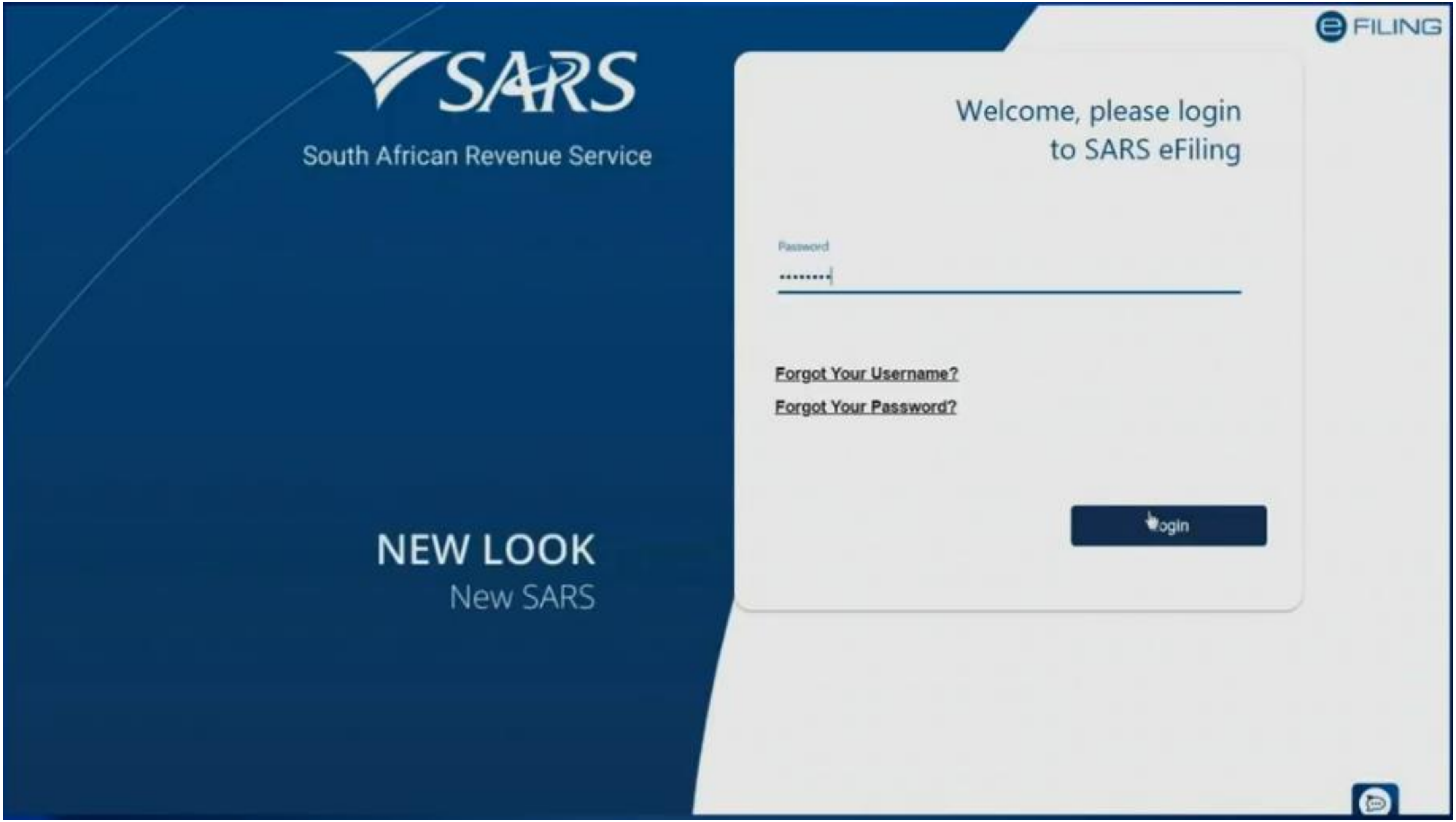
SARS Tax Practitioner Readiness Programme

Module 6 of 8

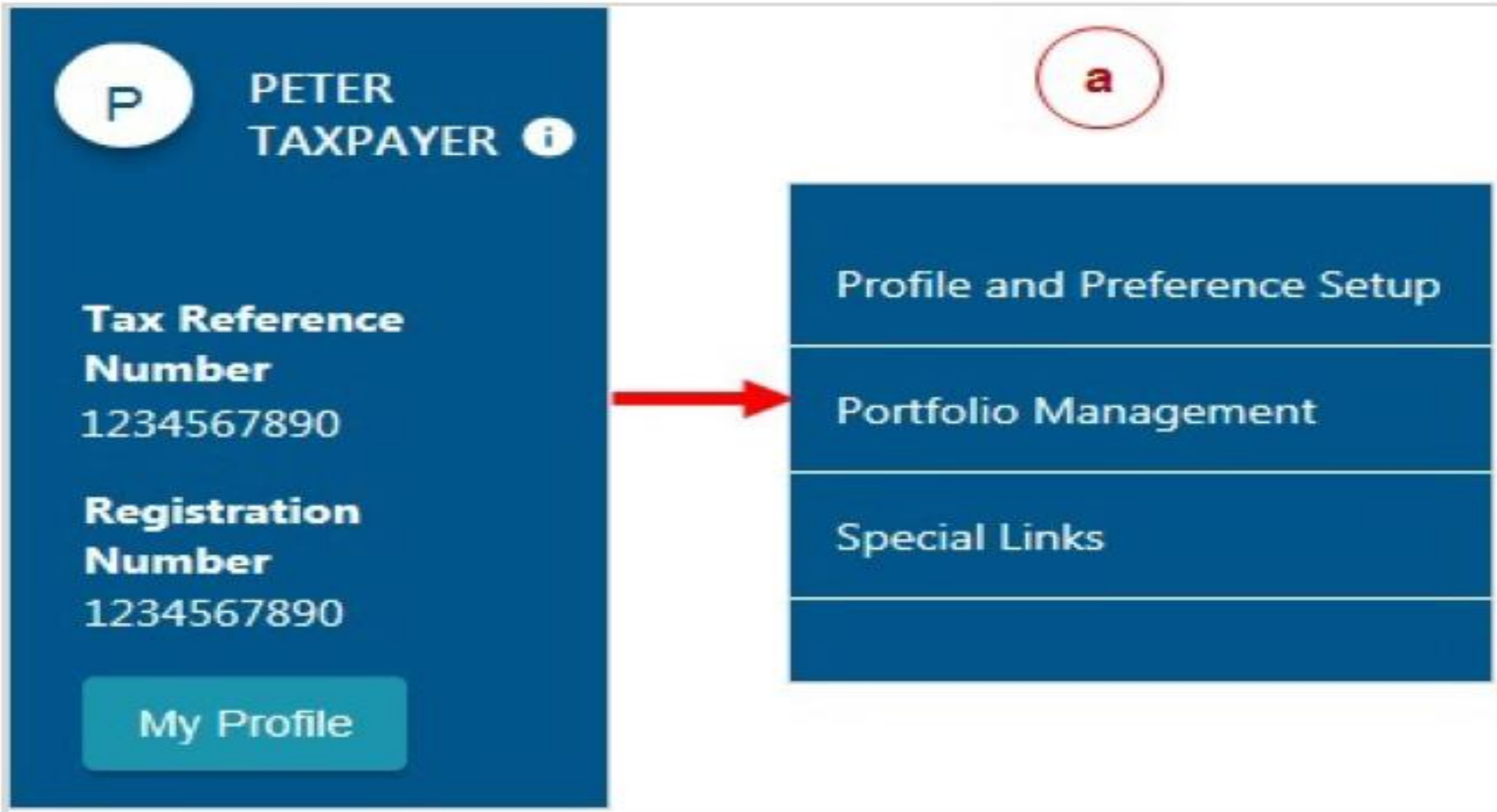
Use of eFiling System

Login to SARS eFiling



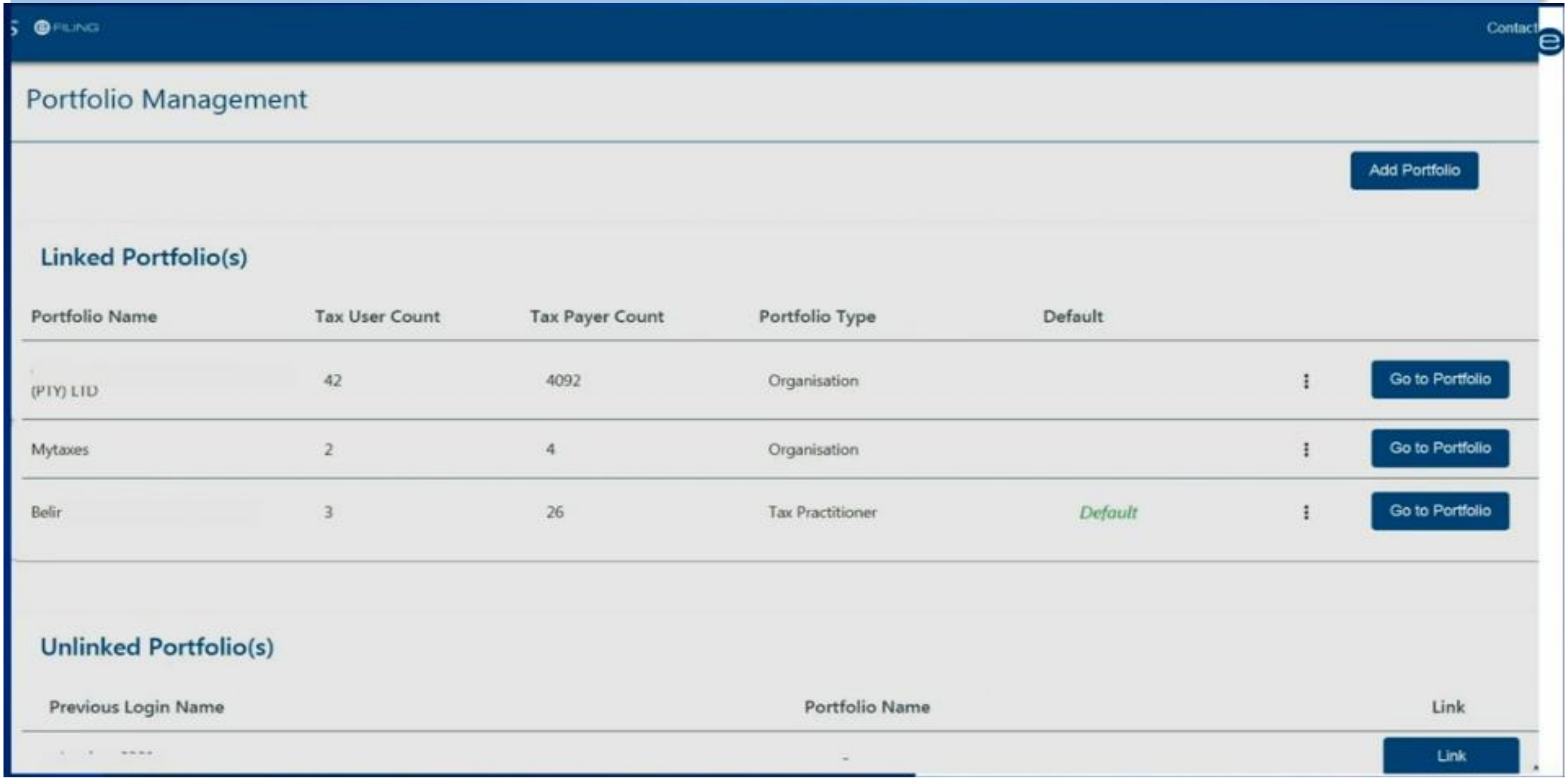
Portfolio Management

Click on “My Profile”, then click on “Portfolio Management”.



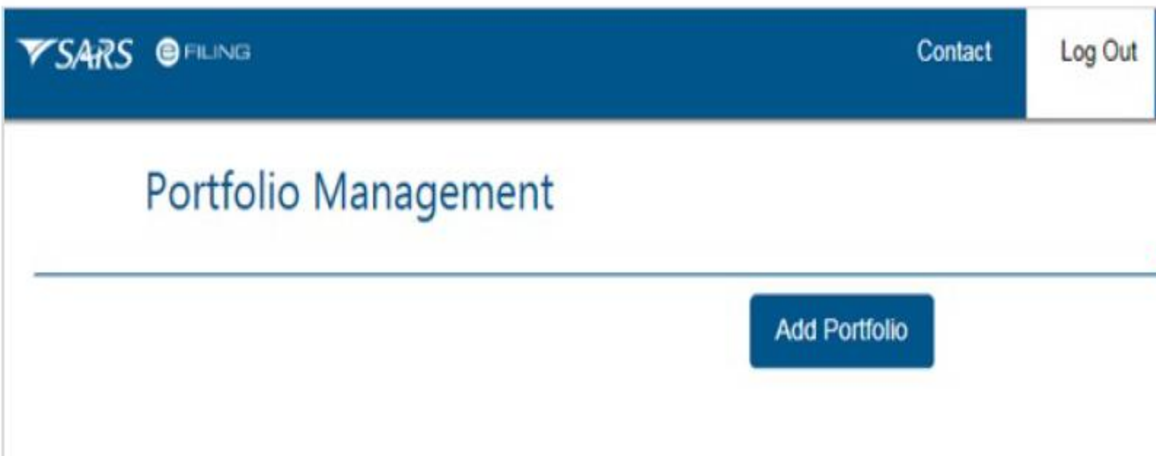
Portfolio Management

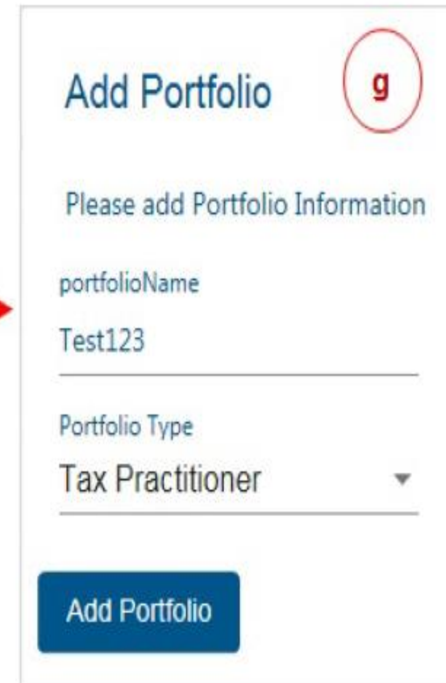
The Portfolio Management Screen will display for you to add a new portfolio.



Portfolio Management

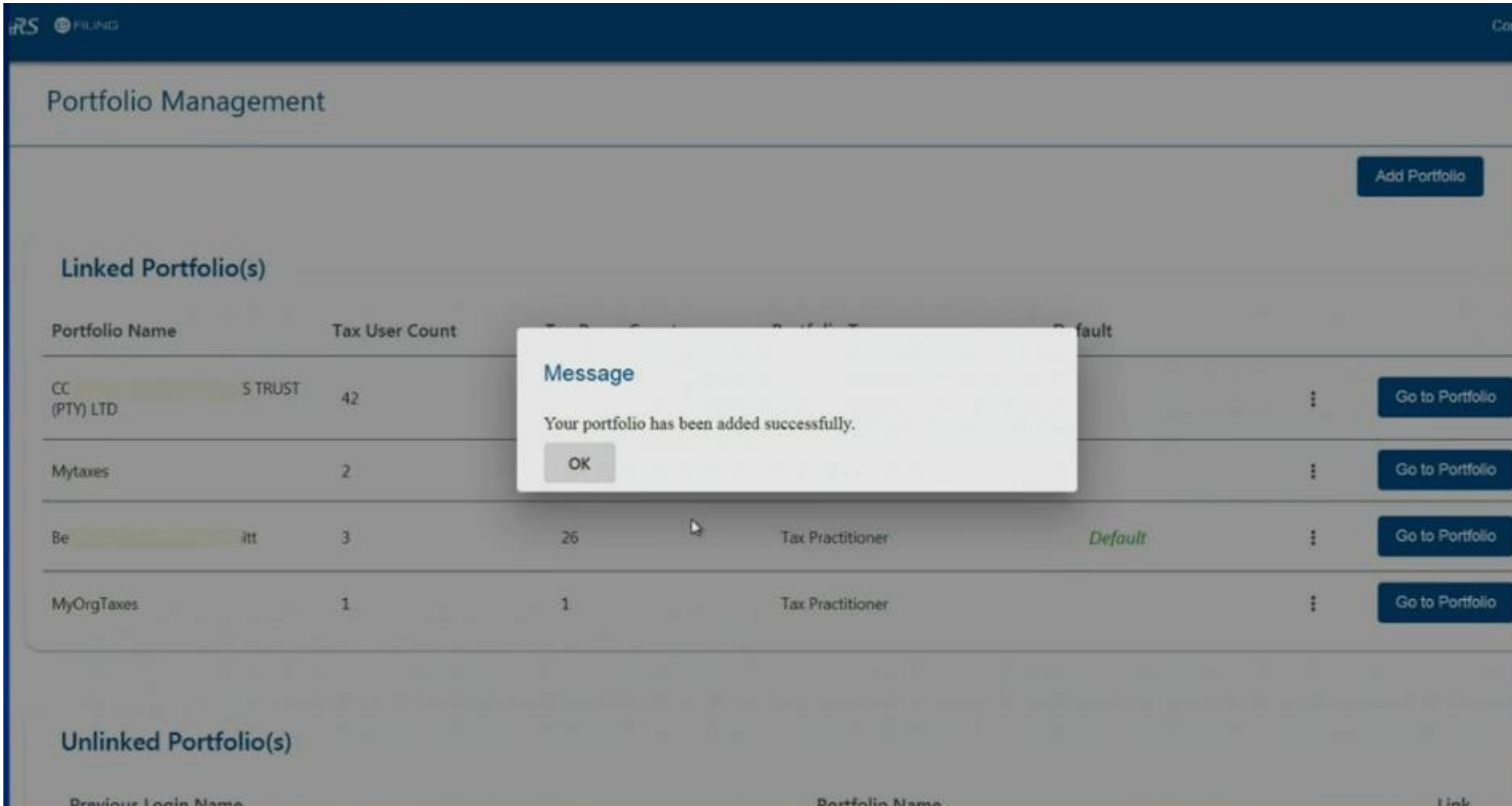
Click on “Add Portfolio”.
Enter the portfolio name and select the portfolio type from the drop-down menu, click on “Add Portfolio”





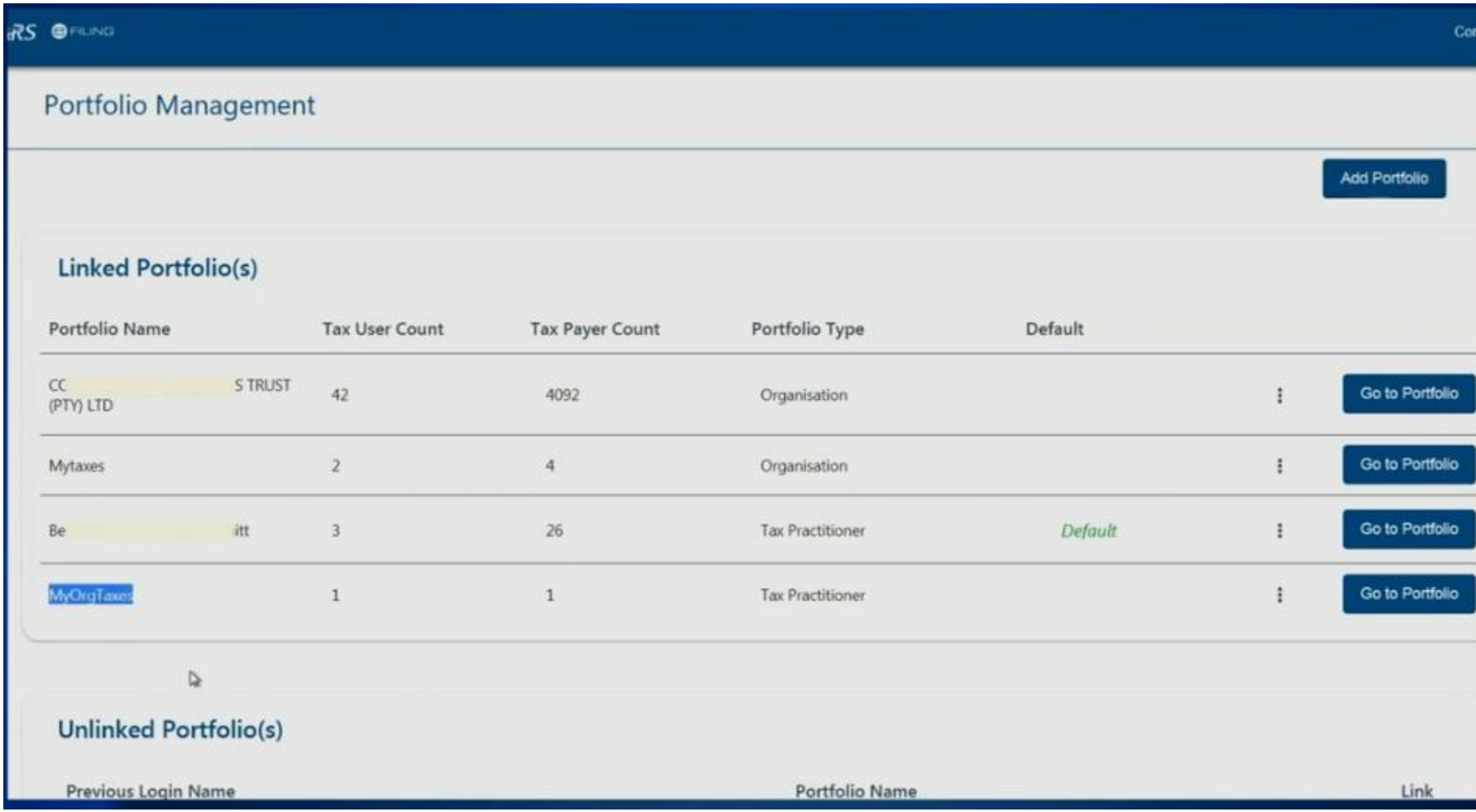
Portfolio Management

The new portfolio will be successfully added.



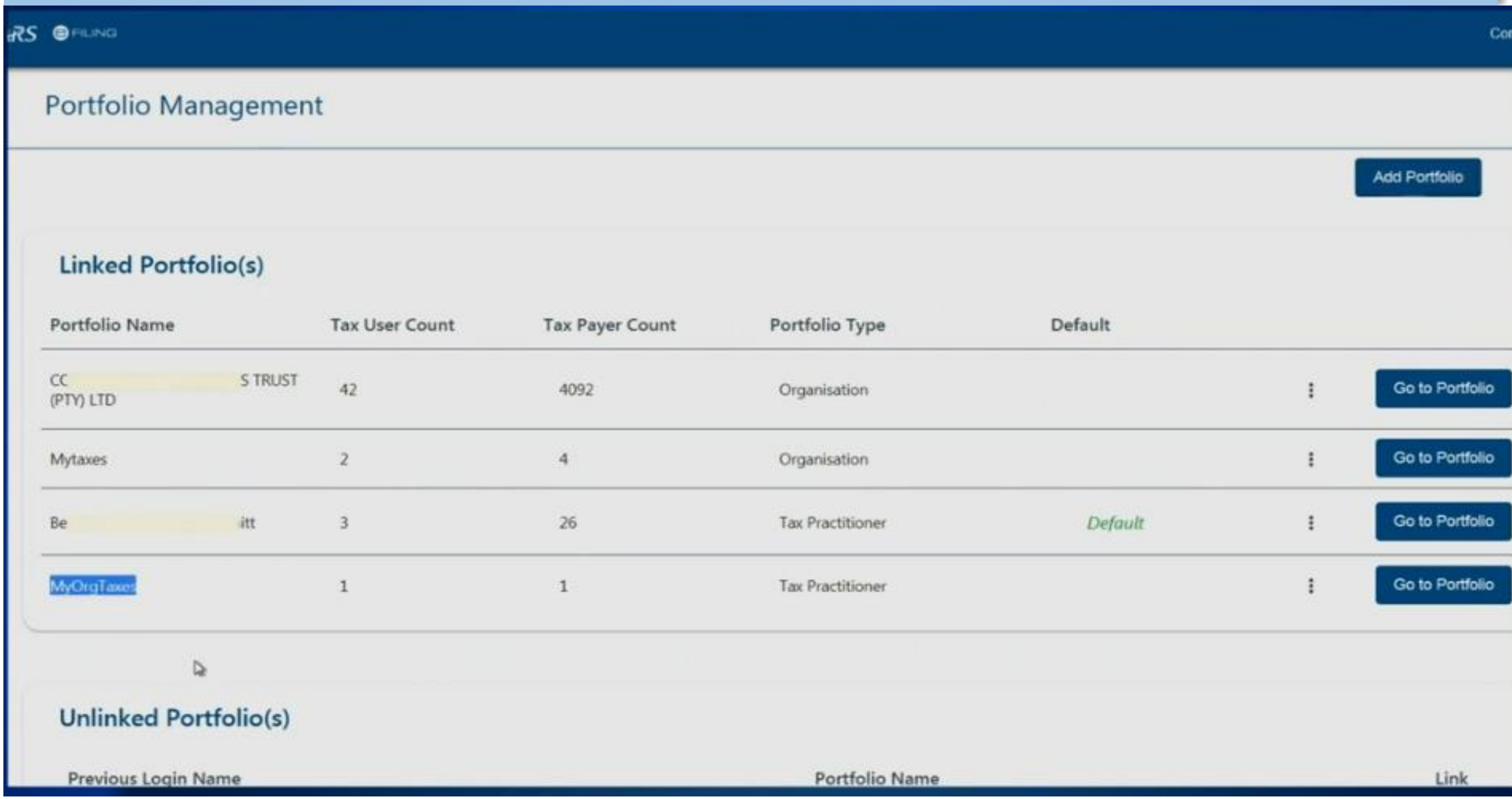
Portfolio Management

The added portfolio will be displayed under linked portfolios.



Adding New Client to a Portfolio

How to add clients to a portfolio? Click “Go To Portfolio” on the portfolio where you wish to add the client.



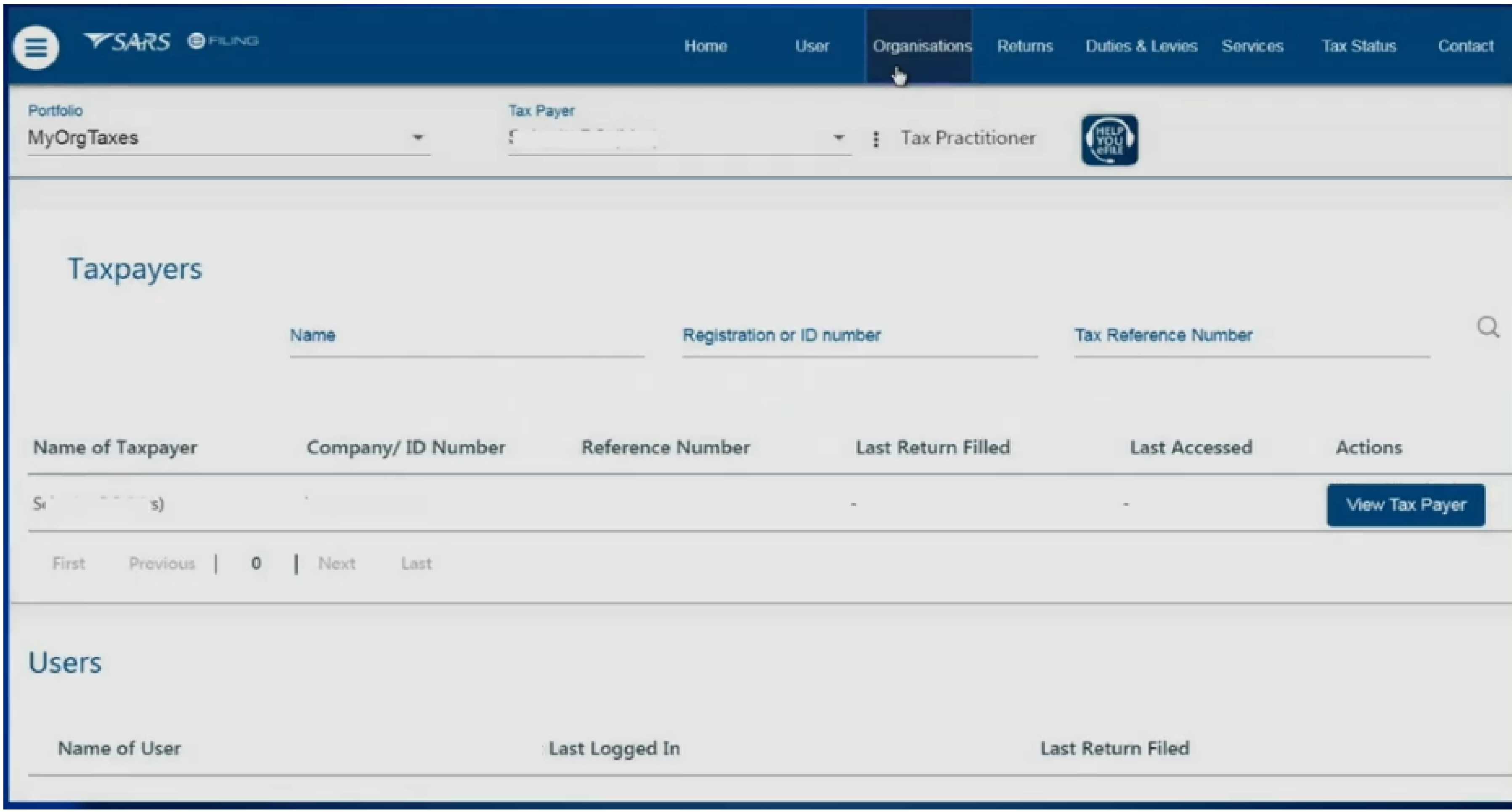
Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default		
CC S TRUST (PTY) LTD	42	4092	Organisation		⋮	Go to Portfolio
Mytaxes	2	4	Organisation		⋮	Go to Portfolio
Be itt	3	26	Tax Practitioner	*Default*	⋮	Go to Portfolio
MyOrgTaxes	1	1	Tax Practitioner		⋮	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link

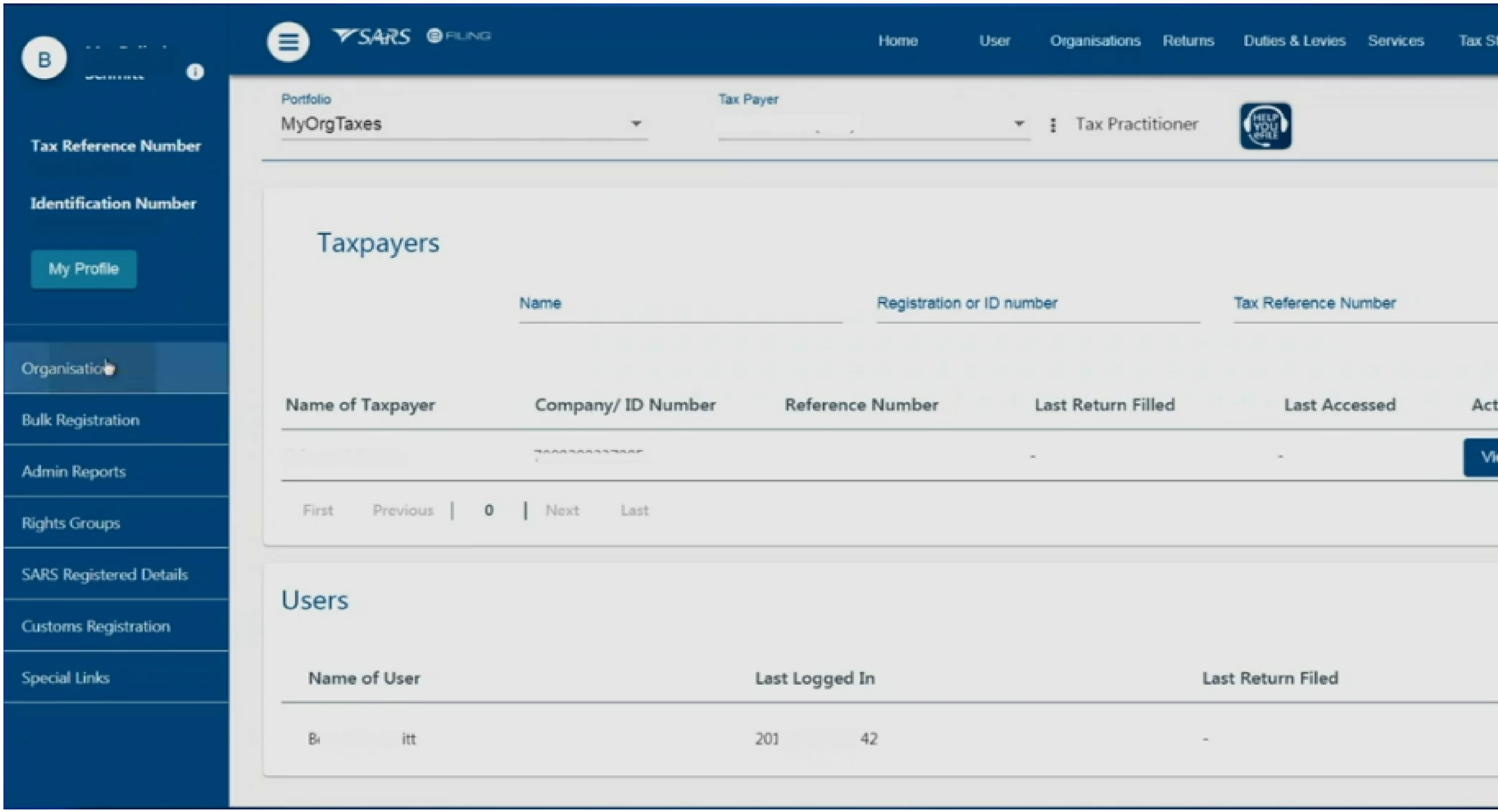
Adding New Client to a Portfolio

Click “Organisations” on the top of the screen



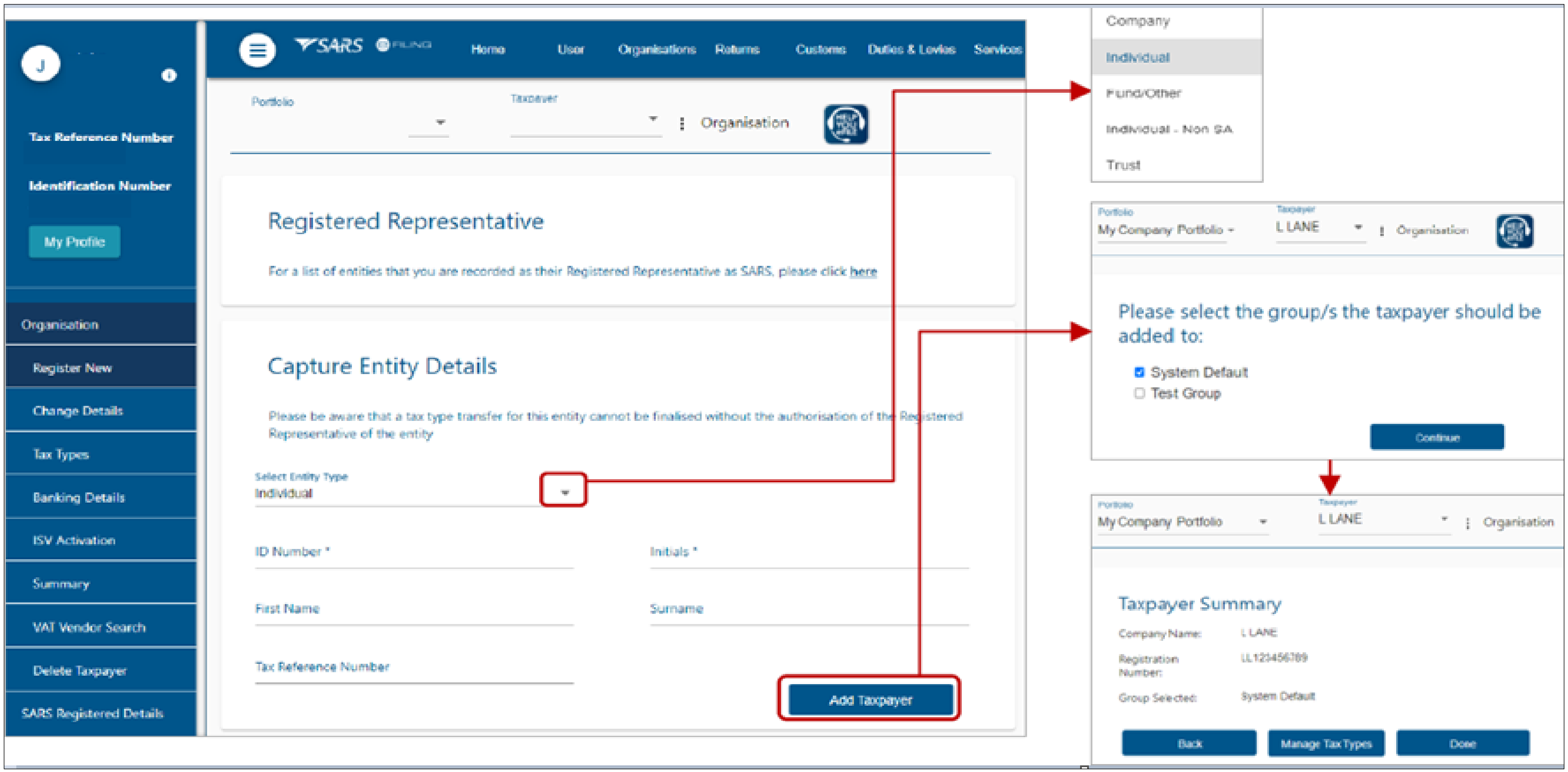
Adding New Client to a Portfolio

Then click "Organisations" on the left hand side of the screen



Adding New Client to a Portfolio

Select the submenu “Register New” to register a new client. Select the Entity Type on the drop-down menu, then complete all the field and click “Add Taxpayer”



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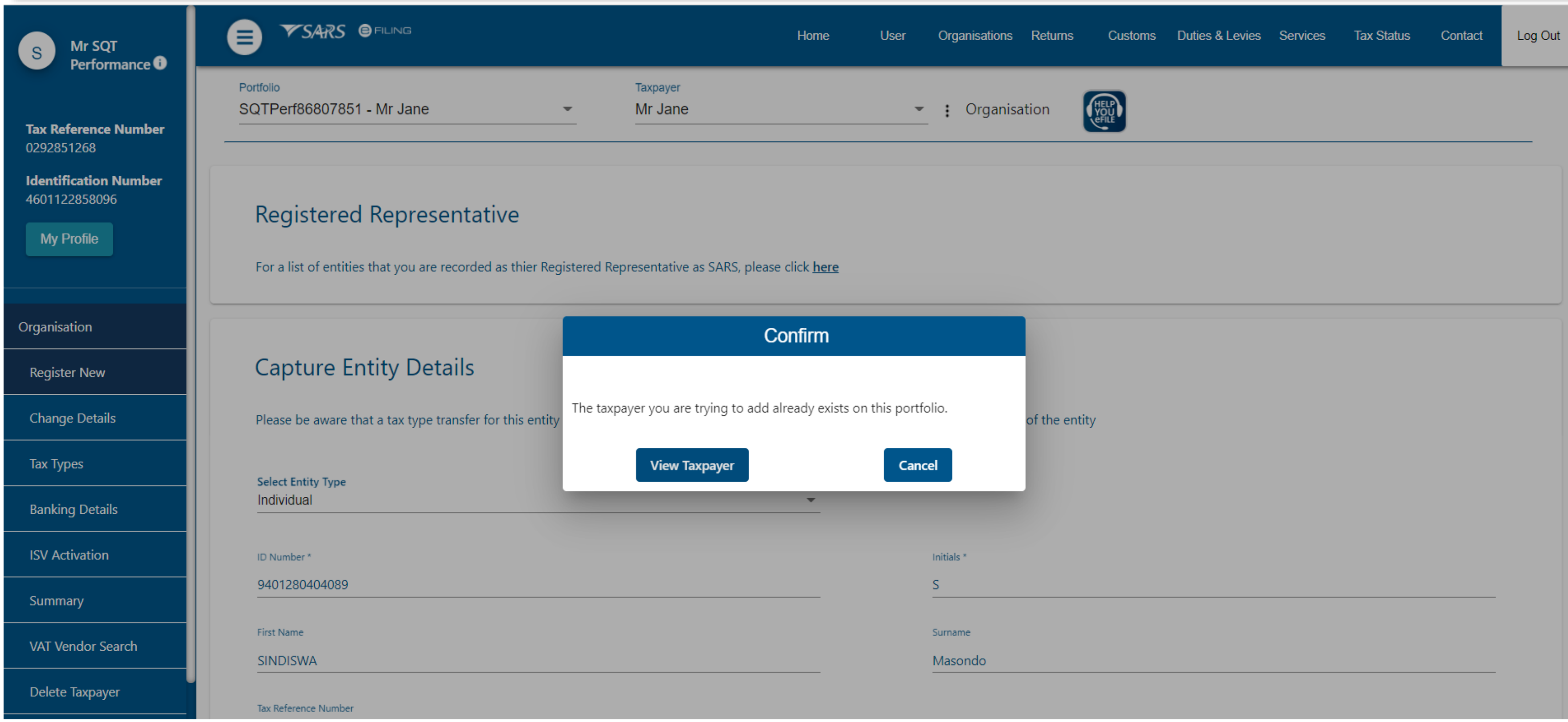
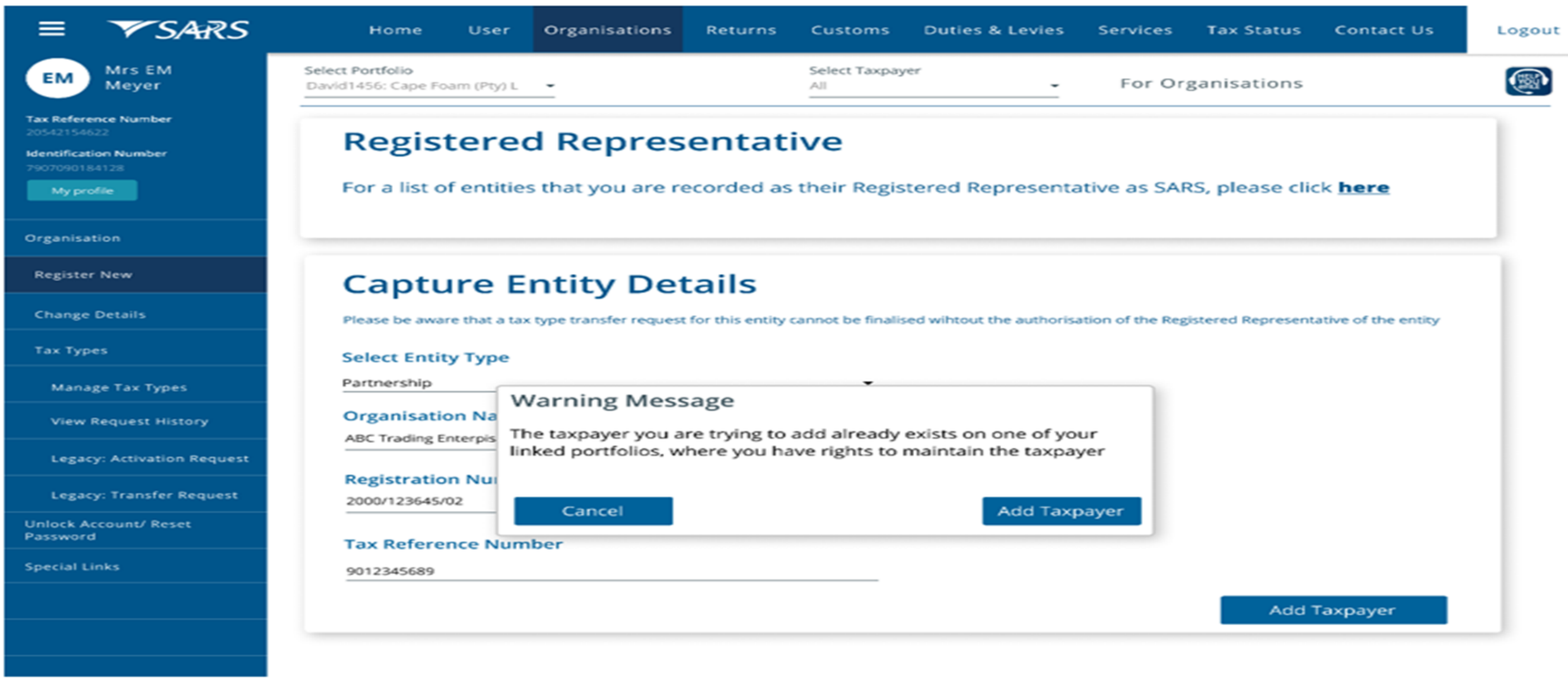
Adding New Client to a Portfolio

If the taxpayer you are adding already exists on your portfolio, you will get a message “The taxpayer you are trying to add already exist on this portfolio” Then click on “View Taxpayer”



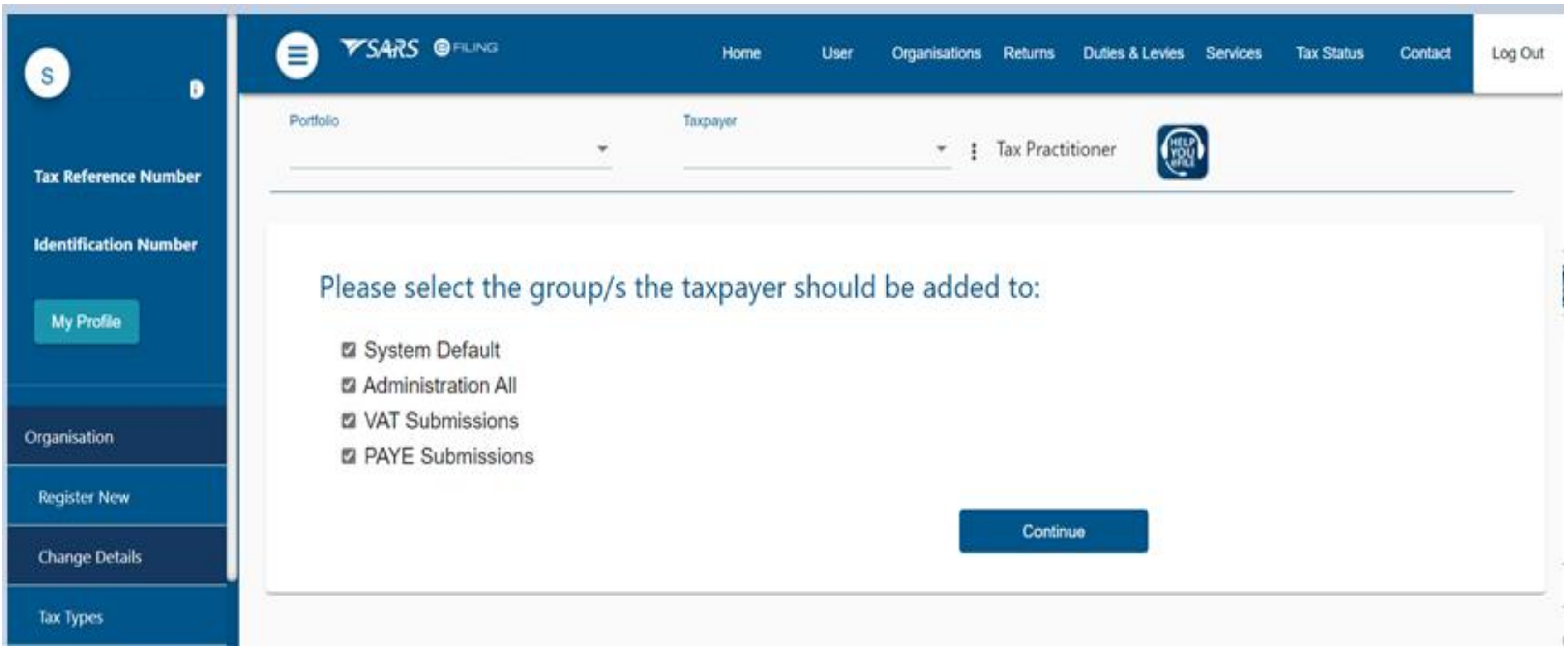
Adding New Client to a Portfolio

If the taxpayer you are adding already exist on a different portfolio, you will get the warning message. Click “Add Taxpayer” if you wish to register the taxpayer on this portfolio.



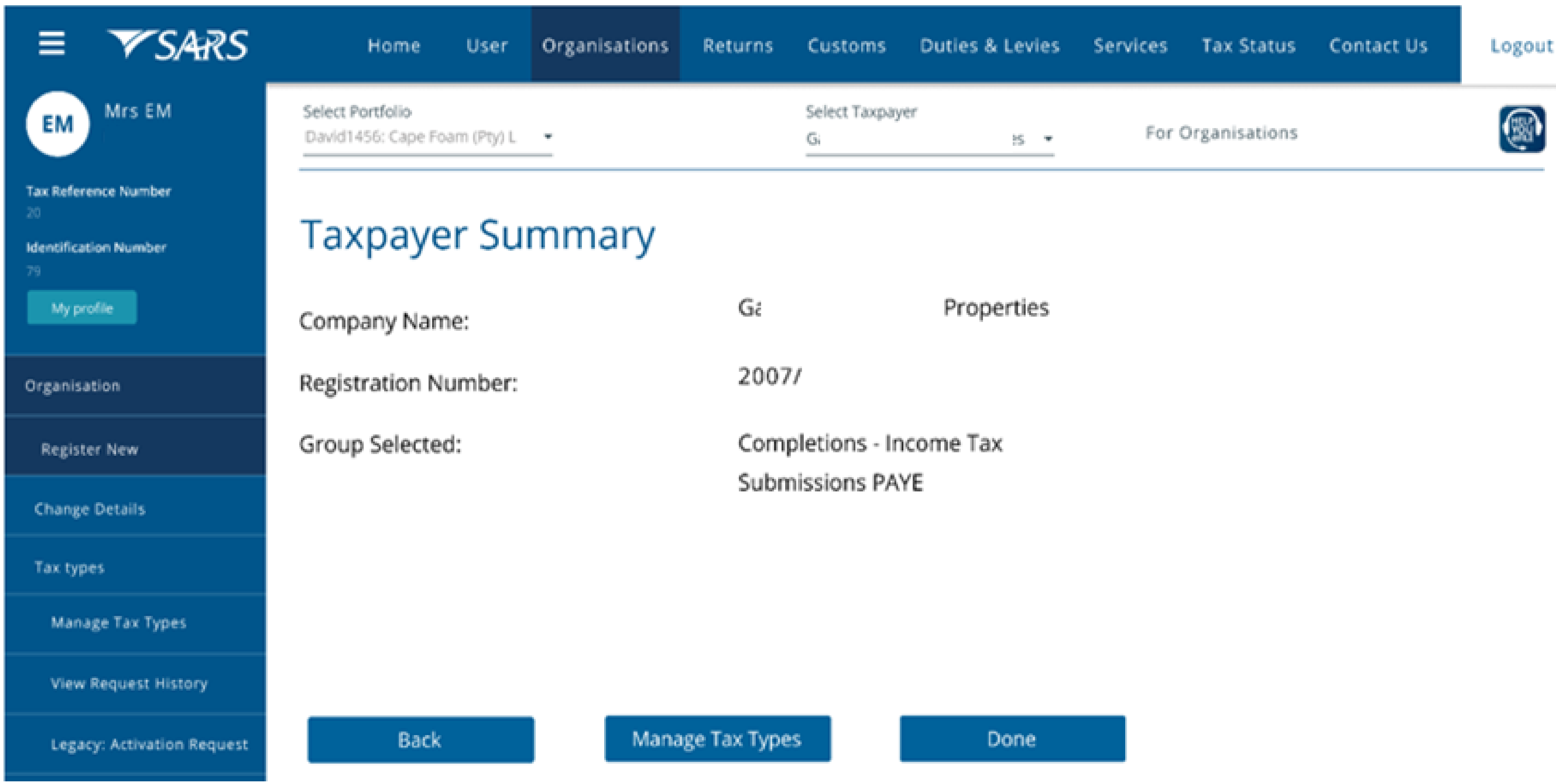
Adding New Client to a Portfolio

After adding the taxpayer, you must add the taxpayer to the group by selecting the group name and click “Continue”



Adding a Tax type for the New Client

Click on “Manage Tax Types” to “Activate” the tax types of the Entity.



Adding a Tax type for the New Client

The list of tax types linked to the selected taxpayer

- Reference numbers
- Activation Status
- Action that can be selected for that number (e.g. request activation, request tax type transfer, deactivate)

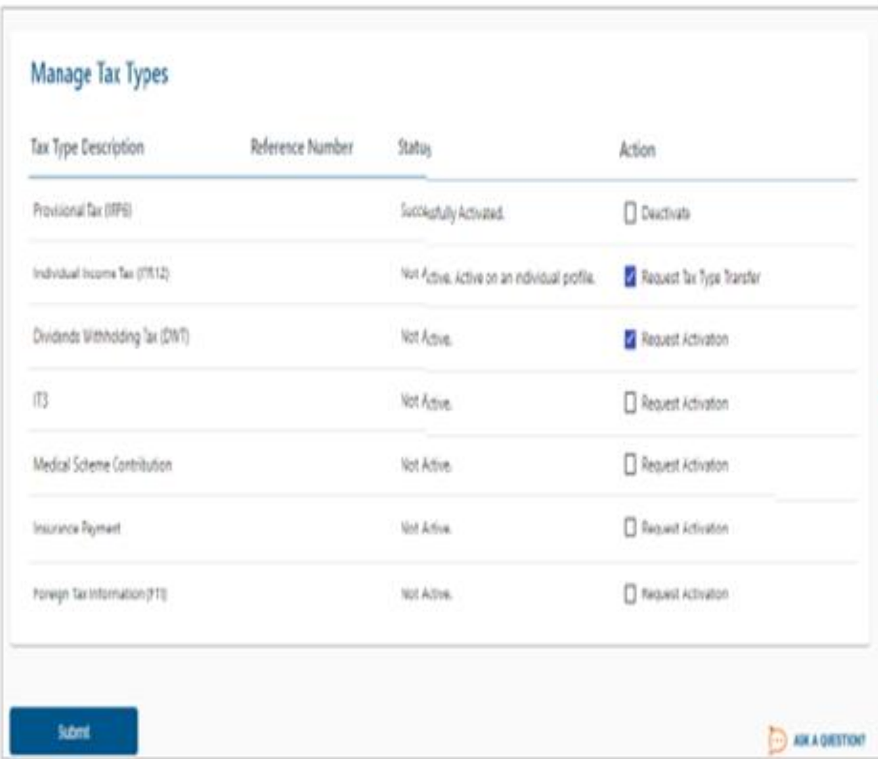
To activate or request transfer of tax types, tick the box under “Action” and click on “Submit” at the bottom.

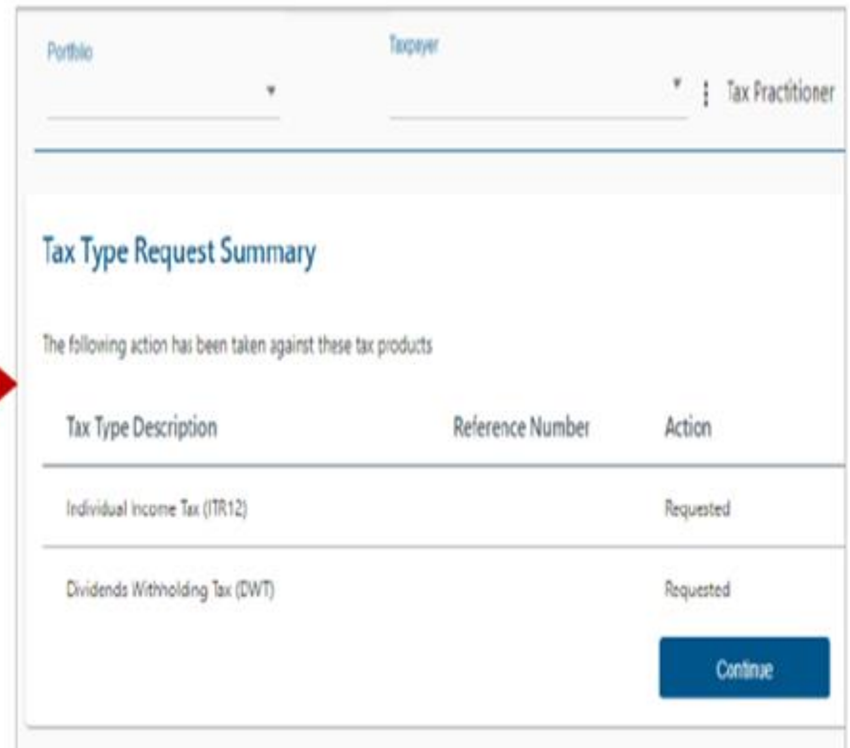
IT56 - Secondary Tax On Companies (STC)	9	Not Active.	☐ Activate
Dividends Withholding Tax (DWT)	9	Successfully Activated.	☐ Deactivate
IT3	9	Successfully Activated.	☐ Deactivate
Medical Scheme Contribution	9	Not Active.	☐ Activate
Insurance Payment	9	Not Active.	☐ Activate
Foreign Tax Information (FTI)	9	Not Active.	☐ Activate

Submit

Adding a Tax type for the New Client

Select the tick-boxes for the applicable actions required (example): “Request Activation” or “Request Tax Type Transfer” and click on “Submit” the status will change to “Requested”, then click “Continue”.





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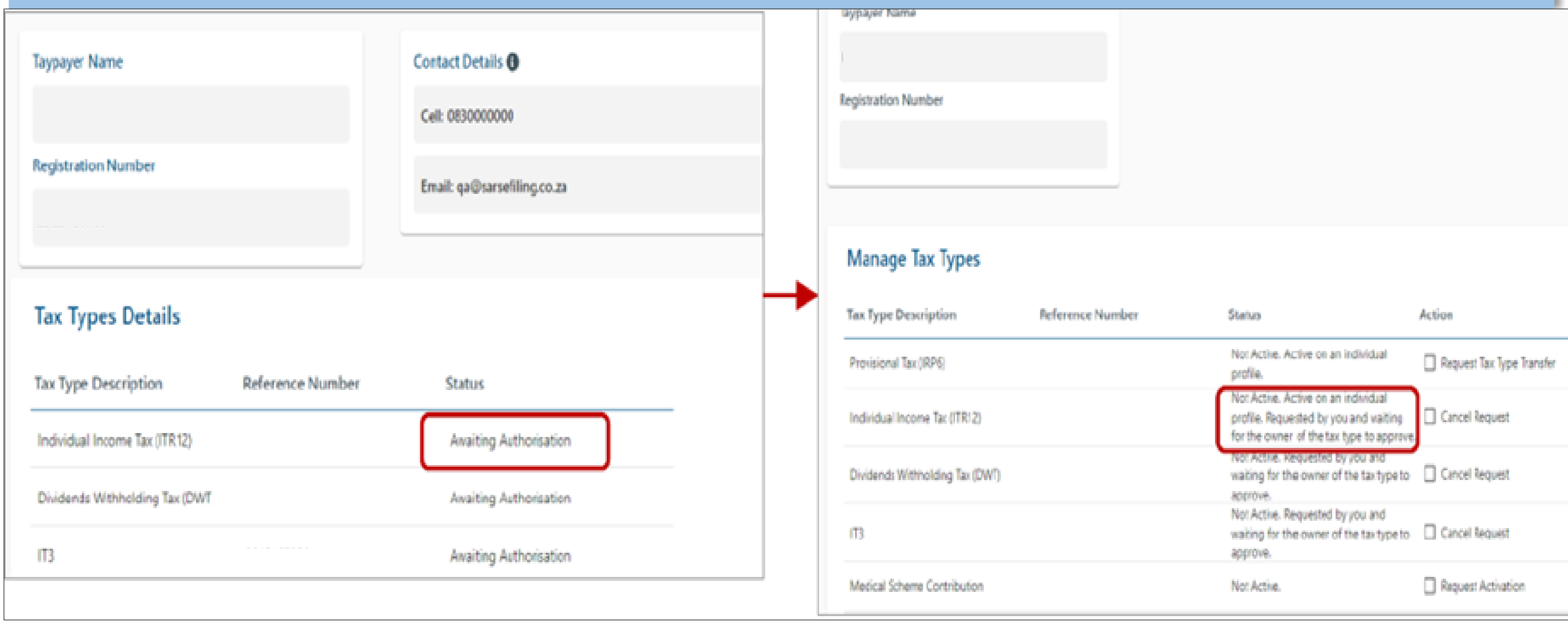
Adding a Tax type for the New Client

The status of the request will change to awaiting authorisation and will require the current Taxpayer/Representative of the tax number to authorise the request via the SARS website in order to complete the process



Adding a Tax type for the New Client

If the Taxpayer/Representative authorise the request to “Activate”, the status will change to “Successfully Activated”. If the taxpayer/representative authorise the request to transfer and there are previously submitted returns, the Status will change to “Authorised schedule to run within 24 hours” to allow the transfer of historical submissions.

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)		Successfully Activated.	☐ Deactivate
		Not Active. Active on an individual	

EMP201 - PAYE		Not Active. Active with scheduled to run within 24 hours.	Authorised	☐ Cancel Request
EMP501 - Submission		Not Active. Active with scheduled to run within 24 hours.	Authorised	☐ Cancel Request

Invite User

In order to Invite a new user to a portfolio select the correct portfolio.

Click on **"My Profile"** on the left screen.
Then select **"Portfolio Management"**

Invite User

Chose the portfolio by clicking on “Go to Portfolio”

Portfolio Management

Add Portfolio

Linked Portfolio(s)

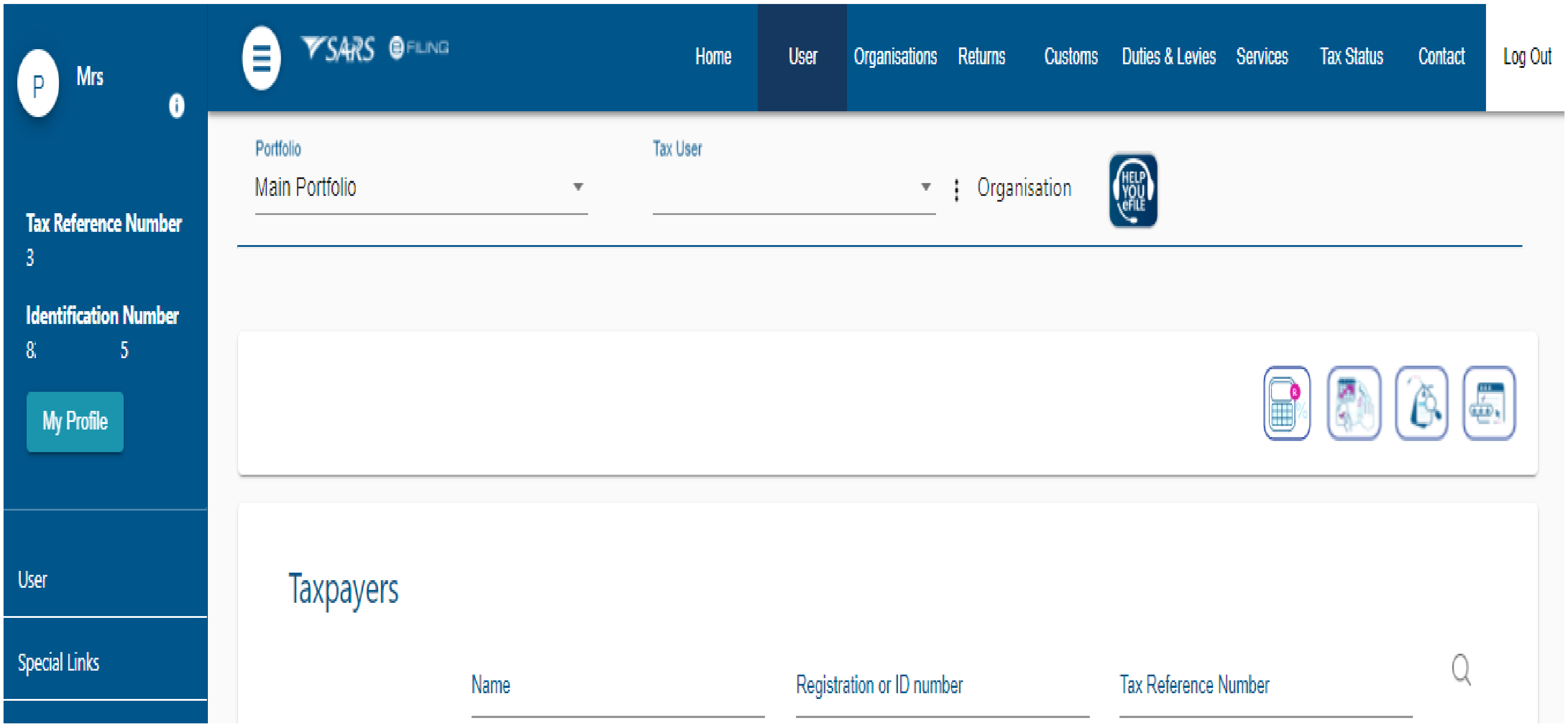
Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default		
Test345 - SARS Pty Ltd	2	1	Organisation		⋮	Go to Portfolio
Test123 - Mr Taxpayer	1	1	Individual	*Default*	⋮	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove

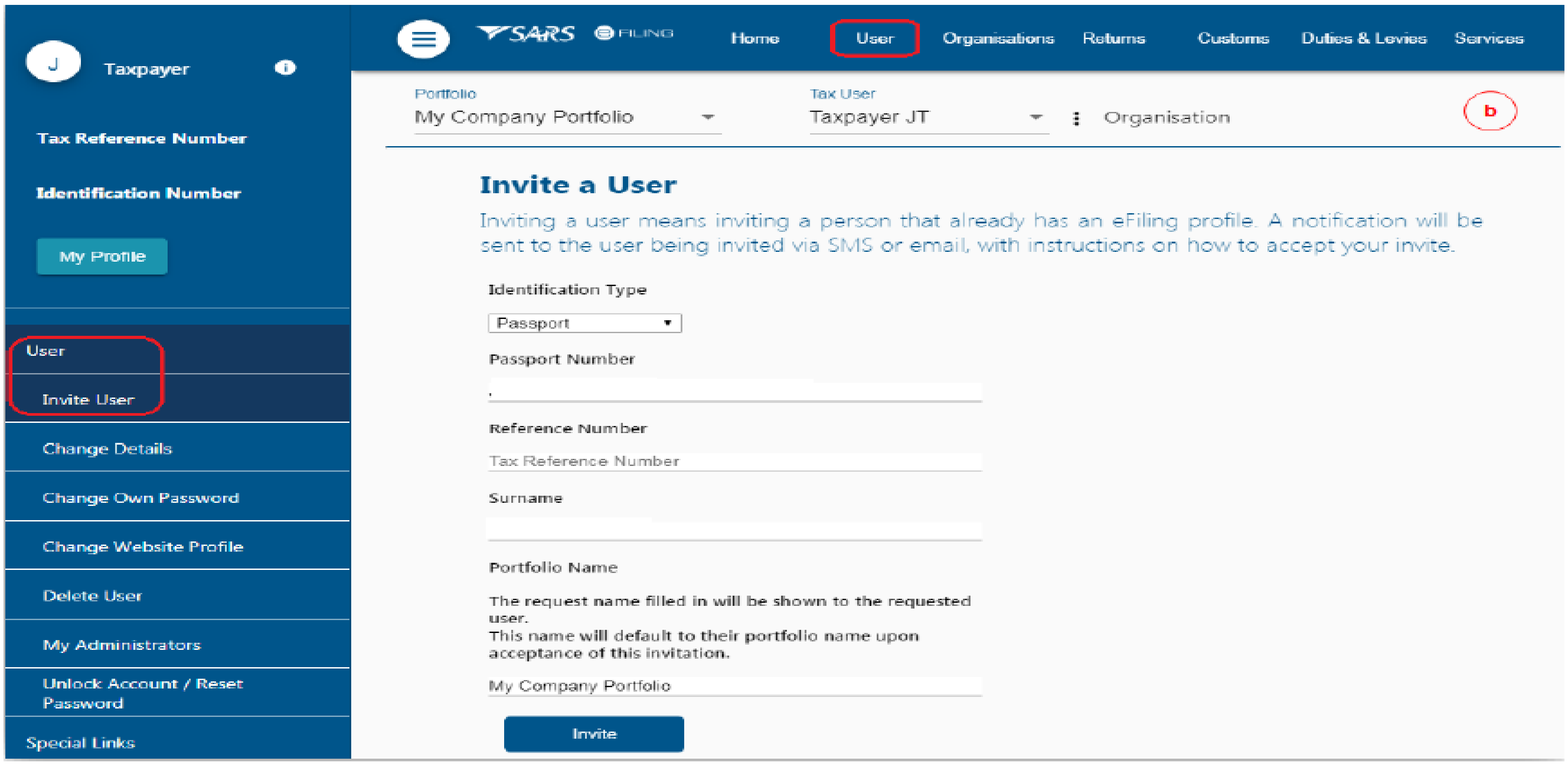
Invite User

Click on “User” from the top menu, then click on “User” on the left menu.



Invite User

Select “Identification Type”, Enter “ID number”, Enter “Surname”, Click on “Invite”



Invite User

Give the new user “Access Rights” on the next screen

USER RIGHTS

For more information on groups and roles, please click **here.**

USER GROUPS

Select User Groups

- [x] Companies
- [x] VAT

USER ROLES

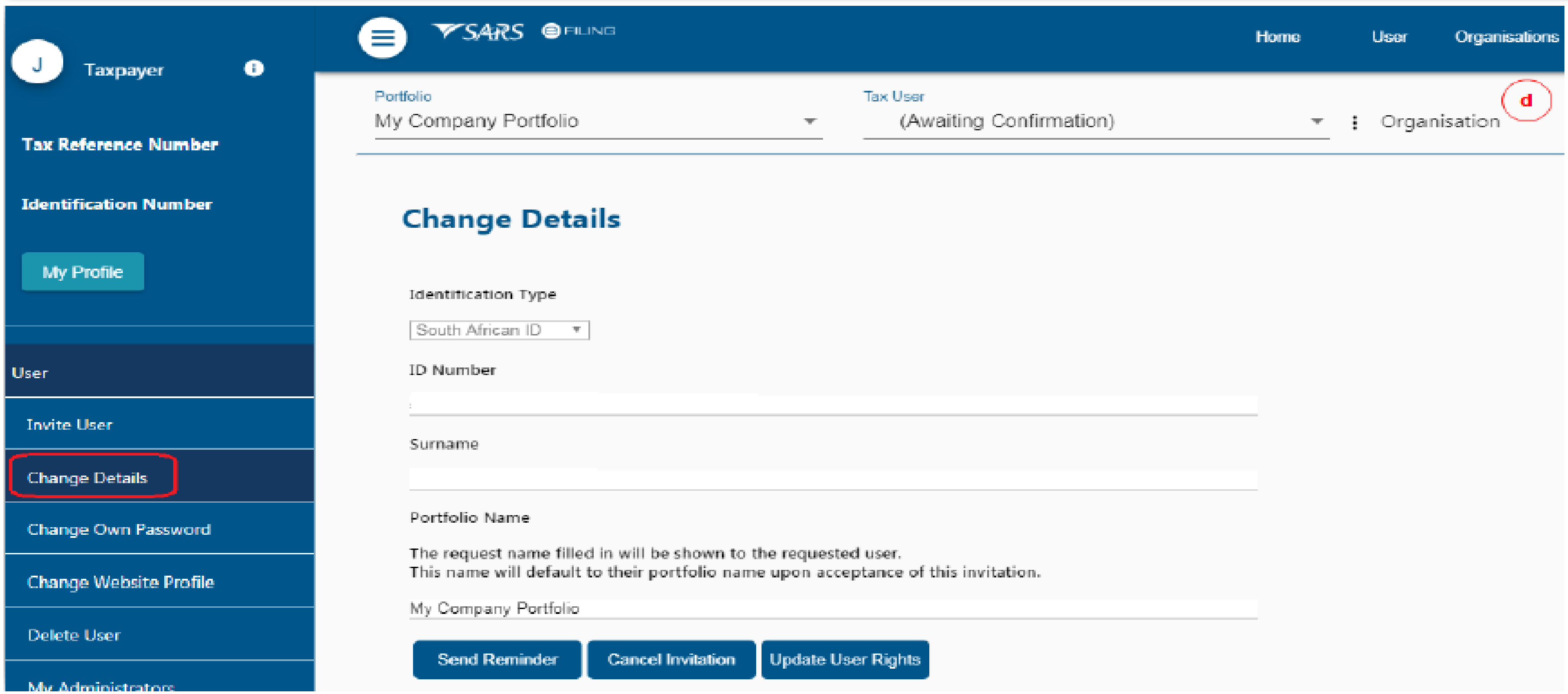
- [x] Manage Transfer Duty Financial Account
  This role allows users to maintain all financial detail against the Transfer Duty account
- [x] SARS Registration
  Can register taxpayers with SARS to get tax reference numbers
- [ ] RLA - View Customs Product information
  RLA â€" View Customs Product information
- [ ] RLA - View Client Type
  RLA - View Client Type
- [x] RLA - Manage Customs Product information
  RLA â€" Manage Customs Product information
- [ ] RLA - Manage Client Type
  With this profile, users can only view and change information relating to their specific client type(s)
- [x] Manage Users
  Can create & change users and assign them to groups
- [x] Manage Taxpayers
  Can create & change taxpayers and assign them to groups
- [x] Manage Groups
  Can create & change groups and assign users and payers to groups
- [x] Manage Excise Financial Account
  This role allows users to maintain all financial detail against an Excise Account
- [x] Manage Deferment Account
- [x] ISV Activation
  This role allows users access to the ISV activation screen
- [x] Directives
- [x] 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.

Continue | Back

Invite User

The status will show “Awaiting Confirmation”. Invitation can be “cancelled” by clicking “Cancel Invitation” and the user can send a reminder by clicking the “Send Reminder”



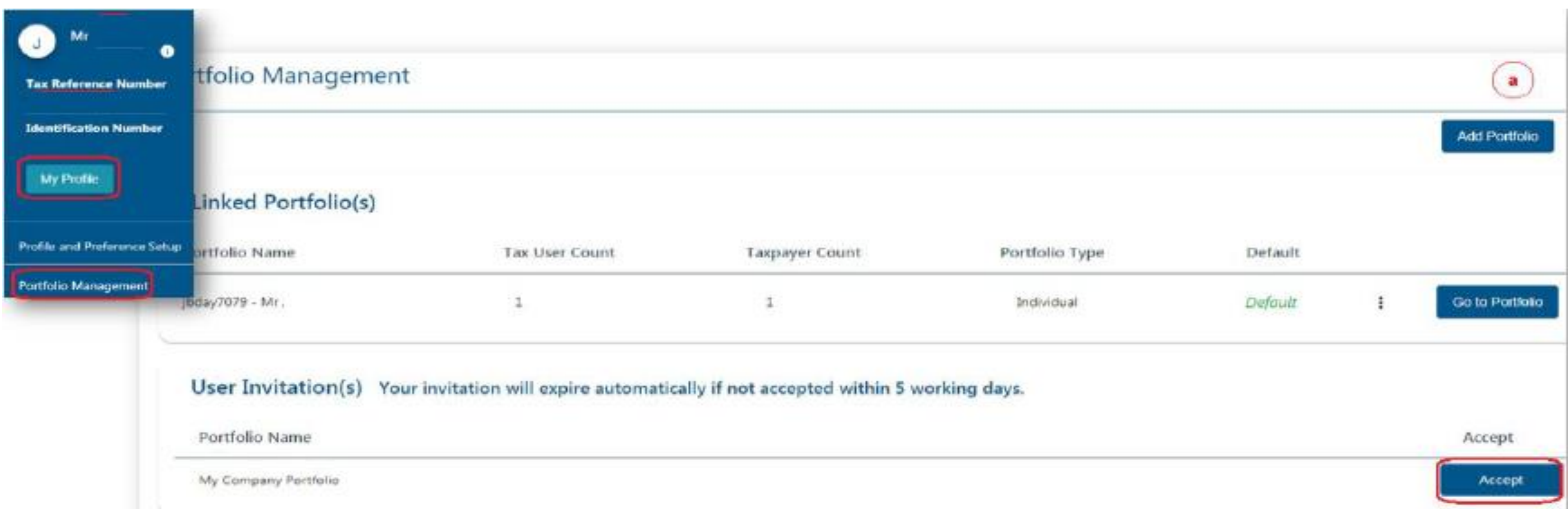
Invite User

Accepting the Invitation

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

Log on to your eFiling profile.

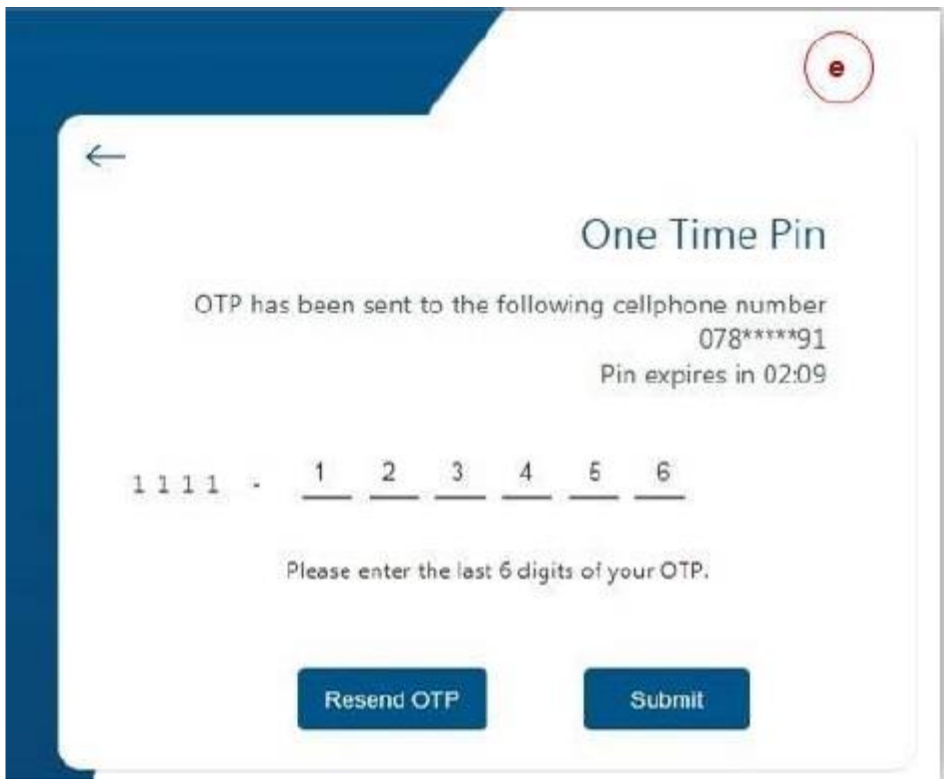
- Select **"My Profile"**
- Select **"Portfolio Management"**
- The User Invitation will display. Click on **"Accept".**



Invite User

Accepting the Invitation

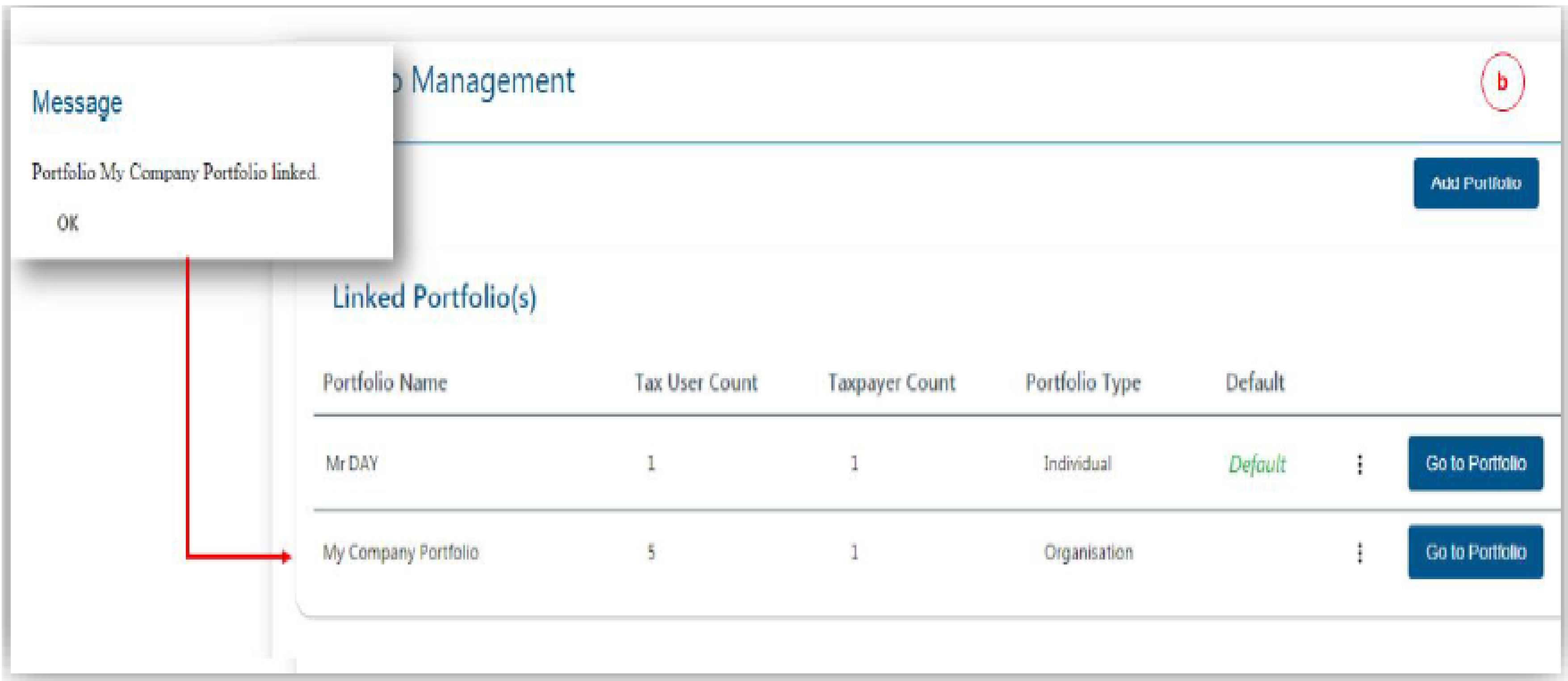
The new user will be sent an **OTP** (One Time Pin) via the preferred means of contact (cell phone or email)



Invite User

Accepting the Invitation

The message will come up confirming that the Portfolio has been linked. The linked portfolio will move to **"Linked Portfolio"**



Invite User

You have now successfully added your new user.

Contact us

We've made it easier for you

Go Digital!

- Download the SARS MobiApp via your app store
- Register for eFiling

- **Need an Individual Tax Number?**

  Register for eFiling and you will be automatically registered for personal income tax and receive a tax reference number

- For more information on individual offerings, visit the:

  SARS website on www.sars.gov.za and go to Individuals webpage

Thank you

Re a leboha

Re a leboga

Ndza Khensa

Dankie

Ndi a livhuwa

Ngiyabonga

Enkosi

Ngiyathokoza

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