

## EXTERNAL GUIDE

# HOW TO REGISTER FOR EFILING AND MANAGE YOUR USER PROFILE

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## 1 PURPOSE

The purpose of this document is to assist clients to register for eFiling and manage their eFiling profiles.

This guide in its design, development, implementation and review phases is guided and underpinned by the SARS values, code of conduct and the applicable legislation. Should any aspect of this guide be in conflict with the applicable legislation the legislation will take precedence.

## 2 INTRODUCTION

The vision of SARS is to be an innovative revenue and customs agency that enhances economic growth and social development. This is in line with the legislative mandate of SARS which is to collect revenue and ensure compliance with tax laws. eFiling enables SARS to achieve its mandate by being a service channel for the collection and administration of all national taxes, duties and levies.

One of the issues that emerged from the SARS customer satisfaction research is that the public often dreads standing in long queues, filling in paperwork and visiting SARS branches. The electronic filing system (eFiling) aims to address these issues and ensure that the services SARS provides are efficient and convenient for the taxpayer

eFiling is a free electronic tool designed by SARS to offer electronic services such as filing tax returns, making payments and accessing accounts to name a few.

eFiling allows you the benefit of direct, secure and real-time electronic access to your tax profile as well as the opportunity to manage this at any time and from anywhere.

You must be linked to a tax type (e.g. income tax) in order to have full access to the services on eFiling and to transact.

SARS values you, the taxpayer. In order to protect your tax account(s), please note that not all services are offered online. Services such as change of name and surname must be done at a SARS branch.

## 3 SERVICES OFFERED ON EFILING

The following services are available on eFiling:

- Pay-As-You-Earn (EMP201 return)
- Skills Development Levy (included on the EMP201 and EMP501 return)
- Value Added Tax (VAT201)
- Provisional Tax (IRP6)
- Secondary Tax on Companies (IT56)
- Individual Income Tax (ITR12)
- Trusts (IT12R)
- Advanced Tax Ruling (ATR)
- Change of Personal Details
- Payments
- Request for Tax Clearance Certificate
- Request for Tax Directive
- Transfer Duty
- Stamp Duty
- Security Transfer Tax(STT)
- VAT Vendor Search
- Notification Tool
- Tax Calculators
- Complete history of eFiling usage
- Customs payments
- Air Passenger Tax payments
- Mineral and Petroleum Resource Royalty (MPRR)

## 4 NEW LOOK

SARS has redesigned eFiling in an effort to embrace the benefits of emerging technologies and provide an optimized and secure digital environment. The new look is also intended to help promote voluntary compliance, reduce the administrative burden and provide you, our valued client, with a more intuitive and user-friendly experience. The redesigned functionality on eFiling will be implemented using a phased in approach.

Changes for this phase include:

- New look to align to SARS' corporate identity
- Improved security to safeguard against fraud
- Implementation of a primary user-id (single login) to access all profiles
- Profile management (e.g. Organisations and Tax Practitioners)
- A dashboard providing the eFiler with a visual summary of his/her tax affairs at a glance

### 4.1 MIGRATION OF EXISTING USERS

All existing users (registered prior to 1 July 2019) will be authenticated and migrated to one single user sign on. If you have multiple login profiles linked to your identity/passport number, a list of your profiles will display (after you have been authenticated). You will be required to choose a primary login from the list. All your profiles will still be accessible once you logged in with your primary credentials. You can link your other logins as "Portfolios" to your profile.

### 4.2 PORTFOLIOS

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.

eFilers with a **Tax Practitioner** and **Organisation** portfolio type can:

- Activate multiple taxpayers against that portfolio type,
- Group taxpayers under the same Portfolio Type,
- Specify a descriptive name for each group (for ease of reference).

If you registered different portfolio types prior to 1 July 2019, you would have accessed the abovementioned portfolios by using a unique username and password for each. As from 1 July 2019, you will only use one username and password (referred to as the primary login) to login to eFiling. You can then choose the portfolio that you want to access.

### 4.3 PASSWORD RULES

When creating or changing a password on eFiling please ensure that the password contains a minimum of 8 characters and has at least one of the following:

- uppercase letter
- lowercase letter
- special character
- numeric digit.

#### 4.4 ONE-TIME PIN (OTP)

- The OTP is a unique 4-digit security PIN and you will be required to enter this pin as confirmation when performing certain functions on eFiling.
- You can choose to receive an OTP via SMS or via an email address. Your preferred method of communication for the OTP can be maintained via your eFiling profile.
- For security reasons, the OTP is time-sensitive and you will be required to enter it within the time period indicated. If you are unable to enter the OTP within the specified time, you may request for it to be resent to you.
- For your security, you can only opt to resend an OTP twice.

### 5 REGISTRATION ON EFILING

#### 5.1 HOW TO REGISTER AS A NEW USER ON EFILING

**Procedure:**

- a) Log on to the SARS website.
  - On the top right side of the home page is a list of SARS eFiling options. Select <Register Now>.
  - The eFiling Register screen will display.
- b) Please enter the following personal details and click on <Next>.
  - Name
  - Surname
  - South African Citizen (indicate Yes/No)
  - Identification Number
  - Date of Birth
  - **Note:** If you are not a South African citizen please enter your passport number and your income tax number (if registered).
- c) Please enter the following information on the contact details screen and click on <Next>.
  - Cell number
  - Email
  - A unique user name (you may opt to use your email address as your user name)
  - Password (please refer to the password rules above)
  - Confirm Password
- d) If the details entered are successfully matched with the SARS records, you will be presented with the One-Time-Pin (OTP) screen.
  - Please enter the OTP that is sent to either your cellphone number or your email address.
  - If the time period to enter the OTP has expired you can click on <Resend OTP>. Note: for your security you can only select this option twice.
  - If you do not complete the OTP process successfully, you will have to start the registration process again.
- e) If you have successfully entered the OTP, the eFiling Login Screen will display.

**NOTE:**

- If we cannot match the personal details that you entered, we may ask you a few random

questions to authenticate you.

- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first visit your nearest SARS branch office to register for income tax or activate your income tax number
- If our system identifies you as a registered eFiler, you will either have the option to login with your existing eFiling profile or recover your password (if you cannot remember it).
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party's access.

## Illustration

The illustration shows the SARS eFiling registration process in three steps:

**Step 1: Login/Register/Forgot Password/Forgot Username**

The SARS eFiling logo is shown. The 'Register Now' option is highlighted with a red circle 'a' and an arrow pointing to the registration form.

**Step 2: Register (Please enter personal details.)**

Fields include:

- Name\* (Empty)
- Surname\* (Empty)
- Surname is required (Note)
- Are you a South African Citizen?\*
  - ☐ Yes
  - ☐ No
- Date of Birth\* (Choose a date)
- Next button

**Step 3: Register (Please enter contact and login details. Note that your contact details will be used as your security contact details going forward.)**

Fields include:

- Cell Number\* (0300550090)
- Email\* (TEST@SARS.GOV.ZA)
- Use Email as Username? ☒
- Username\* (EFILING TEST1)
- Password\* (Masked with dots)
- Confirm Password\* (Masked with dots)
- Next button

## 5.2 REQUEST FOR ADDITIONAL INFORMATION TO FINALISE REGISTRATION

If we are unable to finalise your eFiling registration immediately we may request additional information before we issue an OTP to you. Please follow the steps below in order for us to finalise your eFiling registration as soon as possible.

### **Procedure:**

- a) A message will display confirming your registration request and prompting you to upload supporting documents in order to finalise your eFiling registration.
  - A case number will be allocated to you. Please quote this number when contacting SARS to follow up on the progress of your eFiling registration.
  - If you are logged out, please use the username and password that you provided during the registration process.
  - Please note: You will have 21 business days to upload the required documents.
  - Click on <Continue>.
- b) The Registration Workpage will display.
  - Click on <Upload> to upload the required supporting documents.
- c) The file size may not exceed 5mb and the following file types will be accepted:
 

.doc	.docx	.gif	.Jiff	.jpeg
.jpg	.pdf	.png	.xls	.xlsx

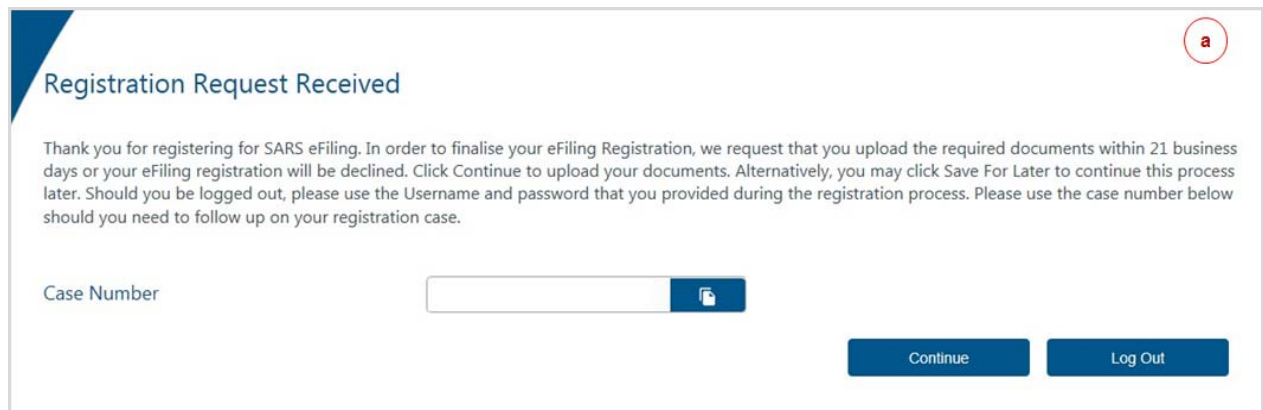
  - Follow the screen prompts to upload the documents.
  - Please ensure that you upload **all** the documents requested by SARS before you click on the <Submit>. Once submitted you will not be able to add more documents unless you receive a new request from SARS.
  - If you are sure you have uploaded all the documents required, click on <Continue>.
- d) You can log in with your username and password to view the status of your registration process (e.g. awaiting supporting document, documents submitted). Once SARS has verified your details, the status will change to 'Request Successful'
  - Click on the <Complete Registration> button.
- e) Confirm your preferred method of communication and click on <Continue>.
  - The method you select will serve as your eFiling security contact details and will be used to send a One-Time-Pin (OTP) to authenticate you.

- f) Please enter the OTP sent to either your cellphone number or your email address. Once the correct OTP is entered, the eFiling Login screen will display.

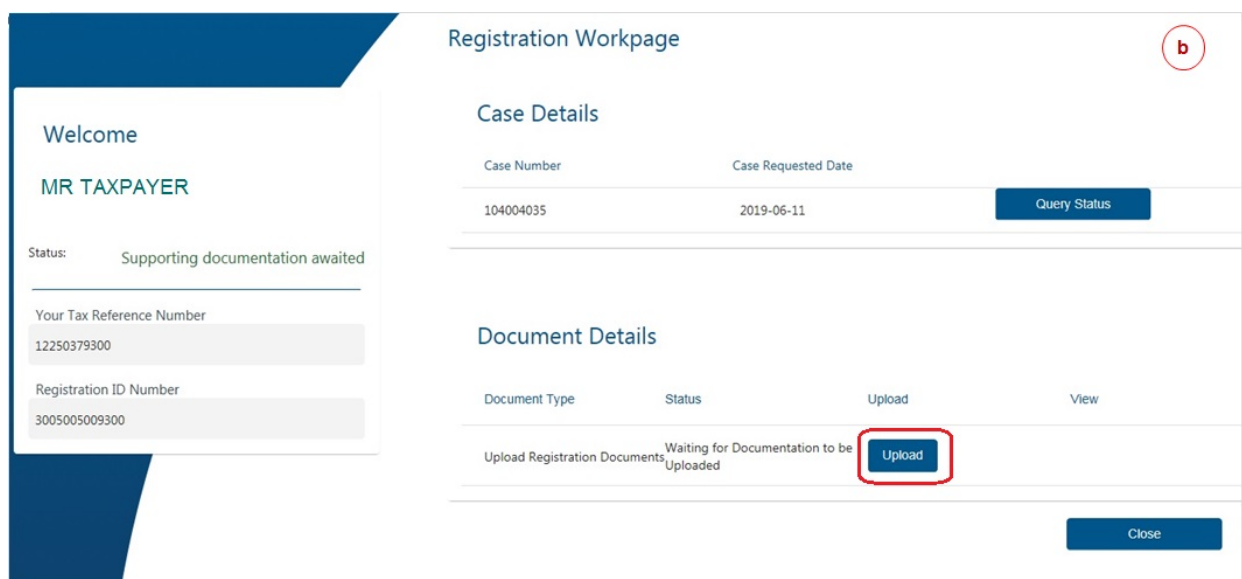
**NOTE:**

If we cannot find your tax record, you will be required to complete your address details.

**Illustration:**



The screenshot shows the 'Registration Request Received' screen. It features a blue header with a white triangle on the left and a red circle with the letter 'a' in the top right corner. The main text reads: 'Thank you for registering for SARS eFiling. In order to finalise your eFiling Registration, we request that you upload the required documents within 21 business days or your eFiling registration will be declined. Click Continue to upload your documents. Alternatively, you may click Save For Later to continue this process later. Should you be logged out, please use the Username and password that you provided during the registration process. Please use the case number below should you need to follow up on your registration case.' Below this text is a 'Case Number' label followed by a text input field and a blue button with a document icon. At the bottom right are two blue buttons: 'Continue' and 'Log Out'.



The screenshot shows the 'Registration Workpage' screen. It has a blue header with a white triangle on the left and a red circle with the letter 'b' in the top right corner. On the left side, there is a 'Welcome' section for 'MR TAXPAYER' with a 'Status: Supporting documentation awaited' and two input fields for 'Your Tax Reference Number' (12250379300) and 'Registration ID Number' (3005005009300). The main area is titled 'Registration Workpage' and contains two sections: 'Case Details' and 'Document Details'. The 'Case Details' section has a table with columns 'Case Number' and 'Case Requested Date', showing values '104004035' and '2019-06-11' respectively, and a 'Query Status' button. The 'Document Details' section has a table with columns 'Document Type', 'Status', 'Upload', and 'View'. The first row shows 'Upload Registration Documents' and 'Waiting for Documentation to be Uploaded', with a red box highlighting the 'Upload' button. A 'Close' button is located at the bottom right.



### Upload Documents

**Important:** Please note that the following file types may be uploaded, undefined.doc , .docx , .gif , .Jiff , .jpeg , .Jpg , .pdf , .Png , .xls , .xlsx , . Maximum allowable file size may not exceed 5mb.

Upload Status	Document Name	Upload
Converted and stored	Res Address.pdf	
Bank statement not older than 3 months		
Converted and stored	Bank Statement.pdf	
Proof of identity		
Converted and stored	Proof of ID.pdf	

[Back](#) [Submit](#)

### Confirm Submission

It is important that you upload all the documents requested by SARS before you submit in order to eliminate any delays in processing your case. Once submitted you will not be able to add more documents unless you receive a new request from SARS. If you are sure you have uploaded all the documents required, click CONTINUE to submit.

[Continue](#)

[Cancel](#)

[Contact](#)
[Log Out](#)

## Registration Workspace

### Welcome

MR TAXPAYER

Status: Request Successful

Your Tax Reference Number  
0083123123

Registration ID Number  
7305021231231

[Complete Registration](#)

### Case Details

Case Number	Case Requested Date	Query Status
101714929	2019-06-12	<a href="#">Query Status</a>

### Document Details

Document Type	Status	Upload	View
Upload Registration Documents	Closed	<input checked="" type="checkbox"/>	<a href="#">View</a>

[Close](#)

## Welcome To SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

### eFiling Security Contact Details

Cell Number

0833333333

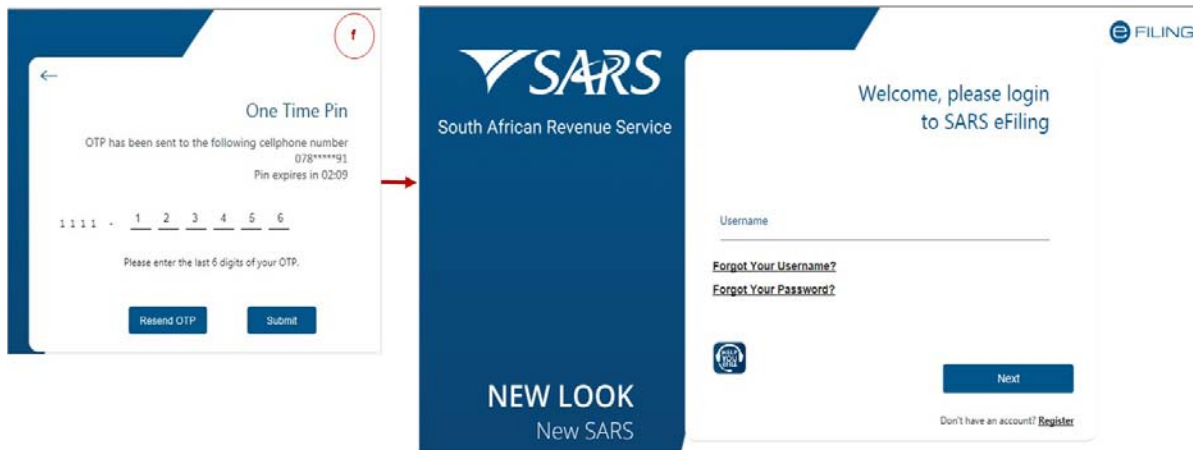
Email

TEST@TEST.CO.ZA

### Preferred Method of communication



[Continue](#)



## 6 FIRST TIME LOGIN FOR EFILING USERS REGISTERED ON/AFTER 1 JULY 2019

### **Procedure:**

- a) Log on to the SARS website. On the top right side of the home page select <Login> from the list of eFiling options.
  - Enter your eFiling Username and click on <Next>
  - Enter your Password and click on <Login>.
- b) The eFiling welcome screen will display.
  - Please read the terms and conditions.
  - At the bottom of the screen click on <I Accept> to continue with the log in process.
- c) You will be presented with a list of returns types as per SARS records.
  - Please click on <Link> for each return type that you want to activate on your profile
  - Click on <Remove> to remove a return type from your profile.
  - After you have selected the return type(s), click on <Submit>.
- d) The eFiling home page will display. This screen is also referred to as the eFiling Dashboard and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notices sent by SARS.

### **NOTE:**

- If you have multiple income tax numbers or your income tax number is inactive/coded as a deceased estate or you are only registered for VAT/PAYE and not for income tax, you will be required to first visit your nearest SARS branch office to register for income tax or activate your income tax number.
- If your tax number is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party's access.

### **Illustration:**

a


Welcome, please login  
to SARS eFiling

Username

EFILING TEST3

[Forgot Your Username?](#)

[Forgot Your Password?](#)



Next

Don't have an account? [Register](#)

Welcome, please login  
to SARS eFiling

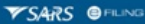
Password

.....

[Forgot Your Username?](#)

[Forgot Your Password?](#)

Login



Contact

Log Out

Welcome to SARS eFiling

SARS EFILING TERMS & CONDITIONS

THE USE OF THIS WEB SITE IS REGULATED BY THE RULES FOR ELECTRONIC COMMUNICATION PRESCRIBED UNDER SECTION 255(1) OF THE TAX ADMINISTRATION ACT, 2011 (ACT NO. 28 OF 2011) (the "Rules").


THE RULES WERE ISSUED IN PUBLIC NOTICE GN 644 IN GG 37940 OF THE 25TH OF AUGUST 2014. available here

THE RULES AS WELL AS THE TERMS AND CONDITIONS HEREUNDER ARE BINDING AND ENFORCEABLE AGAINST ALL PERSONS THAT ACCESS THIS WEB SITE OR ANY PART THEREOF. IF YOU DO NOT AGREE TO THE RULES OR THESE TERMS AND CONDITIONS. YOU MUST LEAVE THIS WEB SITE NOW. AS FURTHER USE SHALL AUTOMATICALLY BIND YOU.

I Decline

I Accept

b



SARS eFiling

**My Details**

Name & Surname  
PETER TAXPAYER

ID Number  
1234567890

**Activate Your Return Types**  
Please select the return types you want to activate on your profile

Return Type Description	Reference No.	Selected
Individual Income Tax (ITR12)	4500000000	<a href="#">Link</a>

[Submit](#)

**PETER TAXPAYER**

Tax Reference Number  
1234567890

Registration Number  
1234567890

[My Profile](#)

User

SARS Registered Details

Customs Registration

Special Links

Portfolio: EFILING TEST4

Tax Payer: TAXPAYER J ()

Individual

**Tax Compliance Status**  
Compliant  
As of: 2019-06-13 : 13:51:03

**Personal Income Tax (ITR12)**

Tax Period	Return Status	Date
2019	Saved on 13/06/2019	2019/10/31

**Account Balance:**  
As of: 2019-06-13 : 13:51:03  
R 0.00

Notification

Statement of Account [Request](#)

## 7 FIRST TIME LOGIN FOR EFILING USER REGISTERED BEFORE 1 JULY 2019

### 7.1 SINGLE LOGIN PROFILE

#### Procedure:

- Log on to the SARS website. On the top right side of the home page select <Login> from the list of eFiling options.
  - Enter your eFiling Username and click on <Next>
  - Enter your Password and click on <Login>.
- The eFiling welcome screen will display.

- Please read the terms and conditions.
  - At the bottom of the screen click on <I Accept> to continue with the log in process.
- c) Select your preferred method of communication and click on <Continue>.
- This will serve as your eFiling security contact details and we will send a One-Time-Pin (OTP) to your preferred method of communication in order to authenticate you.
  - You can edit your contact details on this screen.
- d) Please enter the OTP sent to either your cellphone number or your email address.
- e) Once the correct OTP is entered, the eFiling home page will display. This screen is also referred to as the eFiling Dashboard and provides a visual summary of your current tax affairs with SARS with regard to compliance, outstanding returns and account balance(s). You can also view your statement of account and any notices sent by SARS.

### **Illustration:**

## Welcome To SARS eFiling

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

### eFiling Security Contact Details

Cell Number

0833333333

Email

TEST@TEST.CO.ZA

### Preferred Method of communication



Continue

←

One Time Pin

OTP has been sent to the following cellphone number  
078\*\*\*\*\*91  
Pin expires in 02:09

1 1 1 1 - 1 2 3 4 5 6

Please enter the last 6 digits of your OTP.

Resend OTP

Submit

PETER TAXPAYER

Tax Reference Number  
1234567890

Registration Number  
1234567890

My Profile

User

SARS Registered Details

Customs Registration

Special Links

SARS eFILING

Home Returns Services Tax Status Contact Log Out

Portfolio  
EFILING TEST4

Tax Payer  
TAXPAYER J ()

Individual

HELP  
YOU  
OFFLINE

Tax Compliance Status

Compliant

As of: 2019-06-13 : 13:51:03

Personal Income Tax (ITR12)

Tax Period	Return Status	Date
2019	Saved on 13/06/2019	2019/10/31

Account Balance:

As of: 2019-06-13 : 13:51:03

R 0.00

Notification

Statement of Account

Request

## 7.2 MULTIPLE LOGIN PROFILES

### Procedure:

- Log on to the SARS website. On the top right side of the home page select <Login> from the list of eFiling options. Enter your eFiling User Name and Password details and click on <Login>. Please read and accept the terms and conditions.

- b) A screen will display with a list of all the login profiles linked to your identity/passport number. Please select the primary login name that you would like to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.
- c) If you select a primary login (e.g taxpayer111111 as illustrated in the screen below) that is different from the profile that you are currently logged in with (e.g. taxpayer222222), you will be prompted to enter the password for that primary login selected (i.e taxpayer111111). If you do not remember the password, click on <Forgot Password> to reset it.
- d) Once you have selected the primary login click on <Done>. Select your preferred method of communication and click on <Continue>.
- This will serve as your eFiling security contact details and we will send a One-Time-Pin (OTP) to your preferred method of communication in order to authenticate you.
  - You can edit your contact details on this screen.
- e) Insert the OTP issued to you.
- f) A message will display confirming that your primary login has been successfully set-up. Click on <Continue>.
- g) The Portfolio Management screen will display for you to link or unlink or add portfolios.
- Please refer to the Portfolio Management section below.

**NOTE:**

- After you have selected and confirmed your primary login, you must only use that login to access eFiling. If you attempt to login with any other portfolio that is linked to your identity/passport number, the following error message will display:  
  
*“According to our records you have already chosen your Primary Login. Please Login with your Primary Login details and then activate your other profiles in the Portfolio Management section on eFiling.”*
- If you are an individual with multiple logins and you try to login with the username that is not linked to your personal income tax number, the following message will display:  
  
*“Our records indicate that your own personal income tax is associated to one of your other existing Login details. Due to improved security measures implemented, please authenticate this profile by providing the applicable password below. Note – should you not be able to authenticate this profile now, you may be required to do so at a later stage to gain access to certain online transactions.”*

**Illustration:**



**a**


Welcome, please login  
to SARS eFiling

Username

EFILING TEST3

Forgot Your Username?

Forgot Your Password?



Next

Don't have an account? [Register](#)

Welcome, please login  
to SARS eFiling


Password

.....

Forgot Your Username?

Forgot Your Password?

Login

ContactLog Out

Primary Login Credentials

**b**

We have detected that your ID is linked to other login profiles. Going forward you will only be allowed to use your preferred credentials to access eFiling. Please choose the login name that you would like to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

Default	Previous Login Name	Tax User Count	Tax Payer Count	Portfolio Type
<input type="radio"/>	taxpayer111111	1	1	Company
<input type="radio"/>	taxpayer222222	4	5	Company

Done

Primary Login Credentials

We have detected that your ID is linked to other login profiles. Going forward you will only be allowed to use your preferred credentials to access eFiling. Please choose the login name that you would like to use going forward. All your profiles will still be accessible once you logged in with your primary credentials.

Default	Previous Login Name	Tax User Count	Tax Payer Count	Portfolio Type
<input checked="" type="radio"/>	taxpayer111111	1	1	Company
<input type="radio"/>	taxpayer222222	4	5	Company

Done

Set Default Security Contact

**c**

Please enter the password for taxpayer111111

Password

.....

Forgot Password?

SubmitCancel



## Welcome To SARS eFiling

d

SARS eFiling has enhanced its security. Please confirm or update your eFiling Security Contact Details and select your preferred method of communication. Your eFiling Security Contact Details will be used to authenticate you when necessary.

### eFiling Security Contact Details

Cell Number

0833333333

Email

TEST@TEST.CO.ZA

### Preferred Method of communication



Continue

e

←

### One Time Pin

OTP has been sent to the following cellphone number  
078\*\*\*\*91  
Pin expires in 02:09

1 1 1 1 . 1 2 3 4 5 6

Please enter the last 6 digits of your OTP.

Resend OTP Submit

## Thank you for confirming your primary login details

f

Please note: that going forward you will only use the primary login to access eFiling. You will have the opportunity to link your other logins as "Portfolios" to your profile.

### What is a portfolio?

A registered eFiler can act in different "roles", as a tax administrator, on eFiling. These "roles" are referred to as Portfolio Types. For example:

- Individual - Acting as himself or herself when administering his or her own individual taxes,
- Tax Practitioner – Acting as a Tax Practitioner that is (registered with a Recognised Controlling Body (RCB) and in good standing) on behalf of another tax paying entity with a signed Power of Attorney in place,
- Organisation – Acting as the representative of a tax paying entity, 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.

With regards to the Tax Practitioner and Organisation Portfolio Type – An eFiler will be able to activate one or more taxpayers against the Portfolio Type and will also be able to group taxpayers together under the same Portfolio Type. The eFiler will be able to specify a descriptive name for each group, for ease of reference.

Previously, an eFiler accessed his or her different Portfolios by using a unique username and password for each Portfolio. Going forward, you will only have one username and password (referred to as the primary login) and after login, you can choose the Portfolio that you want to access.

Continue

Portfolio Management
9

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default	
taxpayer222222 - SARS PTY LTD	1	1	Organisation	Default	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
taxpayer111111	-	Link	Remove

## 8 MY PROFILE

### 8.1 PROFILE AND PREFERENCE SETUP

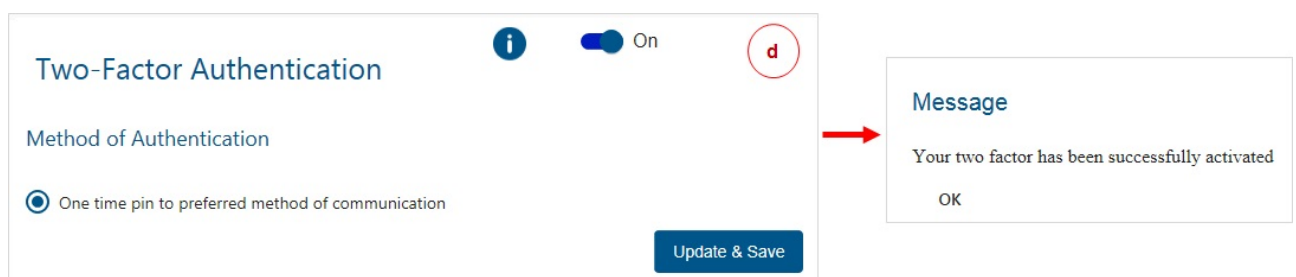
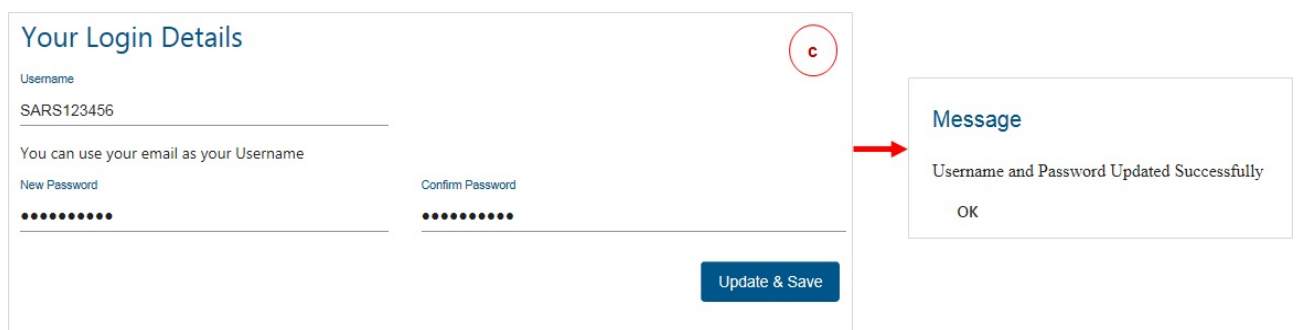
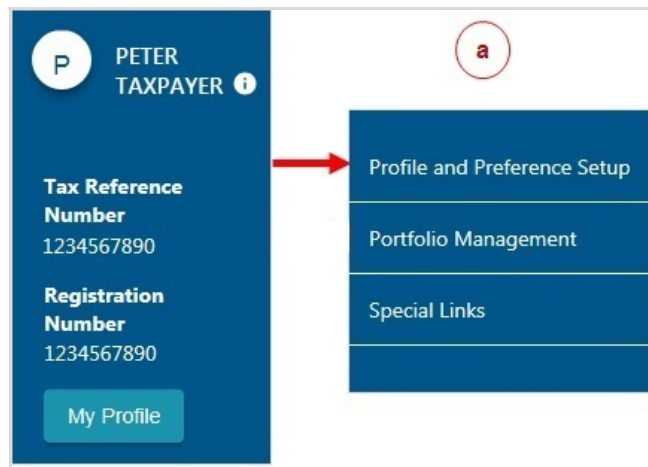
This function is used to update your primary login details, security contact details and method of authentication. You cannot change your tax reference number and identity/passport number on this screen.

#### **Procedure:**

- a) Log on to eFiling, click on <My Profile> from the menu on the left and select <Profile and Preference Setup>.
- b) To change your security contact details:
  - Insert your new email address
  - Insert your new cell number
  - Select your preferred method of communication
  - Click on <Update & Save>
  - Click on <Send OTP> to send the One-Time-Pin number to your preferred method of communication
  - After you have entered the correct OTP, a pop-up message will display confirming that your security contact details have been updated successfully.
- c) To change your username and password:
  - Insert your new username (you may use your email address as your username)
  - Insert your new password
  - Insert your new password again to confirm it
  - Click on <Update & Save>
  - An OTP will be sent to your preferred method of communication
  - After you have entered the correct OTP, a pop-up message will display confirming that your username and password have been updated successfully.
- d) Two-factor authentication is an additional security measure and requires you to provide your password as well as a second factor of authentication to login to eFiling. To switch on two-factor authentication:
  - Select the button to switch on two-factor authentication
  - Select the option <One time pin to preferred method of communication>. Note: additional options will be added to the system at a later stage.

- An OTP will be sent to your preferred method of communication
- After you have entered the correct OTP, a pop-up message will display confirming that your two-factor authentication has been successfully activated.

**Illustration:**



## 8.2 PORTFOLIO MANAGEMENT

This function is used to link, unlink and add various portfolios (roles) on your eFiling profile. Example:

- Your individual portfolio to manage your own personal taxes;
- Multiple company portfolios where you are the registered representative (e.g. public officer) or employee and you manage the taxes of those companies
- Multiple tax practitioner portfolios where you manage the taxes of multiple individuals/entities as a tax practitioner.

You can also opt to have all your roles merged into one company or tax practitioner profile if you so wish.

### **Procedure:**

- a) Once you have logged on to eFiling, click on <My Profile> from the menu on the left and select <Portfolio Management>.
- b) The Portfolio Management screen will display for you to link or unlink or add portfolios.
- c) You will be prompted to enter the password for each portfolio that you want to link.
  - If you do not remember the password, click on <Forgot Password> to reset it.
  - After you enter the correct password, a message will display to confirm that the portfolio has been linked.
- d) You can set a default portfolio so that the system automatically displays this portfolio when you login instead of you having to select it each time. To change the default portfolio, click on the ellipses ( ⋮ ) menu icon and then either select <Set as Default> or <Remove Default>.
  - You cannot have more than one default portfolio;
  - Portfolios that are not linked cannot be set as a default profile.
- e) To change the portfolio type, click on the ellipses ( ⋮ ) menu icon and select <Change Portfolio Type>.
  - Select the portfolio type (i.e. Individual / Tax Practitioner / Organisation) from the drop down menu and click on <Save>.
  - You can have multiple Tax Practitioner and Organisation portfolios on your profile.
  - You can only have one Individual portfolio linked to your profile.
- f) You can rename your portfolios for your ease of reference. Click on the ellipses ( ⋮ ) menu icon and select <Rename>. Insert the new description for the portfolio and click on <Save>
- g) To link a new portfolio to your profile, click on <Add Portfolio>. On the pop-up screen, insert the portfolio name, select the <Portfolio Type> and click on <Add Portfolio>.
  - You can choose to set the new portfolio as your default.
  - You can add taxpayers and users to this portfolio.

### **Illustration:**

P

PETER TAXPAYER

Tax Reference Number  
1234567890

Registration Number  
1234567890

My Profile

a

Profile and Preference Setup

Portfolio Management

Special Links

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default	
taxpayer222222 - SARS PTY LTD	1	1	Organisation	Default	Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
taxpayer111111	-	Link	Remove

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Default	
taxpayer222222 - SARS PTY LTD	Default	Go to Portfolio
taxpayer111111 - TAX PTY LTD		Go to Portfolio

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
---------------------	----------------	------	--------

Message

Portfolio taxpayer111111 linked.

OK

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default
Test345 - SARS Pty Ltd	2	1	Organisation	
Test123 - Mr Taxpayer	1	1	Individual	Default

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
---------------------	----------------	------	--------

d

Rename

Change Portfolio Type

Set As Default

Rename

Change Portfolio Type

Remove Default

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default
Test345 - SARS Pty Ltd	2	1	Organisation	
Test123 - Mr Taxpayer	1	1	Individual	Default

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
---------------------	----------------	------	--------

e

Rename

Change Portfolio Type

Set As Default

Portfolio Type

Individual

Tax Practitioner

Organisation

Portfolio Management

Add Portfolio

Linked Portfolio(s)

Portfolio Name	Tax User Count	Tax Payer Count	Portfolio Type	Default
Test345 - SARS Pty Ltd	2	1	Organisation	
Test123 - Mr Taxpayer	1	1	Individual	Default

Unlinked Portfolio(s)

Previous Login Name	Portfolio Name	Link	Remove
---------------------	----------------	------	--------

f

Rename

Change Portfolio Type

Set As Default

Linked Portfolio(s)

Portfolio Name

Mr Taxpayer

Save

Cancel

## 9 FORGOT PASSWORD

### Procedure

- On the eFiling login in screen click on <Forgot Password> and then enter your user name.
- Indicate if you want your OTP to be sent to your email or your cell number. Click on <Send OTP>.
- Insert your new password and retype it to confirm.
  - Click on <Submit>.
  - A pop-up message will display confirming that your password has been changed successfully.
- If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be required to enter your cell number and email address.
  - If we can match your details with our records, an OTP will be sent to you.
  - If we cannot match your details, we will ask you a few questions to authenticate you.
  - If we are still unable to match your details, please call the SARS Contact Centre for further assistance.

### Illustration:



**b** **One Time Pin (OTP)  
Contact Details**

SARS would like to send you an OTP. Please indicate your preferred channel and click Send OTP.

☐ Email
 ☐ Cell Number

Your Preferred Contact  
TE\*\*@TE\*\*.CO.ZA

**Send OTP**

**One Time Pin**

OTP has been sent to the following email  
TE\*\*@T\*\*\*.CO.ZA  
Pin expires in 02:51

1 1 1 1 - 1 2 3 4 5 6

Please enter the last 6 digits of your OTP.

**Resend OTP**
**Submit**

**c** **Forgot Password**

Please enter your new password

New Password  
.....

Confirm Password  
.....

**Submit**

**Message**

Your password has been successfully changed.

OK

**d** **Forgot Password**

Please enter your contact details

Cell Number  
0833333330

Email  
Test1@sars.gov.za

**Next**

**Error**

We could not verify your details at the moment. Please try again later or call the SARS Contact Centre on 0800 00 7277 for assistance.

OK

## 10 FORGOT USERNAME

### Procedure



- a) On the eFiling login in screen click on <Forgot Your Username>. Insert the following particulars
- Cell number
  - Email
  - Indicate if you are a South African citizen
  - ID number (or Passport number if you are not a South African citizen)
  - Tax number (if you have one)
- b) If we can match you personal particulars an OTP will be sent to your email or your cell number. Insert the OTP and click on <Submit>.
- c) Once you have entered the correct OTP, your username will display. You will be prompted to insert a password and retype it to confirm.
- Click on <Submit>.
  - A pop-up message will display confirming that your password has been changed successfully.
- d) If you registered for eFiling prior to 1 July 2019 and did not provide your contact details, you will be prompted to select a preferred channel to receive your OTP.
- If we can match your details with our records, an OTP will be sent to you.
  - If we cannot match your details, we will ask you a few questions to authenticate you.
  - If we are still unable to match your details, please call the SARS Contact Cetnre for further assistance.

**Illustration:**

**Forgot Username**

Please enter ID or Passport number and contact details

Cell Number  
0833333333

Email  
cena@test.co.za

Are you a South African Citizen?\*

☐ Yes ☒ No

Foreign ID / Passport Number  
123456789CE

Tax Number Linked to the Username

Continue

**b**

## One Time Pin

OTP has been sent to the following email  
CE\*\*@T\*\*\*.CO.ZA  
Pin expires in 02:50

1 1 1 1 - 1 2 3 4 5 6

Please enter the last 6 digits of your OTP.

[Resend OTP](#) [Submit](#)

**c**

## Forgot Username

Please enter your new password

Your username is:  
**CENA@TEST.CO.ZA**

New Password  
\_\_\_\_\_

Confirm Password  
\_\_\_\_\_

**Message**

Your password has been successfully changed.

OK

**d**

## One Time Pin (OTP) Contact Details

SARS would like to send you an OTP. Please indicate your preferred channel and click Send OTP.

☐ Email ☒ Cell Number

Your Preferred Contact  
\*\*\*\*\*00000

[Send OTP](#)

## 11 ACCESS TO MY PROFILE

If your tax number(s) is already registered against another party's eFiling profile (e.g. a tax practitioner), you have the option to obtain shared access or revoke the other party's access.

### Procedure:

- a) When you log on to eFiling a message will display stating that our records indicate that you do not have any tax types linked to your current profile. Select the option to link your own tax type (e.g. provisional tax or individual income tax) to your profile.
- b) Select the type of access you require and click on <Submit>:
  - <Obtain View Only Shared Access> - this option will only allow you to view transactions done on your behalf on eFiling
  - <Obtain Full Shared Access> - this option will allow you to have full shared access and the other party will still retain access rights to the tax type
  - <Remove Tax Practitioner Access>
  - <Remove My Access> - This option will display if you currently have shared access with your tax practitioner
  - <Deactivate Tax Type>

### Illustration:

The screenshot shows the SARS eFiling 'My Details' page. The header includes the user's name 'PETER TAXPAYER' and a 'Log Out' link. The sidebar displays the 'Tax Reference Number' and 'Registration Number' (1234567890) with a 'My Profile' button. The main content area has a 'Portfolio' dropdown set to 'Mr Taxpayer' and a 'Tax Payer' dropdown set to 'Individual'. A red circle 'a' is placed near the 'Individual' dropdown. The main text says 'Welcome to SARS eFiling' and 'Our records indicate that you do not have any tax types linked to your current profile. Please make a selection below to update your current profile.' Below this are three numbered links: 1. To link your own tax type, click [here](#); 2. To administer tax types on behalf of others, click [here](#); 3. If you are a registered Tax Practitioner, click [here](#). A red circle 'b' is placed near the first link. The 'Activate your Return Types' section for 'Provisional Tax (IRP6)' shows a message 'Mr FAC have access to this return type 0009000900' and three buttons: 'Obtain View-Only Shared Access', 'Obtain Full Shared Access', and 'Remove Tax Practitioner Access'. The same section is repeated for 'Individual Income Tax (ITR12)' with the message 'Mr FAC Goga have access to this return type 0009000900' and the same three buttons. A 'Submit' button is at the bottom right.

## 12 MANAGE USERS AND TAXPAYERS ON MY PORTFOLIO

### 12.1 MANAGE USERS

#### Procedure:

- a) To manage users linked to a portfolio:
  - Select <User> from the menu on the top
  - Select <User> again from menu on the left
- b) From the menu on the left:
  - Select <Register New> to add a new user to the portfolio:
    - After you have completed the relevant fields, click on <Register>
    - Select the user groups and user roles and click on <Continue>
    - The user's login name will display on the screen.
  - Select <Change Details> to amend a user's details. After you have amended the relevant fields, click on <Update Details>
  - Click on <Delete User> to remove a user from an existing portfolio.

#### Illustration:

The screenshot shows the SARS eFiling 'My Portfolio' interface. The top navigation bar includes 'Home', 'User' (highlighted with a red box), 'Organisations', 'Returns', 'Duties & Levies', 'Services', 'Tax Status', 'Contact', and 'Log Out'. The left sidebar shows the user 'PETER TAXPAYER' with their Tax Reference Number (1234567890) and Registration Number (1234567890). The 'User' menu item is also highlighted in the sidebar. The main content area is titled 'Taxpayers' and contains a table with the following data:

Name of Taxpayer	Company/ ID Number	Tax reference Number	Last Return Filled	Last Accessed	Actions
TAXPAYER, J ()	1234567890		0001-01-01T00:00:00	0001-01-01T00:00:00	<a href="#">View Tax Payer</a>

**PETER TAXPAYER**  
Tax Reference Number: 1234567890  
Registration Number: 1234567890  
[My Profile](#)

**Portfolio:** Test Practitioner  
**Tax User:** TAXPAYER J  
Tax Practitioner

**Register new User**

**Required Details**

Title:  Initials:  First Name:  Surname:

Identification Type:  South African ID  
ID Number:

Do you wish to receive SMS notifications for the following events: ☐ Yes ☐ No

- After activation as an eFiler
- After any payment

Cell Number:

E-mail Address:

Telephone Number: (  )

**Login Account Information**

Login:

Password:

Confirm Password:

The user you are adding will be required to change this password on first login.

This user is a:

☐ Tax Consultant / Tax Practitioner  
☐ Organisation Representative

## 12.2 MANAGE TAXPAYERS

### Procedure:

- To manage taxpayer types linked to a portfolio:
  - Select <Organisations> from the menu on the top
  - Click < Organisation> from menu on the left.
- From the menu on the left:
  - Select <Register New> to add a new taxpayer type (e.g. individual, company, trust) to your portfolio.
    - After you have completed the relevant fields, click on <Continue>
    - Select the taxpayer groups and click on <Continue>
    - A summary of the new taxpayer's details will display. Click on <Continue>
    - Select the return types that you want to activate for the taxpayer. Insert the reference number and click on <Register>.
  - To amend a specific taxpayer's details on your portfolio, search for the taxpayer and then select <Change Details> from the menu on the left.
    - After you have completed the relevant fields, click on <Update Details>
    - Select the taxpayer groups and click on <Continue>
    - A summary of the taxpayer's details will display. Click on <Continue>
    - Select the return types that you want to activate/deactivate for the taxpayer and click on <Register>.

### Illustration:

## 13 ACTIVATE/ DEACTIVATE TAX TYPES

In order to transact (e.g. submit returns, make payments, request statement of account) on specific tax types (e.g. provisional tax), you will need to activate that specific tax type.

### 13.1 INDIVIDUALS

#### Procedure:

- a) To activate/deactivate tax types on your own individual profile.
  - Select <Home> from the menu on the top
  - Select <User> from the menu on the left
  - Select <Tax Types> from the menu on the left
  - Select the check box for the tax type you want to activate (or deactivate)
  - Insert the tax reference number
  - Click on <Register>
  - Once SARS has verified your details, the status will change to 'successfully activated'.

#### Illustration:

**PETER TAXPAYER**

**Tax Reference Number**  
1234567890

**Registration Number**  
1234567890

[My Profile](#)

**User**

[Change Details](#)

[Banking Details](#)

[Tax Types](#)

[Transfer Requests](#)

[Summary](#)

[Change Website Profile](#)

**Portfolio**  
EFILING TEST4

**Tax Payer**  
TAXPAYER J ()

Individual

[Home](#) [Returns](#) [Service](#)

For help on how to deactivate and reactivate tax types, please click [here](#).

Select the electronic returns that you wish to register for:

☐ **Provisional Tax (IRP6)**

Reference Number

Tax Office

Please note that you will automatically be activated to receive SARS notices for this tax type online.

☒ **Individual Income Tax (ITR12)**

Reference Number

Tax Office

Please note that you will automatically be activated to receive SARS notices for this tax type online.

**Status:**  
Successfully Activated

**Note:** Click [Here](#) to activate/deactivate individual Income Tax activation for deceased estate purposes.

**Note:** Click [Here](#) to activate/deactivate individual Income Tax activation for insolvent estate purposes.

☒ **IT Admin Penalty**

Reference Number

Tax Office

Please note that you will automatically be activated to receive SARS notices for this tax type online.

**Status:**  
Successfully Activated

## 13.2 ORGANISATIONS AND TAX PRACTITIONERS

### Procedure:

- To activate/deactivate tax types for taxpayers on your portfolio, click on the ellipses (⋮) menu icon and then search for the specific taxpayer.
- Select <Organisations > from the menu on the top.
  - Select <Organisation> from the menu on the left
  - Select <Organisation Tax Types> from the menu on the left
  - Select the check box for the tax type you want to activate (or deactivate)
  - Insert the tax reference number
  - Click on <Register>
  - Once SARS has verified the details, the status will change to 'successfully activated'

### Illustration:

**PETER TAXPAYER**

**Tax Reference Number**  
1234567890

**Registration Number**  
1234567890

[My Profile](#)

**Home** **User** **Organisations** **Returns** **Duties &**

**Portfolio**  
Test Practitioner

**Tax Payer**  
TAXPAYER J ()

Tax Practitioner

**Taxpayers**

[Portfolio Management](#)

[Profile Settings](#)

[Search Taxpayer](#)



**PETER TAXPAYER**

**Tax Reference Number**  
1234567890

**Registration Number**  
1234567890

**My Profile**

**Organisation**

**Register New**

**Change Details**

**Banking Details**

**Organisation Tax Types**

**Request Tax Types**

**ISV Activation**

**Summary**

**Home User Organisations Returns Duties**

**Portfolio**  
Test Practitioner

**Tax Payer**  
TAXPAYER J ()

**Tax Practitioner**

For help on how to deactivate and reactivate tax types, please click [here](#).

Select the electronic returns that you wish to register for:

☐ **Provisional Tax (IRP6)**

Reference Number

Tax Office **ALBERTON**

Please note that you will automatically be activated to receive SARS notices for this tax type online.

☐ **Individual Income Tax (ITR12)**

Reference Number

Tax Office **ALBERTON**

Please note that you will automatically be activated to receive SARS notices for this tax type online.

**Note: Click Here to activate/deactivate individual Income Tax activation for deceased estate purposes.**

**Note: Click Here to activate/deactivate individual Income Tax activation for insolvent estate purposes.**

☐ **IT Admin Penalty**

Reference Number

Tax Office **ALBERTON**

Please note that you will automatically be activated to receive SARS notices for this tax type online.

☐ **Mineral Royalties (MPR3)**

Reference Number

Tax Office **ALBERTON**

Please note that you will automatically be activated to receive SARS notices for this tax type online.

**Register Reset**

For additional information, please refer to the following guide on the SARS website:

- GEN-ELEC-10-G01 - Guide for Tax Practitioners on eFiling

## 14 CONCLUSION

Please contact SARS should you require any further information which might not be addressed in this guide.

### 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](http://www.sars.gov.za)
- Visit your nearest SARS branch
- Contact your own registered tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 7277
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).