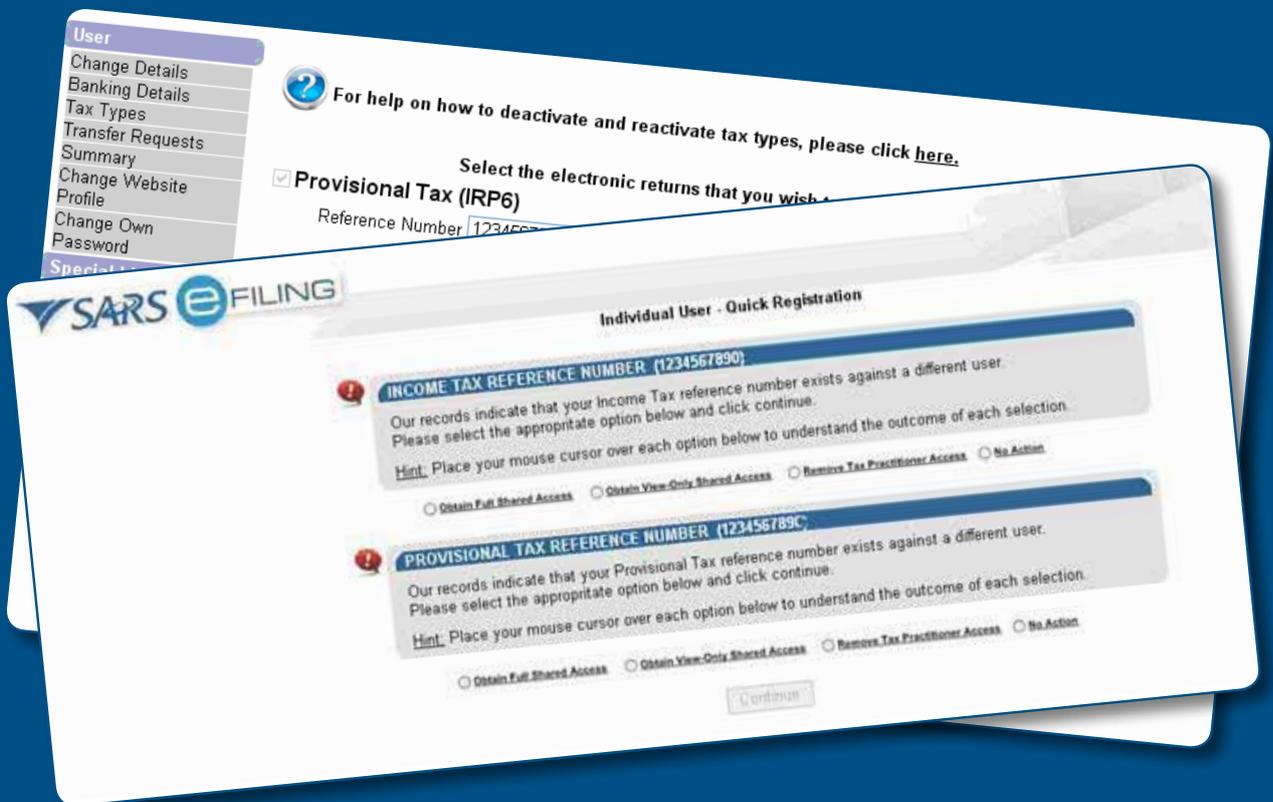


TAXPAYER CENTRICITY
(CLIENT – APPROACH
FUNCTIONALITY ON eFILING)



CONTENTS

WHAT IS TAXPAYER CENTRICITY?	3
FOR WHICH TAX TYPES IS TAXPAYER CENTRICITY CURRENTLY AVAILABLE?.....	3
WHAT DOES THE DIFFERENT TAXPAYER CENTRICTY FUNCTIONALITIES IMPLY?.....	3
WHAT WILL TAXPAYER’S BE ABLE TO DO WITH THIS FUNTIONALITY	3
WHO WILL RECEIVE CORRESPONDENCE FROM SARS?	5
HOW DO I DEACTIVATE/REACTIVATE TAX TYPES?	5
HOW WILL THIS APPEAR ON eFILING?	5
INDIVIDUAL TAXPAYER VIEW	6
TAX PRACTITIONER VIEW	6
SUMMARY OF TASK WHICH CAN BE PERFORMED.....	7
TAX PRACTITIONER.....	7
FOR MORE INFORMATION	8

WHAT IS TAXPAYER CENTRICITY?

- Taxpayer centricity is the client – approach functionality available on eFiling to ensure that an Individual has full control/knowledge of his/her tax affairs. This functionality is available to taxpayers, regardless of whether a tax practitioner submits tax returns on their behalf.

FOR WHICH TAX TYPES IS TAXPAYER CENTRICITY CURRENTLY AVAILABLE?

- Currently the taxpayer centricity functionality is available for Income Tax (ITR12) and Provisional Tax (IRP6) only.

WHAT DOES THE DIFFERENT TAXPAYER CENTRICTY FUNCTIONALITIES IMPLY?

- “Obtain Full Shared Access”, means that you, as well as the tax practitioner, will have full and equal access to all the information pertaining to the associated tax type(s). Once this type of access is requested, immediate authorisation is granted to you. Both you and your tax practitioner will be able to view, complete and submit your tax return(s), update you personal details, etc.
- “Obtain View-Only Shared access” means that you will be able to view all information pertaining to the associated tax type(s), while ensuring that you are unable to edit tax related data, e.g. complete and submit your tax return(s), update you personal details, etc. Full access will remain with your tax practitioner.
- “Remove Tax Practitioners Access”, means you will have full access to all the tax type(s) and you will be fully responsible for liaising with SARS concerning any information relevant to the transferred tax type(s). Access will be granted immediately, and the tax practitioner will not be able to access any of your information pertaining to the linked returns. You will not be able to reactivate the tax practitioner access to your tax type(s), unless the tax practitioner initiates a transfer from his/her profile.
- “Remove My Access”, means that you will not be able to manage or view your tax returns, and full access will be delegated to the tax practitioner with whom you shared your last “Shared Access”.
- Perform “No Action”, means that you will not be able to manage or view your tax returns and full access will remain with the tax practitioner with whom your profile resided. This option can only be access when using the quick registration process. Should a taxpayer during, the quick registration, select this option and thereafter have a change of heart, the taxpayer can login and change the functionality setup.

Note: For more information or help, look for the“?” sign.

ACCESS TO MY PROFILE



For information on how to use this functionality, please click [here](#).

WHAT WILL TAXPAYER’S BE ABLE TO DO WITH THIS FUNTIONALITY

When registering for the first time, you will be able to:

- “Obtain Full Shared Access” with your tax practitioners;
- “Obtain View-Only Shared access” with your tax practitioner;
- “Remove Tax Practitioners Access”; or
- Perform “No Action”.

Individual User - Quick Registration

INCOME TAX REFERENCE NUMBER (1234567890)

Our records indicate that your Income Tax reference number exists against a different user. Please select the appropriate option below and click continue.

Hint: Place your mouse cursor over each option below to understand the outcome of each selection.

Obtain Full Shared Access
 Obtain View-Only Shared Access
 Remove Tax Practitioner Access
 No Action

PROVISIONAL TAX REFERENCE NUMBER (1234567890)

Our records indicate that your Provisional Tax reference number exists against a different user. Please select the appropriate option below and click continue.

Hint: Place your mouse cursor over each option below to understand the outcome of each selection.

Obtain Full Shared Access
 Obtain View-Only Shared Access
 Remove Tax Practitioner Access
 No Action

Continue

- If you are already registered as an eFiler, you must do the following to effect this functionality:
 - Select "Home"
 - Select "Tax Types"
 - Select "Click here to edit the access to your tax types"

User

- Change Details
- Banking Details
- Tax Types
- Transfer Requests
- Summary
- Change Website Profile
- Change Own Password

Special Links

? 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: 1234567890
 Tax Office: ALBERTON

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

Status: Return Successfully Activated. Access is shared with TaxPrac CC.

[Click here to edit the access to your tax types.](#)

Personal Income Tax (ITR12)

Reference Number: 1234567890
 Tax Office: ALBERTON

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

Status: Return Successfully Activated. Access is shared with TaxPrac CC.

[Click here to edit the access to your tax types.](#)

Register Reset

- Determine the access required; and

Note: For more information or help, look for the "?" sign.

- Select the applicable access required.
- Details of the organisation with access to your profile will appear on the "Access to my profile" page.

MY DETAILS		DETAILS OF ORGANISATION WITH ACCESS	
Taxpayer Name:	Mr J Doe	Organisation Name:	TaxPrac CC
Return Type:	ITR12	Practice Number:	2001/123456/06
Tax Reference Number:	1234567890	Email Address:	
Status:	Successfully Activated		

ACCESS TO MY PROFILE	
The options below are available to you. Please select an appropriate action or click on the 'Back' button to return to the previous screen.	
<input type="button" value="Obtain View-Only Shared Access"/>	<input type="button" value="Remove My Access"/>
<input type="button" value="Remove Tax Practitioner Access"/>	<input type="button" value="Deactivate Tax Type"/>
<input type="button" value="Back"/>	

WHO WILL RECEIVE CORRESPONDENCE FROM SARS?

- If you selected "Obtain Full Shared Access" with your tax practitioner, then both you and your tax practitioner will receive all correspondence from SARS. The correspondence will automatically be sent to each of the email addresses captured against your profiles that share access.

HOW DO I DEACTIVATE/REACTIVATE TAX TYPES?

- To deactivate or reactive tax types for:
 - Tax Practitioner who do not share access with individuals for ITR12 and/or provisional tax;
 - Tax Practitioners who share access with Individuals for ITR12 and/or provisional tax;
 - Individuals who do not share access with Practitioners for ITR12 and/or provisional tax;
 - Individuals who share access with Practitioners for ITR12 and/or provisional tax
- Select "Home"
- Select "Tax Types"
- Click on "For help on how to deactivate and reactivate tax types, please click here".



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

- Should you decide to remove your access, the following message will appear:



- If you wish to continue, select "Ok", and full access will be delegated to the tax practitioner.

HOW WILL THIS APPEAR ON eFILING?

- For both taxpayers and tax practitioners, when logging onto your "Income Tax Work Page", you can view who you have "Shared Access With" and if any information has been updated viewing "Last Updated By".

INDIVIDUAL TAXPAYER VIEW

SARS eFILING

HOME RETURNS SERVICES CONTACT LOGOUT Taxpayer List: **Mr J Doe (Shared PTAX)**

INCOME TAX WORK PAGE

Get ADOBE FLASH* PLAYER Get ADOBE READER*

Taxpayer Name: Mr J Doe
Tax Period: 2010
Tax Reference: 1234567890
Return Type: ITR12

eFiling Status: Saved
Shared Access With: TaxPrac CC

Open my return with Flash Player ADOBE Reader

RETURN TYPE	STATUS	DATE	LAST UPDATED BY	VERSION	CALCULATION RESULTS
ITR12	Saved	2010/06/22	Mr J Doe	1	View

Tax Calculator Refresh IRP5 Data Manually Submitted Request Historic Documents

TAX PRACTITIONER VIEW

SARS eFILING

HOME ORGANISATIONS RETURNS SERVICES CONTACT LOGOUT Taxpayer List: **Doe J (Mr)**

INCOME TAX WORK PAGE

Get ADOBE FLASH* PLAYER Get ADOBE READER*

Taxpayer Name: Mr J Doe
Tax Period: 2010
Tax Reference: 1234567890
Return Type: ITR12

eFiling Status: Saved
Shared Access With: Mr J Doe

Open my return with Flash Player ADOBE Reader

RETURN TYPE	STATUS	DATE	LAST UPDATED BY	VERSION	CALCULATION RESULTS
ITR12	Saved	2010/06/22	Mr J Doe	1	View

Tax Calculator Refresh IRP5 Data Manually Submitted Request Historic Documents

SUMMARY OF TASK WHICH CAN BE PERFORMED

- The table below summarise the task which can be performed by a taxpayer, depending on the functionality selected

-  Denotes a task which can be performed
-  Denotes a task which cannot be performed

INDIVIDUAL TAXPAYER

FUNCTIONALITY SELECTED	VIEW ALL TAXPAYER INFORMATION	CHANGE/UPDATE TAX-PAYER INFORMATION	SUBMIT RETURNS	LODG DISPUTE (OBJECTION/ APPEAL)	CORRESPONDENCE FROM SARS RECEIVED
Obtain Full Shared Access					
Obtain View-Only Shared Access					
Remove Tax Practitioner Access					
Remove My Access					
No Action					

- The table below represent the task which the tax practitioner will be able to perform, depending on the functionality selected by the taxpayer.
- A tax practitioner's existing functionality will remain unchanged, provided the taxpayer does not select the "Obtain Share Access" or "Remove Tax Practitioner Access" functionality.

-  Denotes a task which can be performed
-  Denotes a task which cannot be performed

TAX PRACTITIONER

FUNCTIONALITY SELECTED	VIEW ALL TAXPAYER INFORMATION	CHANGE/UPDATE TAX-PAYER INFORMATION	SUBMIT RETURNS	LODG DISPUTE (OBJECTION/ APPEAL)	CORRESPONDENCE FROM SARS RECEIVED
Obtain Full Shared Access					
Obtain View-Only Shared Access					
Remove Tax Practitioner Access					
Remove My Access					
No Action					

FOR MORE INFORMATION

- Call the SARS Contact Centre on 0800 00 SARS (7277) Helpdesk operating hours : 08h00 - 17h00 (excluding weekends and public holidays); or
- Email your queries to eFilingAssist@sars.gov.za, which could take up to 24 hours (excluding weekends and public holidays) for a response;
- Visit you local SARS Branch; or
- Refer to "How to eFile your Tax Return", available on the SARS website www.sars.gov.za, or
- Refer to "How to eFile your Provisional Tax Return", available on the SARS website www.sars.gov.za.
- Refer to "How to eFile your Provisional Tax Return" available on the SARS website www.sars.gov.za.

