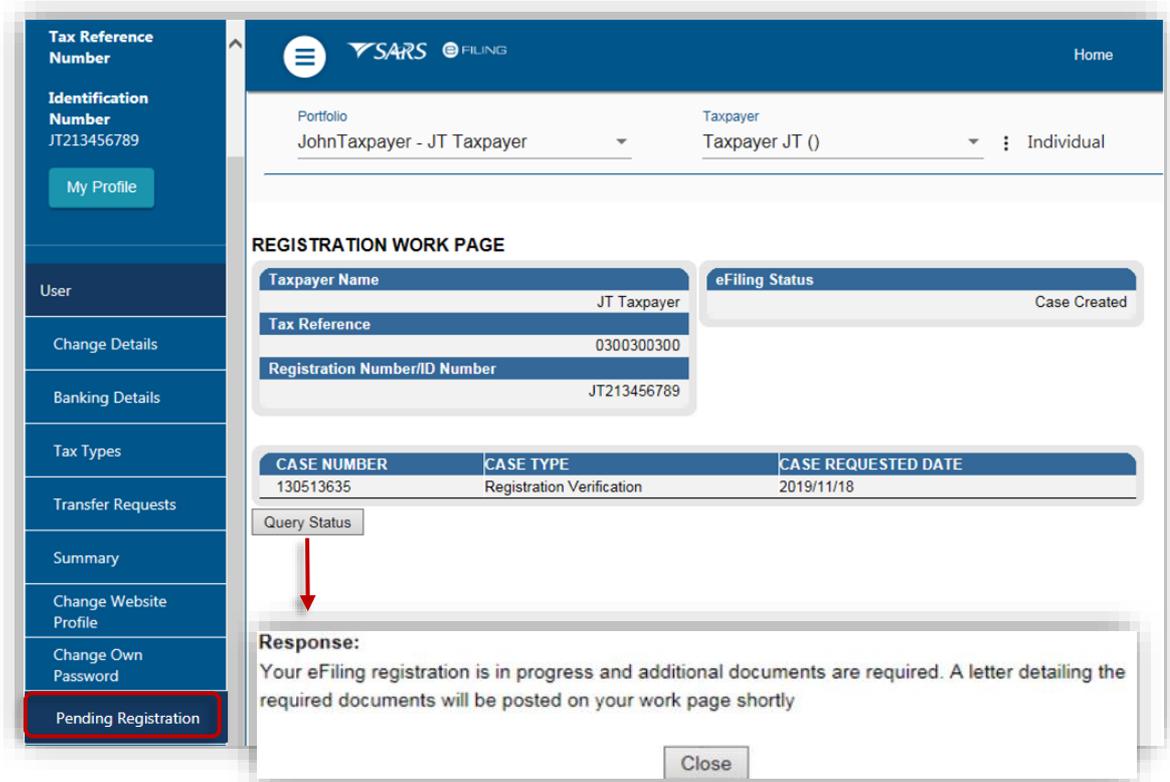
16.3 TAX TYPE ACTIVATION PENDING

There may be cases where SARS will need to review the request before activating the particular tax type for eFiling. In this instance the status of the tax type activation will be "Awaiting Registration Verification" and a case number will be allocated to you.

- a) You can view your case number and case status on the <Pending Registration> function:
- If you are an individual, select <Home> from the menu on the top and then select <User> and <Pending Registration> from the menu on the left
 - For Organisations and Tax Practitioners, select <Organisations> from the menu on the top and then click on <Organisation> and <Pending Registration> from the menu on the left.
 - Click on <Open> to view the case details.



- b) Click on <Query Status>. A pop-up message will display if your request is still in progress.



- c) Should SARS require additional information to process your request, a letter will be issued and the workpage will display a link for you to upload supporting documents. Once the case has been reviewed and approved, your tax type will be activated.

Portfolio: JohnTaxpayer - JT Taxpayer Taxpayer: Taxpayer JT () Individual

REGISTRATION WORK PAGE

Taxpayer Name	JT Taxpayer	eFiling Status	Supporting Documents Submitted
Tax Reference	0308918267		
Registration Number/ID Number	JT213456789		

CASE NUMBER	CASE TYPE	CASE REQUESTED DATE
130513635	Registration Verification	2019/11/18

Query Status

SUPPORTING DOCUMENTS	STATUS	TYPE	DATE	SIZE (Kb)	NO. OF DOCS
Documents for Registration	Submitted		2019/11/19	80	1

LETTER DESCRIPTION	LETTER DATE	OPEN
Request for supporting document for Registration	2019/11/19	View

Individual Income Tax (ITR12)

Reference Number:

Tax Office:

Please note that you will automatically be activated to receive SARS notices for this tax type online.

Status: Successfully Activated

Note: [Click Here](#) to activate/deactivate individual Income Tax activation for deceased estate purposes.

Note: [Click Here](#) to activate/deactivate individual Income Tax activation for insolvent estate purposes.

17 TAX TYPE TRANSFER

The purpose of this function is to enable the transfer of tax types (personal income tax and provisional tax) between taxpayers, tax practitioners and registered representatives on eFiling.

Before requesting a tax type transfer, please ensure that the taxpayer is created on the profile.

For more information please refer to the section '[Manage Taxpayers on an Organisation or Tax Practitioner Portfolio](#)'.

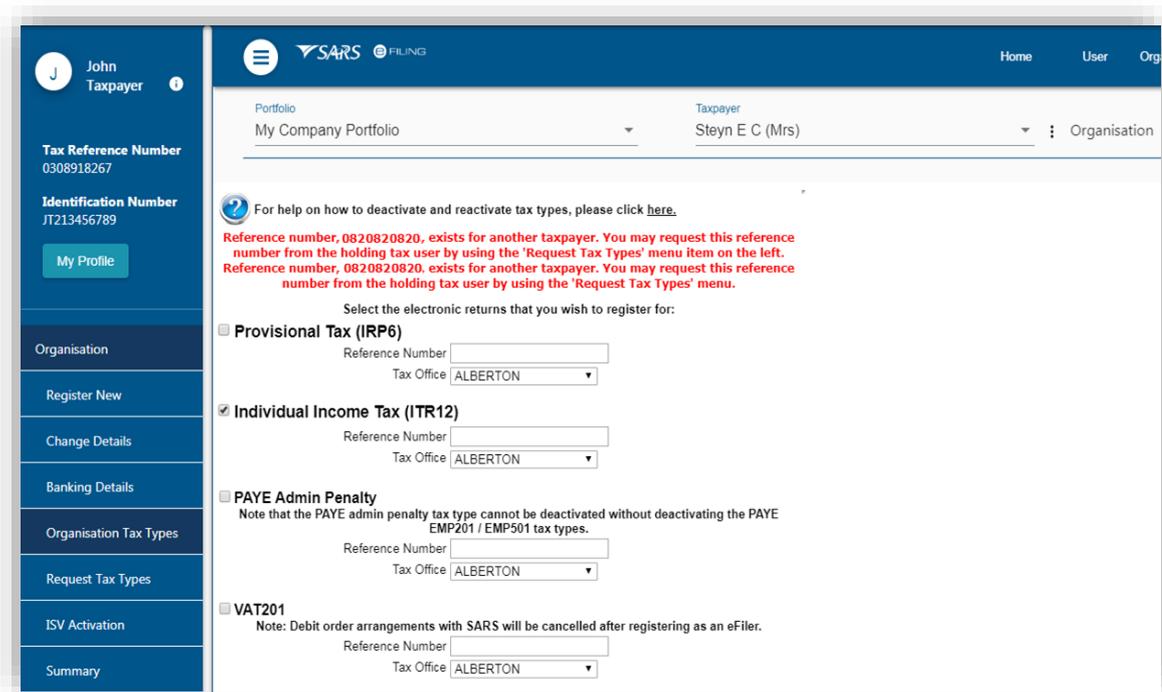
The owner/registered representative of that tax number must approve the transfer in order to complete the process.

This section describes the steps to:

- Request a tax type transfer
- Approve a tax type transfer

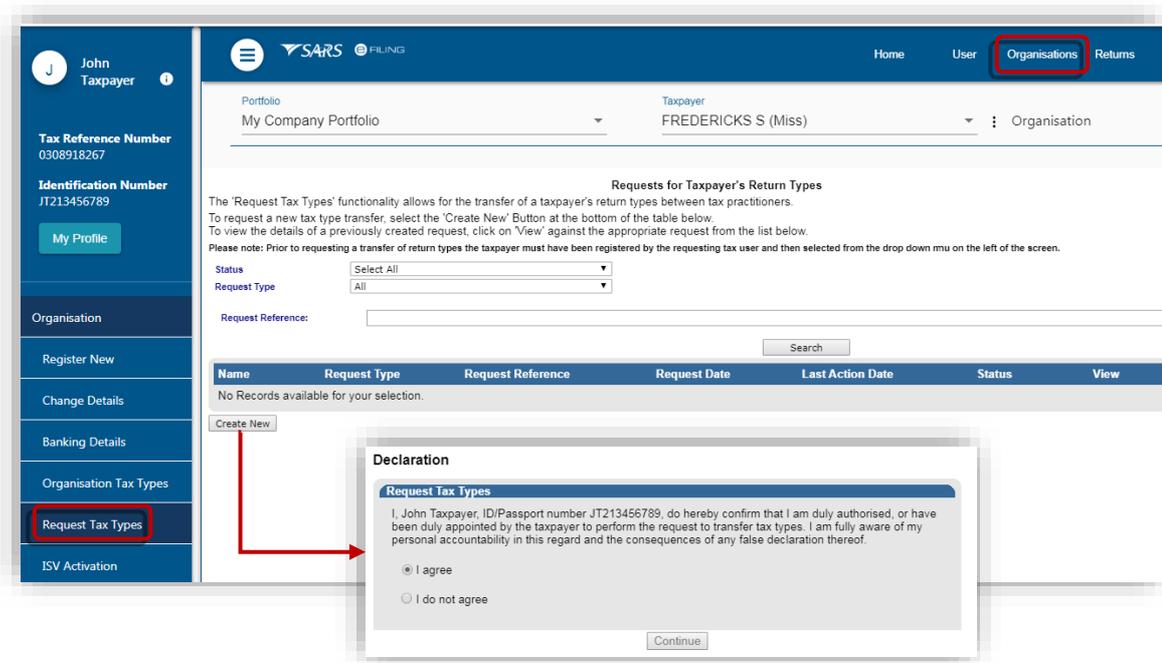
17.1 REQUEST TAX TYPE TRANSFER

- If a tax type is already registered on another eFilers profile, an error message will display (see below) when you try to activate the tax type. You have the option to request the transfer of the tax type that is registered with the other eFiler.



b) To request a tax type transfer:

- Search for the required taxpayer
- Select <Organisations > from the menu on the top.
- Select <Organisation> from the menu on the left
- Select <Request Tax Types> from the menu on the left
- Click on <Create New>
- On the Declaration, select <I agree> and click on <Continue>



c) Complete the details of the taxpayer you want to move to your portfolio.

- Click on <Request>

- Click on <OK> on the pop-up message to confirm you are that sure you want to request these reference number(s) for those return types.

Portfolio
My Company Portfolio
Taxpayer
FRED
Organisation

Taxpayer Move Request - Requested

To request a transfer against any return type linked to the taxpayer, make sure the correct taxpayer is selected on the drop down menu on the left of the screen and then enter the associated reference number in the box alongside the return type. A transfer request against more than one reference number, where applicable, is permissible.
You may send your contact details to allow the holding tax user to contact you outside the system. You may also give the holding tax user more information in the message

Requesting Taxpayer Name: FRED
 Requesting Registration Number:
 Status: New Request
 Request Created Date:
 Last Action Date:

Requested Return Type:	Reference Number	Status
EMP201 - PAYE	<input type="text"/>	
EMP501 - Submission	<input type="text"/>	
PAYE Admin Penalty	<input type="text"/>	
VAT201	<input type="text"/>	
VAT Admin Penalty	<input type="text"/>	
Provisional Tax (IRP6)	<input type="text"/>	
Individual Income Tax (ITR12)	<input type="text" value="0820820825"/>	
IT Admin Penalty	<input type="text"/>	
Dividends Withholding Tax (DWT)	<input type="text"/>	

Contact details to send to holding tax user:
 Requesting tax user: JT Taxpayer name
 Message :
 Send Contact Details?
 Email Address:
 Telephone Number:
 Cell Number:

- d) A message will display confirming that the tax type has been requested and that the request is pending approval from the individual.
- The taxpayer/registered representative must [approve the transfer request](#) in order to complete the process.
- e) The table on the <Request Tax Types> page allows you to track and view the status of each request.

Requests for Taxpayer's Return Types

The 'Request Tax Types' functionality allows for the transfer of a taxpayer's return types between tax practitioners.
 To request a new tax type transfer, select the 'Create New' Button at the bottom of the table below.
 To view the details of a previously created request, click on 'View' against the appropriate request from the list below.

Please note: Prior to requesting a transfer of return types the taxpayer must have been registered by the requesting tax user and then selected from the drop down menu on the left of the screen.

Status:

Request Type:

Request Reference:

Name	Request Type	Request Reference	Request Date	Last Action Date	Status	View	Cancel
Mr TR	Requested	191219492	18 Nov 2019	20 Nov 2019	Cancelled	View	
Mrs E C	Received	191219432	12 Nov 2019	14 Nov 2019	Cancelled	View	
Miss S	Received	191219426	12 Nov 2019	14 Nov 2019	Cancelled	View	
Miss S	Received	191219425	12 Nov 2019	12 Nov 2019	Cancelled	View	
Mrs E C	Received	191219404	11 Nov 2019	13 Nov 2019	Cancelled	View	
Mrs BL	Requested	191219378	07 Nov 2019	07 Nov 2019	Authorised by Individual TaxPayer	View	
Miss S	Requested	191219376	07 Nov 2019	07 Nov 2019	Authorised by Individual TaxPayer	View	

1

Please Note:

- If the you are the owner or active registered representative of that tax type:
 - An override code will immediately be sent to your security contact details
 - After successfully capturing the override code, the tax type and history will immediately move to the registered your portfolio.
- If you have multiple portfolios, you can transfer tax types between portfolios:
 - We will check if you if have 'Manage Payer Rights' on both the requesting and holding portfolio. Once verified the tax type will be transferred immediately.
- Where the owner or registered representative does not [approve the request for tax type transfer](#) after 5 working days, reminders will be sent. If there is no action from the owner or registered representative after the last reminder is sent, the request to transfer the tax type will expire.
- A tax type transfer will be disallowed if:
 - You are not a registered tax practitioner
 - You are not the registered representative for that taxpayer
 - You are a user with the 'Manage Payer Rights' but you are not the registered representative/valid tax practitioner of the individual whose provisional tax or personal income tax type is being requested.

17.2 APPROVE REQUEST FOR TAX TYPE TRANSFER

A message will be sent to notify the taxpayer/registered representative of the request to transfer the tax type. The taxpayer/registered representative must follow the steps below to approve the request in order to complete the process.

- a) Log on to the SARS website and select on **<Manage Tax Type Transfer>**
 - On the Tax Type Transfer screen select yes or no to indicate if you are a South Africa Citizen

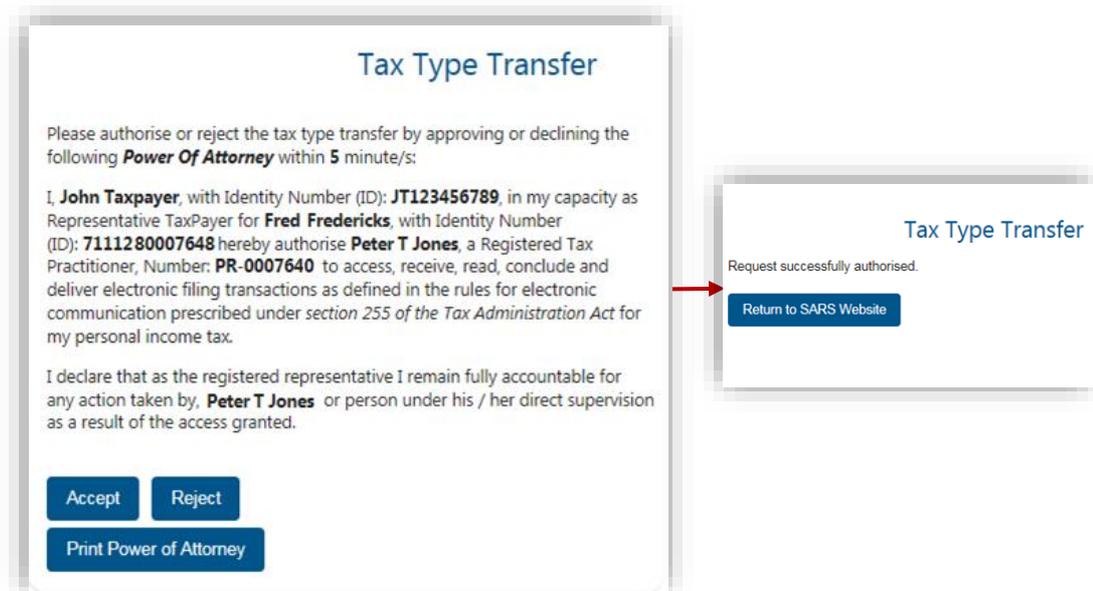
- Insert the identification number and tax number
- Click on **<Submit>**

b) As part of the authentication process, you will be required to enter a [One-Time-Pin \(OTP\)](#).

- Select a preferred channel (i.e. email or cell number) to which SARS can send the OTP and click on **<Send OTP>**
- Insert the OTP sent to your email or cell number and click on **<Submit>**.

c) You can view the details of the party requesting the tax type transfer and print the Power of Attorney

- Click on **<Accept>** or **<Reject>**
- After you have authorised or rejected the request, click on **<Return to SARS Website>**.



Please Note:

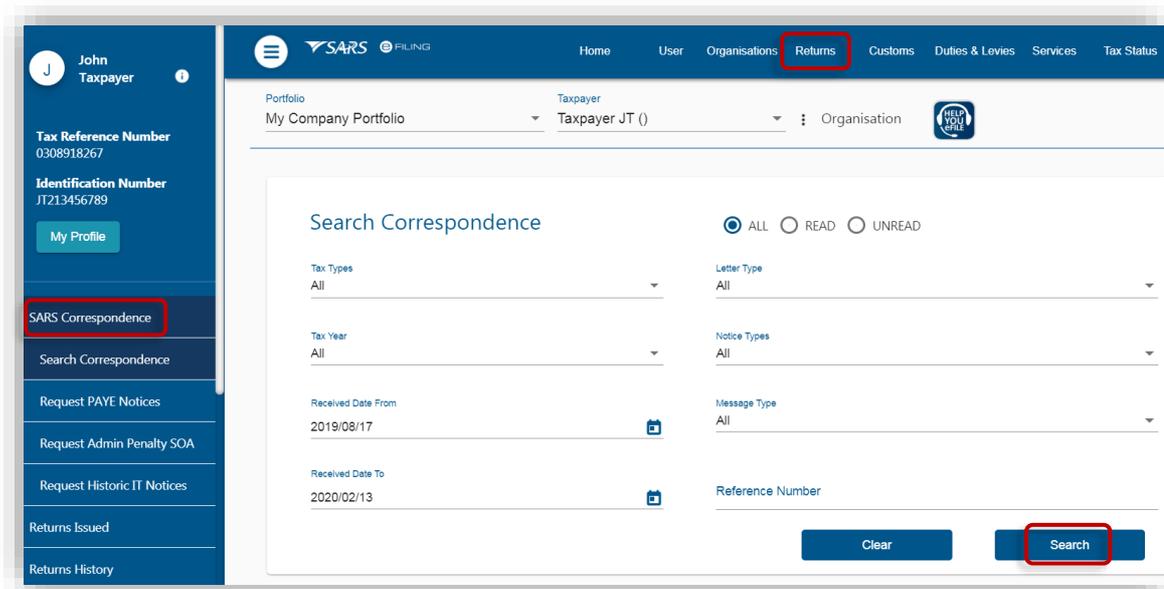
- When a taxpayer or registered representative authorises the transfer request, the tax type will move from the holding party (e.g. old tax practitioner) to the requesting party (e.g. new tax practitioner). If the taxpayer or registered representative has shared access with the holding party, shared access will be established with the requesting party.
- When a taxpayer or registered representative rejects the initial transfer request the requesting tax practitioner will be allowed up to two more retry options to request the tax type transfer.
If the two retries are exhausted, the tax practitioner will not be allowed to submit any further tax type transfer requests for that particular taxpayer for a period of 21 business days

18 SARS CORRESPONDENCE

For your convenience all letters, notices and messages issued by SARS is available in one place under 'SARS Correspondence'.

d) To search for correspondence:

- Log on to eFiling and select <**SARS Correspondence**> from the menu on the left
- Click on <**Search Correspondence**>
- The correspondence grid will display
- You can use one or more of the following filters to search for correspondence:
 - Tax type
 - Tax year
 - Received from date (i.e. start date)
 - Received to date (i.e. end date)
 - Correspondence Type (such as Letters, Notices and Text Messages issued by SARS)
- Click on <**Search**>.

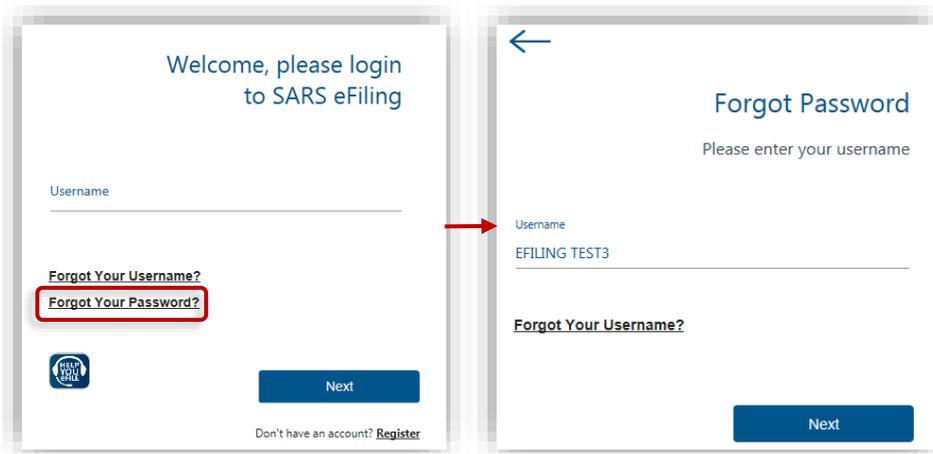


Please Note:

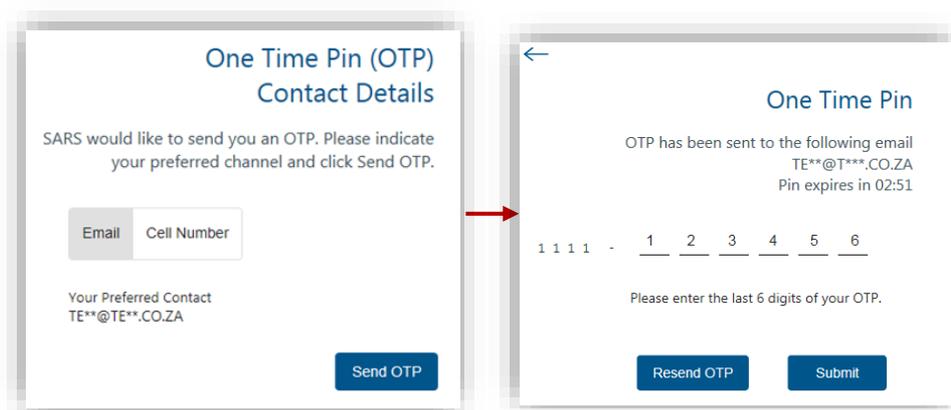
If you navigate to other eFiling pages after logging on, you will no longer see <**SARS Correspondence**> on the menu on the left. To navigate back to <**SARS Correspondence**> select <**Returns**> from the menu on the top.

19 FORGOT PASSWORD

- a) On the eFiling login in screen click on <**Forgot Password**> and then enter your user name.

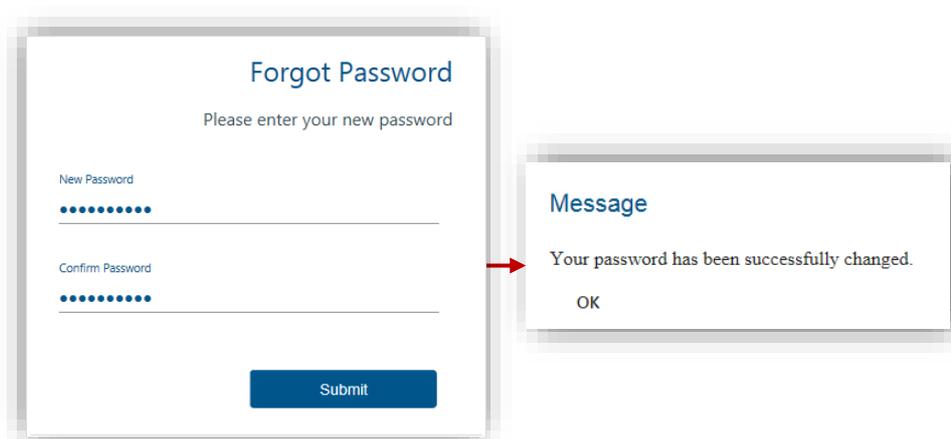


- b) Indicate if you want your [OTP](#) to be sent to your email or your cell number. Click on <**Send OTP**>.



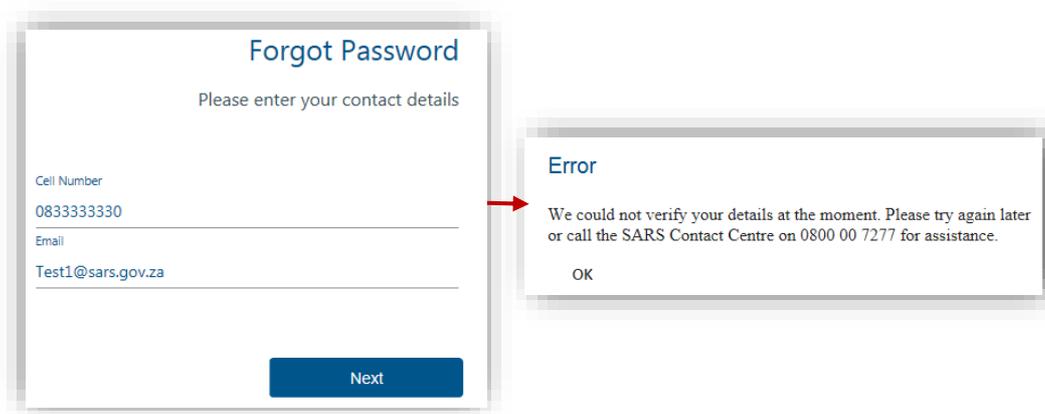
c) Insert your new [password](#) and retype it to confirm.

- Click on <**Submit**>
- A pop-up message will display confirming that your password has been changed successfully.



d) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be required to enter your cell number and email address.

- If we can match your details with our records, an OTP will be sent to you
- If we cannot match your details, we will ask you a few questions to authenticate you
- If we are still unable to match your details, please call the SARS Contact Centre for further assistance.



20 FORGOT USERNAME

a) On the eFiling login in screen click on **<Forgot Your Username>**. Insert the following particulars:

- Cell number
- Email
- Indicate if you are a South African citizen
- ID number (or Passport number if you are not a South African citizen)
- Tax number (if you have one).

b) If we can match you personal particulars an **OTP** will be sent to your email or your cell number. Insert the OTP and click on **<Submit>**.

The image shows two screenshots from the eFiling system. The first screenshot is titled 'Forgot Username' and contains the following fields: 'Cell Number' (0833333333), 'Email' (cena@test.co.za), a radio button selection for 'Are you a South African Citizen?' (with 'No' selected), 'Foreign ID / Passport Number' (123456789CE), and 'Tax Number Linked to the Username'. A 'Continue' button is at the bottom. A red arrow points from the 'Continue' button to the second screenshot. The second screenshot is titled 'One Time Pin' and displays: 'OTP has been sent to the following email CE**@T***.CO.ZA Pin expires in 02:50', a numeric keypad with digits 1-6, and the instruction 'Please enter the last 6 digits of your OTP.' There are 'Resend OTP' and 'Submit' buttons at the bottom.

c) Once you have entered the correct OTP, your username will display. You will be prompted to insert a password and retype it to confirm.

- Click on **<Submit>**
- A pop-up message will display confirming that your password has been changed successfully.

The image shows two screenshots. The first screenshot is titled 'Forgot Username' and contains the text 'Please enter your new password'. It has a box displaying 'Your username is: CENA@TEST.CO.ZA', and two password input fields labeled 'New Password' and 'Confirm Password'. A red arrow points from the 'Confirm Password' field to the second screenshot. The second screenshot is a 'Message' box with the text 'Your password has been successfully changed.' and an 'OK' button.

d) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be prompted to select a preferred channel to receive your OTP.

- If we can match your details with our records, an OTP will be sent to you

- If we cannot match your details, we will ask you a few questions to authenticate you
- If we are still unable to match your details, please call the SARS Contact Centre for further assistance.

21 CONCLUSION

Please contact SARS should you require any further information which might not be addressed in this guide.

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 own tax advisor/tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (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).