

SHARED ACCESS TO EFILING PROFILE

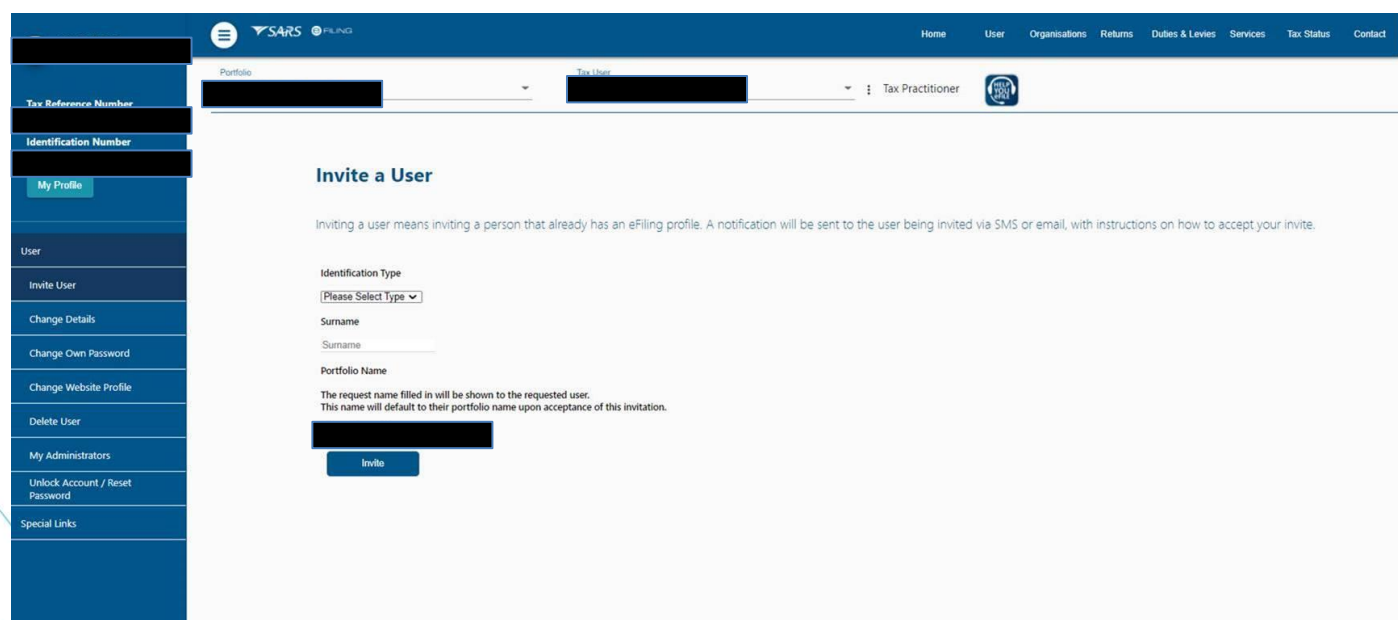
Since November 2020, SARS Contact Centre changed its standard operating procedures and ceased providing telephonic assistance to tax practitioners in instances where the taxpayer in respect of which the tax practitioner sought information, was not linked to that tax practitioner's profile. This rule 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



The screenshot shows the SARS eFiling interface. On the left is a blue sidebar menu with options: Tax Reference Number, Identification Number, My Profile, User, Invite User (highlighted), Change Details, Change Own Password, Change Website Profile, Delete User, My Administrators, Unlock Account / Reset Password, and Special Links. The top navigation bar includes Home, User, Organisations, Returns, Duties & Levies, Services, Tax Status, and Contact. The main content area is titled 'Invite a User' and contains the following text: 'Inviting a user means inviting a person that already has an eFiling profile. A notification will be sent to the user being invited via SMS or email, with instructions on how to accept your invite.' Below this is a form with fields for 'Identification Type' (a dropdown menu), 'Surname', and 'Portfolio Name'. A note states: 'The request name filled in will be shown to the requested user. This name will default to their portfolio name upon acceptance of this invitation.' At the bottom of the form is a blue 'Invite' button.

Step 2:

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



Tax Reference Number

Identification Number

[My Profile](#)

User

Invite User

Change Details

Change Own Password

Change Website Profile

Delete User

My Administrators

Unlock Account / Reset Password

Special Links

USER RIGHTS



For more information on groups and roles, please click [here](#).

USER GROUPS

Select User Groups

- ☒ [Redacted]
- ☒ Agent Appointment System Group
- ☒ Agent Appointment System Group
- ☒ [Redacted]

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
- ☒ Perform Bulk and Additional Payments
This role allows a user without full admin rights to perform bulk and additional payments.

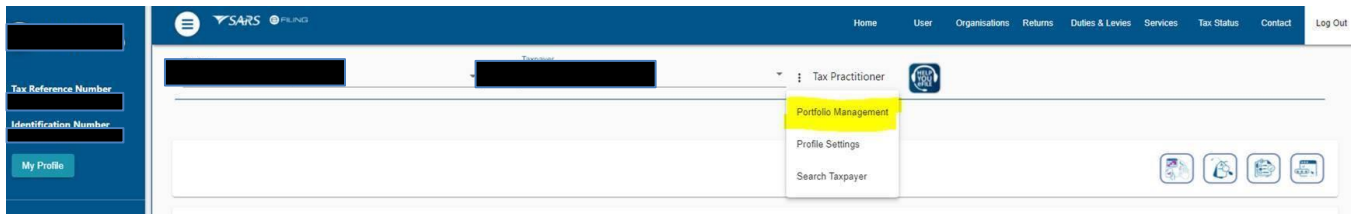
Note: If no groups or roles are assigned to a user, the user will have limited access once logged into eFiling.

[Continue](#)

[Back](#)

Step 3:

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



Portfolio Management

[Add Portfolio](#)

Linked Portfolio(s)

Portfolio Name	Tax User Count	Taxpayer Count	Portfolio Type	Default	Easy File Login	
[Redacted]	2	5	Organisation		[Redacted]	Go to Portfolio
[Redacted]	2	532	Tax Practitioner	Default	[Redacted]	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link
[Redacted]		

9 June 2021