



SARS EFILING ISSUES – 24 JULY 2019

Below is a list of e-filing concerns raised by members that have been reported to SARS. The status of the concerns raised is listed as well as SARS' comments thereto, where applicable. SARS is working closely with SAICA to address the outstanding concerns. However should you have any persistent problems, please send a screen shot and a taxpayer reference number to somayak@saica.co.za for further follow up:

	PROBLEM	RESOLVED	COMMENT
1	Systems hangs when waiting for OTP pin	✓	
2	Cannot print return	✓	
3	Cannot access assessments - blank	✓	
4	Unable to load a statement of account	✓	
5	Can print return but all 27 pages are printed	✓	
6	Cannot access/print simulated assessments	✓	Resolved
7	The ITA34 is pulling through the incorrect PAYE amount (seems the decimal point is the problem)	X	SARS is working on this problem
8	Tax calculator incorrectly calculating tax due/refundable	✓	Resolved
9	Bank interest does not pull through to returns from 3 rd party data	✓	Taxpayers must insert these amounts manually for 2019.
10	The income tax assessment repeats the income subtotal under various headings.	✓	Resolved
11	The source code lookup functionality is no longer available on the return.	X	The technical team will attend to matter in due course
12	When a taxpayer pushes "Print" before "saving", all the information on the return is lost. Furthermore, when the taxpayer goes back into their return to re-input the data, their prepopulated information (such as the IRP5) information not only disappears, but cannot be reinserted – the blocks are greyed out. In some instances the return now states that the individual was "unemployed" for the whole year.	✓	Resolved
13	Codes are not catered for in the return and non-taxable travel/subsistence allowance codes no longer available.	✓	The external guide - guide for employers in respect of allowances (PAYE-GEN-01-G03) and the SARS_PAYE_BRS - PAYE Employer Reconciliation_V18 0 2

			<p>clearly indicate when code 3703 – Reimbursive Travel Allowance, must be used. This code has not been discontinued.</p> <p>The following is the wording used in the SARS_PAYE_BRS - PAYE Employer Reconciliation_V18 0 2:</p> <p>“This code is only applicable where:</p> <ul style="list-style-type: none">• The reimbursement rate used by the employer DOES NOT EXCEED the prescribed rate (par 4 of Fixing of Rate per Kilometre i.r.o. Motor Vehicle Regulation),• The employee DOES NOT receive any other form of compensation for travel; and in respect of the full value of the reimbursement”• Information code 4583 is only affected if the code 3751 (Travel Allowance), 3852 (Use of motor vehicle acquired by employer NOT via Operating Lease), and 3866 (Use of motor vehicle acquired by employer via Operating Lease) is/are present on an IRP5/IT3(a) certificate and the year of assessment is 2019 or later.• For the 2017 and 2018 years of assessment, information code 4583 is affected by the above three codes as well as code 3752 [Reimbursive travel allowance (IT)].• Code 3753 does not affect information code 3703 or 3753.• Subsistence allowances also do not affect information codes 4582 and 4583.
--	--	--	---

14	VAT return defaults back to the tax practitioner's own VAT return and not the client's that the tax practitioner was working on when they got an Adobe error.	X	Please provide supporting information (SAICA provided info on 10 July for an IT case)
15	Adobe error – it allows some returns to be completed and for others not (all on the same day after uploading the latest version).	?	Please provide supporting information in cases where this is still persistent
16	I am trying to upload supporting documentation. When i click on the "choose file" button nothing happens	✓	Resolved
17	With regard to transferring one profile to another, if you unclick the tax types then it doesn't carry over the history: it's cleared everything that was on the profile.	✓	Resolved
18	Capturing screens appear over various pages and require numerous clicks to insert and view data for correctness	X	Kindly test and provide supporting information
19	When you reopen a saved IT14 and then do changes before submission, you must first save before pushing submit otherwise changes omitted from submitted document.	✓	Resolved
20	IT12 gross remuneration field blank and if add in manually and save, all IRP 5 data etc. gone.	✓	Resolved
21	IT12 assessment pay "due dates" default to JAN 2020. This is misleading as taxpayer will probably be liable for interest (unless SARS confirms otherwise).	✓	Resolved
22	IT12 wants schedules for info not created in form creator otherwise can't submit.	✓	Resolved
23	IT14 form creator not working as it includes all the pages not just the relevant ones (variation on print all in IT12).	✓	Resolved
24	When opening a return to complete it, it gives a flash player warning and then kicks you out to your main profile and you have to start all over again. This happens repeatedly. Every minute we received a message to say that we have been inactive and it kicks you out.	✓	Resolved
25	The age rebates on the individual 2020(1) provisional tax returns have not been updated to the 2020 tax tables and still reflect the 2019 rebates.	✓	Resolved: New IRP6's should be fine, but those opened before 6 July will need a fix. SARS is working on this fix.
26	RAF CONTRIBUTIONS: A. The taxpayer is not contributing to a retirement annuity yet the system still	X	

	<p>reflects that they do. Even when refreshing the data <u>only the Medical and IRP5</u> are updated. SARS advised not to use the tax calculator but when submitting the return (without using the tax calculator) the system still showed the error of RA outstanding information.</p> <p>B. The taxpayer is contributing to a RAF but the certificate was not pre-filled on eFiling. When we wanted to submit her return, the wizard made no provision for deductions and we could therefore not manually submit the contributions. We have submitted now without the contribution but have lodge an objection to get it allocated.</p> <p>C. As mentioned above, not all RAF contributions paid are pre-populated on the returns resulting in some taxpayers incorrectly receiving the sms that they do not need to submit a return even though a refund is now actually due to them.</p>		
27	<p>PROFILES: Tax practitioners (TPs) have a practice profile and a personal profile. When the profiles are now merged to be linked to a single ID number, the concern is that the TP's staff will have access to the TP's personal profile as well.</p>	✓	Each user will have 1 login which links to their personal profile and to any business profile. Your login will show "Tax practitioner" – Personal name and Business and each staff member will show Personal – Staff Member and Business. Your profile will not show when they log in and their profiles will not show when you log in.
28	<p>PROFILES: When the new eFiling platform is logged into, a message is received that two profiles (personal and Tax Practitioner profile) exist. When "next" is selected, the system is supposed to take you to a screen where a profile can be selected that you want to use as the main profile, after which you should be able to continue working in the new eFiling platform.</p> <p>This has been successfully for some users but when "next" is selected, it reverts back to the old eFiling platform</p>	✗	

	and this platform then has to be used. The new platform cannot be accessed.		
29	PROFILE: When a person logs into the tax practitioner's e-filing profile as a senior/ junior user and completes the ITR12 return they are not able to save nor calculate the return. It appears that only those that have full user rights can save and calculate the tax return.	X	
30	<p>PROFILE ISSUES:</p> <p>A: I am unable to log on to the new SARS eFiling. All attempts result in the message "User Name and Password cannot be verified". I have used OTP's to change password and received the confirmation the password was successfully changed, but still get "User name and password cannot be verified"</p> <p>B: All staff were allocated as users for the tax practitioner's e-filing profile.</p> <ol style="list-style-type: none"> 1. Some staff are not finding the TP organization on their profile; 2. Some staff are not able to submit returns, they have more rights than other users who can submit the returns 3. One staff had the TP organisation on her profile and then the organization disappeared. <p>C: I try to create a new organisation on my existing tax practitioner profile, after which I need to take the VAT and PAYE over on my profile. I populate all the information and hit continue at the bottom, but the screen goes blank and the profile is not created. Different computers as well as firefox were used, but still no success.</p> <p>D. Taxpayer move request - When doing a transfer request for PAYE, the system comes back with an error: "The PAYE admin penalty cannot be decoupled from the existing PAYE tax type & the PAYE admin penalty tax type must be requested & these will then be registered against your taxpayer". This despite having inserted the number for EMP201 and Admin Penalty.</p> <p>E. Users are unable to link their various profiles under the new 'default profile' system. On the new login screen you type any of your user names, then next. This gives a notice about multiple login names and process to be followed</p>	X	

	with a 'continue' button. This button takes you to the old eFiling login screen where any of your user names and passwords will take you into the old eFiling without linking profiles.		
31	Rounding down: cents are ignored by eFiling for all deductions/rebates. Instead of the conventional rounding up if amount is >= 50c and rounding down if an amount is <50c, all amounts are being rounded down. This is potentially a considerable amount that SARS is collecting if the whole taxpayer population is considered.	X	
32	A return would not file – invalid bank account number – but on the RAV01 form the banking details are valid.	X	
32	STT payments – when attempting to make the payment an error message “secure.sarsefiling.co.za refused to connect” appears not matter what browser is used. Other error messages received when making payment is “secure.sarsefiling.co.z refused to connect”.	X/√	One member managed to make a payment but you need to go onto the “general unpaid” tab, payment does not seem to work through the “Services” section.
33	<p>Uploading documents:</p> <p>A. Letters are being issued by SARS requesting supporting document for new eFiling registrations but there is no link to upload the documents on eFiling.</p> <p>B. When supporting documents have been uploaded (shown as uploaded), e-filing does not accept the submission and gives the following error:</p> <p>Please upload at least one document before clicking the submit button</p> <p>C. It is also not possible to delete any of the uploaded documents.</p> <p>D. Where an IT14SD was requested on a 2018 ITR14, there is a link to upload the documents, but no link to the IT14SD.</p>	<p>X</p> <p>X</p> <p>X</p> <p>X</p>	<p>This has been reported to SARS on 22/7/2019.</p> <p>This has been reported to SARS on 22/7/2019.</p>
34	Struggling to get new registrations activated on e-filing.	X	

35	An ID and residential address is being requested for a business/company registration.	X	
36	<p>SAVING:</p> <p>A. The ITR12 cannot be saved until all info has been entered – so if info is still needed to complete the return, one has to start from scratch.</p> <p>B. I cannot save because certain fields were not completed but these fields did not come up in the first place. Then fields which had been completed in the first place become blank.</p>	X X	
37	Cannot open a ITR12 return – “FormIntergrationError: Provided JSON string is invalid, please provide a valid value” appears – see attached screen shots.	X/√	This has been corrected on the system, so new returns should be fine, but those opened before 6 July will need a fix. SARS is working on this fix.
38	The IRP6 return does not pull the latest assessment. Eg the IRP6 return show the latest assessment 2017 – even though 2018 has been submitted (and assessed) a year ago already.	X	
39	The Bank account details The section does not provide for entering the Bank name or Branch number - the fields have a grey background. Only the Bank a/c number can be entered. When saving the return a message comes up saying "saved with invalid bank details" so the return cannot be submitted.	X	
40	<p>ITR12EI:</p> <p>A. IT12EI returns cannot be completed they look like PDF forms</p> <p>B. Submission of IT12EI error message – “Please complete the registered detail question on the first page before completing the return” even after this has been done and return completed.</p> <p>C.</p>	√ X	Please try opening the form on Firefox rather than Chrome
41	Objections: Cannot efile an objection to the 2019 Assessment (Unused contributions to Retirement Funds not b/Fwd from 2018 year).	X	
42	Tax Directive Error: “Your access is denied because your tax directives profile could not be determined”.	X	

43	<p>Tax Compliance certificate: Unable to access certificate. When trying to drawdown a “Tax Compliance request”, one hits the tab to get a say “good standing” certificate -thereafter you get a box, which shows “busy preparing your form”- some 5 minutes later it is still trying to prepare the form.</p>	X	
44	<p>Assessments: Assessments issued with incorrect:</p> <ul style="list-style-type: none"> - rebates; - trading losses; - treatment of the tax withheld on payment of the lump sum. <p>Phoned eFiling about the problem and was instructed to wait for SARS auditors to complete the audit. The completion letter stated that no changes were made to the assessment. eFiling did not allow an objection to be launched and when phoning SARS, was instructed to visit any SARS branch.</p> <p>Lump sums: SARS assessed a taxpayer who made a transfer from one provident fund to another. It reflects zero tax directives, but SARS still taxes the taxpayer on the transfer.</p>	X	SARS is currently looking into these issues.
45	<p>Duplicate Efiling returns: where a second return is created but not submitted - either by eFiling or by one of the staff or the tax practitioner in error. It should never be submitted electronically. We used to be able to mark it off as manually submitted and get rid of it from the unsubmitted returns. That option is no longer available on the new eFiling so we either have to submit it as a new revised return (which has its own problems) or leave it as outstanding.</p>	X	
46	<p>TRUSTS:</p> <p>A. ITR12T tax return for a testamentary trust 2019: on the Trusts ‘Return information’ page, within the ITR12T: the return reflecting ‘trust type’ as INTERVIVOS. It is a ‘greyed out’ box and can’t be changed by the user. On this trusts RAV01, ‘Nature of Entity’ field is reflecting TESTAMENTARY. (see second screen shot below). I’ve tried ‘refresh’ button but trust type data did not change on the</p>	X	

	<p>ITR12T. Looks like system pulling wrong information through to ITR12T.</p> <p>B. There appears to be no place to indicate if the trust is a Type A or B Special Trust?</p>		
47	<p>Change in contact details: We are not able to change the contact details of a client on the SARS E-filing RAV01. (i.e. email and contact numbers)</p>	X	
48	<p>Questions on return: The taxpayer did not earn income from an employer for the 2019 YOA, but earned interest and contributed to a medical aid and retirement annuity fund. When 'N' is selected to the question of 'Did you receive income that is reflected on an IRP5 or IT3b certificate', the options to input the medical aid and retirement annuity contributions disappear.</p>	X	