SARS
South African Revenue Service

eFiling Changes - July 2019 PIT Filing Season

Question	Answer
What is a default Primary User?	A Primary User is a default username that is selected by the user to access eFiling.
Why do I need a default Primary User?	The purpose of a default Primary User is to enforce users to utilise a single username when accessing eFiling. This is mainly for users with multiple profiles linked to their identity number. For a user that has a single username linked to their identity number, their default Primary User will be their current username. All your clients (Individuals and Organisations) listed under your profile will not be affected and can be accessed as per normal.
How do I create a default Primary User?	Upon first login as of 1st July 2019, a user with multiple usernames will be prompted to select their default Primary username from a list of existing usernames, linked to their identity number.
How will I access my other profiles, once I have created a default Primary User?	All existing profiles, associated with a user's identity number, will still be accessible when the user logs in with their primary username. For example: a user with an individual and organisation / tax practitioner profiles, will be give option to link their other profiles into one profile, once logged in they can switch between the different portfolios.
Can I choose not to select a default Primary user?	No. All users will have to select a default primary user in order to use eFiling, Otherwise, they will not be able to access eFiling functionality.
Will I be able to change my default Primary User?	Yes, upon successful logon into eFiling, a user may change their primary user to a preferred username by using the "Profile and Preference Setup" function listed under "My Profile" on the left menu pane. Detailed steps can be accessed in **EXTERNAL GUIDE - HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE** from 1 July 2019.
Will selecting a primary user affect my shared access with my clients?	No, all clients on users portfolios with whom shared access is activated will not be

	affected when users setup their primary user. The function to obtain or remove shared access remains the same. Individuals that register their own eFiling profile will be given the option to immediately remove or grant shared access for their products.
What is a portfolio and what are the different types?	A registered eFiler can act in different “roles” on eFiling (e.g. tax administrator). These “roles” are referred to as Portfolio Types. For example: • **Individual** – a person acting as himself/herself to administer his/her own individual taxes. • **Tax Practitioner** – a person registered with SARS and a Recognised Controlling Body (RCB) and has a signed power of attorney to act on behalf of another taxpayer. • **Organisation** – a representative of a tax paying entity acting either as the representative taxpayer (e.g. Public Officer, Executor of an estate, etc.) or an appointed representative with a signed Power of Attorney in place.
Can I change my portfolio name?	Yes, users may change their portfolio name by using the “Portfolio Management” function listed under “My Profile” on the left menu pane. Detailed steps can be accessed in **EXTERNAL GUIDE - HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE** from 1 July 2019
Can I change my portfolio type?	Yes, users may change their portfolio type by using the “Portfolio Management” function listed under “My Profile” on the left menu pane. Detailed steps can be accessed in **EXTERNAL GUIDE - HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE** from 1 July2019
Where will correspondence relating to various clients linked to the primary user portfolio be sent?	All taxpayers registered on a users eFiling portfolio have a contact person listed as part of their registration details. The contact person’s details are used to send any correspondence. Thus, if the primary user is listed as the contact for any individual and/or organisation

	portfolio, they will receive the correspondence as per normal.
If I remove rights or delete user(s) from my portfolio as a Practitioner or Organisation, will the user still have access to my clients?	No. If the rights to clients are removed from the user on eFiling, the user will not be able to see the client's records nor see the client as part of their client list. If the user is completely removed or deleted, they will also not be able to view any of the client's records. The user will still be able to log onto eFiling but only view clients to whom they have rights. Note that the current function to add and remove right to users will still apply. User(s) will not be able to view any client or personal records without rights being allocated to accordingly.
How will VAT, PAYE or IT tax types located on different profiles be managed with the new default Primary User?	If a client's tax types are located on different portfolios, which belong to the same identity number, then all tax type will be accessible using the Primary user in the different portfolios. Or else, if the tax types are linked to different identity number with their own default Primary user, then each user will still access their linked tax types as per the current function.
What will happen when I try to login with any of my other usernames once I have created a default Primary User?	Any other username associated with your identity number will be restricted from logging in and you will be directed to login using the Primary User. All other associated usernames, once verified with the linked password, can be managed via Portfolio Management.
What is Portfolio Management?	The Portfolio Management feature provides eFilers with the flexibility of a single login, while being able to transact between their existing usernames which will be called Portfolios. Once verified and linked to the Primary User, you will be able to access, transact and manage your various portfolios without being required to log out and change users.