



HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE

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1 SUMMARY

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.

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.

2 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.

Changes 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.

2.1 MIGRATION OF USERS

All eFiling users registered prior to 1 July 2019 will be authenticated and migrated to one single user sign on. If you had 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.

2.2 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 each of the abovementioned portfolios with a unique username and password. As from 1 July 2019, you only require 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.

3 PASSWORD RULES

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

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

4 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.

5 CHAT WITH SARS

5.1 LWAZI THE CHATBOT

The chat bot icon appears on the bottom right side of your screen.



- Lwazi the chatbot is a virtual assistant that provides automated answers to general queries
- Click on this icon to ask a question:
 - Type a question in the input text-box
 - Click on the send/arrow button on your screen or press <Enter> on your keyboard to submit the

- question
 - Lwazi, the virtual assistant, will process your request and display the answers on your screen.
- The following personal income tax services can also be requested via the virtual assistant. Note, you will be prompted to provide certain information (e.g. ID number, email, cell number) to enable us to authenticate you for the required service:
 - Request Tax Reference Number
 - Request Statement of Account
 - Request Refunds Status
 - Request Audit Status
 - Request Notice of Assessment
 - Request Call Back

5.2 LIVE CHAT

The Live Chat icon appears on the bottom right side of your screen.



- The Live Chat service allows you to chat with a SARS service agent in real-time via eFiling and the SARS MobiApp instead of having to call the SARS Contact Centre, visiting a Branch Office, or sending an email.
- For more information please refer to the following guide on the SARS website: "IT-AE-50-G01 - How to Resolve Queries via SARS Live Chat"

6 REGISTRATION ON EFILING

6.1 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.
- b) Select **<Register Now>**
 - The eFiling Register screen will display. 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](#) sent to either your cell number or your email address
 - If the time period to enter the OTP expires 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 (refer to the section on ['First Time Login'](#) below).

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.

6.2 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) 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>**.

Registration Request Received

Thank you for registering for SARS eFiling. In order to finalise your eFiling Registration, we request that you upload the required documents within 21 business days or your eFiling registration will be declined. Click Continue to upload your documents. Alternatively, you may click Save For Later to continue this process later. Should you be logged out, please use the Username and password that you provided during the registration process. Please use the case number below should you need to follow up on your registration case.

Case Number

Continue
Save for Later

- b) The Registration Workpage will display. Click on **<Upload>** to upload the required supporting documents.
- The file size may not exceed 5mb.
 - 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
 - After you have uploaded the documents, click on **<Continue>**.
 - SARS will receive the case for review.
 - You can log in with your username and password at any time to view the status of your registration (e.g. awaiting supporting document, documents submitted).

Welcome

Johnny John

Status: Supporting Documents Submitted

Your Tax Reference Number
3****42**

Registration ID Number
51102751511027

Registration Workpage

Case Details

Case Number	Case Requested Date	
131621865	2021-03-11	Query Status

Document Details

Document Type	Status	Upload	View
Upload Registration Documents	Submitted	<input checked="" type="checkbox"/>	View

Close

- c) 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.
 - 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. Please enter the OTP sent to either your cell number or your email address.

- d) Once you have successfully entered the OTP, the eFiling Login Screen will display (refer to the section on ['First Time Login'](#) below).

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.

6.3 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 to you if:

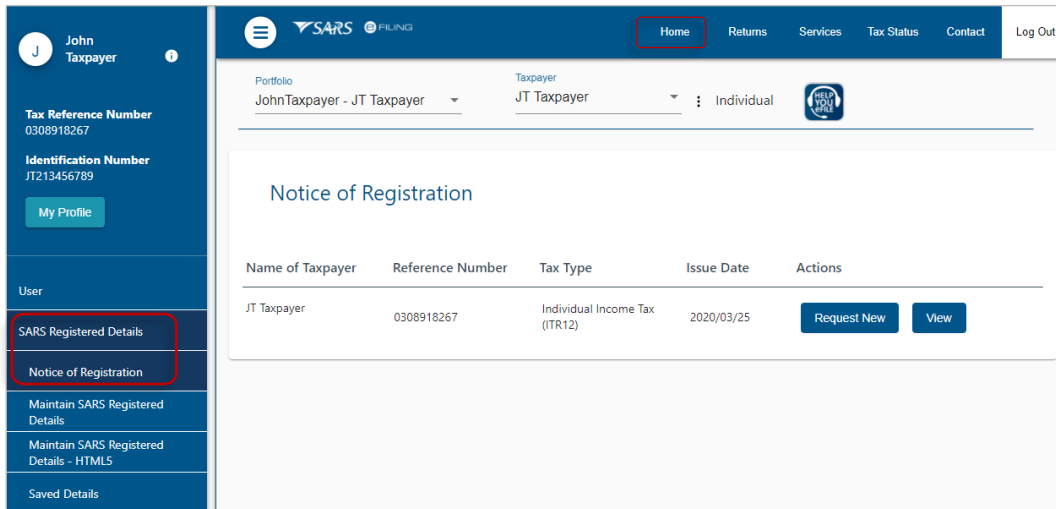
- You are not yet registered for income tax

- 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>.



 <p>South African Revenue Service</p> <p>JT TAXPAYER 299 BRONKHORST BROOKLYN PRETORIA 0001</p>	<p>INCOME TAX</p> <p>Notice of Registration</p> <p>Enquiries should be addressed to SARS</p> <p>Contact Detail</p> <p>SARS 0800 00 7277 Alberton Website: www.sars.gov.za 1528</p> <p>Details</p> <p>Taxpayer Reference No: 030891826 <small>Always quote this reference number when contacting SARS</small></p> <p>Date: 2020-03-25</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <p style="text-align: center; font-size: small;">Electronic Certification</p>  <p style="text-align: center; font-size: x-small;">South African Revenue Service</p> <p style="text-align: center; font-size: x-small;">Certified as a true copy and there is no indication that the original has been amended by any unauthorised person</p> <p style="text-align: center; font-weight: bold;">2020-03-25</p> </div>
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Dear Taxpayer

NOTICE OF REGISTRATION

The South African Revenue Service (SARS) confirms registration of the following taxpayer:

Name and Surname: JOHN TAXPAYER
Passport number: JT123456789
Taxpayer reference number: 030891826
Date of Registration: 2019-11-14

Your tax obligation

Depending on your circumstances, you may be required to submit an annual income tax return. Should you be a provisional taxpayer, returns and payments will be required every six months. More details can be obtained from the SARS website.

Any person who derives by way of income any amount which does not constitute remuneration or an allowance or advance contemplated in section 8(1) of the Income Tax Act is regarded as a Provisional Taxpayer and may be required to submit provisional returns.

Kindly notify SARS of any change to your registered particulars within 21 business days of such change.

Should you have any queries please call the SARS Contact Centre on 0800 00 7277. Remember to have your taxpayer reference number at hand when you call to enable us to assist you promptly.

Sincerely

ISSUED ON BEHALF OF THE COMMISSIONER OF THE SOUTH AFRICAN REVENUE SERVICE

7 FIRST TIME LOGIN

7.1 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 the **<Link>** button 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>**.

My Details

Name & Surname
PETER TAXPAYER

ID Number
1234567890

Activate Your Return Types
Please select the return types you want to activate on your profile

Return Type Description	Reference No.	Selected
Individual Income Tax (ITR12)	4500000000	Link

[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 notifications sent by SARS.

John Taxpayer

Tax Reference Number: 0308918267
Identification Number: JT1213456789

Portfolio: JohnTaxpayer - JT Taxpayer | Taxpayer: JT Taxpayer | Individual

Tax Compliance Status [Refresh](#)

Tax Period	Return Status	Due Date
2021	Filed through branch	2021-11-30
2019	Filed through eFiling on 2021-04-12	2019-12-04

Refund Status: [Refresh](#)

Tax Period	Return Status	Date
2020	Filed through eFiling on 2020-02-28	2021-03-09

Account Balance: [Refresh](#)
Not Available

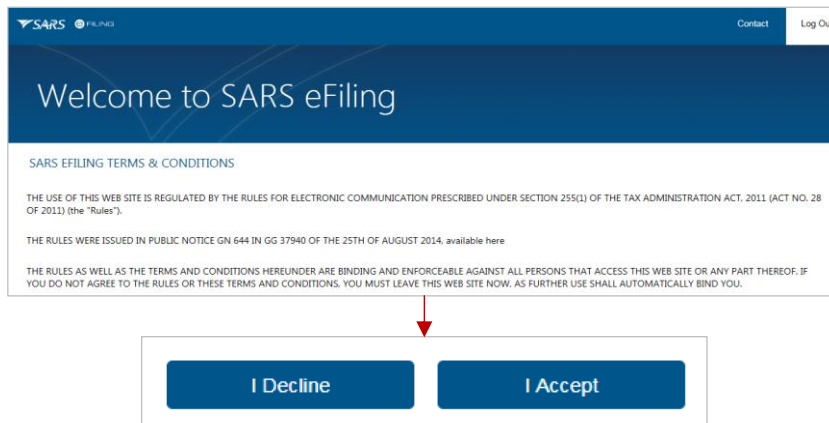
Please Note:

- 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 contact a 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.

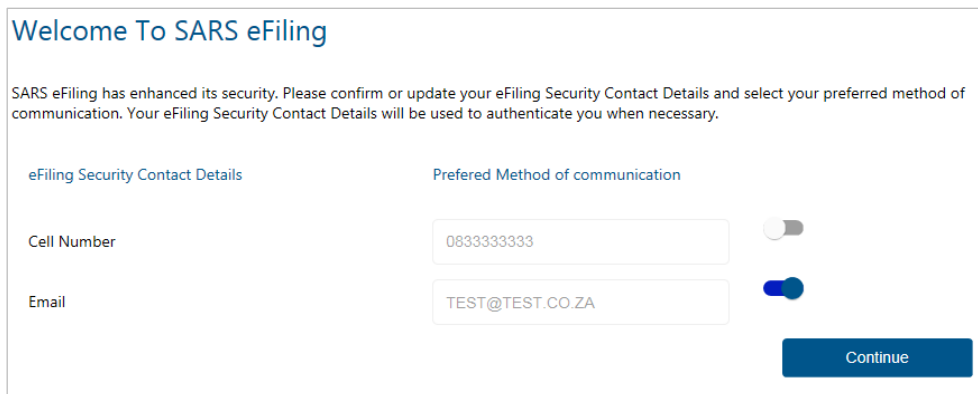
7.2 FIRST TIME LOGIN FOR EFILING USER REGISTERED BEFORE 1 JULY 2019

7.2.1 USER WITH 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>.
 - 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.



- b) Select your preferred method of communication and click on <Continue>.
- This will serve as your eFiling security contact details. 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.



- c) Please enter the OTP sent to either your cell number or your email address.
- 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 notifications sent by SARS.

7.2.2 USER WITH 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 the section 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 prior to 1 July 2019.
 - Please select the [primary login](#) name that you would prefer to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

Default	Previous Login Name	Tax User Count	Tax Payer Count	Portfolio Type
<input checked="" type="radio"/>	taxpayer111111	1	1	Company
<input type="radio"/>	taxpayer222222	4	5	Company

- c) If you select a primary login (e.g taxpayer11111 as illustrated in the screen below) which is different to the profile that you are currently logged in with (e.g. taxpayer222222), you will be prompted to enter the password for the primary login you select (i.e taxpayer11111). 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. 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 style="width: 80%;" type="text" value="0833333333"/> <input style="float: right; width: 15%; height: 15px; border: 1px solid #ccc;" type="checkbox"/>
Email	<input style="width: 80%;" type="text" value="TEST@TEST.CO.ZA"/> <input checked="" style="float: right; width: 15%; height: 15px; border: 1px solid #ccc;" type="checkbox"/>

- e) Please enter the OTP sent to either your cell number or your email address. 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.

- f) 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

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default	
taxpayer222222 - SARS PTY LTD	1	1	Organisation	Default	<input style="background-color: #0056b3; color: white; padding: 5px 10px; border: none;" type="button" value="Go to Portfolio"/>

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
taxpayer111111	-	<input style="background-color: #0056b3; color: white; padding: 5px 10px; border: none;" type="button" value="Link"/>	<input style="background-color: #0056b3; color: white; padding: 5px 10px; border: none;" type="button" value="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.”

7.3 ACCESS TO MY PROFILE

When you log in for the **first time** and your tax number(s) is already registered against another party's eFiling profile (e.g. a tax practitioner), the system will display the name of the party who has access to the tax type. You have the option to obtain shared access or revoke the other party's access.

- a) 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 shows the 'My Details' section of the SARS eFiling portal. It displays the user's name and surname as 'MR TAXPAYER' and their 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 that 'Mr FAC have access to this return type: 0009000900'. The second section is for 'Individual Income Tax (ITR12)' and shows that 'Mr FAC Goga have access to this return type: 0009000900'. Each section has 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 user assistance.

8 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.

8.1 CHANGE SECURITY CONTACT DETAILS:

- a) Select <My Profile> from the menu on the left and click on <Profile and Preference Setup>
- Scroll to the section <Security Contact Details>
 - Insert your new email address and/or your new cell number
 - Select your preferred method of communication
 - Click on <Update & Save>
 - On the pop-up screen that displays, select your preferred method of communication to receive the One-Time-Pin number
 - After you have entered the correct OTP, a message will display confirming that your security contact details have been updated successfully.

8.2 CHANGE USER NAME AND PASSWORD:

- a) Select <My Profile> from the menu on the left and click on <Profile and Preference Setup>
- Scroll to the section <Your Login Details>
 - 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 message will display confirming that your username and password have been updated successfully.

8.3 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 follow the steps below:

- a) Select <My Profile> from the menu on the left and click on <Profile and Preference Setup>

- Click on the button to switch 'Two-factor authentication' on
- 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.

8.4 TWO-FACTOR AUTHENTICATION USING THE EFILING MOBILE APP

- a) 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.
- b) Log on to the eFiling website:
 - Select **<My Profile>** from the menu on the left and click on **<Profile and Preference Setup>**
 - Click on the button to switch 'Two-factor authentication' on
 - 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.

Passwordless Login
i
On

Method of Authentication

eFiling Mobile App Authentication

Please download the app from your app store and scan the QR code. The device will automatically be added as part of your linked devices

Enroll Device
Refresh Devices
Update & Save

Scan QR Code

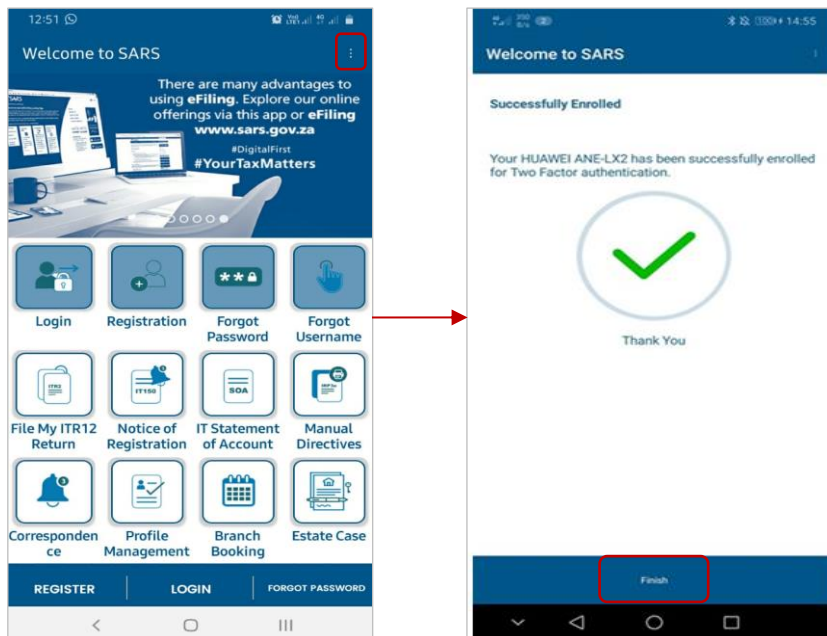
To continue please scan the QR Code on your SARS MobiApp using your Device

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.

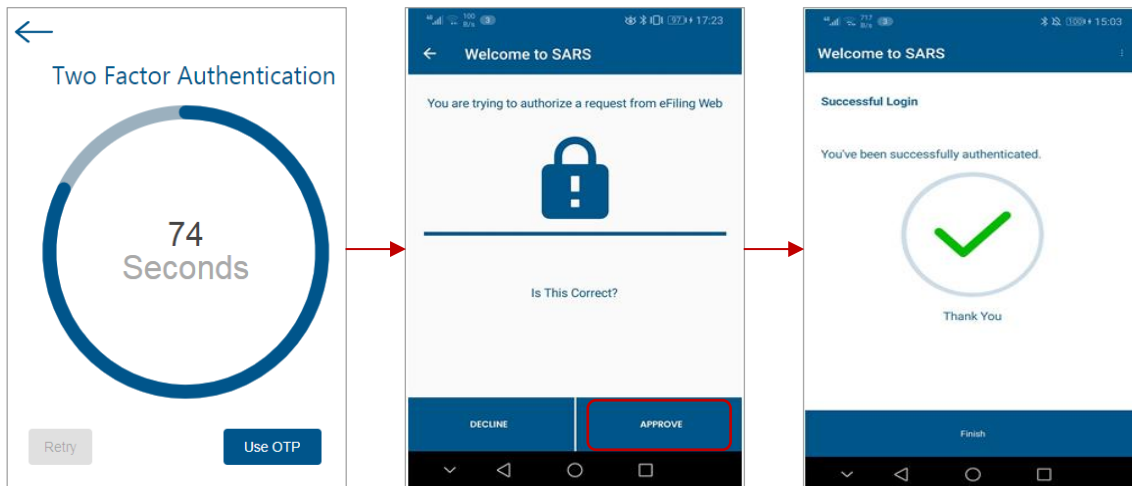
Cancel
OK

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:

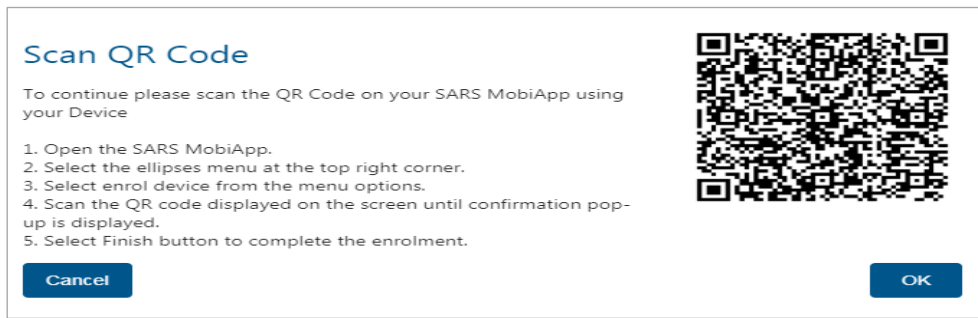
- A device can only be enrolled on one eFiling profile at a time. If you try to enrol a device that is already linked to another eFiling profile, an error message will display. If you would like to enrol the device on another eFiling profile:
 - Logon to the existing eFiling profile > Navigate to the 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.

8.5 PASSWORDLESS LOGIN

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

- a) Please download the SARS Mobile App from your app store. Once you have downloaded the app onto your device, follow the steps described below.
- e) Log on to the eFiling website:
- Click on <**My Profile**> on the menu on the left and select <**Profile and Preference Setup**>
 - Select the button to switch on <**Passwordless Login**>

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



- f) 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.

9 PORTFOLIO MANAGEMENT

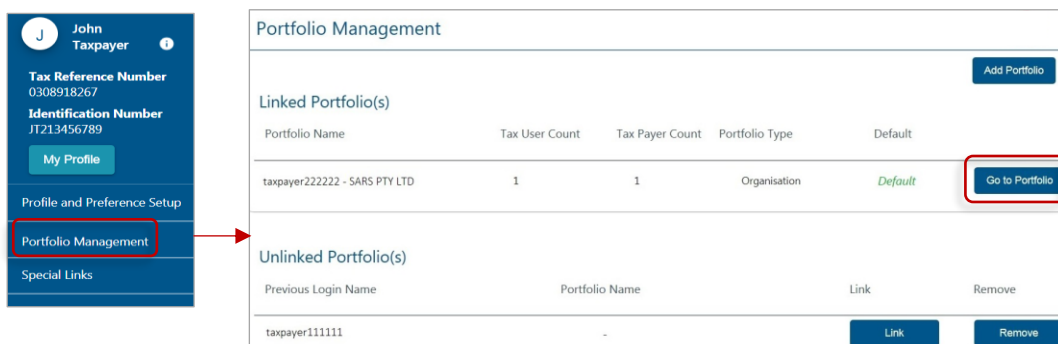
The Portfolio Management function is used to link, and add various [portfolios](#) (roles) on your eFiling profile, such as:

- Your **individual** portfolio to manage your own personal taxes
- Multiple **company** portfolios if you are the registered representative (e.g. public officer) or employee and you manage the taxes of those companies
- Multiple **tax practitioner** portfolios if 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:

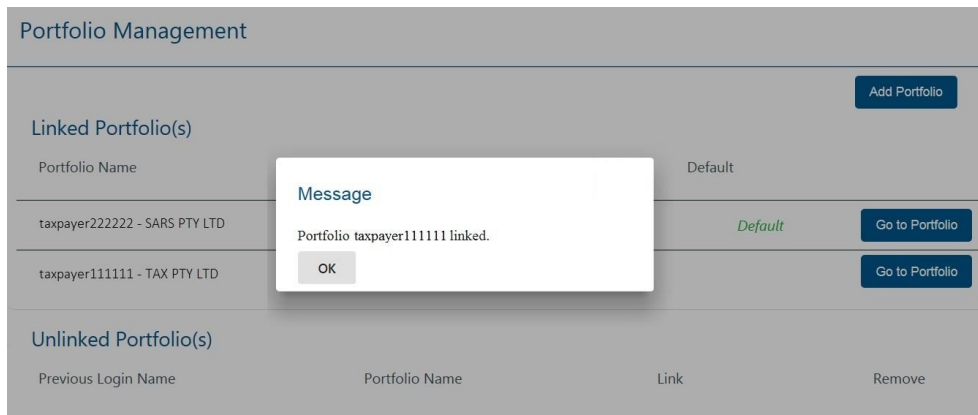
- Select **<My Profile>** from the menu on the left
- Select **<Portfolio Management>**.
- The Portfolio Management screen will display for you to link, unlink, or add portfolios.



- b) You will be prompted to enter the password for each portfolio that you want to link.

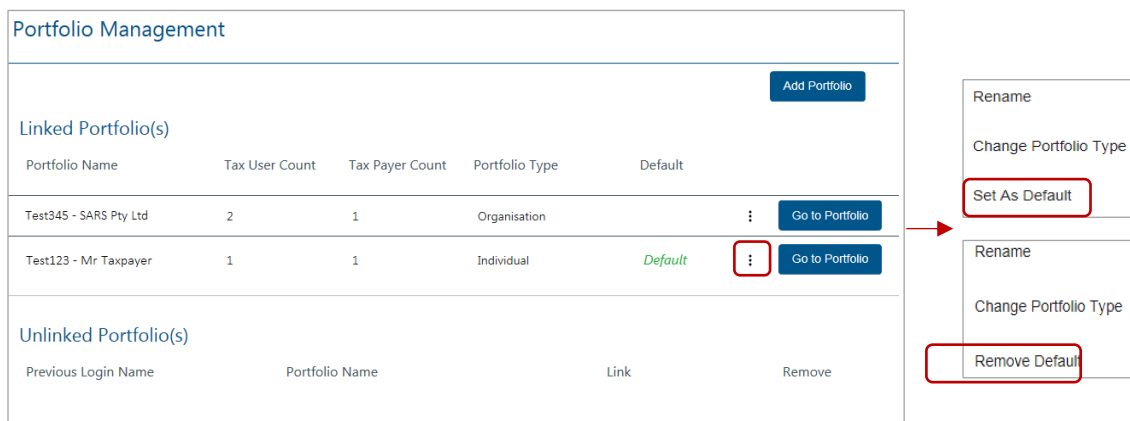
- If you do not remember the password, click on [<Forgot Password>](#) to reset it

- 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 sytem 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 (⋮) menu icon and then either select **<Set as Default>** or **<Remove Default>**.

- You can only have 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.

The screenshot shows the 'Portfolio Management' interface. It features a table of 'Linked Portfolio(s)' with columns for Portfolio Name, Tax User Count, Tax Payer Count, Portfolio Type, and Default. Two portfolios are listed: 'Test345 - SARS Pty Ltd' (Organisation) and 'Test123 - Mr Taxpayer' (Individual, Default). A red box highlights the vertical ellipsis menu icon for the 'Test123 - Mr Taxpayer' portfolio. To the right, a dropdown menu is shown with options: 'Rename', 'Change Portfolio Type' (highlighted with a red box), and 'Set As Default'. Below this, another dropdown menu for 'Portfolio Type' is shown with options: 'Individual' (highlighted), 'Tax Practitioner', and 'Organisation'.

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>**.

This screenshot illustrates the 'Rename' process. It shows the same 'Portfolio Management' table as above. A red box highlights the vertical ellipsis menu icon for the 'Test123 - Mr Taxpayer' portfolio. To the right, a dropdown menu is shown with options: 'Rename' (highlighted with a red box), 'Change Portfolio Type', and 'Set As Default'. Below this, a form titled 'Linked Portfolio(s)' is shown with a 'Portfolio Name' field containing 'Mr Taxpayer' and 'Save' and 'Cancel' buttons.

f) To link a new portfolio to your profile, click on the **<Add Portfolio>** button. 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.

The 'Add Portfolio' pop-up form has a blue header with the text 'Add Portfolio'. Below the header, it says 'Please add Portfolio Information'. There are two input fields: 'portfolioName' with the value 'Test123' and 'Portfolio Type' with a dropdown menu showing 'Tax Practitioner'. At the bottom, there is a blue 'Add Portfolio' button.

10 MANAGE USERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

10.1 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 refers to 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 interface. The top navigation bar includes 'Home', 'User' (highlighted with a red box), 'Organisations', 'Returns', 'Customs', 'Duties & Levies', and 'Services'. The left sidebar shows 'John Taxpayer' with a 'My Profile' button and a 'User' menu where 'Invite User' is highlighted with a red box. The main content area is titled 'Invite a User' and contains the following fields:

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

Below the Portfolio Name field, there is a note: 'The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation.'

An '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

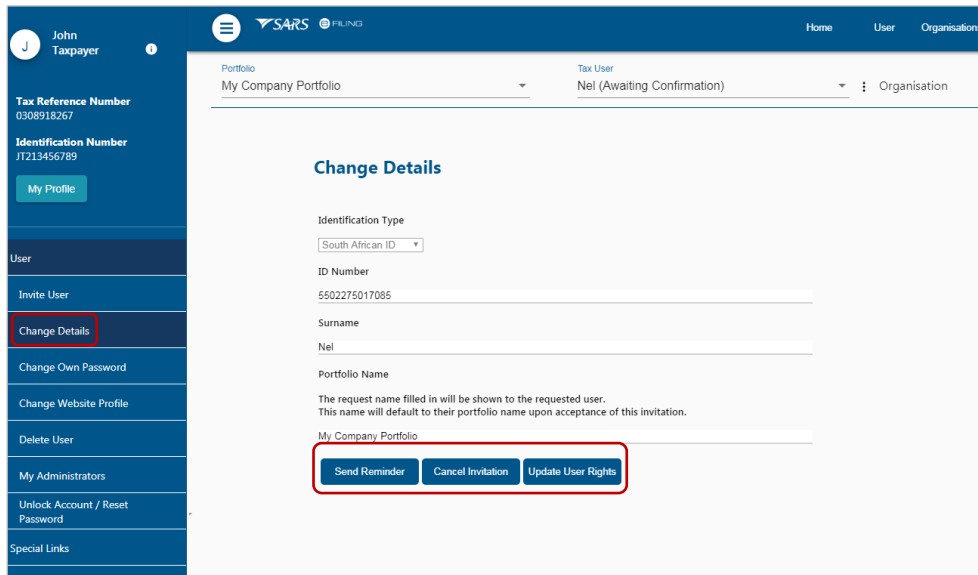
USER ROLES

- 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.

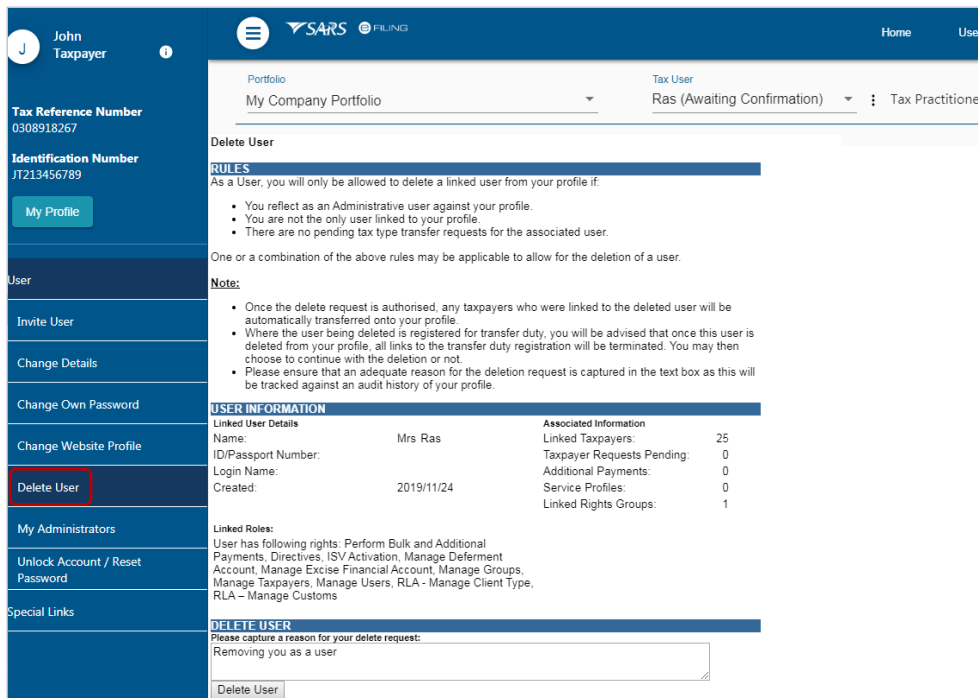
Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.

Continue
Back

- 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.

10.2 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.

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.

11 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 organisation's portfolio.

a) To activate the tax type functions and services:

- Select **<Organisations>** 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.
 - Click on the **<Setup New Group>** button to create a new group (e.g. Return Submissions)
 - Click on the **<Manage Payers>** hyperlink to add Taxpayers (activated on your organisation's portfolio) to a specific group
 - Click on the **<Manage Users>** hyperlink to add users on your organisation's portfolio to a specific group (for more information refer to the section on [manage users](#)).

The screenshot displays the SARS eFiling 'Group Details' page. On the left, a sidebar menu includes 'Organisation' and 'Manage Groups', both highlighted with red boxes. The main content area shows a table of groups 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) To amend the details of an existing group click on the **<Open>** hyperlink:

- 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 forms (e.g 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>**.

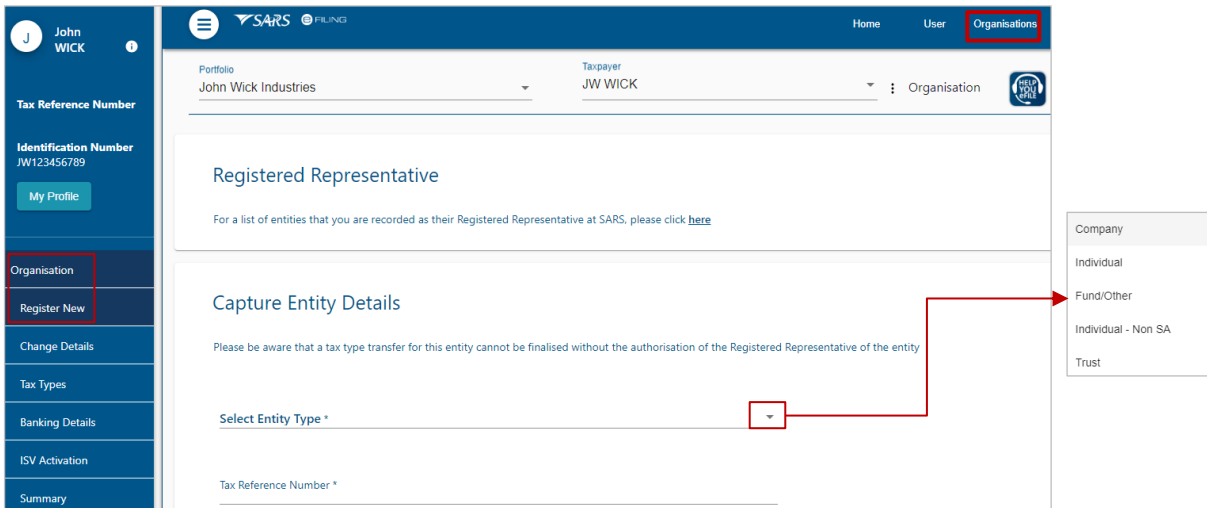
The screenshot shows the 'UPDATE GROUP DETAILS' form in the SARS eFiling system. The form is titled 'UPDATE GROUP DETAILS' and is located within a 'Portfolio' context (My Company Portfolio). The 'Taxpayer' field is set to 'Show all' and the 'Organisation' is selected. The form contains the following 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.

12 MANAGE TAXPAYERS ON AN ORGANISATION OR TAX PRACTITIONER PORTFOLIO

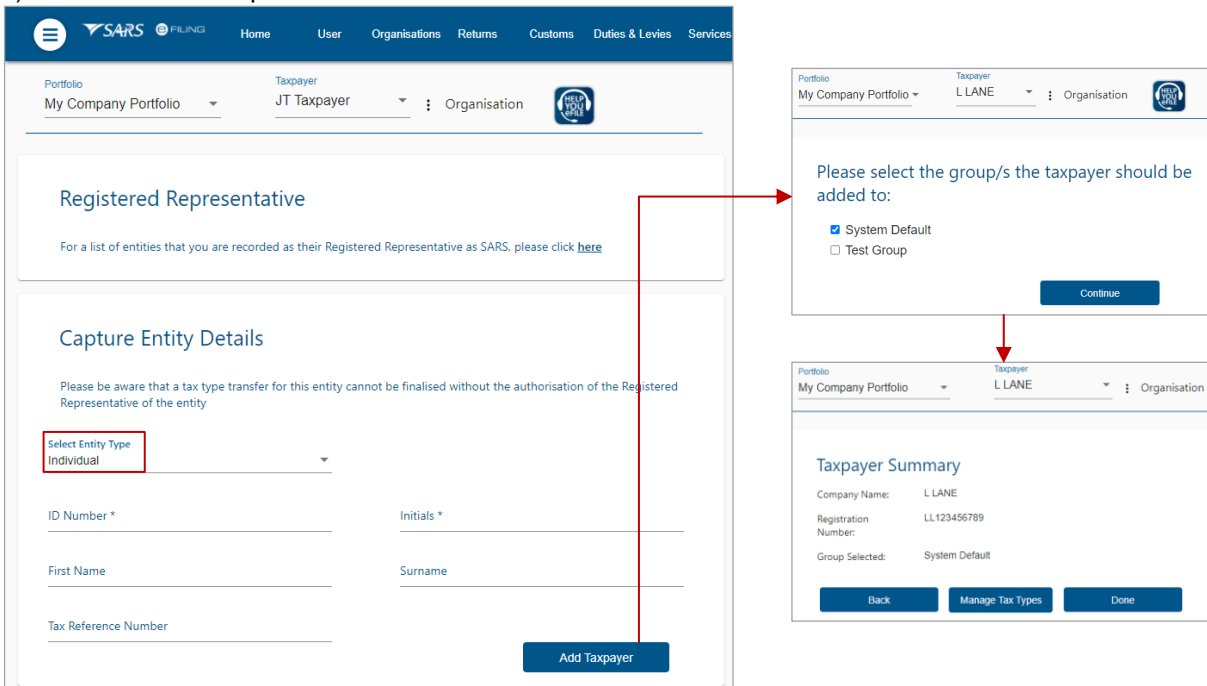
- To manage taxpayer types linked to a portfolio:
 - Select <**Organisations**> from the menu on the top
 - Select <**Organisation**> from menu on the left.
- To amend details of an existing taxpayer on your portfolio select <**Change Details**> from the menu on the left.
- To add a new taxpayer/entity type to your portfolio:
 - Select <**Register New**> from the menu on the left
 - Select the <**Entity Type**> from the drop down list (e.g. Individual, Company, Trust, Individual Non-SA, Fund/Other)
 - If you are registering a **Trust** and the **Trust Type** is 'Intervivos Trust' or 'Testamentary Trust' or 'Estate CGT Trust' or 'Special Trust', you must provide the trust registration number issued by the Master of the High Court. A trust registration number is not required if the **Trust Type** is 'Non Resident Foreign Trust' or 'Collective Investment Scheme'.



d) The registration fields displayed will differ according to the type of entity selected (see screens below)

- Complete the applicable fields and click on **<Add Taxpayer>**
- On the pop-up screen select the group(s) to which the taxpayer should be added (for more information refer to the section on [Manage Groups](#))
- A summary of the new taxpayer's details will display. Click on **<Done>**
- Refer to the section on [Manage Tax Types](#) for more information on how to activate return/tax types for a taxpayer.

e) Information required to add an Individual:



f) Information required to add a Company:

The screenshot shows the SARS eFiling portal interface. At the top, there is a navigation bar with the SARS logo and 'eFILING' text. Below this, there are dropdown menus for 'Portfolio' (My Company Portfolio) and 'Taxpayer' (JT TAXPAYER). A 'Home' button and 'User' and 'Organisations' links are also visible. The main content area is titled 'Registered Representative' and includes a link to a list of entities. Below this is the 'Capture Entity Details' section, which contains a warning message and a form with the following fields: 'Select Entity Type *' (highlighted with a red box and set to 'Company'), 'Registered Name *', 'Registration Number *', and 'Tax Reference Number *'.

g) Information required to add a Fund/Other

The screenshot shows the SARS eFiling portal interface, similar to the previous one. The 'Select Entity Type *' dropdown is highlighted with a red box and set to 'Fund/Other'. The other fields in the 'Capture Entity Details' section are 'Fund Name *', 'Fund Number', and 'Tax Reference Number *'.

h) Information required to add an Individual who is a non South African

The screenshot shows the 'Capture Entity Details' form in the SARS eFiling system. At the top, the Portfolio is 'My Company Portfolio' and the Taxpayer is 'JT TAXPAYER'. The 'Select Entity Type *' dropdown menu is highlighted with a red box and contains the option 'Individual - Non SA'. Below this are input fields for 'Passport Number *', 'Initials *', 'First Name *', 'Surname *', and 'Tax Reference Number *'.

i) Information required to add a Trust and Trust Type.

- A trust deed number is not applicable to Non-resident (Foreign) Trusts or Collective Investment Schemes)

The screenshot shows the 'Capture Entity Details' form for a Trust. The 'Select Entity Type *' dropdown is set to 'Trust' and is highlighted with a red box. Below it is the 'Select Trust Type *' dropdown, also highlighted with a red box. A red arrow points from this dropdown to a separate list of trust types: Intervivos Trust, Testamentary Trust, Estate CGT Trust, Non Resident Foreign Trust, Special Trust, and Collective Investment Scheme.

Please Note:

- You will only have access to the 'Register New' function if the Manage Taxpayer rights have been assigned to you

- The system will display a message if the taxpayer you want to add already exists on another portfolio where you also have the “manage taxpayer rights”. You will have the option to add the taxpayer to the current portfolio

13 MANAGE TAX TYPES

The purpose of this function is to enable the following:

- **Activation/Deactivation** of specific tax types – In order to transact on eFiling (e.g. submit returns, make payments, request statement of account) the applicable tax type must be activated on your profile
- **Transfer of tax types** (personal income tax and provisional tax) between taxpayers, tax practitioners and registered representatives on eFiling.

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

13.1 INDIVIDUALS

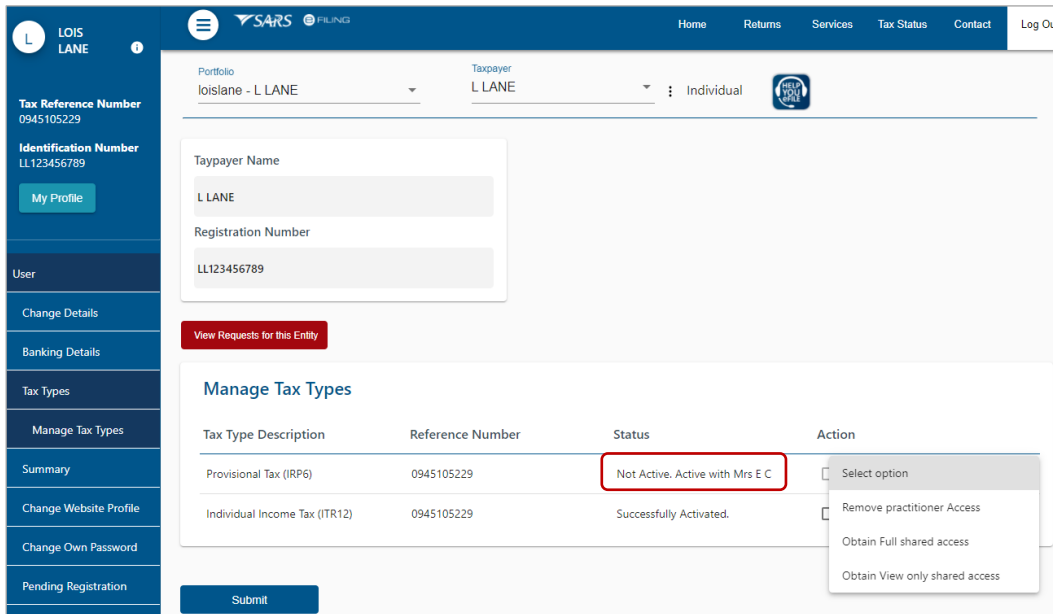
a) To activate/deactivate tax types on your individual portfolio:

- Click on **<Home>**
- Select **<User>** from the menu on the left
- Select **<Tax Types>** and then click on **<Manage Tax Types>**
- A list of taxes you are registered for will display.
- Select the items that you want to activate/deactivate. Click on **<Submit>**.
- A summary of the actions will display. Click on **<Continue>** to confirm the action.

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Successfully Deactivated.	<input type="checkbox"/> Activate
Individual Income Tax (ITR12)	0945105229	Successfully Deactivated.	<input type="checkbox"/> Activate

b) If your tax type is activated with another party (e.g. tax practitioner), you can navigate to the **<Manage Tax Types>** function and select one of the following options at any time:

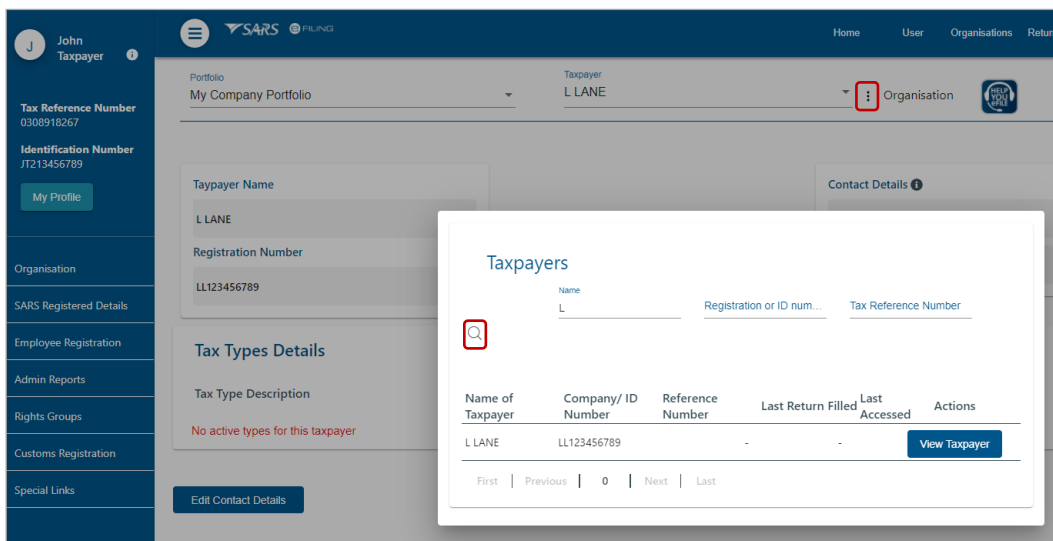
- **<Remove Tax Practitioner Access>**
- **<Obtain Full Shared Access>**
- **<Obtain View Only Shared Access>**



13.2 ORGANISATIONS AND TAX PRACTITIONERS

a) To activate/deactivate tax types for taxpayers on your portfolio, click on the ellipses (⋮) menu icon

- Search for the specific taxpayer using the name, registration number, ID number or tax reference number
- Click on the **<View Taxpayer>** button. This option will load the existing taxpayer details.



c) The **'Tax Types Details'** screen will display with the following buttons:

- **<Edit contact details>** – used to update eFiling correspondence details only. To update your security contact details please use the **<Profile and preference setup>** function
- **<Manage Tax Types>** – used to activate/deactivate specific taxes that you represent the client for
- **<Access Rights>** – used to add the taxpayer to a group if you have the manage taxpayer rights.

The screenshot shows the SARS eFiling portal interface. On the left is a navigation menu for John Taxpayer, including sections for Tax Reference Number (0308918267), Identification Number (JT213456789), My Profile, SARS Correspondence, Returns Issued, Returns History, Returns Search, Levies and Duties, Third Party Data, and Non-Core Taxes. The main content area displays the taxpayer's profile for 'My Company Portfolio' (L LANE). It includes fields for Taxpayer Name (L LANE), Registration Number (LL123456789), and Contact Details (Cell: 0833333333, Email: test@sars.gov.za). Below this is a 'Tax Types Details' section with a table showing no active types for this taxpayer. At the bottom are buttons for 'Edit Contact Details', 'Manage Tax Types', and 'Access Rights'.

d) Click on **<Manage Tax Types>**

- A table will display with the following information:
 - 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)

The screenshot shows the 'Manage Tax Types' section of the portal. It includes a summary box for the taxpayer 'L LANE' with registration number 'LL123456789'. Below is a table with the following data:

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)	0945105229	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Individual Income Tax (ITR12)	0945105229	Not Active. Active on an individual profile.	<input type="checkbox"/> Request Tax Type Transfer
Dividends Withholding Tax (DWT)	0945105229	Not Active.	<input type="checkbox"/> Request Activation
IT3	0945105229	Not Active.	<input type="checkbox"/> Request Activation
Medical Scheme Contribution	0945105229	Not Active.	<input type="checkbox"/> Request Activation
Insurance Payment	0945105229	Not Active.	<input type="checkbox"/> Request Activation
Foreign Tax Information (FTI)	0945105229	Not Active.	<input type="checkbox"/> Request Activation

13.2.1 Request Activation or Transfer of Tax Type

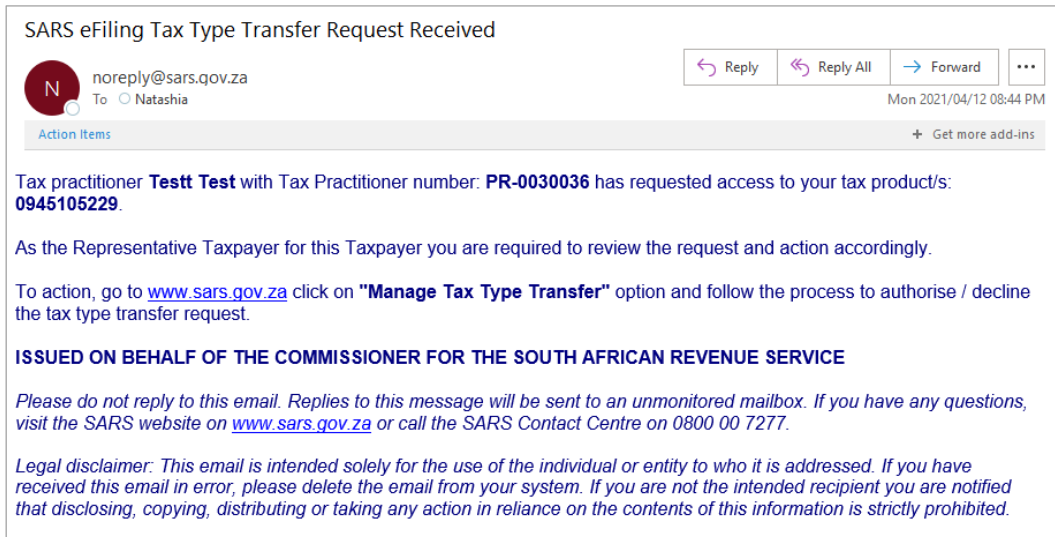
- a) Select the tick-boxes for the applicable actions required (example: "Request Activation" or "Request Tax Type Transfer")
 - Click on the **<Submit>** button.
 - A screen will display with the summary of the actions you selected. Click on **<Continue>**

b) The status of the request will change to awaiting authorisation and will require the current owner/representative of the tax number to [approve the request](#) in order to complete the process.

c) If the owner/representative approves the request, the status will change to “Successfully Activated”.

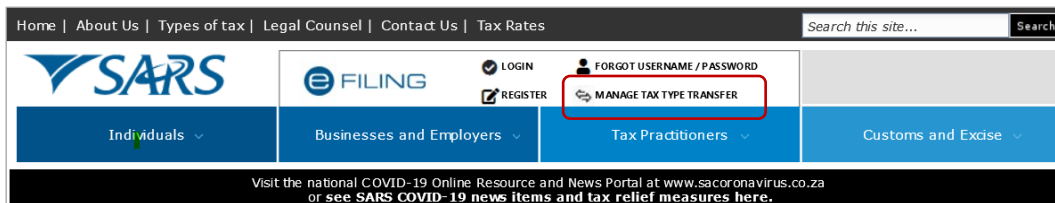
13.2.2 Approve Request for Tax Type Activation or Transfer

- a) A notification will be sent to the current owner/representative to inform him/her:
- Of the transfer request, and
 - The steps to follow to action the request



b) The owner/registered representative must follow the steps below to action the request and complete the process.

- 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 your own identification number and the tax number for which the transfer is requested. Click on **<Submit>**
- As part of the authentication process, you will be required to enter a [One-Time-Pin \(OTP\)](#).
- Insert the OTP sent to your email or cell number and click on **<Submit>**.



Tax Type Transfer

Are you a South African citizen?

Yes No

Foreign ID / Passport Number

JJ123456789

Tax Reference Number

0945105229

Submit

Approve Online Request

SARS would like you to approve your online request. Please indicate your preferred channel and click OK to authorize.

Email Cell Number

Please select a method of communication
Your Preferred Contact

OK

b) Read the declaration and the details of the party requesting the tax type transfer and print the Power of Attorney

- Select **<Authorise>** or **<Decline>**
- Click on **<Submit>**

- After you have authorised or declined the request, click on **<Return to SARS Website>**.

Tax Type Transfer

Please action the tax type transfer request by authorising or declining the following **Power Of Attorney** within 5 minute/s:

I, **JOHN TAXPAYER** with Identity Number (ID): **JT123456789**, in my capacity as Representative TaxPayer for **LOIS LANE**, with Identity Number (ID): **LL123456789** hereby authorise **Testt Test**, a Registered Tax Practitioner, Number: **PR-0036308**, to access, receive, read, conclude and deliver electronic filing transactions as defined in the rules for electronic communication prescribed under *section 255 of the Tax Administration Act* for the tax(es) listed below.

I declare that as the registered representative I remain fully accountable for any action taken by, **Testt Test** or person under his / her direct supervision as a result of the access granted.

Provisional Tax (IRP6) - 0945105229

Authorise Decline

Cancel Submit
Print Power of Attorney

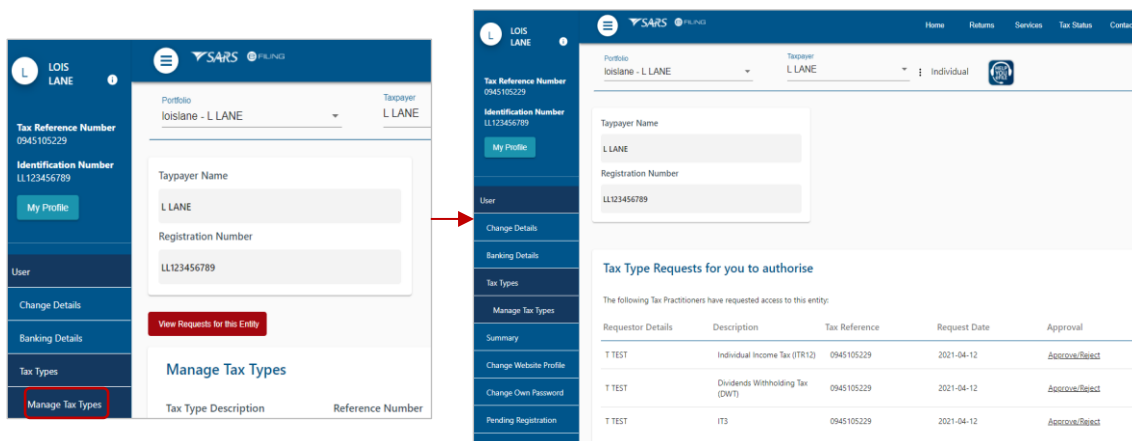
← Tax Type Transfer

Request successfully actioned.

Return to SARS Website

c) If you are a registered eFiler, you can log on to eFiling to view a list of tax type requests that require your authorisation:

- Navigate to the **<Manage Tax Types>** function
- Click on **<View Requests for this Entity>**



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

- If you have multiple portfolios, you can transfer tax types between portfolios:
 - We will check if the portfolio/profile has '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, 3 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.

13.2.3 Tax Types Legacy

- a) The legacy menu items will be available for a temporary period and is intended to allow users to view/monitor requests made via the previous Tax Type Transfer functionality (prior to the implementation of the [Manage Tax Type](#) function).
- b) To access the legacy requests
 - Select **<Organisations >** from the menu on the top.
 - Select **<Organisation>** from the menu on the left
 - Select **<Tax Types>** from the menu on the left
- c) **<Legacy Activation Requests>** - this function is read-only and allows you to view tax types previously activated for a particular taxpayer

The screenshot displays the SARS eFiling interface for a user named Mr T TEST. The left-hand navigation menu is visible, with 'Legacy: Activation Requests' highlighted in a red box. The main content area shows a list of tax types for the taxpayer Mr T TEST at the ALBERTON tax office. The 'Individual Income Tax (ITR12)' is selected, showing a reference number of 0477604776 and a tax office of PRETORIA. A note states: 'Please note that you will automatically be activated to receive SARS notices for this tax type online.' The status is 'Successfully Activated'. There are two red notes: 'Note: Click Here to activate/deactivate individual Income Tax activation for deceased estate purposes.' and 'Note: Click Here to activate/deactivate individual Income Tax activation for insolvent estate purposes.' Other tax types listed include VAT Admin Penalty, Provisional Tax (IRP6), and IT Admin Penalty.

d) **<Legacy Transfer Requests>** - this function allows you to access the list of previous tax type transfer requests.

- You can open individual requests
- Where applicable you can capture an override code that was sent for a legacy request (prior to the implementation of the Manage Tax Types function)
- You will not be able to create any new tax type transfer requests.

The screenshot displays the SARS eFiling interface for 'Legacy Transfer Requests'. The left sidebar contains navigation options: My Profile, Organisation, Register New, Change Details, Tax Types, Manage Tax Types, View Request History, Legacy: Activation Requests, Legacy: Transfer Requests (highlighted with a red box), and Legacy: Pending Registration. The main content area shows the 'Requests for Taxpayer's Return Types' section, including a table of requests and a search bar.

Name	Request Type	Request Reference	Request Date	Last Action Date	Status	View	Cancel
Miss S	Requested	19121937	07 Nov 2019	07 Nov 2019	Authorised by Individual TaxPayer	View	
Mrs BL	Requested	19121937	07 Nov 2019	07 Nov 2019	Authorised by Individual TaxPayer	View	
Mrs EC	Received	19121940	11 Nov 2019	13 Nov 2019	Cancelled	View	
Miss S	Received	19121942	12 Nov 2019	12 Nov 2019	Cancelled	View	
Miss S	Received	19121942	12 Nov 2019	14 Nov 2019	Cancelled	View	
Mrs EC	Received	19121943	12 Nov 2019	14 Nov 2019	Cancelled	View	
Mr TR	Requested	19121949	18 Nov 2019	20 Nov 2019	Cancelled	View	
Mr GA	Requested	20121953	24 Jan 2020	29 Jan 2020	Cancelled	View	
Mrs BL	Received	20121954	28 Jan 2020	28 Jan 2020	Request Unsuccessful	View	

e) **<Legacy Pending Registration>** - There may be cases where SARS needs to review a 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. You can use this function to view the pending registration requests.

- Select the option for all taxpayers
- Click on the **<Open>** hyperlink
- You can view the taxpayer's details and click on **<Query Status>** to view the progress of the eFiling registration.

The screenshot shows the SARS eFiling interface. The top navigation bar includes 'Home', 'User', 'Organisations', 'Returns', 'Duties & Levies', 'Services', and 'Tax Status'. The left-hand menu is expanded, showing options like 'My Profile', 'Organisation', 'Register New', 'Change Details', 'Tax Types', 'Manage Tax Types', 'View Request History', 'Legacy: Activation Requests', 'Legacy: Transfer Requests', and 'Legacy: Pending Registration' (which is highlighted with a red box). The main content area shows a search for tax payers with a table of results.

Name	Registration Number	Return Type	TaxReference Number	Status	Open
Mr QAY	730116730116	Individual Income Tax (ITR12)	0004935000	Case Created	Open
1					

14 ACTIVATE REGISTERED REPRESENTATIVE

- a) If you are the appointed registered representative for an entity, you must activate the status on eFiling in order to transact on behalf of your client.
- Select **<Organisations >** from the menu on the top.
 - Select **<SARS Registered Details>** from the menu on the left
 - Select **<Activate Registered Representative>**
 - Select the applicable option (i.e. Tax Practitioner or Registered Representative)
 - Agree to the declaration confirming that you are the authorised representative for the taxpayer and click on **<Continue>**
 - Complete the applicable fields and select the representative capacity (e.g. accounting officer, curator, public officer, parent guardian, etc.)
 - Click the on the activate button at the bottom of the screen

The screenshot displays the SARS eFiling interface. On the left, a user profile for 'John Taxpayer' is shown with their Tax Reference Number (0308918267) and Identification Number (JT213456789). The main content area is titled 'Activate Registered Representative'. It includes a 'Confirmation of Registered User' section with the following text: 'There are two ways to be activated as a Registered User. This 'Activate Registered Representative' function is intended only for the activation of Registered Representatives and is not intended for use by Tax Practitioners.' Below this, there are three sections: 'Are you a Registered Representative?', 'Are you a Registered Representative acting on behalf of an Individual?', and 'Are you a Registered Tax Practitioner?'. The 'Are you a Registered Representative?' section defines a Registered Representative and lists circumstances where SARS allows activations for individuals. The 'Are you a Registered Tax Practitioner?' section defines a Registered Tax Practitioner. At the bottom, two buttons are visible: 'Activate Registered Representative' and 'Activate Tax Practitioner', both highlighted with red boxes.

15 TAX PRACTITIONER CONFIGURATION

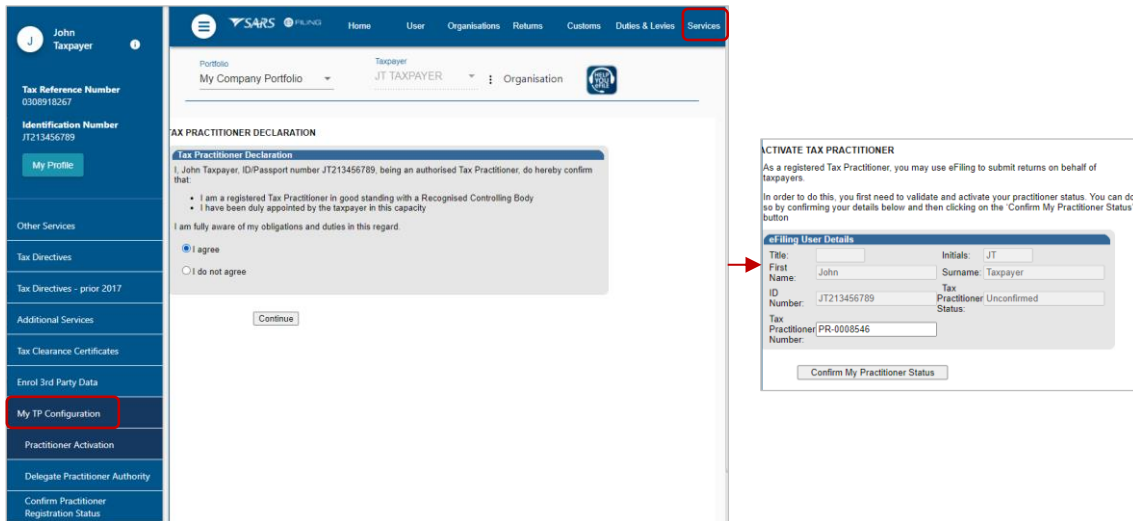
This functionality enables tax practitioners to confirm their tax practitioner status at SARS and allow tax practitioners to link practitioner users to other activated practitioner user profiles.

If a user is not a confirmed practitioner or has not been linked to a practitioner user, access to ITR12 returns will be limited to only a "SAVE" functionality. This means that the tax practitioner or practitioner user will not be able to submit the ITR12 returns to SARS and the taxpayer will have to either submit the return via eFiling (if he/she has shared access to the ITR12 with the tax practitioner) or the taxpayer will have to contact a SARS branch office for assistance to submit the return.

- a) To access this functionality, click on **<Services>** on the menu on the top and select **<My TP Configuration>** from the menu on the left.

15.1 PRACTITIONER ACTIVATION

- a) Select **<Practitioner Activation>** from the menu on the left
 - The **Tax Practitioner Declaration** will display. Read the declaration, select **<I agree>** click on the **<Continue>** button
 - On the **<Activate Tax Practitioner>** screen enter a valid practitioner number in the tax practitioner number field and click on the **<Confirm My Tax Practitioner Status>** button.



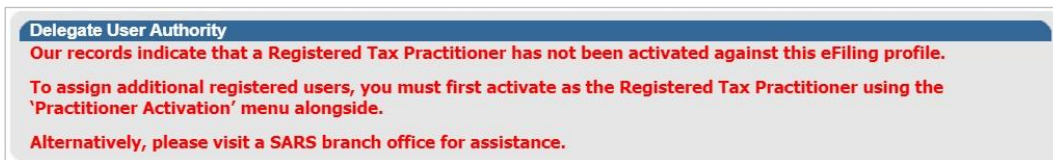
Please Note:

- If the tax practitioner number is inactive and does not match with SARS, the status field will indicate “**Unconfirmed**”. Tax practitioners are encouraged to register with RCB’s and ensure that they are registered as a tax practitioner with SARS.
- If the tax practitioner number is valid and matches with SARS, the status field will indicate “**Registered**”.
- If you wish to validate the status of an existing PR number on the profile, select the “**Reconfirm Status**” button. A message will display indicating that you have been successfully confirmed as a registered tax practitioner.

15.2 DELEGATE PRACTITIONER AUTHORITY

Tax practitioners are allowed to link practitioner users to other activated practitioner users and thereby delegate authority. This is typically in cases whereby staff members of an organisation are performing functions on eFiling on behalf of the tax practitioner.

- Select < **Delegate Practitioner Authority** > from the menu on the left
- If the tax practitioner has not been activated against the eFiling profile, the following message will display. To activate, refer to “[Practitioner Activation](#)” step above.



- If the tax practitioner has been activated and the status indicates “**Registered**”, the <**Delegate User Authority**> page will display.

Delegate User Authority

Actions on the page below are only available to the Site Administrator and to the Registered Tax Practitioner. It displays the Registered Tax Practitioner who was activated via eFiling and lists all the registered eFiling users. Only the registered practitioner may assign and remove practitioner rights to other users. To assign or remove rights, select the checkbox alongside the user and then click on the 'Save' button. To activate as the Registered Tax Practitioner, please use the 'Practitioner Activation' menu on the left.

Please select PR number you would like to delegate authority to

Login Name: Surname:
 First Name:

First Name	Initials	Surname	ID Number	Login Name	

d) Choose the “PR number” that you want to delegate authority to:

- Administrators or the registered tax practitioner may perform actions on this page
 - The admin user on eFiling will be able to view all linked practitioners in the dropdown.
 - If it is the user on eFiling, only his/her practitioner (PR) number will display on the dropdown list for selection.
- Once the PR number has been chosen, click on **<Select>**
- A list of users will display. Select the users and click on the **<Save>** button to continue
- Click on **<OK>** to confirm the selection. A message will display to indicate that the users have been successfully updated.

Delegate User Authority

Actions on the page below are only available to the Site Administrator and to the Registered Tax Practitioner. It displays the Registered Tax Practitioner who was activated via eFiling and lists all the registered eFiling users. Only the registered practitioner may assign and remove practitioner rights to other users. To assign or remove rights, select the checkbox alongside the user and then click on the 'Save' button. To activate as the Registered Tax Practitioner, please use the 'Practitioner Activation' menu on the left.

Please select PR number you would like to delegate authority to

Login Name: Surname:
 First Name:

First Name	Initials	Surname	ID Number	Login Name	
Col	C	A	620	col	<input checked="" type="checkbox"/>
Sim	S	B	570	S	<input type="checkbox"/>
sive	s	d	010	d	<input type="checkbox"/>
s	sd	d	010	d	<input checked="" type="checkbox"/>
Pat	P	K	470	pat	<input type="checkbox"/>
BON	BL	M	711	M	<input type="checkbox"/>
Ing	I	S	760	I	<input type="checkbox"/>

15.3 CONFIRM PRACTITIONER REGISTRATION STATUS

a) Select **<Confirm Practitioner Registration Status>** from the menu on the left

- The tax practitioner registration status page will display.
- Enter the tax practitioner number. Complete and verify the security pin displayed on the screen
- Click the **“Search”** button to continue.

- b) If the tax practitioner number is incorrect, the following error message will display.

Please ensure that your Tax Practitioner Number is correct. eg. Number PR-0000000

OK

- c) If no registered tax practitioner can be found, a message will display on the screen.

Tax Practitioner Number PR-0000000 (e.g. PR-0000000)

Security PIN 192247

Verify Security PIN **Search**

No registered tax practitioner can be found for this number.

- d) If the tax practitioner is registered, the practitioner’s name, surname, practitioner number and registration status indicated as **“Registered”** will display.

TAX PRACTITIONER REGISTRATION STATUS

Tax Practitioner Number PR-00 (e.g. PR-0000000)

Security PIN 944541

Verify Security PIN **Search**

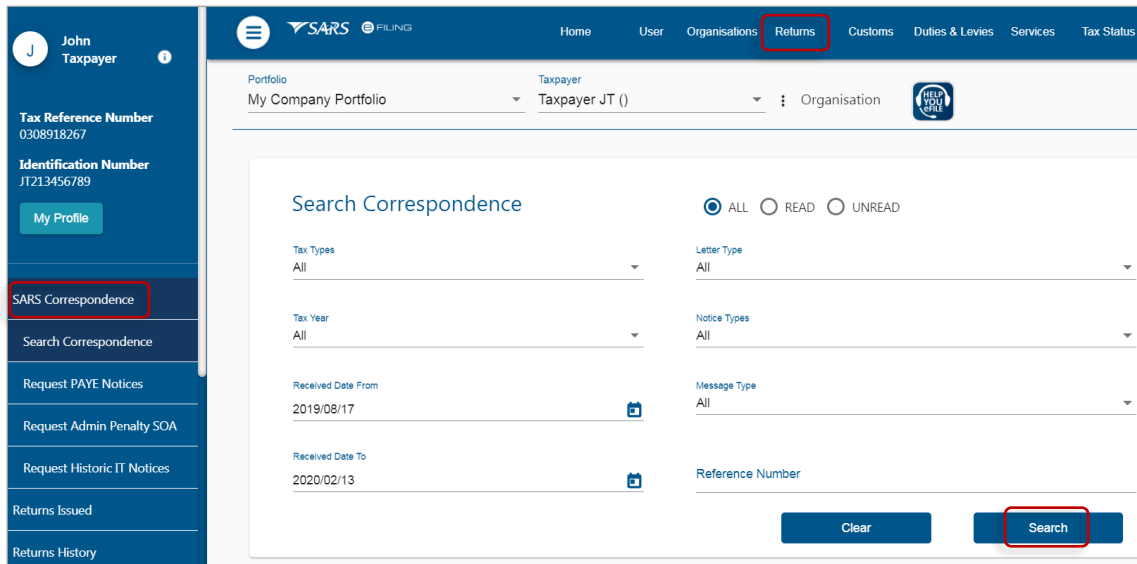
Full Names	Surname	Practitioner Number	Registration Status
FRAN	MOS	PR-00	REGISTERED

16 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>**.

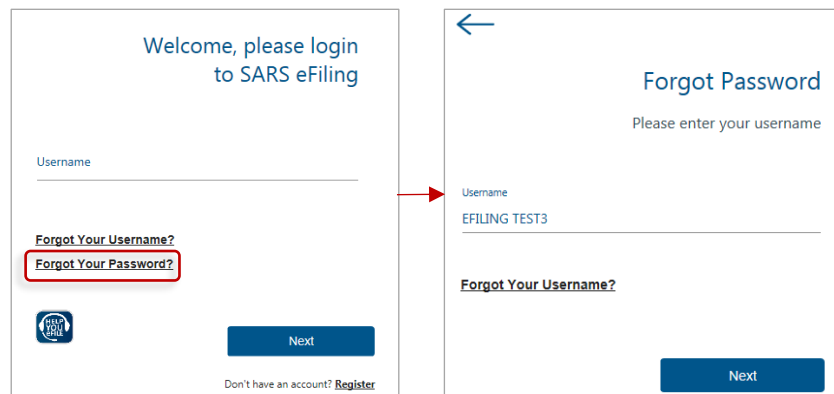


Please Note:

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.

17 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.

The screenshot shows a 'Forgot Password' form with the following fields: 'New Password' and 'Confirm Password', both containing masked text (dots). A 'Submit' button is at the bottom. To the right, a 'Message' pop-up box displays: 'Your password has been successfully changed.' with an 'OK' button.

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.

The screenshot shows a 'Forgot Password' form with the following fields: 'Cell Number' (0833333330) and 'Email' (Test1@sars.gov.za). A 'Next' button is at the bottom. To the right, an 'Error' pop-up box displays: 'We could not verify your details at the moment. Please try again later or call the SARS Contact Centre on 0800 00 7277 for assistance.' with an 'OK' button.

18 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 your personal particulars, an OTP will be sent to your email address or your cell number. Insert the OTP and click on <**Submit**>.

Forgot Username

Please enter ID or Passport number and contact details

Cell Number
0833333333

Email
cena@test.co.za

Are you a South African Citizen?*

Yes No

Foreign ID / Passport Number
123456789CE

Tax Number Linked to the Username

Continue

One Time Pin

OTP has been sent to the following email
CE**@T***.CO.ZA
Pin expires in 02:50

1 1 1 1 - 1 2 3 4 5 6

Please enter the last 6 digits of your OTP.

Resend OTP Submit

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.

Forgot Username

Please enter your new password

Your username is:
CENA@TEST.CO.ZA

New Password

Confirm Password

Message

Your password has been successfully changed.

OK

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.

19 DOCUMENT MANAGEMENT

<u>Detail of Change</u>	<u>Date</u>	<u>Version</u>	<u>Description</u>
	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
	23-04-2021	11	New function to Manage Tax Types, Practitioner configuration
	11-08-2021	12	Chatbot; Approve Tax Type Transfer request
	28-02-2023	13	Added Trust Types (including foreign and CIS trusts); LiveChat

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;
- Make a booking to visit the 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); or
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).