

FILING SEASON FIX: NO LUMP SUM AMOUNT DECLARED ON THE TAX RETURN

Members have complained that there have been instances where they cannot file returns due to a tax directive submitted by the employer. eFiling has a facility for taxpayers to search on his/her eFiling profile to see history of tax directives submitted by anyone under his/her name.

When a taxpayer receives the following error when filing the tax return, the taxpayer should use the search function on eFiling to determine who issued such tax directive in order to consult the relevant employer.

EXAMPLE OF THE ERROR

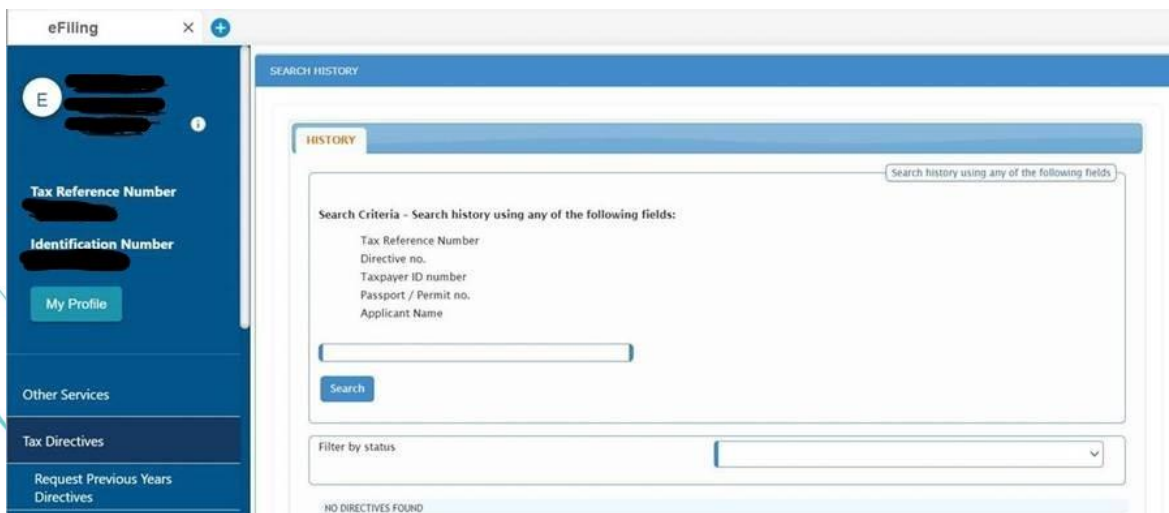
INCOME TAX WORK PAGE

Taxpayer Name	[REDACTED]	eFiling Status	Saved
Tax Period	2021	SARS Status	Please note that this return cannot be processed, tax Directive No [REDACTED] was issued by SARS, but no Lump Sum amount is declared on the return. Contact the Fund Administrator/Employer to rectify the error and resubmit the return. i
Tax Reference	[REDACTED]		
Return Type	ITR12		

REMEDY FOR THE ERROR

Taxpayer must go onto eFiling:

1. Choose SERVICES on Top menu;
2. Click on TAX DIRECTIVES on the left side menu;
3. Click on "HISTORY"; and
4. The screen below will appear and taxpayer must insert the search criteria



SEARCH HISTORY

HISTORY

Search history using any of the following fields

Search Criteria - Search history using any of the following fields:

- Tax Reference Number
- Directive no.
- Taxpayer ID number
- Passport / Permit no.
- Applicant Name

Filter by status

NO DIRECTIVES FOUND