

## PERSONAL INCOME TAX (PIT)

TAXPAYER CENTRICITY  
(CLIENT – APPROACH FUNCTIONALITY  
ON eFILING)

## 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. SARS eFiling will be extending this functionality to all other tax types (e.g. VAT, PAYE etc) in the near future.

## WHAT DOES THE DIFFERENT TAXPAYER CENTRICITY FUNCTIONALITIES IMPLY?

- “Obtain 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.
- “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”.
- “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.

**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 FUNCTIONALITY

- When registering for the first time, you will be able to:
  - “Obtain Shared Access” with your tax practitioners;
  - “Remove Tax Practitioners Access”; or
  - Perform “No Action”.

Individual User - Quick Registration

**INCOME TAX REFERENCE NUMBER(2314469145)**

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 Shared Access
 Remove Tax Practitioner Access
 No Action

**PROVISIONAL TAX REFERENCE NUMBER(2314469145)**

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 Shared Access
 Remove Tax Practitioner Access
 No Action

- 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

Tax Office

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

Tax Office

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.](#)

- 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:	2314469145	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="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 to share access with your tax practitioner, then both of you will receive all correspondence from SARS, via e-mail.
- On the "Change Details" page, insert your cellphone number and e-mail address in the fields provided to which all correspondence will be sent. This information is mandatory and must be completed.
- Additional fields have been created to enter a telephone number and/or an alternative e-mail address. If you enter your tax practitioners e-mail address in the fields provided of your tax practitioner, all correspondence sent by SARS to you will be sent to your tax practitioner as well.

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:	2314469145	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.

## 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

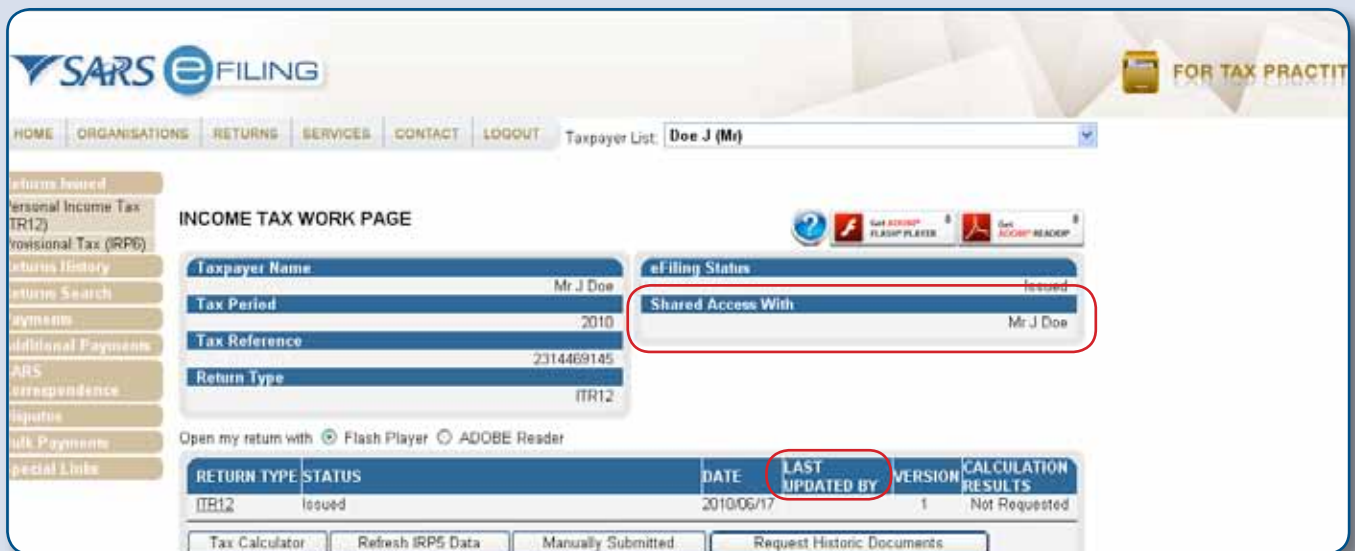
**INCOME TAX WORK PAGE**

Taxpayer Name: Mr J Doe | eFiling Status: Issued

Shared Access With: TaxPrac CC

RETURN TYPE	STATUS	DATE	LAST UPDATED BY	VERSION	CALCULATION RESULTS
ITR12	Issued	2010/06/17		1	Not Requested

## TAX PRACTITIONER VIEW



## SUMMARY OF TASK WHICH CAN BE PERFORMED

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

**Note:** A tax practitioner's existing functionality will remain unchanged, provided the taxpayer does not select the "Obtain Shared Access" functionality.

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

## INDIVIDUAL TAXPAYER

FUNCTIONALITY SELECTED	VIEW ALL TAXPAYER INFORMATION	CHANGE/UPDATE TAXPAYER INFORMATION	SUBMIT RETURNS	LODG DISPUTE (OBJECTION/ APPEAL)	CORRESPONDENCE FROM SARS RECEIVED
Obtain 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](mailto:eFilingAssist@sars.gov.za), which could take up to 24 hours (excluding weekends and public holidays) for a response; or
- Visit your local SARS branch; or
- Refer to "How to eFile your Tax Return" available on the SARS website [www.sars.gov.za](http://www.sars.gov.za), or
- Refer to "How to eFile your Provisional Tax Return" available on the SARS website [www.sars.gov.za](http://www.sars.gov.za).



[www.sars.gov.za](http://www.sars.gov.za)