



HOW RCBs CAN MANAGE TAX PRACTITIONER MEMBERS ON EFILING



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1 SUMMARY

a) The maintenance of tax practitioner member details and registration statuses are part of the responsibilities of the Recognised Controlling Bodies (RCBs) for the implementation of the Tax administration Act. This guide details how representatives of RCBs can activate the RCB functionality on eFiling, add users to the RCB eFiling profile and submit new tax practitioner member details to SARS.

2 HOW TO REGISTER ON EFILING

a) eFiling is a digital platform which allows users to comply with their various tax responsibilities. Controlling Bodies are required, once recognised by SARS as RCBs, to register on eFiling. This is important to ensure the use of eFiling is effective for the function that they are to perform.

Ensure that the following eFiling registration processes have been completed:

- The RCB's portfolio has been registered as an organisation on eFiling.
- The registered representative of the RCB has been activated on the RCB's organisation portfolio.
- Where a tax practitioner is handling the tax affairs on behalf of the RCB, he/she has been activated on the Tax Practitioner Portfolio.
- b) For more information on how to register on eFiling, kindly refer to the eFiling registration guide available on the SARS website.

3 HOW TO ACTIVATE THE RCB FUNCTIONALITY ON EFILING

- a) SARS will notify the Controlling Body, once it has been recognised. Additionally, SARS will also update its system, so that the RCB can access the RCB functionality on eFiling
- b) Once SARS has updated its systems by including the Controlling Body on the RCB lists, proceed by activating the RCB functionality on eFiling
 - i) Note that the RCB may request SARS to confirm whether they have been added to the RCB list using the following mailbox: ReportingUnprofessionalConduct@sars.gov.za
- c) To activate the RCB functionality, proceed as follows:
 - i) Log on to eFiling
 - ii) On the **Landing** page.
 - A) Select **User** displayed as part of the main menu
 - B) Select **User** on the left menu
 - C) Select Change Details



		Home User Organisations	Returns Customs Duties & Levies	Services Tax Status Contact Log OL
	Portfolio 👻	Tax User	🝷 🚦 Organisation	
Tax Reference Number				
Identification Number				
My Profile				📄 🚷 🚱 🖾
User	Taxpayers			
Invite User	Name	Registration of	ID number Tax Referen	ce Number Q
Change Details				
Change Own Password	Name of Taxpayer Company/ ID	Number Reference Number	Last Return Filled Last	Accessed Actions
Change Website Profile	The Financial Planning Institute			View Taxpayer
Delete User	First Drucious 0 Nust	Lest.		
My Administrators	FITSE Previous 0 Next	Last		
Unlock Account / Reset Password	1000			
Shared Access	Users		🛄 LIVE CHAT	ASK A QUESTION?

The Change Details page will be displayed d)

	Portfolio	Tax User	- • •		
Tax Reference Number				Iganisation You	
Identification Number					
My Profile	Change Details				
	Identification Type				
ser	South African ID 🗸				
Invite User	ID Number				
Change Details	Surname				
Change Own Password					
Change Website Profile	Portfolio Name				
Delete User	The request name filled in will be she This name will default to their portfor invitation.	own to the requested user. blio name upon acceptance o	f this		
My Administrators	The Financial Planning Insti				
Unlock Account / Reset Password	Update User Rights				
Shared Access				🔜 LIVE CHAT	ASK A QUESTION?

- On the Change Details page, complete the following details of the Registered Representative of the e) organisation:
 - Select the applicable Identification Type from the drop-down menu i)
 - ii)
 - Complete the **ID Number** Complete the **Surname** iii)



iv) Once the details have been completed, click on Update User Rights.

f) This will display the **User Roles** page

LIVE CHAT 🔁 ASK /	QUESTION?
□ KLA - 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 reprofile function and product information.	
RLA - View Client Type With this profile users can only view information relating to their specific client hype(s) on important/aynotter	
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	
SARS Registration Can register taxpayers with SARS to get tax reference numbers	
Manage SWP_PRList Process on SWP Manage_SWP_PRList_Process on SWP (for SARS P&R Team Officials) - Approver	
Manage SWP_PRList Submit on SWP (or OGAs) - Requester	
I his role allows users to maintain all thrancial detail against the Transfer Duty account	
Manage Transfer Duty Financial Account	
USER ROLES 1	
System Default	
Select User Groups	
USER GROUPS	
For more information on groups and roles, please click <u>here.</u>	
	For more information on groups and roles, please dick here. DEER GROUPS I Better Groups I group Transfer Duty Financial Account The role allows users to maintain all financial detail against the Transfer Duty account The role allows users to maintain all financial detail against the Transfer Duty account The role allows users to maintain all financial detail against the Transfer Duty account The role allows users to maintain all financial detail against the Transfer Duty account Manage SWP PRList Submit on SWP (for OGAs) - Requester Manage SWP_PRList Process on SWP (for SARS P&R Team Officials) - Approver Manage SWP_PRList Process on SWP (for SARS P&R Team Officials) - Approver Manage SWP_PRList Process on SWP (for SARS P&R Team Officials) - Approver Manage SWP_PRList Process on 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 Manage Customs Product information Matage Customs Product information The this profile, users can only view 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 Matage Customs Product information Matage Customs Product information Matage Customs Product information Matage Customs Product information

g) On the page, scroll down and select Controlling Body Tax Practitioner Management

ared Access	LIVE CHAT 🗁 ASK A QUESTION?
Unlock Account / Reset Password	Continue Back
My Administrators	Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.
Delete User	Controlling Body Tax Practitioner Management Can register and maintain tax practitioners belonging to the controlling body
Change Website Profile	Perform Bulk and Additional Payments This role allows a user without full admin rights to perform bulk and additional payments.
Change Own Password	Directives
Change Details	ISV Activation This role allows users access to the ISV activation screen
Invite User	Manage Deferment Account This role allows users to manage access to SAP accounts
ser	Manage Excise Financial Account This role allows users to maintain all financial detail against an Excise Account
	Manage Groups Can create & change groups and assign users and payers to groups
My Profile	Manage Taxpayers Can create & change taxpayers and assign them to groups
Identification Number	□ Manage Users Can create & change users and assign them to groups
Tax Reference Number	Ida - Manage Client Type With this profile, users can only view and change information relating to their specific client type(s)
•	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 Customs Product information

- h) Once selected, click on **Continue**
- i) This will display the **User Summary** page.



	USER SUMMARY	
ux Reference Number	GROUPS SELECTED	
	System Default	
entification Number	ROLES SELECTED	
My Profile	 This role allows users to maintain all financial detail against the Transfer Duty account. Can register taxpayers with SARS to get tax reference 	
e de la companya de la	 Can create and change users and assign them to groups. 	
vite User	 Can create and change taxpayers and assign them to groups. Can create and change groups and assign users and payers to groups. 	
nange Details	 This role allows users to maintain all financial detail against an Excise Account. 	
ange Own Password	 This role allows users to manage access to SAP accounts. This role allows users access to the ISV activation screen. 	
ange Website Profile	This role allows a user without full admin rights to perform	
elete User	bulk and additional payments • Can register and maintain tax practitioners belonging to the controlling body.	
ly Administrators		
Unlock Account / Reset Password	Continue	
ared Access	🙀 LIVE CHAT	SK A QUESTION

j) Take note of the listed descriptions of the roles selected.

Note the following:

- The user roles listed are consistent with the use or function that the Controlling Body will use on eFiling. These are activated by SARS. If the Controlling Body is not a Recognised Controlling Body, the option of "Controlling Body Tax Practitioner Management" will not be displayed as part of the user roles.
- k) Once noted, click on **Continue**
- I) The **Change Details** page will be displayed with the completed details.

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 mitation. The Financial Planning Inst Update User Rights		
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 nvitation. The Financial Planning Insti Update User Rights		
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Portfolio Name For request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this		
Portfolio Name		
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D Number		
South African ID 🗸		
dentification Type		
	dentification Type South African ID v D Number	Anange Details



4 HOW TO ADD USERS TO THE RCB EFILING PROFILE

4.1 How to add a user

Note the following:

- Only the registered representative/tax practitioner can add eFiling users to the profile
- The user being added to the RCB eFiling profile must have an existing eFiling profile

a) To add users, proceed as follows:

- i) On the Landing page, select User displayed on the main menu
- ii) Select **User** displayed on the left menu
- iii) Select Invite User

	Portfolio Tax User
Reference Number	· · · · · · · · · · · · · · · · · · ·
ntification Number	
ty Profile	USER RIGHTS
	For more information on groups and roles, please click here.
	USER GROUPS II
ite User	Select User Groups
ange Details	System Default
unge betuns	USER ROLES II
ange Own Password	Manage Transfer Duty Financial Account Transfer Duty account
ange Website Profile	Instance and/or distribution of SWP PRI is its short of the control of the contro
lete User	Manage_SWP_PRList_Submit on SWP (for OGAs) - Requester
v Administrators	Manage SWP PRList Process on SWP Manage SWP PRList Process on SWP Manage SWP PRList Process on SWP (or SARS P&R Team Officials) - Approver
llock Account / Reset	SARS Registration Can register taxpayers with SARS to get tax reference numbers
ed Access	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/exports Live CHAT To Ask Address

- b) The **Invite User** screen will be displayed
 - i) Complete the following information regarding the user you wish to add to the RCB profile
 A) Select the applicable Identification Type

T OF COMP		Tax User		
Reference Number	*		Organisation	
ification Number				
y Profile	Invite a User			
	Inviting a user means inviting a pe SMS or email, with instructions on	erson that already has an eFil how to accept your invite.	ling profile. A notification will be sent to th	e user being invited via
e User	Identification Time			
nge Details	Please Select Type Y			
nge Own Password	Please Select Type South African ID			
inge Website Profile	Passport			
	The request name filled in will be shown	to the requested user.		
ete User	This name will default to their portfolio n invitation.	ame upon acceptance of this		
Administrators				
Administrators ock Account / Reset aword	Invite			



Complete the **ID Number/Passport number** Complete the **Surname** B) C)

0		
Reference Number	Invite a User	
tification Number	Inviting a user means inviting a person that already has an eFiling profile. A notification will be sent to the user b	being invited via
ly Profile	sms or email, with instructions on now to accept your invite.	
	Identification Type	
	South African ID 🗸	
vite User	ID Number	
ange Details	Surname	
ange Own Password	Portfolio Name	
inge Website Profile	The request name filled in will be shown to the requested user.	
lete User	This name will default to their portfolio name upon acceptance of this invitation.	
Administrators		
lock Account / Reset ssword	Invite	
ed Access	LIVE CHAT	ASK A QUESTION?

- ii) Click on Invite
- The User Rights/ User Groups will be displayed iii)

	🔛 LIVE CHAT	ASK A QUESTION?
red Access	RIA, Manara Client Tune	
nlock Account / Reset issword	With this profile users can view and change information such as address, contact and bank account details. Users can also view and change their specific client type(s) eg. importer/exporter	e information relating to
ly Administrators	with this prome, users can only view information relating to their specific client type(s) eg. importer/exporter	
elete User	RLA - View Client Type	
hange Website Profile	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 relatin type(s) eq importer/exporter	g to their specific client
hange Own Password	□ SARS Registration Can register taxpayers with SARS to get tax reference numbers	
hange Details	Manage SWP PRList Process on SWP Manage_SWP_PRList_Process on SWP (for SARS P&R Team Officials) - Approver	
wite User	Manage SWP PRList Submit on SWP Manage_SWP_PRList_Submit on SWP (for OGAs) - Requester	
r	Manage Transfer Duty Financial Account This role allows users to maintain all financial detail against the Transfer Duty account	
	USER ROLES	
My Profile	🖾 System Default	
	Select User Groups	
Jentification Number	USER GROUPS	
Deferment Musellan	For more information on groups and roles, please click <u>here</u> .	
•		
	USER RIGHTS	



iv) Select the applicable user rights for the user

v) Select Controlling Body Tax Practitioner Management

ed Access	🔓 LIVE CHAT	ASK A QUESTION?
Ilock Account / Reset ssword	Continue Back	
Administrators	Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.	
lete User	Controlling Body Tax Practitioner Management Can register and maintain tax practitioners belonging to the controlling body	
ange Website Profile	Perform Bulk and Additional Payments This role allows a user without full admin rights to perform bulk and additional payments.	
ange Own Password	Directives	
ange Details	☐ ISV Activation This role allows users access to the ISV activation screen	
vite User	This role allows users to manage access to SAP accounts	
	Manage Excise Financial Account This role allows users to maintain all financial detail against an Excise Account Manage Deformed Account	
	Manage Groups Can create & change groups and assign users and payers to groups	
My Profile	Manage Taxpayers Can create & change taxpayers and assign them to groups	
entification Number	Can create & change users and assign them to groups	
Reference Number	🖾 Manage Users	
	RLA - Manage Client Type With this profile, users can only view and change information relating to their specific client type(s)	
6	With this profile, users can view and change information such as address, contact and bank account details. Users can also view and change information in their specific client type(s) eg. importer/exporter	elating to

- vi) Click on **Continue**
- vii) The User Summary screen will be displayed

• 0	USER SUMMARY	l
Tax Reference Number Identification Number My Profile	GROUPS SELECTED System Default ROLES SELECTED	
User Invite User Change Details Change Own Password Change Website Profile Delete User My Administrators	 Can create and change users and assign them to groups. Can create and change groups and assign users and payers to groups. Can register and maintain tax practitioners belonging to the controlling body. 	
Shared Access	LIVE CHAT So ASK A QUESTION?	Į

i) Click on **Continue**



0	Change Details	
ax Reference Number Ientification Number	Identification Type South African ID	ſ
My Profile	ID Number	
er		
nvite User	Portfolio Name	
Thange Details	This name will default to their portfolio name upon acceptance of this invitation.	
hange Own Password		· · · · · · · · · · · · · · · · · · ·
hange Website Profile	Send Reminder Cancel Invitation Update User Rights	
elete User		
ly Administrators		
Inlock Account / Reset assword		
red Access	📔 LIVE CHAT	ASK A QUESTION?
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- i) The **Change Details** screen will be displayed showing the information of the invited user.
- b) Notify the user that they have been invited to the profile
 - i) An email and SMS invite notification will be sent through to the invited user.

4.2 How a user accepts an invitation

- a) To accept an invitation, proceed as follows:
 - i) Login to eFiling using the Individual Profile details

SARS South African Revenue Service	Welcome, please to SARS of Usename * Hope I Forgot Your Username? Forgot Your Username? Forgot Your Password?	e FILING
	LIVE CHAT	ASK A QUESTION?



- i)
- ii) iii)
- On the **Landing** page Click on **My Profile** Select **Portfolio Management**

	E TSARS @ FILLING Home Returns Services Tax Status Contact Log Out
Tay Reference Number	Portfolio Taxpayer
Identification Number	
My Profile	
SARS Correspondence	Tax Compliance Status Refresh Ø Refund Status: No refund due Refresh Ø
Returns issued	As of: 2019-07-17. 11:22:06 As of: 2020-10:03. 03:25:43 Note: Please note that you must refer to your Statement of Account
Returns History	for the latest account balance. Should your account reflect a credit (amount due to you), please allow up to 72 hours for the refund to be paid to you. Should the refund not be paid within the stated
Non-Core Taxes	period, you can refer to the refund dashboard status for a reason for non-payment of the refund.
Returns Search	
Search	Account Balance: Not Available
Payments	As of: 2019-07-17. 11:22:06
Request For Reason	Personal Income Tax (ITR12)
Request for Reduced Assessment	🔓 LIVE CHAT 💬

iv) Scroll down to User Invitation(s)

					Add Portfolio
Linked Portfolio(s)					
Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	
LESTER	1	1	Individual	Default	Co to Portfolio
User Invitation(s) Y	our invitation will expire	e automatically if not ac	cepted within 5 working day	S.	
User Invitation(s) Y Portfolio Name	our invitation will expire	e automatically if not ac	cepted within 5 working day Request Date	серині S.	Accept
User Invitation(s) Y Portfolio Name	our invitation will expire	e automatically if not ac	cepted within 5 working day Request Date 2024-10-03T15-28	5. 141.323	Accept
User Invitation(s) Y Portfolio Name Unlinked Portfolio(s	four invitation will expire	e automatically if not ac	cepted within 5 working day Request Date 2024-10-03T15-28	5. 541.323	Accept Accept

v) On the applicable Portfolio Name

- i)
- Click on **Accept** A One-Time Pin will be sent ii)





A) Complete the OTP numberI) Click on **Submit**

B) Once completed correctly, the following pop-up message will be displayed.

	Message	
Portfolio	linked.	
ок		

vi) The message displayed indicates that the user has been linked to the portfolio of the RCB.



- An email and SMS invite notification will be sent through to the user.
- Where the invited user has not responded by accepting the invitation, as detailed on this section, within <u>5 working days</u>, the invitation will be cancelled.

4.3 How to view users

- a) To view all the users linked to the RCB portfolio, proceed as follows:
 - i) On the **Landing** page
 - ii) Click on **User** displayed on the main menu
 - iii) Click on **User** displayed on the left menu
 - iv) Select My Administrators
 - A) This will display the Admin Users screen



0	₿	SARS @FILING		Home	User	Organisations	Returns	Customs	Duties & Levies	Services	Tax Status	Contact	Log Ou
	Portfolio		*	Tax User			- : O	rganisation	REAL REAL REAL REAL REAL REAL REAL REAL				
Tax Reference Number	ADMIN USERS												-
My Profile	C HOPE												
User													
Invite User													
Change Details													
Change Own Password													
Delete Use													
My Administrators													
Unlock Account / Reset Password													

b) Note that only the tax practitioner or the registered representative profile can view the added users

4.4 How to delete a user

- a) To delete the applicable **user**, proceed as follows:
 - i) Select the applicable **Tax User** to be deleted from the drop-down list beside **Organisation**

	Portfolio		Tax User		Organization	MUR		
Reference Number			-		Organisation	None		_
ntification Number	Delete User							
	RULES							
ly Profile	As a User, you will on	nly be allowed to delete a linke	ed user from your profile if:					
	You reflect as a You are not the There are no p	an Administrative user agains e only user linked to your prof pending tax type transfer requ	it your profile. file. ests for the associated user.					
	One or a combination	n of the above rules may be a	pplicable to allow for the deletion of a user.					
	Note:							
nte user	Once the delet	te request is authorised, any t	taxpayers who were linked to the deleted use	er will be				
ange Details	Once the delet automatically t Where the use deleted from your	te request is authorised, any t transferred onto your profile, rr being deleted is registered f our profile, all links to the tran	taxpayers who were linked to the deleted use for transfer duty, you will be advised that once isfer duty registration will be terminated. You	er will be be this user is may then				
ange Details	Once the delet automatically t Where the use deleted from y choose to cont Please ensure be tracked aga	te request is authorised, any the ransferred onto your profile. In being deleted is registered to our profile, all links to the tran tinue with the deletion or not. It that an adequate reason for ainst an audit history of your p	taxpayers who were linked to the deleted use for transfer duty, you will be advised that ono sfer duty registration will be terminated. You the deletion request is captured in the text be rofile.	er will be this user is may then ox as this will				
nange Details	Once the delet automatically to Where the use deleted from y choose to com Please ensure be tracked aga	te request is authorised, any t transferred onto your profile. It being deleted is registered four profile, all links to the tran tinue with the deletion or not. I that an adequate reason for f ainst an audit history of your p N	axpayers who were linked to the deleted use for transfer duty, you will be advised that onci sfor duty registration will be terminated. You the deletion request is captured in the text bo rofile.	er will be we this user is may then ox as this will				
ange Details ange Own Password ange Website Profile	Once the delet automatically t Where the use deleted from y choose to cont Please ensure be tracked age USER INFORMATIO Uniked User Details	te request is authorised, any t ransferred onto your profile. To being deleted is registered our profile, all links to the tran tinue with the deletion or not. that an adequate reason for ainst an audit history of your p N	axpayers who were linked to the deleted use for transfer duty, you will be advised that onci sfer duty registration will be terminated. You the deletion request is captured in the text bo rofile. Associated Information	er will be be this user is may then ox as this will				
ange Details ange Own Password ange Website Profile	Once the delet automatically t Where the use deleted from y choose to cont Please ensure be tracked age USER INFORMATIO Linked User Details Name: ID/Daesnot Number	te request is authorised, any t ransferred onto your profile. It being deleted is registered to our profile, all links to the tran tinue with the deletion or not. that an adequate reason for 1 hanst an audit history of your p N Miss	axpayers who were linked to the deleted use for transfer duty, you will be advised that onci sfor duty registration will be terminated. You the deletion request is captured in the text be rofile. Associated Information Linked Taxpayers: Taxpager Results Restricts.	er will be this user is may then ox as this will				
nange Details nange Own Password nange Website Profile slete User	Once the delet automatically t Where the uses deleted from y choose to cont Please ensure be tracked age USER INFORMATIO Linked User Details Name: Logn Name:	le request is authorised, any t ransferred onto your profile. It being deleted is registered to our profile, all links to the tran inue with the deletion or not. that an adequate reason for inist an audit history of your p N	axpayers who were linked to the deleted use for transfer duty, you will be advised that onci isfer duty registration will be terminated. You the deletion request is captured in the text be rofile. Associated Information Linked Taxpayers: Taxpayer Requests Pending: Additional Payments:	er will be this user is may then ox as this will 2 0				
ange Details ange Own Password ange Website Profile elete User	Once the delet automatically t Where the use deleted from y choose to cont Please ensure be tracked age USER INFORMATIO Linked User Details Name: Login Name: Created:	te request is authorised, any t ransferred onto your profile. The bing deleted is registered to our profile, all links to the tran inue with the deletion or not. that an adequate reason for sinst an audit history of your p N Miss 2021/09/29	axpayers who were linked to the deleted use for transfer duty, you will be advised that onci isfor duty registration will be terminated. You the deletion request is captured in the text bo rofile. Associated Information Linked Taxpayers: Taxpayer Requests Pending: Additional Payments: Service Profiles:	er will be this user is may then ox as this will 2 0 1				
nange Details nange Own Password nange Website Profile Hete User	Once the delet automatically t Where the use deleted from y choose to cont Please ensure be tracked aga USERINICORMATIO Linked User Details Name: Created:	te request is authorised, any t ransferred onto your profile. The bing deleted is registered to our profile, all links to the tran tinue with the deletion or not. that an adequate reason for ainst an audit history of your p N Niss 2021/09/29	axpayers who were linked to the deleted use for transfer duty, you will be advised that onci- isfer duty registration will be terminated. You the deletion request is captured in the text bo- rofile. Associated Information Linked Taxpayors: Taxpayor Requests Pending: Additional Payments: Service Profiles: Linked Rights Groups:	er will be we this user is may then ox as this will 2 0 1 1				
nne User nange Details nange Own Password nange Website Profile elete User y Administrators nlock Account / Reset	Once the delet automatically t Where the uses deleted from y choose to cont Please ensure be tracked age Unset NIFOCAMATIO Linked Number: Login Name: Created: Linked Roles:	te request is authorised, any t ransferred onto your profile. It being deleted is registered to our profile, all links to the tran inue with the deletion or not. that an adequate reason for inist an audit history of your p N Niss 2021/09/29	Iaxpayers who were linked to the deleted use for transfer duty, you will be advised that onci ster duty registration will be terminated. You the deletion request is captured in the text be rofile. Associated Information Linked Taxpayers: Taxpayer Requests Pending: Additional Payments. Service Profiles: Linked Rights Groups:	er will be this user is may then ox as this will 2 0 1 1				
ange Details ange Own Password ange Website Profile elete User y Administrators alock Account / Reset	Once the delet automatically t Where the uses deleted from y choose to cont Please ensure be tracked age USER INFORMATIO Linked User Details Name: Login Name: Created: Linked Roles: User has following ing	te request is authorised, any t ransferred onto your profile. It being deleted is registered to our profile, all links to the tran inue with the deletion or not. that an adequate reason for inist an audit history of your p N Miss 2021/09/29 ghts: Controlling Body Tax Pre	expayers who were linked to the deleted use for transfer duty, you will be advised that ono isfer duty registration will be terminated. You the deletion request is captured in the text be rotile. Associated Information Linked Taxpayers: Taxpayer Requests Pending: Additional Payments: Service Profiles: Linked Rights Groups: actitioner	er will be we this user is may then ox as this will 2 0 1 1 1				
hange Details hange Own Password hange Website Profile slete User y Administrators hlock Account / Reset ssword	Once the delet automatically t Where the use deleted from y choose to cont Please ensure be tracked age USER INFORMATIO Linked User Details Name: ID/Passport Number: Login Name: Created: Linket Roles: User Roles: User Roles: User Solowing in Management, Manag Henry	te request is authorised, any t ransferred onto your profile. The bing deleted is registered to our profile, all links to the tran inue with the deletion or not. that an adequate reason for links an audit history of your p N Miss 2021/09/29 aptis: Controlling Body Tax Pro- ge Groups, Manage Taxpayen	Axpayers who were linked to the deleted use for transfer duty, you will be advised that onci sfor duty registration will be terminated. You the deletion request is captured in the text bo rofile. Associated Information Linked Taxpayers: Taxpayer Requests Pending: Additional Payments: Service Profiles: Linked Rights Groups: actitioner s, Manage	er will be we this user is may then ox as this will 2 0 1 1				
hange Details hange Own Password hange Website Profile Hete User y Administrators hlock Account / Reset esword	Once the delet automatically t Where the uses deleted from y choose to cont Please ensure be tracked age User INFOCMANTIC Lister University Name: ID/Passport Number: Login Name: Created: Linked Roles: User has following in Management, Manag Users	te request is authorised, any t ransferred onto your profile. It being deleted is registered to our profile, all links to the tran inue with the deletion or not. that an adequate reason for i ainst an audit history of your p N Niss 2021/09/29 ghts: Controlling Body Tax Pra pe Groups, Manage Taxpayen	Iaxpayers who were linked to the deleted use for transfer duty, you will be advised that ono ster duty registration will be terminated. You the deletion request is captured in the text be rofile. Associated Information Linked Taxpayor Requests Pending: Additional Payments: Service Profiles: Linked Rights Groups: actitioner s, Manage	er will be se this user is may then ox as this will 2 0 1 1		CHAT		 ESTION?

- ii) Select **User**
- iii) Select Delete User



b) The Delete User screen will be displayed

	RILES				
	As a User, you will only be allowed to delete a linked user from	your profile if:			
	You reflect as an Administrative user against your profile	э.			
	You are not the only user linked to your profile.				
ax Reference Number	 There are no pending tax type transfer requests for the 	associated user.			
entification Number	One or a combination of the above rules may be applicable to	allow for the deletion of a user.			
	Note:				
My Profile	 Once the delete request is authorised, any taxpayers will automatically transferred onto your profile. Where the user being deleted is registered for transfer of deleted from your profile, all links to the transfer duty re- choose to continue with the deletion or not. 	ho were linked to the deleted user duty, you will be advised that once gistration will be terminated. You n	will be this user is lay then		
er E	Please ensure that an adequate reason for the deletion be tracked against an audit history of your profile.	request is captured in the text box	as this will		
	USER INFORMATION	An example of the formation			
wite User	Name:	Linked Taxpavers:	2		
	ID/Passport Number:	Taxpayer Requests Pending:	122		
hango Detaile	Login Name:	Additional Payments:	0		
nunge octans	Created	Service Profiles:	0		
hanne Own Password		Linked Rights Groups:	1		
and ge own assword	Linked Boles:				
Change Website Profile	User has following rights: Controlling Body Tax Practitioner Management, Manage Groups, Manage Taxpayers, Manage Users				
Delete User			_		
	Please capture a reason for your delete request:				
My Administrators					
Unlock Account / Reset Password		A			
	Delete User				
ared Access				THE CHAT	
				LIVE CHAI	ASK A QUESTION?

c) Scroll down and click on Delete User

5 HOW TO SUBMIT YOUR TAX PRACTITIONER MEMBER DETAILS ON EFILING

a) Once the Controlling Body Tax Practitioner Function has been activated on eFiling, the RCB should then submit its tax practitioner member details.

5.1 How to submit new individual tax practitioner details

- a) To add a new member (tax practitioner), proceed as follows:
 - i) Click on Services displayed on the main menu
 - ii) Click on Tax practitioner Controlling Body displayed on the left menu
- b) The Maintain Tax Practitioner Details page will be displayed

H a		Home User	Organisations Returns	Customs Duties & Levie	rs Services Tax Status	Contact Log Out
	Portfolio	Taxpayer	- : o	rganisation		
Tax Reference Number						
Identification Number	MAINTAIN TAX PRACTITIONER DETAILS					
My Profile	Controlling Body					
	Please capture the datails below to main	tain or add the practitioner	dataile			
Other Services	Search Criteria	and and the placetoner	details.			
Tax Directives	Tax Reference Number:					
ax Directives - prior 2017	Search					
dditional Services						
ax Practitioner Controlling Body						
Maintain Members						
Notices						
History						
				THE CHAT		



- i) Complete the tax practitioner's **Tax Reference Number**
- c) The system will notify the user that there is no link with the Controlling Body by displaying the following message:

a matching Tax reactitioner information cou ax Practitioner Information associated to this	o be retrieved using the Tax Reference number pr s Tax Reference number, please click "Continue" or	alternatively
lick "Back to Search" to search again.		
	Back To Search	Continue

- d) Proceed by clicking on **Continue**
- e) The Maintain Members page will be displayed

		τ	AX PRACTITIONE	R INFORMATION			
	Membership Number	Initials	First Name	Surna	ame Date of Birth(cccc-mn dd)	n-	
ax Reference Number		Н	HOPE		1976-03-22		
entification Number	Identification Type So	uth African ID 🗸	ID Numbe	er 760322545508	2 Country of Issue		
	Tax Reference Number						
My Profile	Tax Practitioner Number		E	-mail Address			
	FUSIAI AUGLESS						
her Services							
		2090					
Directives	Business Tel No						
	Cell Number						
Directives - prior 2017							
ditional Services	15	TAX PRACTITION	ER COMPLIANT	WITH?			
Practitioner Controlling Body	Tax Criminal Status	Y	~				
	Education	Y	•				
Maintain Members	Code of Conduct	Development Y					
latices	Relationship Status	Ac	tive 🗸				
voices							
listory		TAX PRA	CTITIONER PRA	CTICE INFORMATI	ON	1	
	Does Practitioner practic	e under a Practice	No V	Doois	tration		
and the second sec						LIVE CHAT	ASK & DUESTIONT

- f) Complete all the required information relating to the new tax practitioner.
- g) Once all the fields have been completed, click on **Submit** at the bottom of the page.

Note the following when completing the Maintain Members Page

- Where the Tax Reference Number completed is incorrect, an error message will be displayed.
- Where the completed Tax Reference Number already forms part of the SARS database, however it has not been linked to the Recognised Controlling body, a blank page will be displayed.
 Proceed by completing the new tax practitioner details.
- All fields of the new tax practitioner must be captured.



6 HOW TO MANAGE YOUR TAX PRACTITIONER MEMBERS ON EFILING

6.1 How to view notices of a tax practitioner

- a) At any given time, SARS may issue a notice regarding the continuous non-compliance of Controlling Body's individual tax practitioner members. These notices, when received will be stored under the "Notices" sub menu as indicated in the following screen.
- b) To view tax practitioner members, proceed as follows:
 - i) Click on **Services**
 - ii) Click on Tax Practitioner Controlling Body
 - iii) Click on Notices

	SARS @FILING	Home User	r Organisations Returns	Customs Duties	& Levies Services	Tax Status Cont	act Log Ou
	Portfolio	Taxpayer		6		8	
Tax Reference Number	· · · · · · · · · · · · · · · · · · ·		• I Organ	nisation	P		
Identification Number	Tax Practitioner Submissions						
-	Letter Description				Created Date	Open	6
My Profile	Tax Practitioner Compliance Status Verification Notice				2024/08/07	View	
	Tax Practitioner Compliance Status Verification Notice				2024/05/07	View	
	Tax Practitioner Compliance Status Verification Notice				2024/02/07	View	
Other Services	Tax Practitioner Compliance Status Verification Notice				2023/05/07	View	
Tay Directives	Tax Practitioner Compliance Status Verification Notice				2023/02/07	View	
	Tax Practitioner Compliance Status Verification Notice				2022/11/07	View	
ax Directives - prior 2017	Tax Practitioner Compliance Status Verification Notice				2022/08/07	View	
100 10 1	Tax Practitioner Compliance Status Verification Notice				2022/05/07	View	
dditional Services	Tax Practitioner Compliance Status Verification Notice				2022/02/07	View	
fax Practitioner Controlling Body	Tax Practitioner Compliance Status Verification Notice				2021/11/07	View	
	Tax Practitioner Compliance Status Verification Notice				2021/08/07	View	
Maintain Members	Tax Practitioner Compliance Status Verification Notice				2021/05/07	View	
Notices	Tax Practitioner Compliance Status Verification Notice				2021/02/07	View	
	Tax Practitioner Compliance Status Verification Notice				2020/11/07	View	
History	Tax Practitioner Compliance Status Verification Notice				2020/08/07	View	
	Tax Practitioner Compliance Status Verification Notice			THE CHAT	2020/05/07	View	
ax Clearance Certificates	Tax Practitioner Compliance Status Verification Notice			LIVE CHAI	2020/02/26	View	SK A QUESTION?

- c) The **Tax Practitioner Submissions page** will be displayed with the following fields:
 - i) Letter Description Letter name.
 - ii) **Creation Date** Date letter received.
 - iii) **Open** Option to open the issued letter.
- d) On the applicable **Letter Description**
 - i) Click on the **View** hyperlink
- e) The following screen will be displayed





f) Click on **Download File**

i) Click on the downloaded PDF document

6.2 How to view the history of a tax practitioner

- a) This functionality allows RCB to view the individual tax practitioner historical information submissions.
- b) To access this functionality, proceed as follows:
 - i) Click on Services
 - ii) Click on Tax Practitioner Controlling Body
 - iii) Click on **History**
- c) The **History** screen page will be displayed.

	Portfolio				Taxpayer				
Reference Number						: Organisation			
ntification Number				ID Number: From Date:		Surname:			
My Profile						Search Show All			
her Services	ame	Surname	ID Number		Registered Name	Practitioner Number	Date_Submitted	Status	Open
S	USAN	FOURIE					2023/04/10	Deregistered	View
Directives	USAN	FOURIE					2023/01/29	Active	View
Directives - prior 2017									
litional Services									
Practitioner Controlling Body									
Vaintain Members									
Notices									
History									
n Clastanca Cartificator						<u></u>	E CHAT		ASK A QUESTION?



- d) The page will be displayed with the following fields:
 - i) **Name** Name of the tax practitioner.
 - ii) **ID number** Identification number of the tax practitioner.
 - iii) **Registered name** Registered name of the tax practitioner's practice if available.
 - iv) **Practitioners number** Practitioner's number allocated to tax practitioner by SARS.
 - v) **Date submitted** Submission date.
 - vi) Status Tax practitioner registration status
 - vii) **Open** Option to open the submitted data.
- e) The user may search for the tax practitioner by completing the above-mentioned information and click on **Search** or alternatively click on **Show All** to display all the tax practitioner members.
- f) To view the tax practitioner details,
 - i) Click on the **View** hyperlink beside the applicable tax practitioner
 - ii) The following screen will be displayed

		1	TAX PRACTITIONE	R INFORMATION			
Me	mbership Number	Initials	First Name	Surname	Date of Birth(cccc/mr	m/dd)	
Reference Number	x	M				28	
Ide	ntification Type South A	frican ID 🗸	ID Number		Country of Issue		
tification Number Tax	Reference Number						
Tax	Practitioner Number		E-m	ail Address			
Pos	stal Address						
y Profile							
Senéres	209	0					
Bus	siness Tel No						
rectives Cel	I Number						
rectives - prior 2017							
	is taj	PRACTITION	IER COMPLIANT V	VITH?			
onal Services		Y v					
Crir	minal Status	Yv					
actitioner Controlling Body	ucation atinuous Professional Devi	Y V					
Cor	te of Conduct	N N N					
ntain Members Rel	ationship Status	Sus	pended v				
	anoning oration		POLINICA T				
ices		TAV DO					
Tax		IAX PRAC	TITIONER PRACT	ICE INFORMATION			
ory Pra	ctitioner Yes ~						
Pra	ctice			Desistantian			
Ner	nisteren			Redistration		THE CHAT	ARK & DUERTIO

6.3 How to view or update tax practitioners' details

- a) RCBs can deregister their tax practitioner members from their list of registered tax practitioners via eFiling.
- b) To update the tax practitioner member details, proceed as follows:
 - i) Select **Services** on the e-filing menu bar.



н	Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out
	Portfolio Texpayer
ax Reference Number	······································
dentification Number	What is Service used for?
My Profile	eSTI: Securities Transfer Tax is levied on every transfer of a security. A security is any share or depository; in a company or member's interest, within a close corporation (CC). How will be notified when the eSTT declaration has been processed? After submission of an eSTT declaration, the outcome will be immediately available on eFiling.
ther Services	eSTT refunds: Request an eSTT refund by correctly completing Part A of the REV1600 form; and emailing it to <u>(bqueries@sars.gov.za</u> eStamps+ As per SARS Website dated 07/01/2016:
x Directives	"The Stamp Duties Act, 1988 (Act No. 77 of 1968) was repealed with effect from 1 April 2009. It should be noted that all lease agreements executed on or after this date are not liable for Stamp Duty." eStamps - Leases: eStamp Duty is naveled on a lease or an agreement of lease of immovable property.
x Directives - prior 2017	eStamp S-My Explose on a wase of an egreeneer of reade of interviewe property of rights in interviewe property. eStamps - Marketable securities: Marketable securities are investments that can easily be bought, sold, or traded on public exchanges.
dditional Services	How will I be notified when the eStamp request has been processed? After payment has been made, the outcome will be available on eFiling immediately.
x Practitioner Controlling Body	eSTT and Stamps Payments: eSTT and Stamp (Leases and Marketable securities) payments are allowed only on eFiling. No other payment method will be allowed.
x Clearance Certificates	Advance Tax Ruling (ATR): The Advance Tax Ruling (ATR) system seeks to promote clarity, consistency and certainty about the interpretation and application of the applicable tax laws.
nrol 3rd Party Data	How will I be notified when the ATR application has been processed? Clients will be notified via email.
y TP Configuration	Tax Directives: The purpose of a Tax Directive is to enable SARS to instruct an employer, fund administrator or insurer about how to deduct employees' tax, from certain lump sums to a taxpayer or member.
omplaints	How long will it take to get a Tax Directive?

- c) Tax Practitioner Controlling Body sub menu will be displayed.
 - i) Select Tax Practitioner Controlling Body option on the services menu.
- d) Select Maintain Members option.
- e) Maintain Tax Practitioner Details page will be displayed.

н .		Home User	Organisations Returns	Customs	Duties & Levies	Services	Tax Status	Contact Log	Out
	Portfolio	Taxpaver	· : c	rganisation					
Tax Reference Number					Contra				
Identification Number	MAINTAIN TAX PRACTITIONER DETAILS								
My Profile	Controlling Body The Financial Planning Institute (FPI)								
	Please capture the details below to maint	ain or add the practitioner	details.						
Other Services	Search Criteria								
Tax Directives	Tax Reference Number:								
Tax Directives - prior 2017	Search								
Additional Services									
Tax Practitioner Controlling Body									
Maintain Members									
Notices									
History									
Tax Clearance Certificates				LIVE C	CHAT			ASK A QUESTION	N?
	-								

- f) Insert the **Tax Reference Number** of the tax practitioner on the textbox and click on the **Search** button.
- g) The tax practitioner details submitted will be displayed.



	TAX PRACTI	TIONER INFORMATION		
Membership Numb	er Initials First Nam	e Sumame	Date of Birth(cccc-mm- dd)	
ax Reference Number	HOPE		1976-03-22	
entification Number Identification Type	South African ID V	lumber 7603225455082	Country of Issue	
My Profile Tax Reterence Nun Tax Practitioner Nu Postal Address	mber	E-mail Address		
her Services	2090			
x Directives Business Tel No				
Directives - prior 2017				
ditional Services	IS TAX PRACTITIONER COMPLI	ANT WITH?		
Practitioner Controlling Body Education	Y v Y v			
Aaintain Members Continuous Profess Code of Conduct	ional Development Y v			
Notices Relationship Status	Active			
History	TAX PRACTITIONER	PRACTICE INFORMATION		
I THE DIM HOUD IN				

- h) Complete the information to be updated on the Maintain Member page
- i) Once completed, click on the **Submit button** displayed at the end of the page.

6.4 How to deregister a tax practitioner

- a) To deregister a tax practitioner member, proceed as follows:
 - i) Select **Services** on the e-filing menu bar.
 - ii) Select **Tax Practitioner Controlling Body** option on the services menu.
 - iii) Select Maintain Members option.
 - iv) Complete the **Tax Reference Number** of the relevant tax practitioner on the textbox and click on the **Search** button.

H a		Home User	Organisations Retu	rns Customs	Duties & Levies	Services Tax Stat	is Contact Lo	og Out
Tax Reference Number	Portfolio	Taxpaver		Organisation				
Identification Number								
My Profile	Controlling Body The Financial Planning Institute (FPI)							
ther Services	Please capture the details below to maintai Search Criteria	in or add the practitioner	details.					
x Directives	Tax Reference Number:							
x Directives - prior 2017	Search							
dditional Services								
x Practitioner Controlling Body								
Maintain Members								
Notices								
History								
ax Clearance Certificates				LIVE	CHAT		ASK A QUESTI	ON?



b) Fill in the tax practitioner compliance details as required on the screen. To deregister a tax practitioner, on the **dropdown Relationship Status**, select **Deregistered**

Tax	N	
Criminal Status	Y	
Education	N	
Continuous Professional Dev	velopment Y 📼	
Code of Conduct	Y	
Relationship Status	Deregistered -	
	Active	
0	TAX OD Cancelled	

Note:

- If you are only interested in updating information of a tax practitioner and not deregistering a tax practitioner, the Relationship Status must be selected as "Active".
- Any other selected Relationship Status (Cancel, Inactive, Suspend, and Deregistered) will result in the tax practitioner being recorded as "Unregistered".
- c) Click on the **Submit** button at the bottom of the page. A pop-up message will be displayed.

Identification Number	Tax Criminal Status	Y v Y v				
	Education Continuous Professional [Development Y v				
My Profile	Code of Conduct Relationship Status	Y 🗸 Deregi	istered 🗸			
ther Services	Does Practitioner practice	TAX PRACT		ORMATION		
x Directives	Name Tax TypePlease sele	ct Tax Type 🗸 T	ax Reference Number	Number		
c Directives - prior 2017	Registered Address					
lditional Services						
dditional Services x Practitioner Controlling Body						
kirtional Services « Practitioner Controlling Body Maintain Members	Business Tel No					

- d) Select "**Ok**".
- e) A message of a successful submission to SARS will be displayed.



•	MAINTAIN MEMBERS Tax Practitioner Information Submitted Successfully to SARS. Please allow 24hrs for update to reflect.	
Tax Reference Number	Back to Search	
Identification Number		
My Profile		
Other Services		
Tax Directives		
Tax Directives - prior 2017		
Additional Services		
fax Practitioner Controlling Body		
Maintain Members		
Notices		
History		
Tax Clearance Certificates	LIVE CHAT	ASK A QUESTION?

f) SARS will update the profile of the tax practitioner submission accordingly.

7 DEFINITIONS AND ACRONYMS

Link for centralised definitions, acronyms, and abbreviations: <u>Glossary A-M | South African Revenue Service</u> (sars.gov.za)

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).