

SARS eFiling



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Overview

- Invite user Menu
- Manage tax types transfer (Individuals)
- Transferring client portfolios from one practitioner to another.
- Notice of registration
- Update Banking details (RAV01)
- Merging Entity
- Updating User Rights
- Delegate Tax Practitioner Authority

Migration of Existing Users

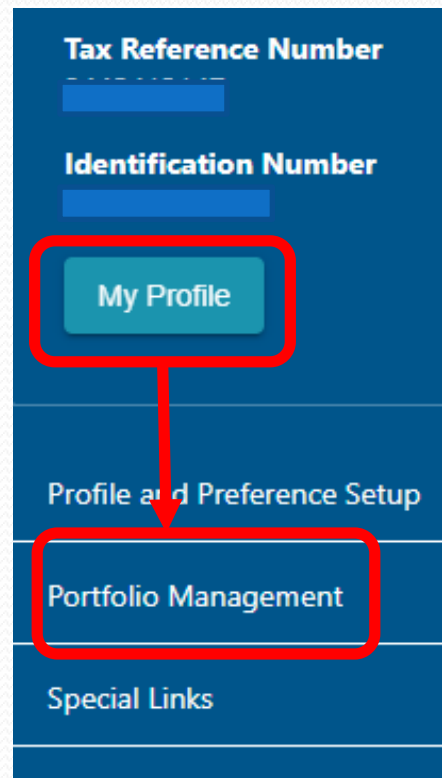
- All existing users (registered prior to 1 July 2019) will be authenticated and migrated to one single user sign
- If you have multiple login profiles linked to your identity/passport number, a list of your profiles will display (after you have been authenticated)
- You will be required to choose a primary login from the list Profile management (e.g. Organisations and Tax Practitioners)
- 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

Migration of Existing Users

If you have not been migrated to the new eFiling platform, you need to book a telephonic branch appointment via the SARS website and have entity records linked to your ID number merged, and your eFiling security contact details updated.

Your profile will be migrated after 24 hours.

Linking portfolios



Linking portfolios

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default		
	1	1	Individual	<i>Default</i>	⋮	Go to Portfolio
	1	2	Organisation		⋮	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name

Portfolio Name

Link

 [ASK A QUESTION?](#)

Inviting a User

The screenshot displays the SARS eFiling user interface. The top navigation bar includes 'Home', 'User', 'Organisations', 'Returns', 'Customs', and 'Duties &'. The left sidebar contains options such as 'My Profile', 'User', and 'Invite User'. The main content area is titled 'Invite a User' and includes a dropdown menu for 'Tax User' and a section for 'Identification Type' with a 'Please Select Type' dropdown. Below this are input fields for 'Surname' and 'Portfolio Name'. A red arrow points from the 'Invite User' option in the sidebar to the 'Tax User' dropdown menu.

Portfolio

Tax User

Organisation

Invite a User

Inviting a user means inviting a person that already has an eFiling profile. A notification is sent via SMS or email, with instructions on how to accept your invite.

Identification Type

Please Select Type

Surname

Surname

Portfolio Name

The request name filled in will be shown to the requested user.
This name will default to their portfolio name upon acceptance of this

Rules To Inviting a User

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.

Accepting Invite To Be a User on Portfolio

Log into your eFiling profile:

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

Deleting a User on eFiling

Log into eFiling

- Click on User
- Select user on User List
- Select User on left
- Delete User

NB : For users that are linked to Portfolios with a large number of taxpayers, ensure that you remove the User rights from the Rights Groups and revoke user roles

Tax Type Transfers

Taxpayer Name

1

Registration Number

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)		Not Active.	 Not Available
Organisation Income Tax (ITR14/IT12EI/ITR12T)		Not Active.	 Not Available
CBC		Not Active.	 Not Available
EMP501 - Submission		Not Active.	 Not Available

Tax Type Transfers

- If a tax type is not available on eFiling, hover cursor above the grey information icon to see the reason
- If the reason relates to contact details, it means that the registered representative does not have eFiling security contact details registered on the SARS system, which usually means that they do not have a personal eFiling profile
- If the reason says that there isn't a registered representative for the taxpayer, then a representative needs to be registered via the SARS website.

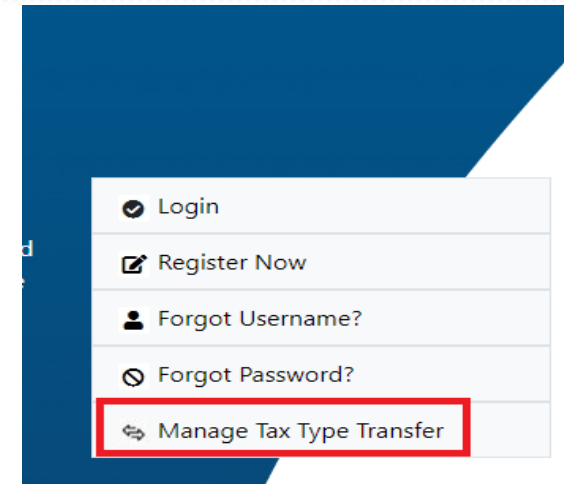
Manage Transfer request



NEW LOOK
New SARS



A screenshot of the 'Tax Type Transfer' form, enclosed in a red border. The form has a white background and a blue header bar with a back arrow icon on the left and the title 'Tax Type Transfer' on the right. The form contains the following elements: a question 'Are you a South African citizen?' with 'Yes' selected via a radio button and 'No' as an option; a text input field for 'Identification Number'; another text input field for 'Income Tax Reference Number'; and a blue 'Submit' button at the bottom.



Merging Entities

- Organisation Top
- Organisation left
- SARS Registered details
- **Merge Entities**
- Continue
- RM001 form will open
- Follow the prompts and submit

Merging Entities

back to eFiling

SARS Records Merge RM001

1 Representative 2 Main record 3 Additional records 4 Review 5 Submit

i Information **Representative** Next

1 Select your representative

Select your representative:

This step allows you to select the representative that will represent the enterprise once the merging process is complete.

This can be done by clicking the representative field and selecting the representative from the list.

Note: If you accessed the merge application as the Representative, you will be defaulted as the new Representative, and you will

Notice of Registration

Activate Registered Representative

Maintain Registered Users

Maintain SARS Registered Details

Saved Details

Maintain Registered Details History

Merge Entities

Entity Merge History

Letters

Register Withholding Tax on Interest

Customs Registration

Merging Entities

SARS Records Merge RM001

done Representative → done Main Record → **create Additional Records** → lock Review → lock Submit

i Information **Additional records** Add Previous Next

3 Select additional records

This step allows you to add additional registrations that belong to the entity but are not displayed in the merge application. Upon clicking the Add button you will be presented with a new record where the details can be captured.

Any additional records added will be subject to verification by SARS before being added to the entity's registration portfolio.


Note: All fields highlighted in Red must be completed in order to add the record.

Main Record	Added record 1	X
SUGGESTED MAIN		
<input type="checkbox"/>	<input type="checkbox"/>	
PRIVATE_CO	PRIVATE CO	
Trading Name		
Registration Number		
Master of Office Registration		
Registered Name		
Legal Status	ACTIVE	
Representative		
- Tax types	Tax types	
Tax Reference Number	[INCOME TAX: €] [VAT:] [PAYE:]	
+ Physical address details	Physical address details	
+ Contact details	Contact details	

User Rights

- Select <Organisation> from the menu on the top
- Select <Organisation> again from menu on the left
- Click on <Rights Group>
- Click on **<Manage Groups>**
- The <System Default Group> will display
- Select **“Setup New Group”**

User rights continued

 Home User Organisations Returns Custom

Portfolio: My Company Portfolio Taxpayer: Show all Organisation

UPDATE GROUP DETAILS

Group Name: SARS Group

Authorisation Level

Access To Payments

Tax Types

Submissions

- 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

Do you want to import taxpayers from an existing group?

Yes No

User Roles

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**
RLA â€™ View Customs Product information
- RLA - View Client Type**
RLA - View Client Type
- 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)
- 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**

Transferring portfolios

- To transfer a whole client portfolio between practitioners/users, the user receiving the portfolio needs to be invited to the client portfolio and given admin rights
- Then the new user will need to delete the old user, thus completing the transfer

Transferring Portfolios

The screenshot displays the SARS eFiling user interface. At the top, a dark blue navigation bar contains the SARS eFiling logo and menu items: Home, User, Organisations, Returns, Customs, Duties & Levies, Services, and Tax Statements. The 'User' menu item is highlighted with a red box. Below this bar, a light grey header area includes dropdown menus for 'Portfolio' and 'Tax User', followed by an 'Organisation' label and a 'HELP YOU eFILE' icon. The main content area is titled 'ADMIN USERS' and lists a user named 'WELILE NHLAPO (W)'. On the left side, a dark blue sidebar menu contains options: 'My Profile', 'User', 'Invite User', 'Change Details', 'Change Website Profile', 'Delete User', 'My Administrators', and 'Unlock Account / Reset Password'. The 'User' and 'My Administrators' options in the sidebar are also highlighted with red boxes. A red arrow points from the 'User' menu item in the top navigation bar to the 'My Administrators' option in the sidebar.

Notice of Registration

The screenshot displays the SARS eFiling user interface. The top navigation bar includes 'Home', 'User', 'Organisations' (highlighted with a red box), 'Returns', 'Customs', 'Duties & Levies', 'Services', 'Tax Status', 'Contact', and 'Log Out'. Below the navigation bar, there are dropdown menus for 'Portfolio' and 'Taxpayer', followed by a 'Help You File' icon. The main content area is titled 'Notice of Registration' and contains a table with the following columns: 'Name of Taxpayer', 'Reference Number', 'Tax Type', 'Issue Date', and 'Actions'. A red box highlights the 'Request New' button in the 'Actions' column of the first row.

Name of Taxpayer	Reference Number	Tax Type	Issue Date	Actions
CC	Projects	Value Added Tax (VAT201)		Request New

Updating Banking Details

The screenshot displays the 'My menu' interface. On the left, a sidebar lists various account management options. The 'My bank accounts' option is highlighted with a red box. A red arrow points from this option to the 'Bank account settings' option in the top navigation bar, which is also highlighted with a red box. The main content area shows a table titled 'My bank accounts' with columns for Bank name, Account no., Account type, Status, Usages, and Delete.

Bank name	Account no.	Account type	Status	Usages	Delete

Delegating Tax Practitioner Authority

Other Services

Tax Directives

Additional Services

Tax Clearance Certificates

Enrol 3rd Party Data

My TP Configuration

Practitioner Activation

Delegating Practitioner Authority

Confirm Practitioner Registration Status

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 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 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

A graphic consisting of three overlapping rectangular panels. The left panel is blue with a white 'Q'. The middle panel is white with a blue '&'. The right panel is blue with a white 'A'. The panels are slightly offset, giving a 3D effect.

Q & A

Thank You