

EXTERNAL

FREQUENTLY ASKED QUESTIONS

TAXPAYER CENTRICITY (CLIENT – APPROACH

FUNCTIONALITY ON eFILING)

1 PURPOSE

- These FAQs provide general information regarding taxpayer centricity, which is a new eFiling functionality introduced and effective from the 2010 Filing Season.

2 SCOPE

- This document addresses the basic questions in relation to taxpayer centricity.
- The target audiences are:
 - Taxpayers; and
 - Tax practitioners.

3 REFERENCES

3.1 LEGISLATION

TYPE OF REFERENCE	REFERENCE
Legislation and rules administered by SARS:	Income Tax Act 58 of 1962
Other legislation:	None
International instruments:	None

3.2 CROSS REFERENCES

DOCUMENT #	DOCUMENT TITLE	QUALITY REQUIREMENTS
	Personal Income Tax (PIT) – Taxpayer Centricity (Client – approach functionality on eFiling)	All
AS-EF-05-S1	External SOP – eFiling Registration	All
AS-EF-10-S1	Internal SOP – Activate or deactivate eFiler	All

4 DEFINITIONS AND ACRONYMS

eFiling	Internet based channel which allows taxpayers to capture and submit their returns. eFiling registration can be applied for at http://www.sarsefiling.co.za .
FAQ	Frequently asked question
IT	Income Tax
PTAX	Provisional Tax
SARS	South African Revenue Service
SOP	Standard operating procedure
TPS	Taxpayer Service

5 FREQUENTLY ASKED QUESTIONS

QUESTION	ANSWER
1. What is taxpayer centricity?	Taxpayer centricity is the client – approach functionality available on eFiling that enables an Individual to have full control/knowledge of his/her tax affairs. This functionality is available to you, regardless of whether a tax practitioner submits tax returns on your behalf.
2. 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 .
3. What are the different taxpayer centricity	The different taxpayer centricity functionalities are: <ul style="list-style-type: none"> ▫ “Obtain Shared Access” with your tax practitioners;

QUESTION	ANSWER
functionalities?	<ul style="list-style-type: none"> ▫ “Remove Tax Practitioners Access”; ▫ Perform “No Action”; or ▫ “Remove My Access”.
4. What does “Obtain Shared Access” mean?	<p>“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 by clicking this button, 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.</p>
5. What does “Remove Tax Practitioners Access” mean?	<p>“Remove Tax Practitioners Access” means you will have full access to all your 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.</p>
6. What does perform “No Action” mean?	<p>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 you during, the quick registration, select this option and thereafter have a change of heart, you can login and change the functionality setup.</p>
7. What does “Remove My Access” mean?	<p>“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”.</p>
8. How do I activate/access these functionalities?	<p>To activate/access these functionalities, you must:</p> <ul style="list-style-type: none"> ▫ Register for eFiling, if not registered already, and during the quick registration process will be given the option to select the applicable functionality required; or ▫ If registered against an Individual profile within which shared access already exist: <ul style="list-style-type: none"> ○ Logon to eFiling ○ Select “Home” ○ Select “Tax Types” ○ Select “Click here to edit the access to your tax types” ○ Determine the functionality required; and ○ Select the applicable access required. ○ Details of the organisation with access will appear on the “Access to my profile” page. ▫ If registered against an Individual profile but the tax type is linked to a different user profile: <ul style="list-style-type: none"> ○ Logon to eFiling ○ Select “Home” ○ Select “Tax Types”; ○ Capture the reference number in the corresponding box and click “Register”; ○ A message will be displayed advising the taxpayer of the existing reference number. Select “Click here to edit the access to your tax types”; ○ Determine the functionality required; and ○ Select the applicable access required.
9. I have registered for eFiling, and received my login details,	<p>If you has registered for eFiling and received your login details, but cannot view any of your returns, attempt to logon to the system again</p>

QUESTION	ANSWER
but cannot view any of my returns? What should I do?	after 24 hours. If after 24 hours the problem still persists, you should contact SARS via one of the applicable channel, refer to question 13 below.
10. How do I deactivate/reactivate tax types?	<p>To deactivate/reactivate tax types:</p> <ul style="list-style-type: none"> <p>▫ For Tax Practitioners who do not share access with Individuals for ITR12 and/or PTAX:</p> <ul style="list-style-type: none"> ○ To deactivate, remove the tick from the checkbox alongside the tax type and then click on the “Register”; ○ The tax type will then remain on the profile and in a deactivated status. The status field alongside it will reflect the change that was applied; ○ To reactivate, tick the checkbox alongside the tax type and then click on the “Register” button; ○ The tax type will be activated and the status field alongside it will be updated to reflect this change. <p>▫ For Tax Practitioners who share access with Individuals for ITR12 and/or PTAX:</p> <ul style="list-style-type: none"> ○ To deactivate, remove the tick from the checkbox alongside the tax type and then click on the ‘Register’ button; ○ The tax type will be immediately removed from the Practitioner profile and subsequently transferred to the Individual’s profile where it will remain activated; ○ In order to regain access to the tax type, a transfer request must be initiated from the Practitioner to the Individual; ○ On receipt of the transfer request, an Individual may choose to authorise a full transfer or shared access of the requested tax type to the Practitioner. <p>▫ For Individuals who do not share access with Practitioners for ITR12 and/or PTAX:</p> <ul style="list-style-type: none"> ○ To deactivate, remove the tick from the checkbox alongside the tax type and then click on the ‘Register’ button; ○ The tax type will then remain on the profile and in a deactivated status. The status field alongside it will reflect the change that was applied; ○ To reactivate, tick the checkbox alongside the tax type and then click on the ‘Register’ button; ○ The tax type will be activated and the status field alongside it will be updated to reflect this change. <p>▫ For Individuals who share access with Practitioners for ITR12 and/or PTAX:</p> <ul style="list-style-type: none"> ○ When a tax type is shared with a Practitioner, the checkbox alongside it will be disabled; ○ Click on the link below the tax type i.e. ‘Click here to edit the access to your tax types’; ○ The ‘Access To My Profile’ page will be displayed; ○ Click on the ‘Deactivate Tax Type’ button of the applicable tax type; ○ A confirmation pop-up box will be displayed. Click on ‘OK’ to continue with the deactivation request;

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	<ul style="list-style-type: none"> ○ In doing so, the shared access link between the Individual and the Practitioner will be severed i.e. The tax type will be immediately removed from the Practitioner's profile and will be subsequently transferred to the Individual profile against which it will be deactivated; ○ A confirmation of the change will be displayed. Select the 'Back' button to be directed back to the 'Tax Types' page; ○ To reactivate again, tick the checkbox alongside the tax type on the 'Tax Types' page and then click on the 'Register' button; ○ The tax type will be activated and the status field alongside it will be updated to reflect this change. Note that the Practitioner will no longer share access to this tax type unless he/she requests a transfer. ○ If a second tax type exists in a shared status, the Individual may reactivate the deactivated tax type by selecting the 'Activate Tax Type' button which will be available from within the 'Access To My Profile' page.
<p>11. Where can I access help or more information if required?</p>	<p>You must look for the question mark "?" sign to access help or more information.</p>
<p>12. Who will receive correspondence from SARS?</p>	<p>Correspondence from SARS will be received by the parties, so determined by the functionality selected.</p> <ul style="list-style-type: none"> ▫ If "Obtain Shared Access" was selected, both the you and your tax practitioner will receive any correspondence sent from SARS to the email address captured against your profiles, ▫ If "Remove Tax Practitioners Access" was selected, only you will receive correspondence from SARS. ▫ If "Remove My Access" was selected, only your tax practitioner will receive correspondence from SARS.
<p>13. What features have been added, on the IT Work Page, PTAX Work Page and the Dispute Work Page, if shared access exists between me and my tax practitioner?</p>	<p>The additional features which have been added to the IT Work Page, PTAX Work Page and the Dispute Work Page, and will be available to both you and your tax practitioner are:</p> <ul style="list-style-type: none"> ▫ A "Shared Access With" section which has been included, informing the user who has shared access to the specified tax type(s); and ▫ A "Last Updated By" section has been included, to accurately record if any user has affected changes, and to notify the other user of this.
<p>14. Who can I contact should I require more information?</p>	<p>You can:</p> <ul style="list-style-type: none"> ▫ Call the SARS Contact Centre on 0800 00 SARS (7277), Helpdesk operating hours: 08:00 – 17:00 (excluding weekends and public holidays); or ▫ Email their queries to eFilingAssist@sars.gov.za, which could take up to 24 hours (excluding weekends and public holidays) for a response; or ▫ Visit their local SARS Branch.

6 QUALITY RECORDS

Number	Title
ITR12	Income tax return for individuals
IRP6	Return for payment of provisional tax

7 DOCUMENT MANAGEMENT

Designation	Name / Division
Business owner:	Group Executive: Contact Centre & Group Executive: TPS
Policy owner:	Executive: EBE – Process Solutions – Assessment, Enforcement and Services Portfolio
Author:	T. Klassen
Detail of change from previous revision:	Revision 0 – Initial Release (01.07.2010)
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