SARS eFiling

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Live Chat/ Q & A: Nokuthula Mbatha (SARS Support Consultant-Gauteng & Free State)

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

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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

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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.

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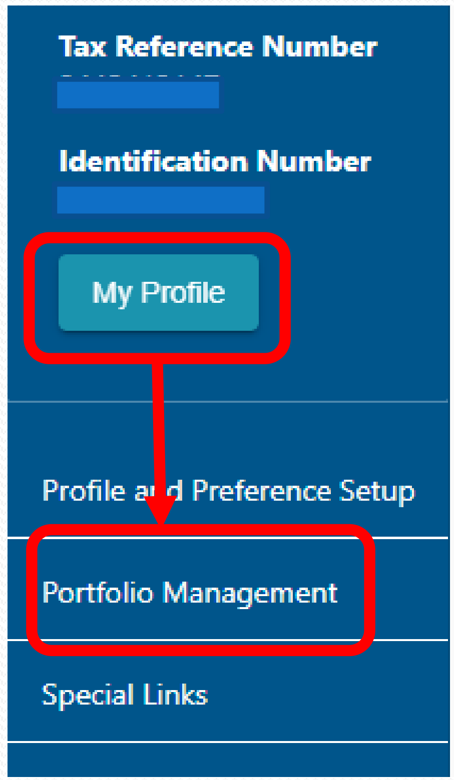
Linking portfolios



Linking portfolios

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default		
	1	1	Individual	*Default*	⋮	Go to Portfolio
	1	2	Organisation		⋮	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link

ASK A QUESTION?

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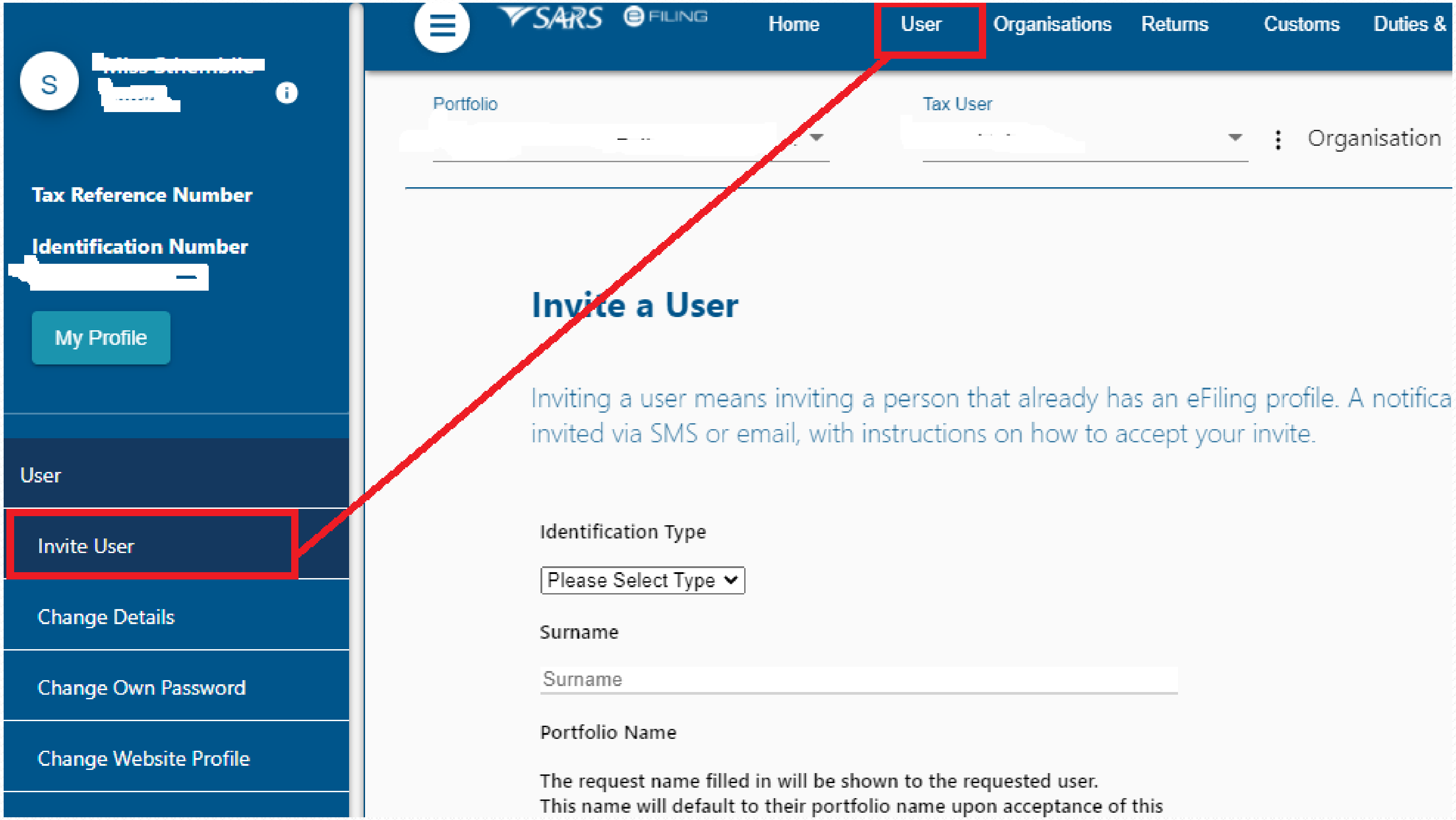
Inviting a User



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.

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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

Taypayer Name

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

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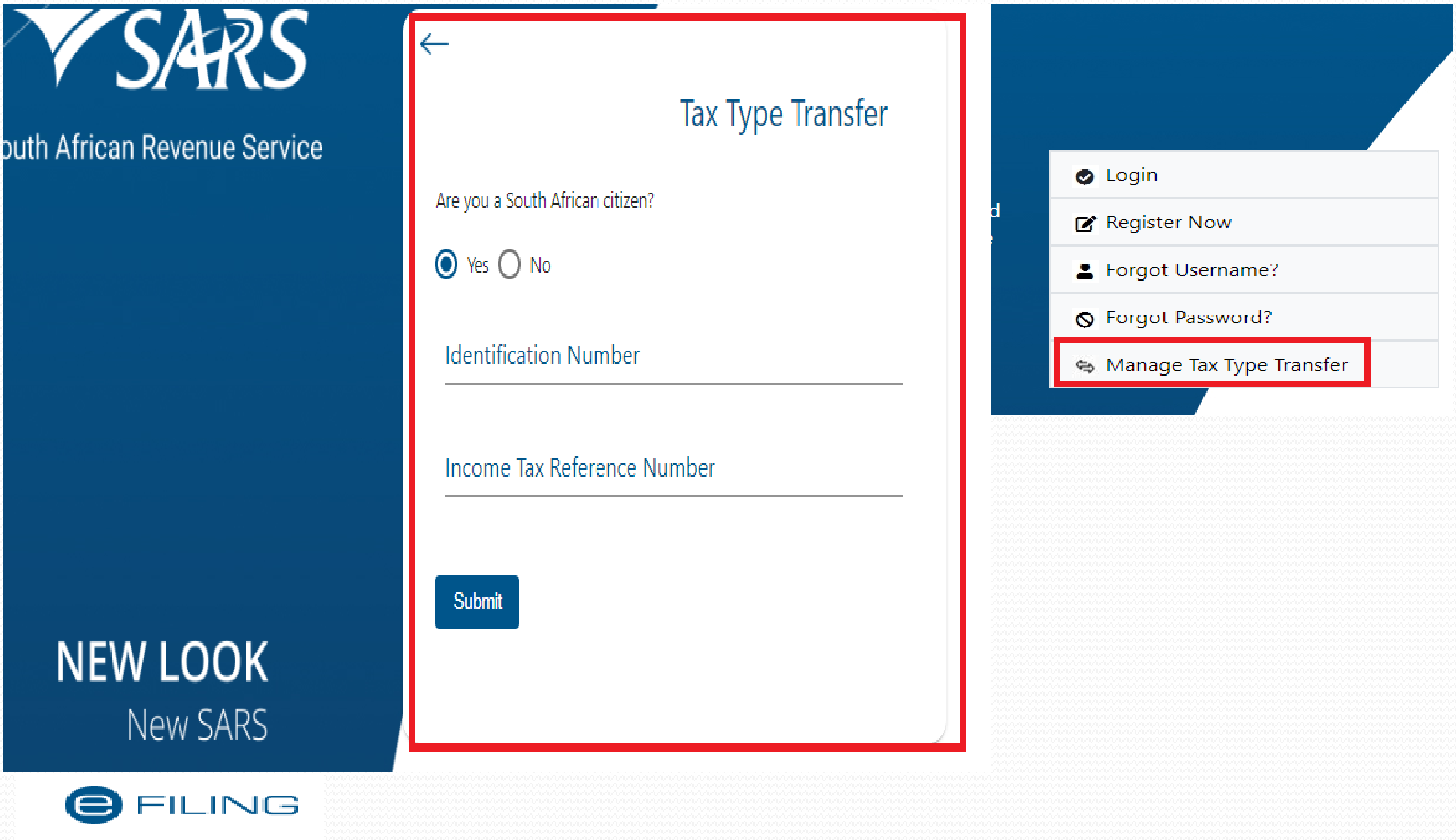
Tax Type Transfers

- 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.

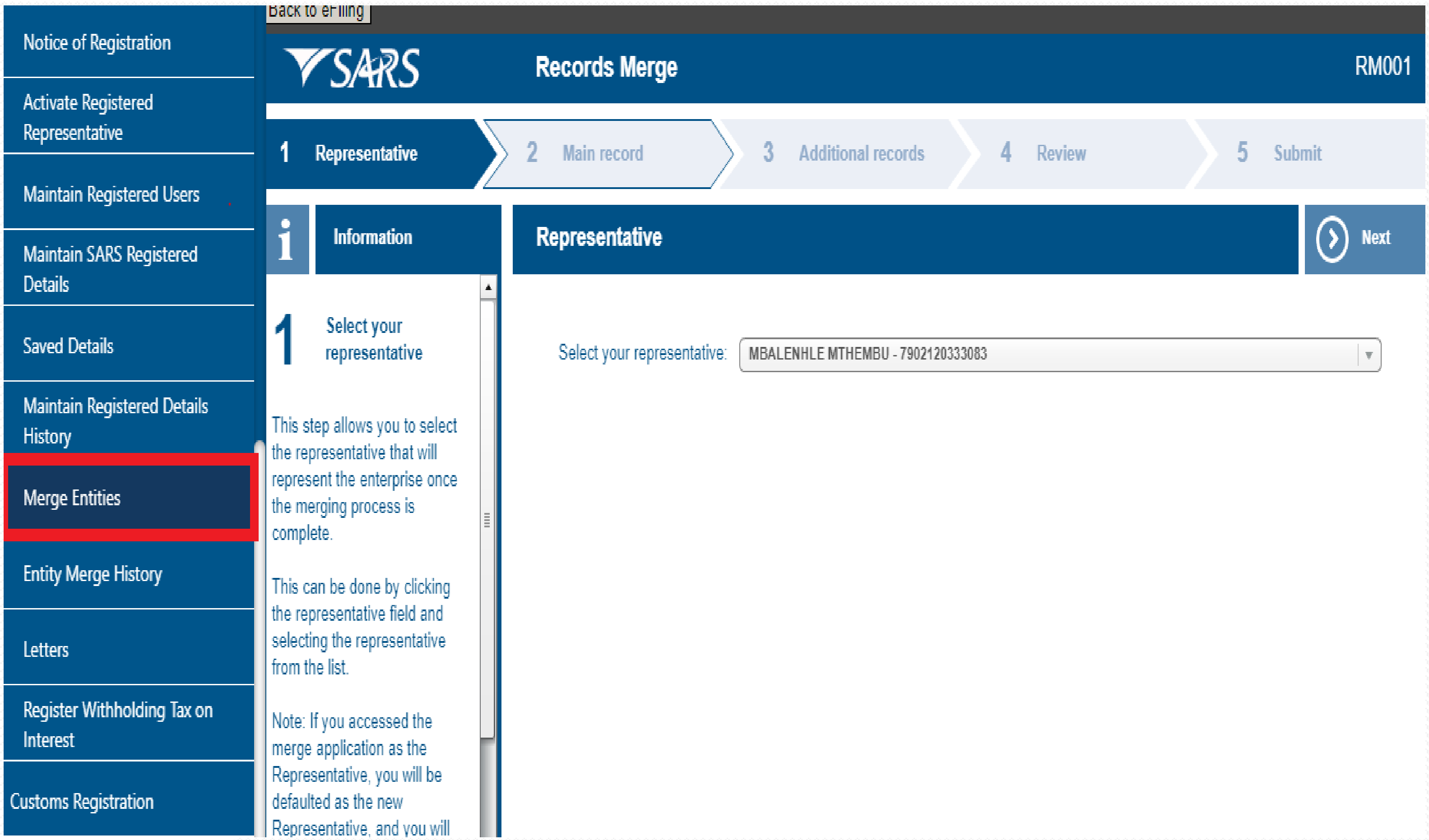
Manage Transfer request



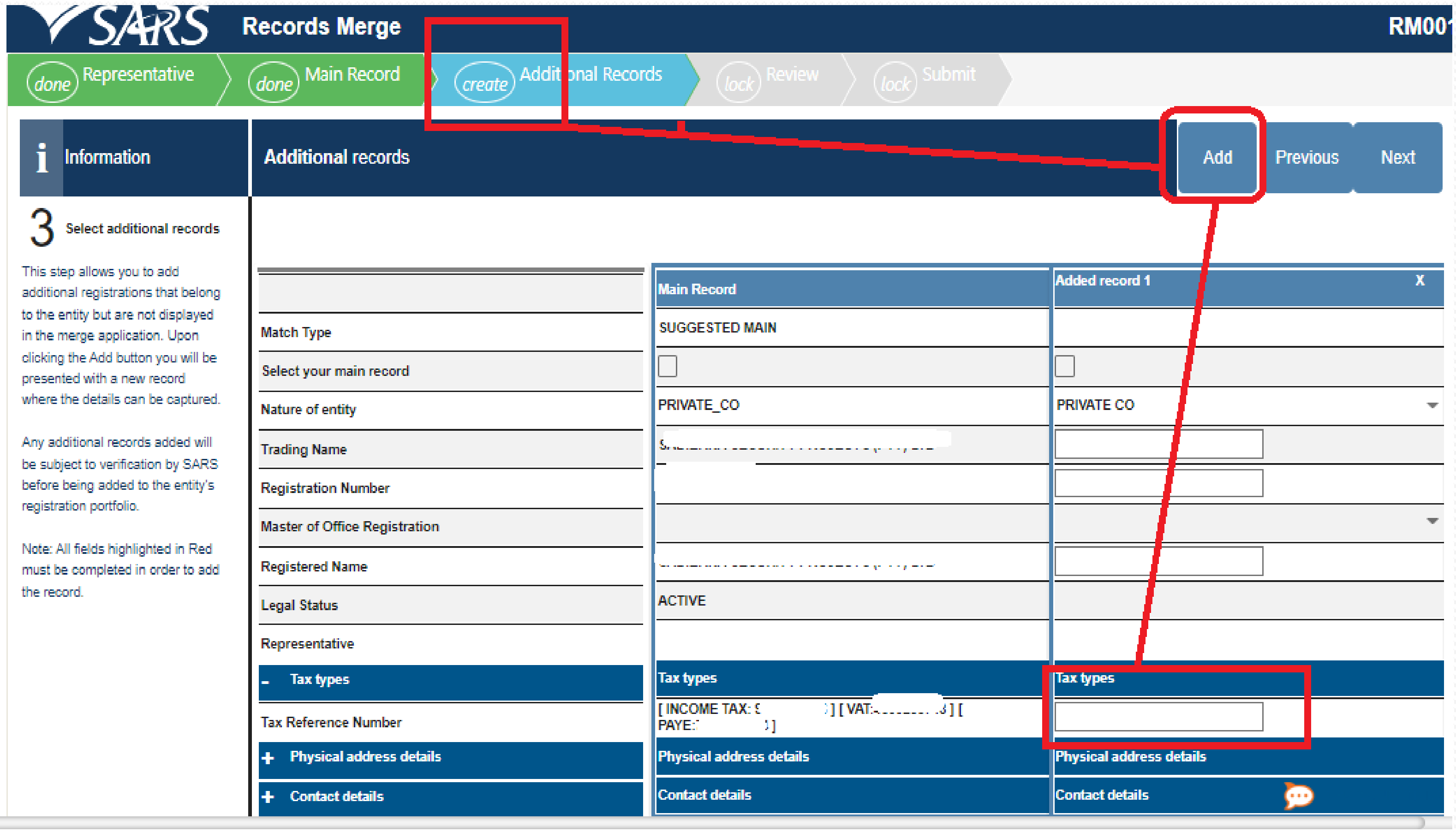
Merging Entities

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

Merging Entities



Merging Entities



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”**

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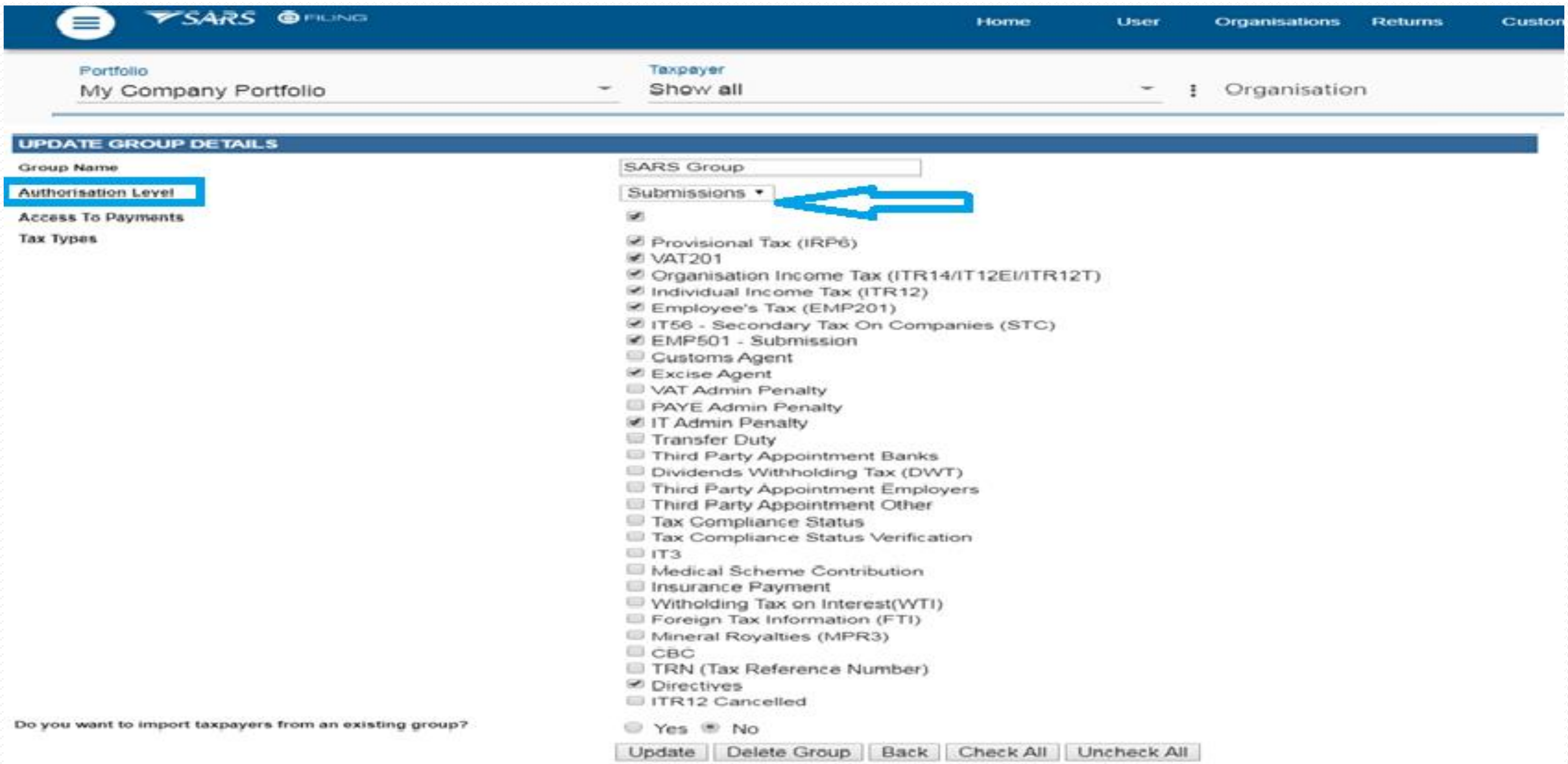
User rights continued



User Roles

USER ROLES

- [x] Manage Transfer Duty Financial Account
This role allows users to maintain all financial detail against the Transfer Duty account

- [x] SARS Registration
Can register taxpayers with SARS to get tax reference numbers

- [ ] RLA - View Customs Product information
RLA â€“ View Customs Product information

- [ ] RLA - View Client Type
RLA - View Client Type

- [ ] RLA - Manage Customs Product information
RLA â€“ Manage Customs Product information

- [ ] RLA - Manage Client Type
With this profile, users can only view and change information relating to their specific client type(s)

- [x] Manage Users
Can create & change users and assign them to groups

- [x] Manage Taxpayers
Can create & change taxpayers and assign them to groups

- [x] Manage Groups
Can create & change groups and assign users and payers to groups

- [x] Manage Excise Financial Account
This role allows users to maintain all financial detail against an Excise Account

- [x] Manage Deferment Account

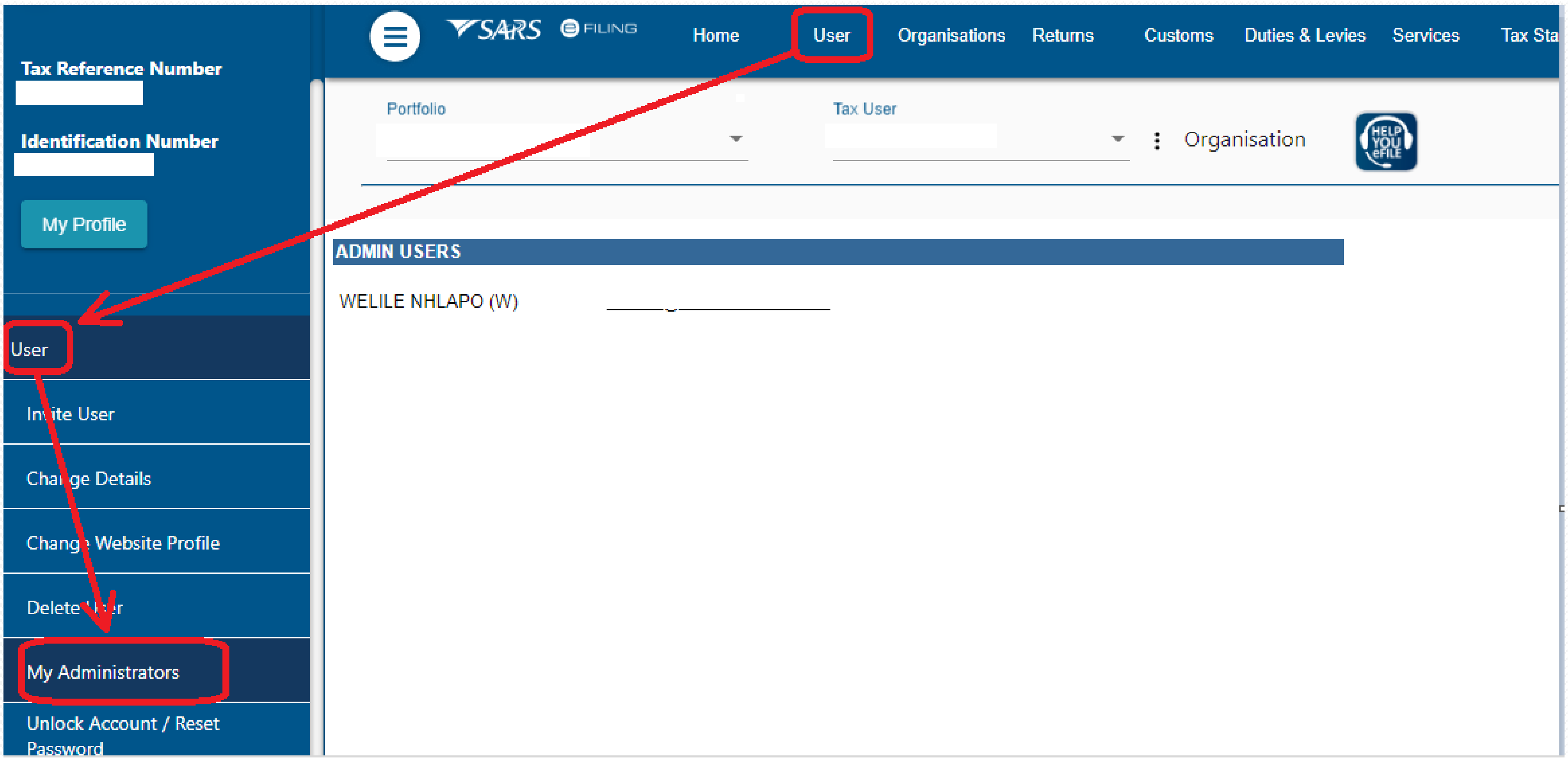
- [x] ISV Activation
This role allows users access to the ISV activation screen

- [ ] 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



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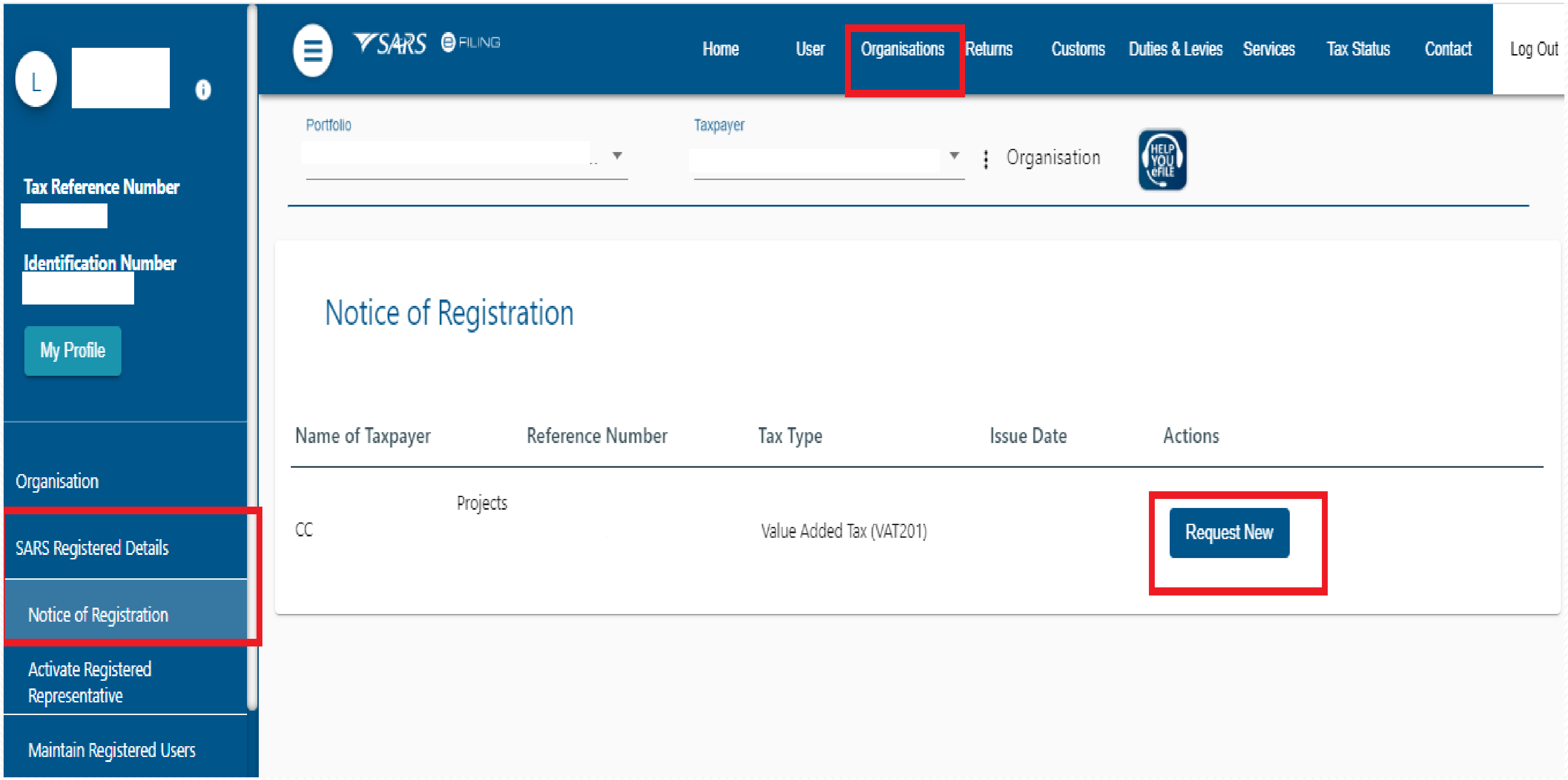
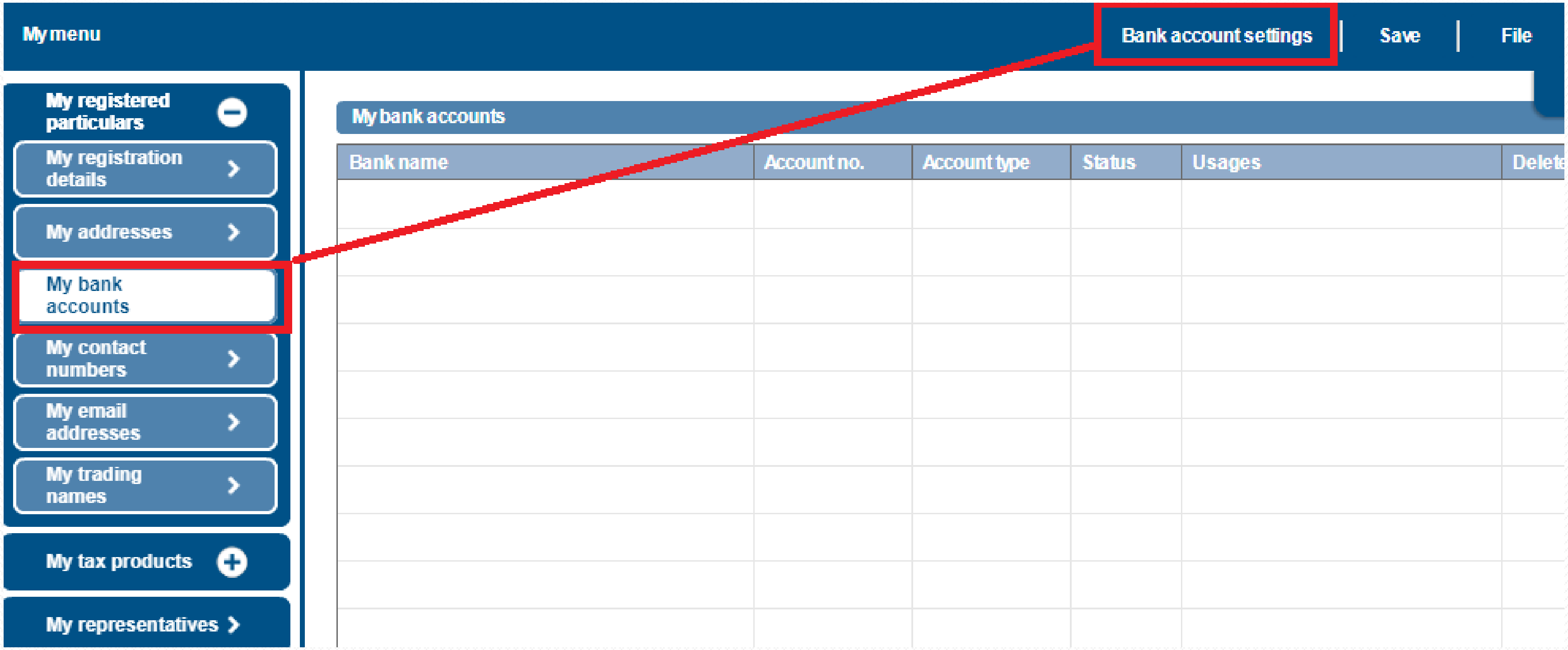
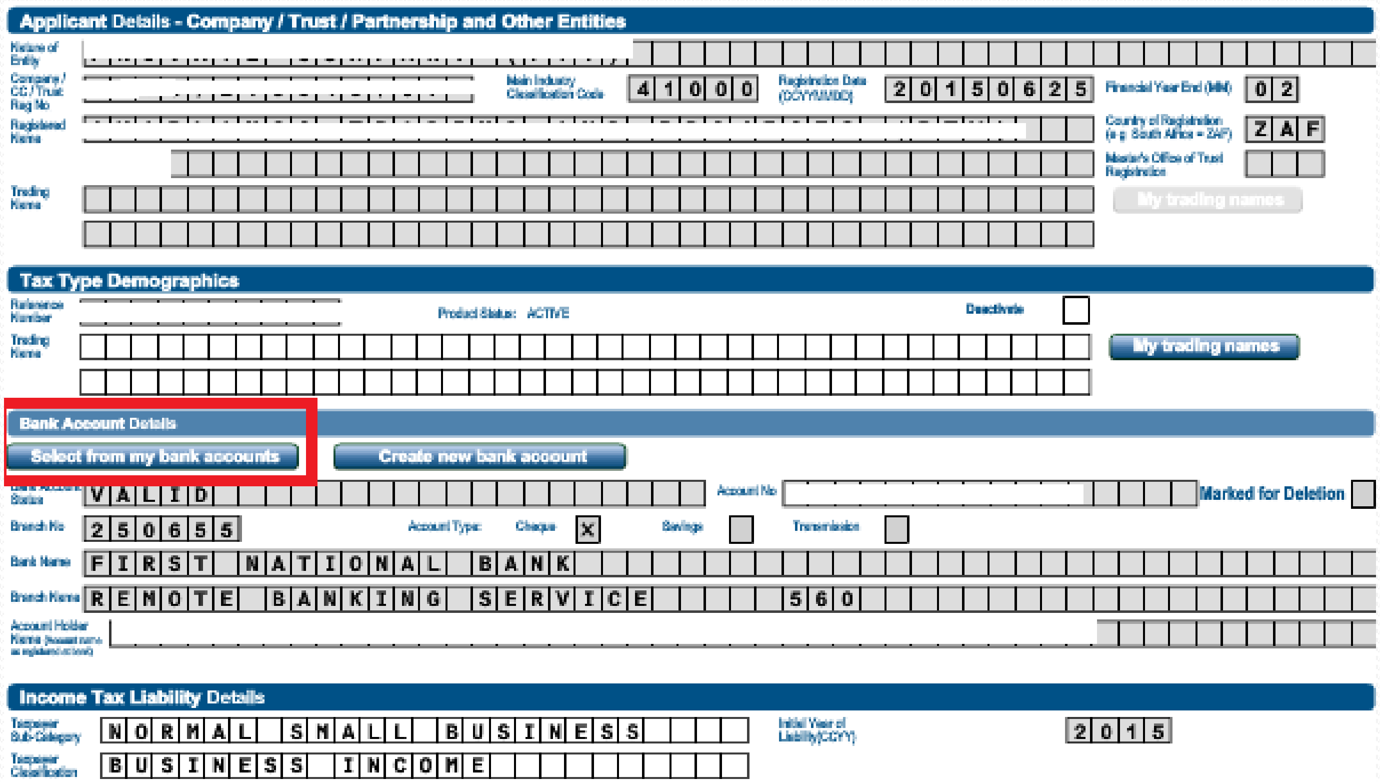
Notice of Registration



Updating Banking Details



Linking Banking details to Income Tax



Applicant Details - Company / Trust / Partnership and Other Entities

Nature of Entity	
Company / CC / Trust Reg No	
Main Industry Classification Code	41000
Registration Date (CCYYMMDD)	20150625
Financial Year End (MM)	02
Registered Name	
Country of Registration (e.g. South Africa = ZAF)	ZAF
Master's Office of Trust Registration	
Trading Name	

My trading names

Tax Type Demographics

Reference Number	
Product Status:	ACTIVE
Deactivate	
Trading Name	

My trading names

Bank Account Details

Select from my bank accounts | Create new bank account

Bank Account Status	VALID
Account No	
Marked for Deletion	
Branch No	250655
Account Type:	Cheque X / Savings / Transmission
Bank Name	FIRST NATIONAL BANK
Branch Name	REMOTE BANKING SERVICE 560
Account Holder Name (account name as registered at bank)	

Income Tax Liability Details

Taxpayer Sub-Category	NORMAL SMALL BUSINESS
Initial Year of Liability (CCYY)	2015
Taxpayer Classification	BUSINESS INCOME

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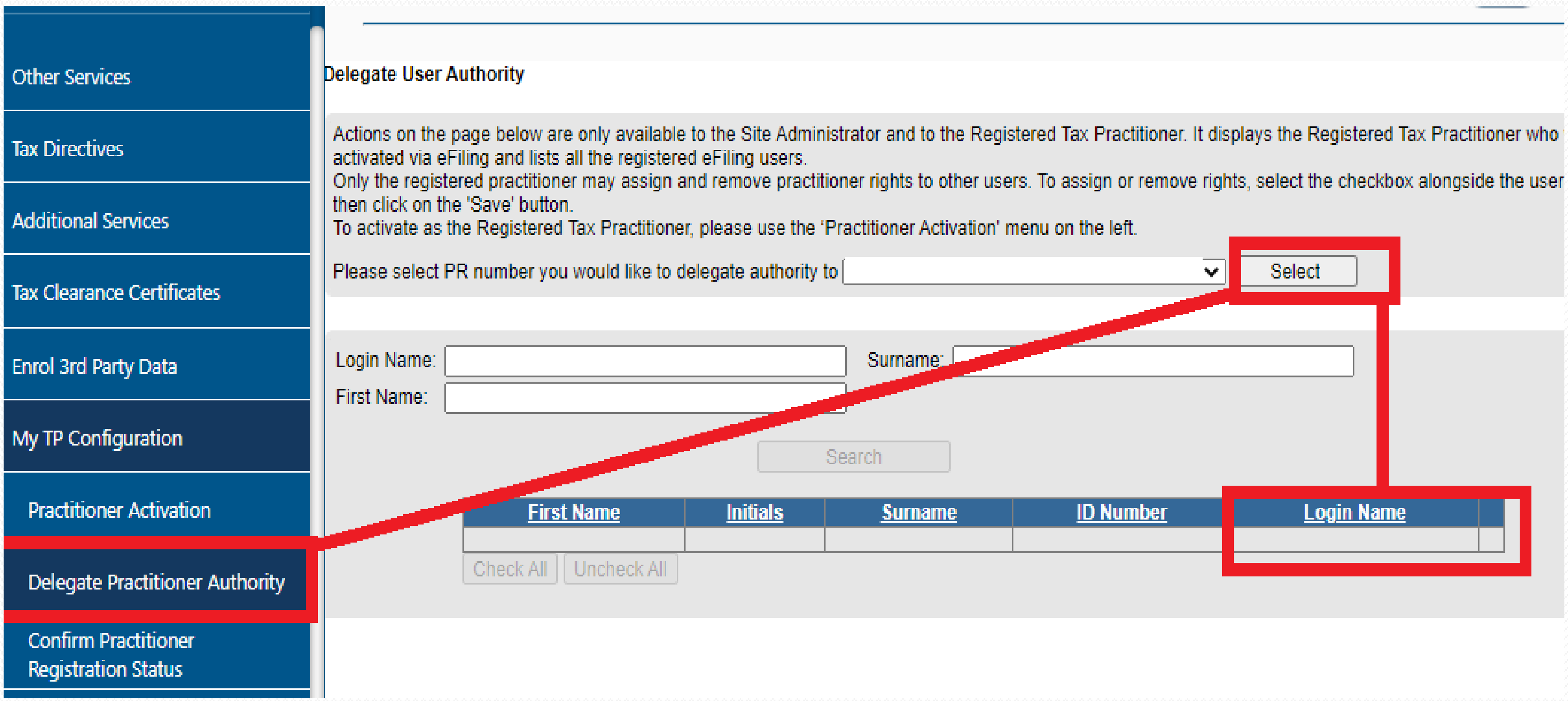
Delegating Tax Practitioner Authority



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Thank You

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