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SHARED ACCESS TO EFILING PROFILE

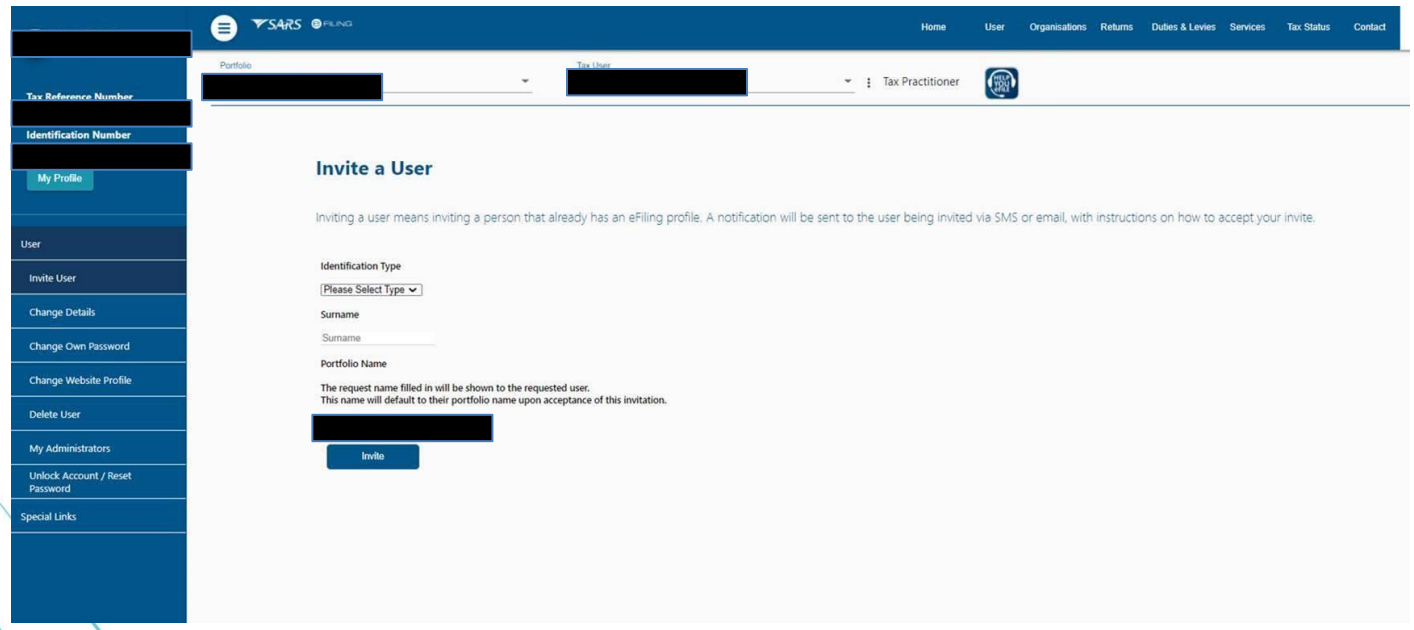
Since November 2020, SARS Contact Centre changed its standard operating procedures and ceased providing telephonic assistance to tax practitioners in instances where the taxpayer in respect of which the tax practitioner sought information, was not linked to that tax practitioner's profile. This rule applies despite the fact that the tax practitioner has a valid power of attorney authorizing him/her to act on behalf of the taxpayer.

The reason for this is presumably to ensure confidentiality of taxpayer information as it is currently not possible for a Contact Centre agent to verify if the tax practitioner is authorized to act on behalf of a particular taxpayer unless the relationship is clear on the eFiling system. There is no option to upload a power of attorney, in the circumstances.

Whilst we have been engaging with SARS to find a solution to this challenge, we believe that there is an interim solution that will assist in circumventing the problem – as documented below.

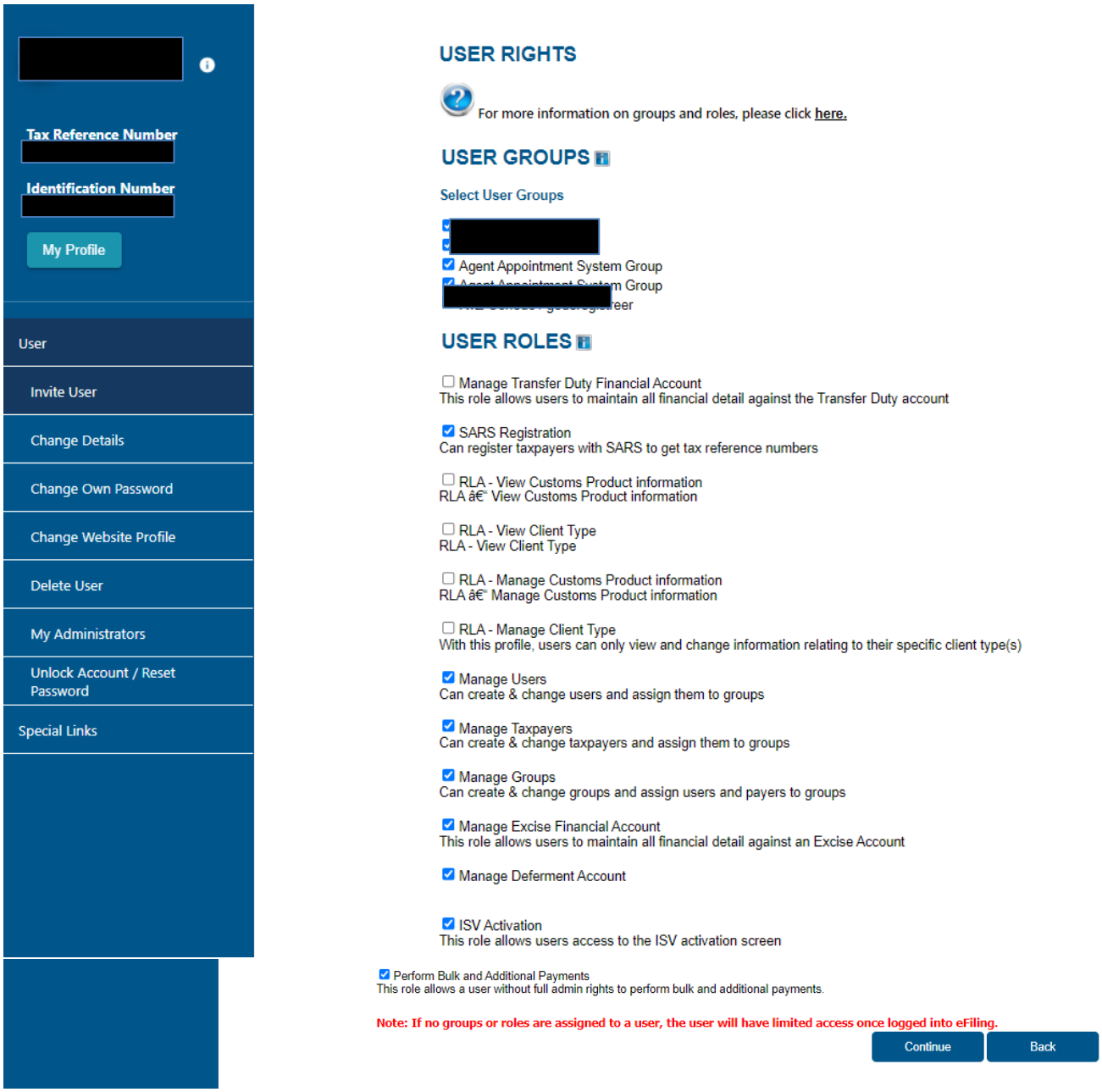
Step 1:

- Taxpayer client to access the User menu on eFiling and select 'Invite a User'.
- Complete the tax practitioner's details in the relevant field



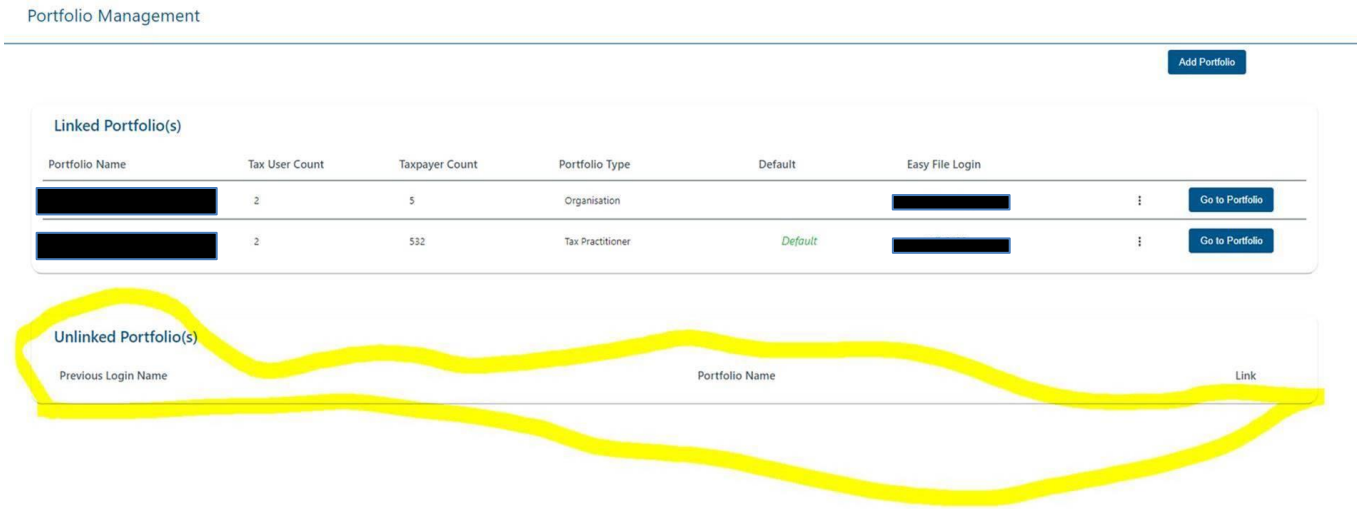
Step 2:

- Tick the relevant boxes to define User rights, groups and roles



Step 3:

- The tax practitioner must access the Portfolio Management page on their eFiling profile and accept the invite



9 June 2021