# ADMINISTRATION OF THE NEW ACCESS RIGHTS FUNCTIONALITY ON eFILING

2009 Tax Season

SARS
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# Contents

# 1. INTRODUCTION

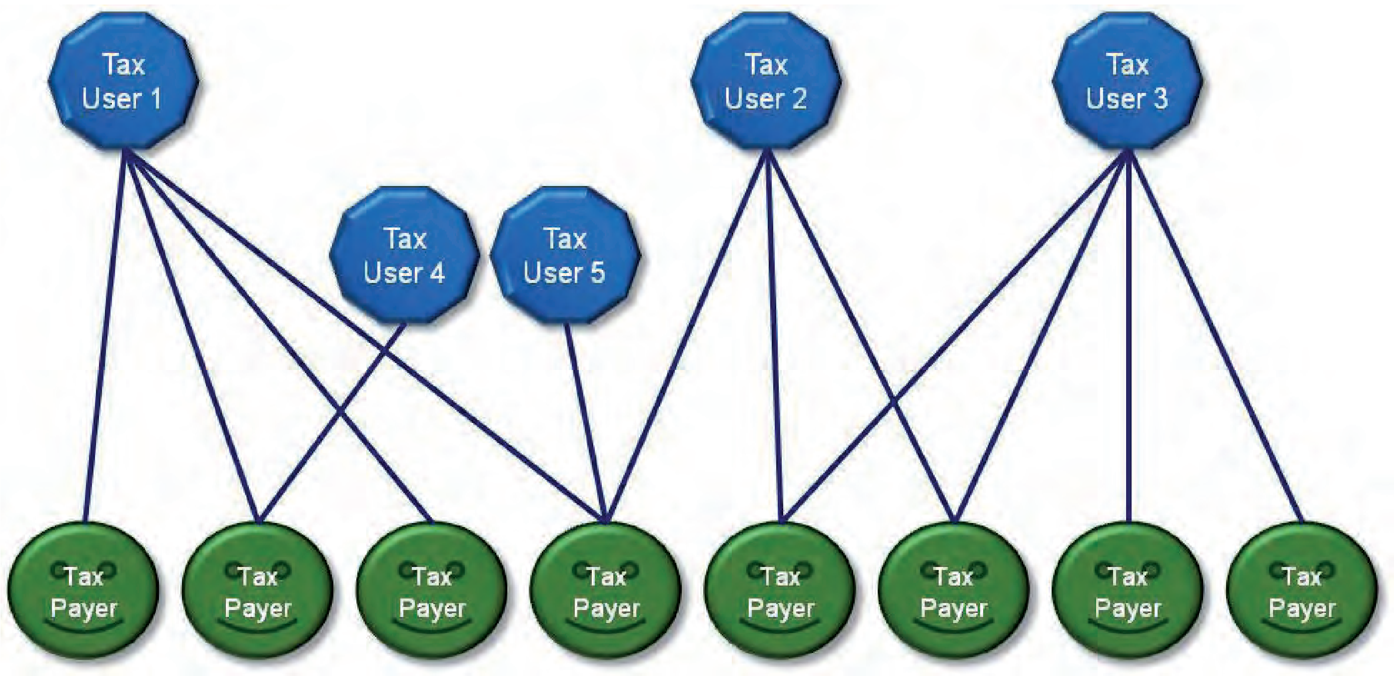
The **eFiling System** has been enhanced to allow Tax Practitioners and representatives to better manage their taxpayers and tax users in a more user friendly manner.

The enhanced functionality is accessible to existing tax practitioners and organisational representatives as well as to users registering for the first time.

The new functionality includes the following features:

- The creation of groups and assigning of tax payers and users to these groups.
- New tax users and taxpayers can easily be added to the groups; the rights will automatically be assigned to the users based on those groups.
- Managing tax users' authorization levels and user roles within specific groups.
- A new organisation that links all users and taxpayers.
- User friendly interface.
- Drag and drop the tax users across groups with different authorization levels.

## 1.1 The Current Setup



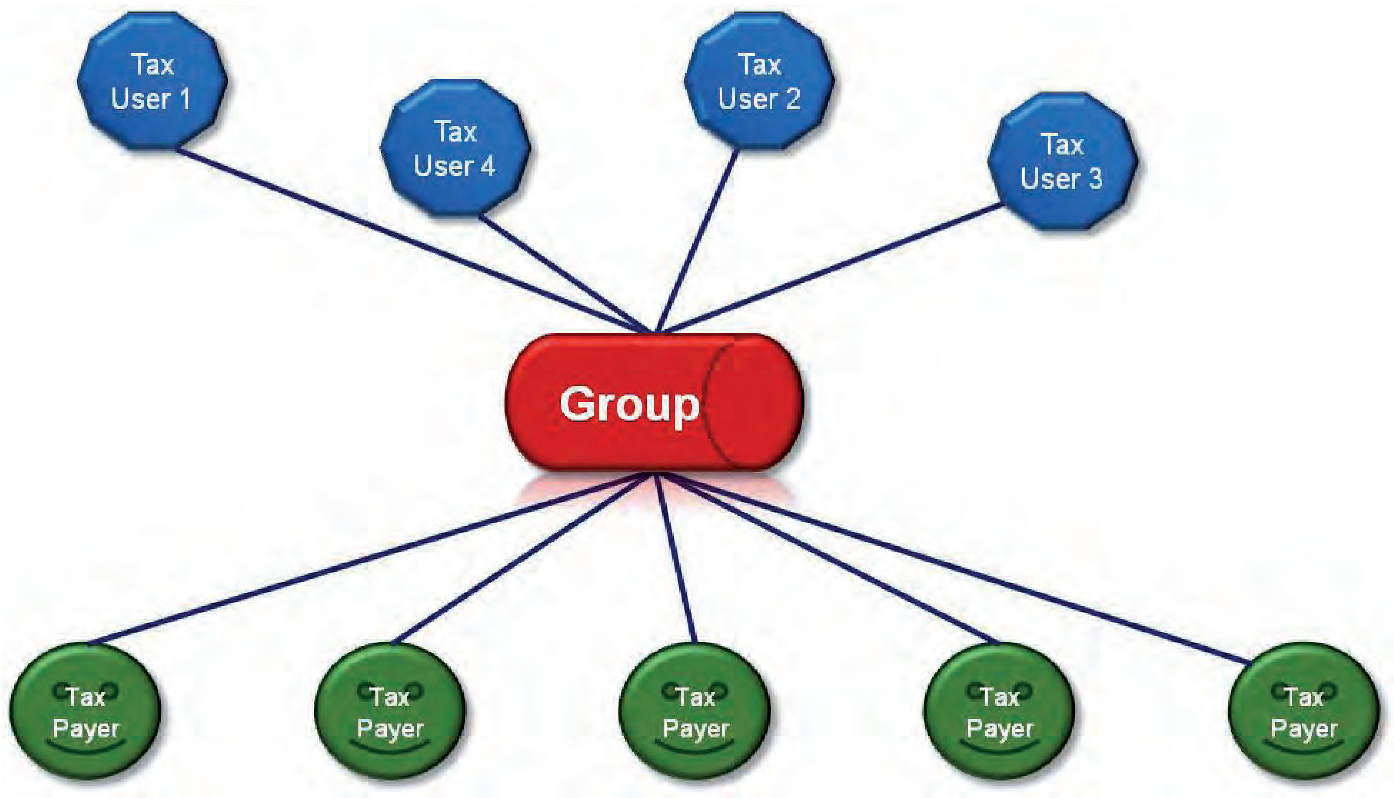

**The Problem:**

Tax User 1, in the example above, is the original organisation administrator who has created other users as well as two administrators Tax User 2 and Tax User 3. The problem arises when these administrators add tax payers (the four on the right) without granting rights to the original administrator. These new tax payers are therefore not visible to the administrator Tax User 1. This is not ideal in any tax practice or organisation that manages multiple tax entities. Should either Tax User 2 or Tax user 3 leave the organisation without sorting out the access rights, a problem emerges.

## 1.2 The New Setup (With Groups)

In the new organisation setup, users are no longer granted rights to tax payers at the tax payer level, but rather at a group structure, as reflect in the diagram below. This grouping allows users to be linked to tax payers via the group structure, allowing for better and easier control.

The steps to begin using the new structure are based on assigning the right default organisation to the default admin group. The list of users and taxpayers need to be confirmed as being correct. After this the correct rights can be granted by create the appropriate grouping in line with the way the organisation works. The example below explains how to setup the main elements of the new organisation structure.




**Example:**

J van Der Merwe works for ABC Tax Consultants and is responsible for setting up the access rights for J Kruger, S Singh and D Phiri:

- ABC Tax Consultants is the **Holding Company**
- J van Der Merwe is the Tax User; and
- J Kruger, S Singh and D Phiri are the **Taxpayers**.

For existing tax practitioners, a **default organisation** was created under your profile.Please log on to your profile to confirm that this is your correct organisation.

For new registrations the registered tax user is the default admin user for the organisation which was registered.

By default this admin user is linked to an 'AdminDefault' group with full authorization level, and is able to:

- Setup new groups and register other tax users from his/her organisation
- Assign specific authorization levels and user roles to these new tax users, as well as
- The registration of new taxpayers and assigning them to new groups which were setup.

# 2. HOW DO I USE THE NEW FUNCTIONALITY

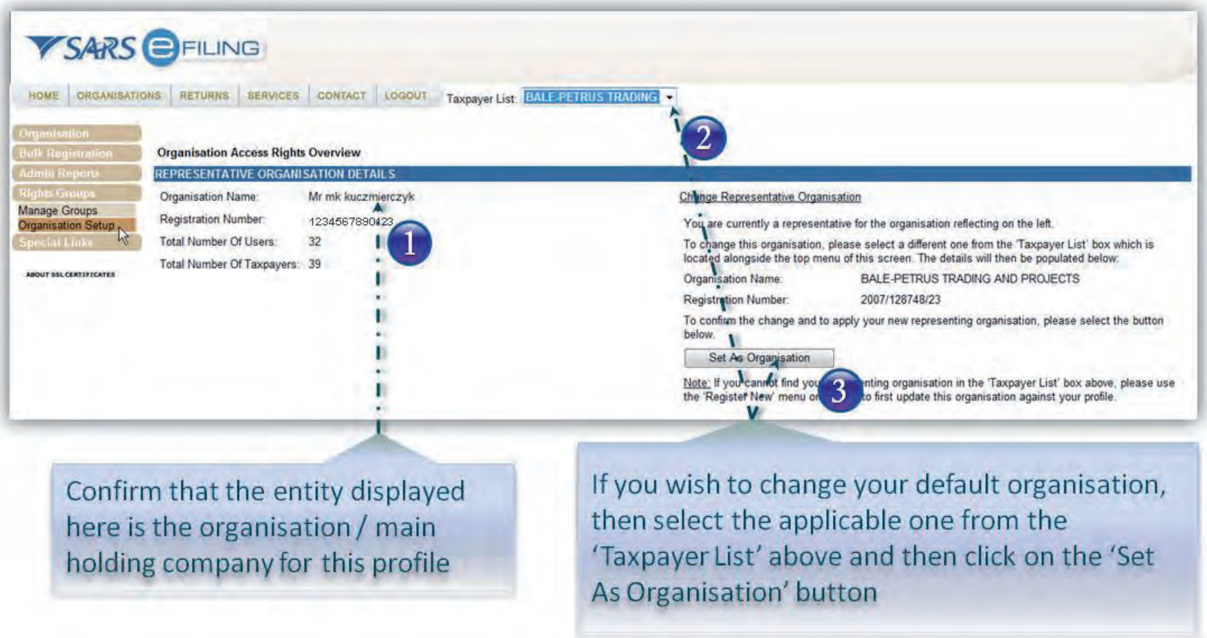
The rest of this guide will explain how you should go about configuring the new groups, assigning the users to the groups and then how to assign taxpayers and access rights to groups.

Firstly, go to the SARS eFiling website, www.sarsefiling.co.za, and log in under your profile.

## 2.1 Confirming / Setting your Default Organisation

As part of the new functionality a default organisation was created for each user. Follow the steps below to confirm your default organisation or to change your default organisation.

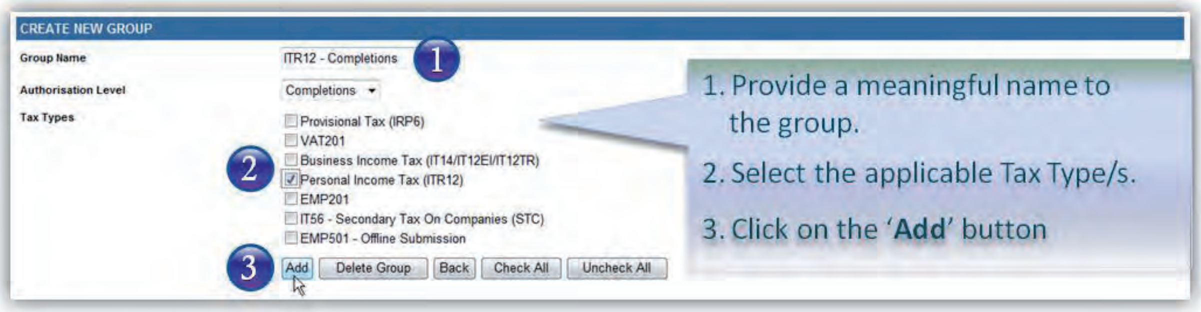
Click on *Organisations* *Rights Groups* *Organisation Setup*



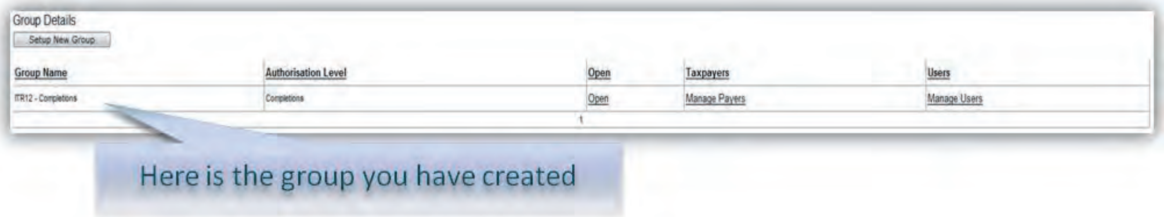

A Group is a logical way to cluster taxpayers together so that you can manage them in an easy way. You can configure the groups any way you feel appropriate for your organisation:

- Groups can be created according to the different partners of the tax practice, with all the taxpayers belonging to one partner in a specific group;
- Groups can be created according to the different regional offices of the organisation, for example all the Pretoria taxpayers can be organised into a Pretoria group;
- Groups can be created according to the different tax types, for example a VAT groups and an Income Tax group;

**Note:**
Keep your group structure as simple as possible. The more elaborate and complex your group structure is, the more difficult it will be to manage.




A confirmation message will be displayed once the group has been successfully added.



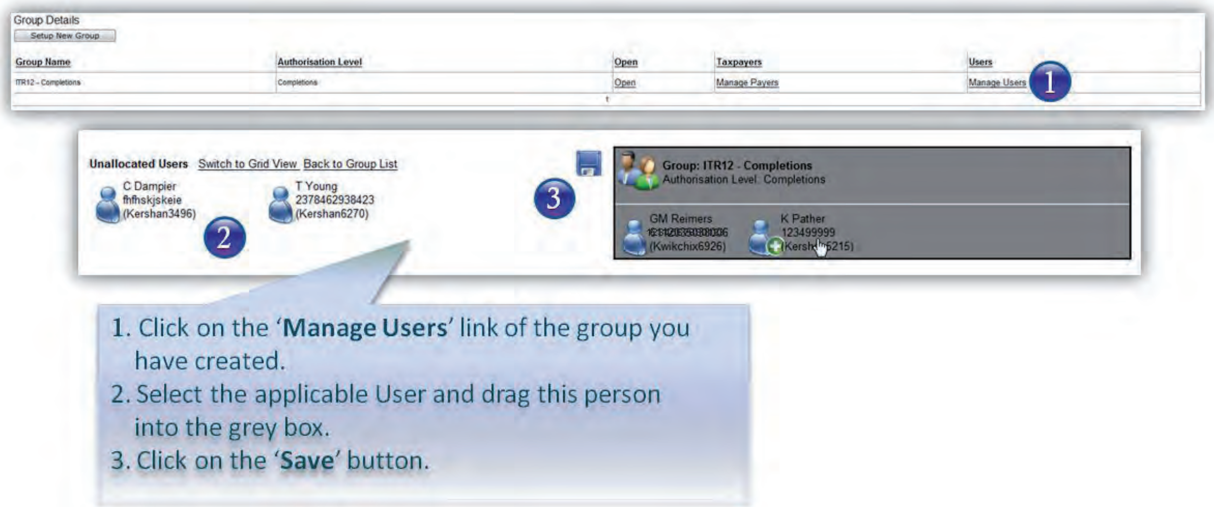

To edit the authorisation level of a specific group:

- Click on the 'Open' link alongside the relevant group;
- Edit the authorisation level and tax types.

## 2.2 Linking Users to Unique Groups

Click on *Organisations* *Rights Groups* *Manage Groups* *Setup New Groups*

You can graphically assign users to groups by dragging a user and dropping it into a group. Users can be unassigned by dragging them from the group to the user area.

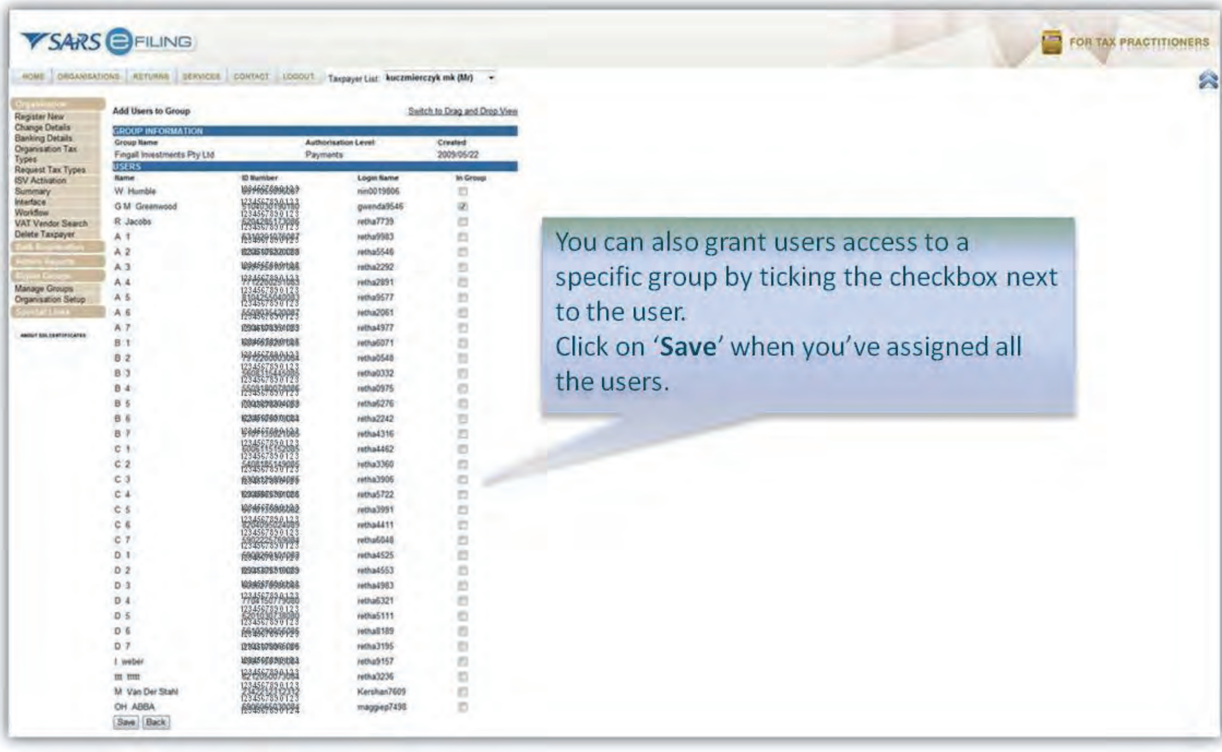



**Note:**

The functionality allows default taxpayers to view their tax users through a Grid or Drag and drop view by clicking: Rights Groups; Manage Groups; Manage Users; and Switch to Grid View.

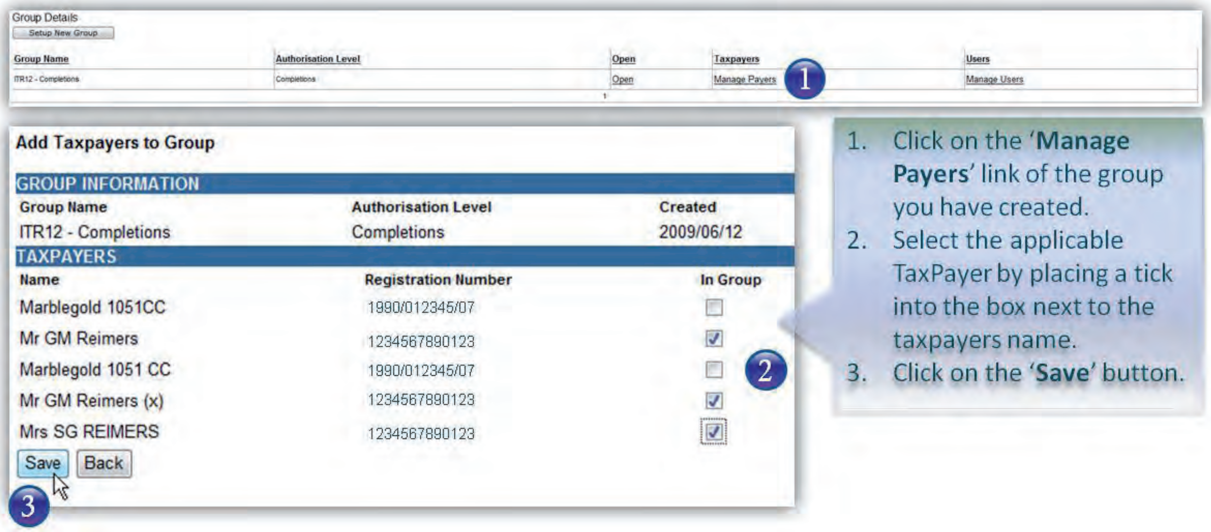
There is an alternative way of assigning users to groups.

Click on "Switch to Grid View" link next to Unallocated Users for the alternate view of user list shown below.

## 2.3 Linking Taxpayers to Unique Groups

Click on *Organisations* *Rights Groups* *Manage Groups* *Setup New Groups*

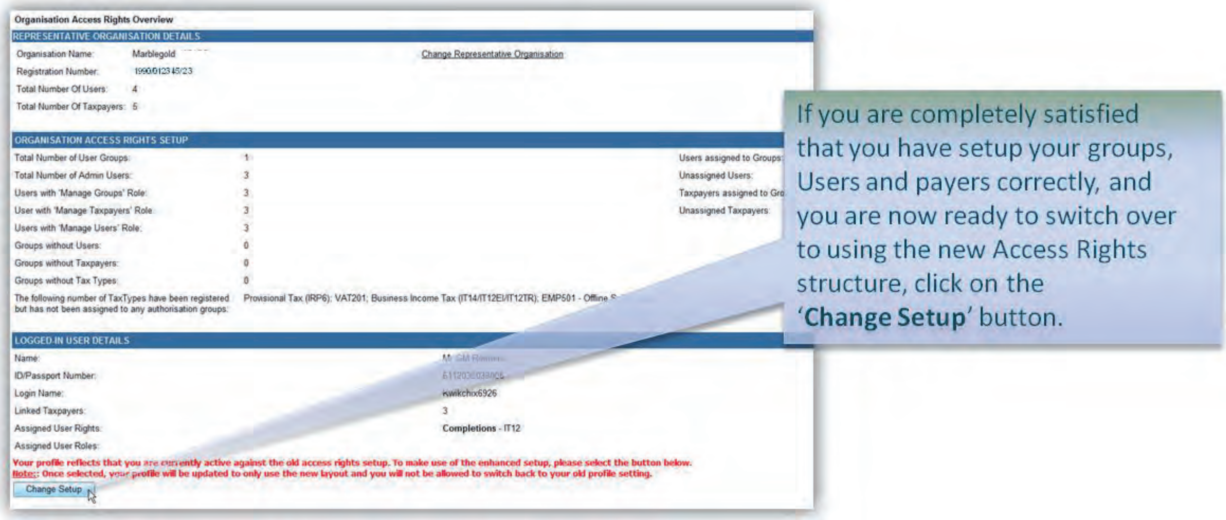



## 2.4 Switching over to new Access Rights Functionality

**Note:**
You should only switch over to the new functionality once you are certain that you can setup your access rights correctly and you that you have assigned all your taxpayers.

Click on *Organisations* *Rights Groups* *Manage Groups* *Organisation Setup*

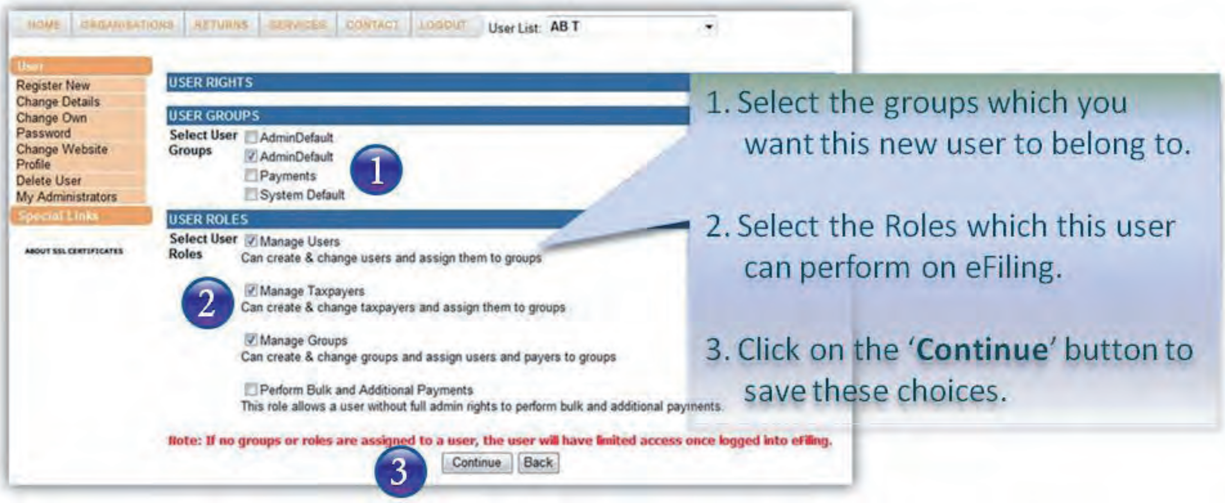
Click on Change Setup as shown below. You will now be able to manage your access rights in the new way.

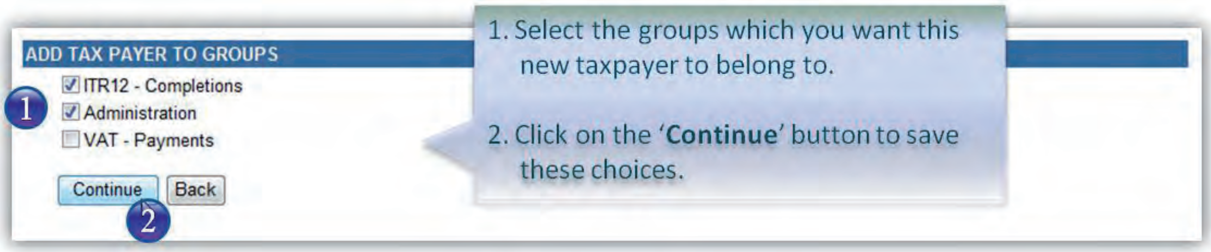


## 2.5 Adding new Users and Linking them to Unique Groups

Click on *Home* *Register New*

Capture the new user's details and click on 'Continue'. Then complete the access rights shown below.




## 2.6 Merging of different Profiles

As part of the new setup process certain admin users will now have their own profile. If there are more than one administrative user in your organisation each having their own profile, you can now merge these profiles into one in order to better manage your organisation's profile and information.

Keep the following points in mind when requesting a merge of profiles:

- A merge can only be sent from an admin user to another admin user.
- Merge requests can only be initiated from profiles using the new access rights setup. Users in the old setup will not have access to requesting merges.
- Merge requests can be sent to users in both the old and new access rights setup.
- Where a user in the old setup accepts a merge request, this user's setup will then be changed to only use the new access rights layout.
- Prior to accepting a merge request, it is advisable for a user to setup groups and to then allocate all his / her users and taxpayers accordingly. This will ensure that once the merge is accepted, all these groups and grouping rules will be transferred over onto the requesting user's profile. The requesting user will then only need to assign roles to the requested user.
- If no groups are setup prior to accepting a merge, the requested user will not have rights to any of his/her users and taxpayers. The requesting user must then assign all the transferred taxpayers and users into groups and then grant the applicable rights to the requested user.
- A request cannot be sent to a user configured as an "Individual" profile. If attempted, a warning message will be displayed.
- A merge between Organisation and Tax Practitioner Profiles is allowed. However, the user accepting the request will then have his / her website profile changed to that of the requesting user.
- Once a merge request is submitted, an email notification (addressed to the intended user) will be sent to all admin users against both profiles. This serves as information to all the admin users. Note that the actual request record will only appear on the receipting administrator's eFiling profile so it is only this user who may accept or decline the request.

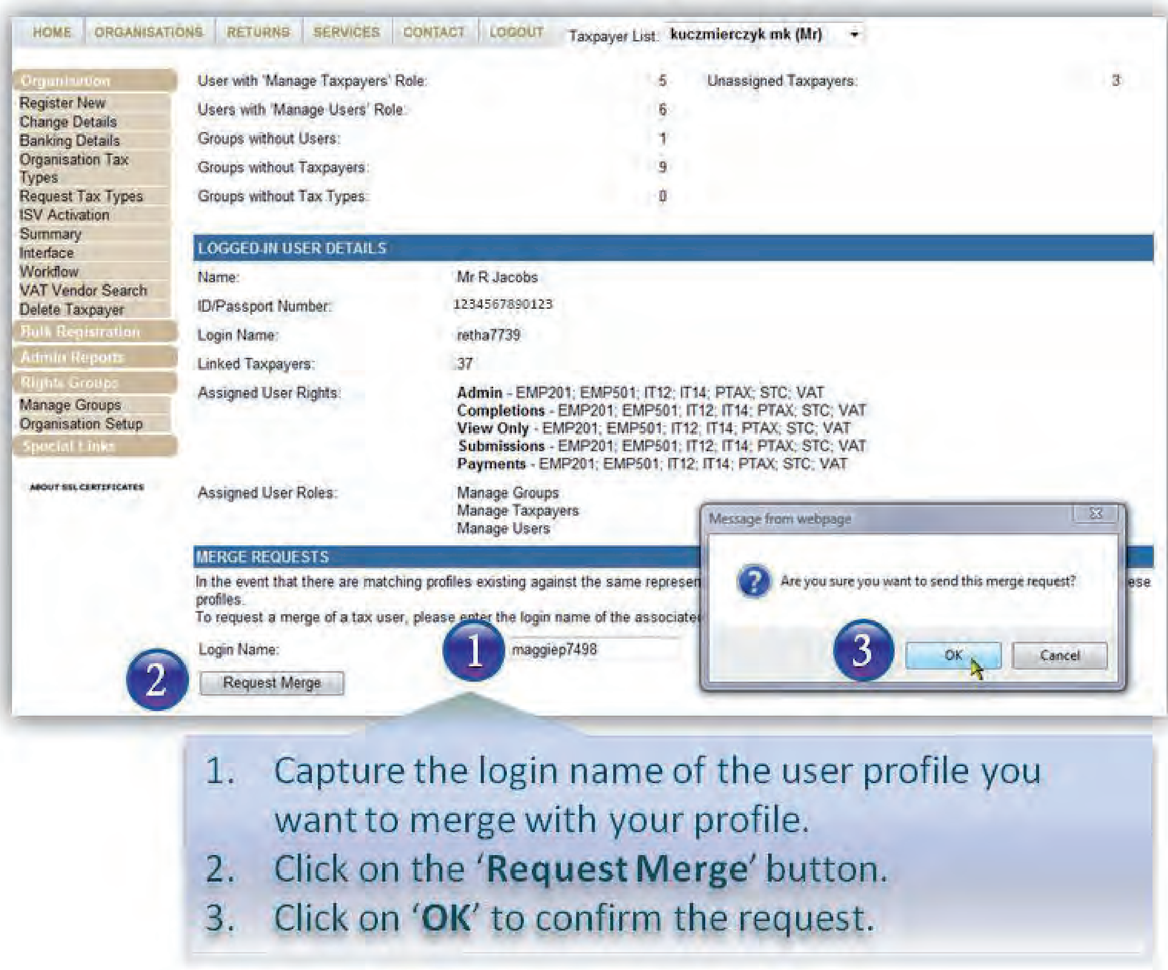
- Email notifications will also be sent when requests are accepted or declined. The same principle outlined in point 9 applies.
- Once a merge is accepted, all the taxpayers and users on the requested user's profile, move over and appear against the requesting user's profile.

**Note:**

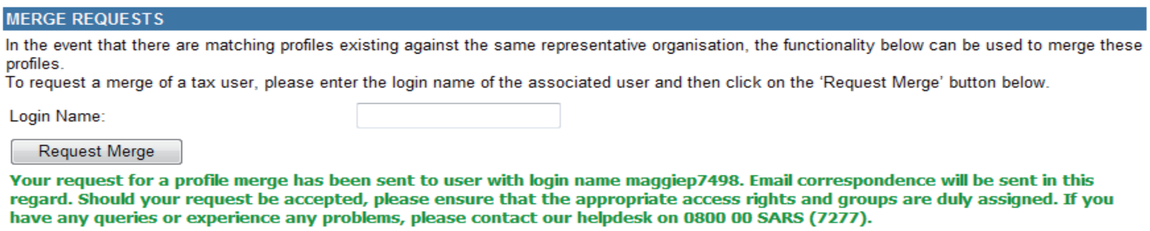
Do not accept merge requests without confirming that you know the requestor and that this user does belong to your organisation.

Merge requests are sent and received within the 'Organisation Setup' screen.

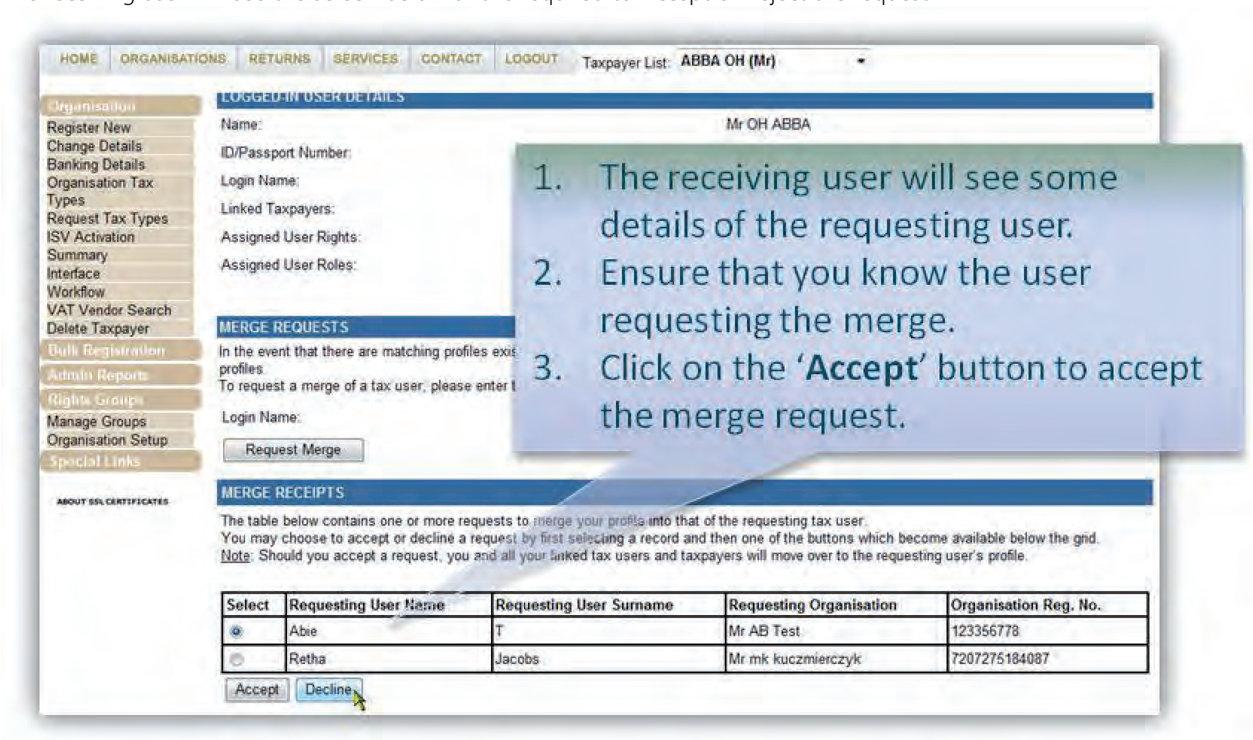
Click on *Organisations* *Rights Groups* *Manage Groups* *Organisation Setup*




Once you have accepted the merge request an email will be sent to the requested user and the following screen will be displayed.



The receiving user will see the screen below and is required to Accept or Reject the request.




Once accepted (or rejected) an email will be sent to the requesting party. If you decline a request, this request will be removed from your profile.

- If a request is sent to a user who already belongs to the organisation, a message "Requested Login Name already belongs to this organization" will be displayed.
- If a request is sent to an Individual Profile, a message "Requested user first needs to switch from Individual Profile to Tax Practitioner or Company" will be displayed.
- If the incorrect login details are provided, a message "Requested Login not found" will be displayed.

**Note:**
You can only request a transfer from a user that has full administrative rights on the profile.

# 3. HOW TO DELETE A TAX USER / PAYER ON eFILING

For tax practitioners and organisation representatives with Administration rights against their eFiling profiles, new functionality exists to allow for the deletion of unwanted Tax Users and Taxpayers.

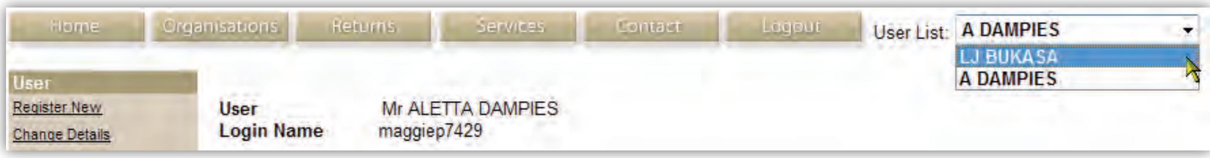
The path to locating the functionality for each of the deletion types is outlined as follows.

## 3.1 Delete a Tax User

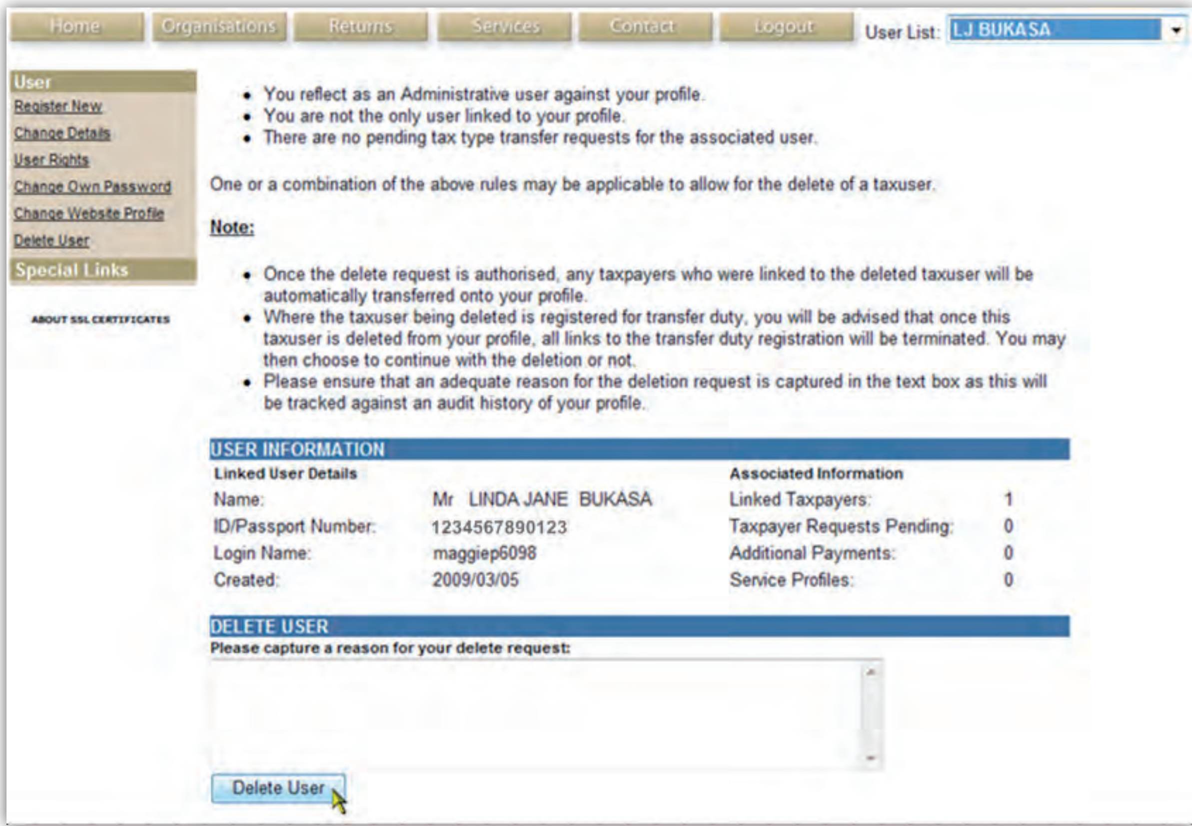
Pior to the deletion of the tax user the following rules must be complied with:

- You must have an Administrative user against the profile;
- You must not be the only the user linked to your proflile; and
- There must not be any pending tax type transfer requests for the associated tax user.

- Log into eFiling and select the Tax User whom you want deleted from your profile:




- Select the ‘Delete User’ option from the User menu on the left of the page.
- Where the rules for a Tax User delete request are met, the ‘Delete User’ button will be available for selection:

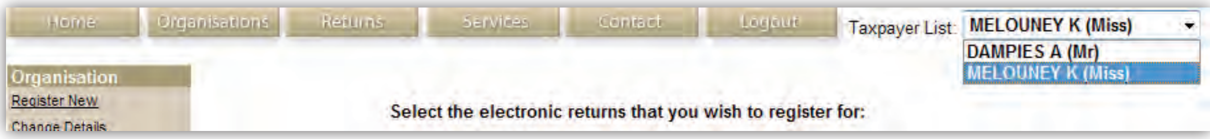



- Once the Tax User is deleted, a confirmatory message will be displayed and the User will be removed from the ‘User List’ of the logged-in profile:

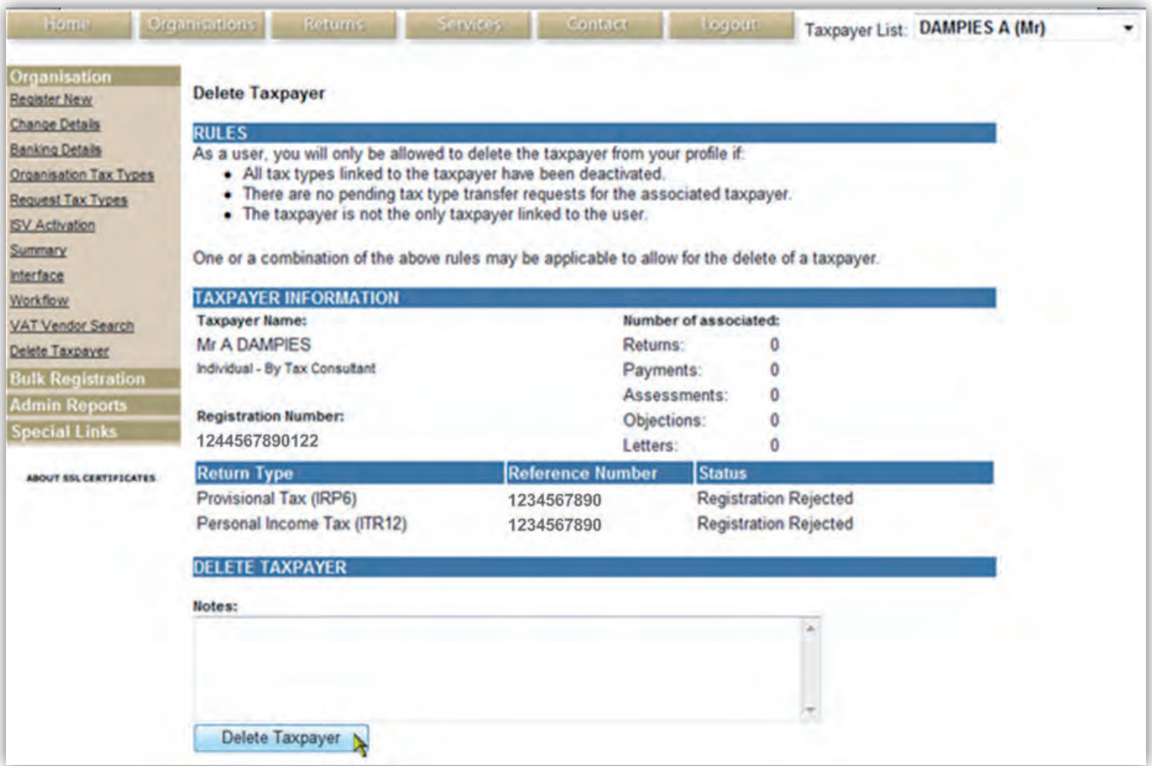
## 3.2 Delete a Taxpayer

A taxpayer's profile can only be deleted by the tax user from the profile provided that
- All tax types linked to the taxpayer have been deactivated;
- There must not be any pending tax type transfer requests for the associated taxpayer; and
- The taxpayer must not be the only one linked to the user.

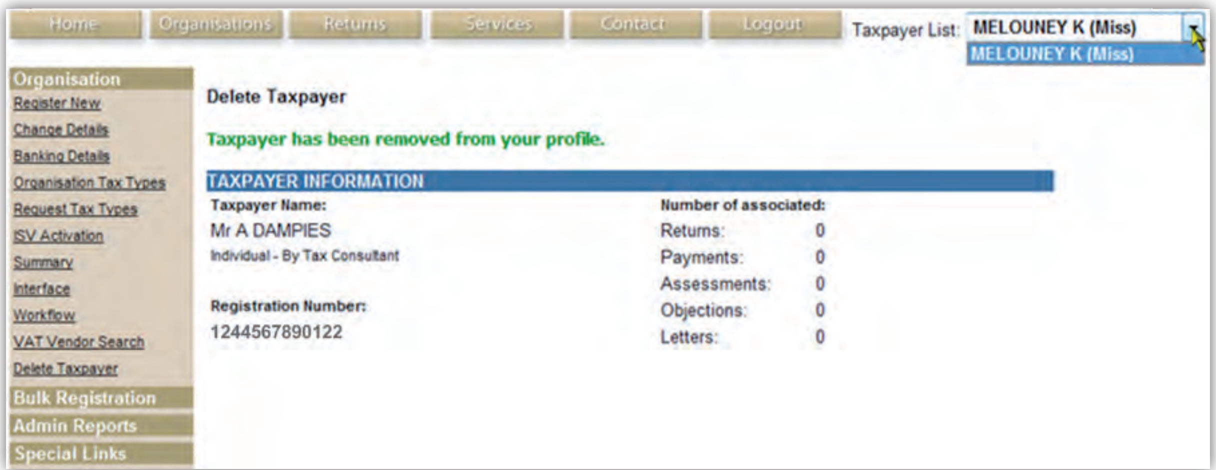
- Log into eFiling and select the Taxpayer whom you want deleted from your profile:




- Select the 'Delete Taxpayer' option from the Organisations menu on the left of the page.
- Where the rules for a Taxpayer delete request are met, the 'Delete Taxpayer' button will be available for selection:




- Once the Taxpayer is deleted, a confirmatory message will be displayed and the Taxpayer will be removed from the 'Taxpayer List' of the logged-in User profile:



# 4. GENERAL

Should you require further information on the enhanced functionality, contact the SARS Call Centre on 0800 00 SARS (7277).

# 5. FREQUENTLY ASKED QUESTIONS

| QUESTIONS | ANSWERS |
|---|---|
| 1. Where can I locate the functionality to manage access rights? | Log into the eFiling website www.sarsefiling.co.za or via the SARS website www.sars.gov.za (click on the eFiling link on the toolbar)<br><br>Then click on **Organisations**, then **Rights Groups** and then you can setup groups or assign rights to users. |
| 2. Why was the eFiling system enhanced with the new access rights functionality? | The eFiling System has been enhanced to allow Tax Practitioners and representatives to better manage their taxpayers and tax users in a more user friendly manner. |
| 3. What is the new access rights functionality able to do that is different from the current functionality? | In the new organisation setup, users are no longer granted rights to taxpayers at the taxpayer level, but rather at a group structure. This grouping allows users to be linked to tax payers via the group structure, allowing for better and easier control. |
| 4. Does this functionality cater only for newly registered tax practitioners? | No, it caters for existing tax practitioners too. |
| 5. How will the new functionality affect existing tax practitioners/representatives? | The existing tax practitioners/representatives can choose to work the current way or have an option to switch to the new way of working. |
| 6. What is the role of the Default Admin user? | By default an admin user is linked to an 'AdminDefault' group with full authorisation level, and is able to:<br>• Setup new groups and register other tax users from his/her organisation<br>• Assign specific authorization levels and user roles to these new tax users, as well as<br>• The registration of new taxpayers and assigning them to new groups which were setup.<br>Every organisation should identify at least one administrator to manage their users. |
| 7. Is there a manual or guide to assist the users on how to use this functionality? | Yes, A guide "Administration of new access rights on eFiling" has been published on the following repositories:<br>• www.sarsefiling.co.za (Under Forms and Guides)<br>• www.sars.gov.za (Select Tax Practitioners under Taxpayers on the tool bar); and the<br>• SARS Internal Portal (Functions/Operations/Documents/Guides/ Assessing and Service) |
| 8. What is a Group? | A Group is a logical way to cluster taxpayers together so that they can be managed in an easy way. These groups can be configured any way appropriate to the organisation. |

| | |
|---|---|
| 9. What are the ways in which a Group can be created? | • Groups can be created according to the different partners of the tax practice, with all the taxpayers belonging to one partner in a specific group;<br>• Groups can be created according to the different regional offices of the organisation, for example all the Pretoria taxpayers can be organised into a Pretoria group;<br>• Groups can be created according to the different tax types, for example a VAT groups and an Income Tax group; |
| 10. What does drag and drop mean? | Users can be assigned to groups by dragging a user and dropping it into a group. Users can be unassigned by dragging them from the group to the user area. |
| 11. How can I view the users that were assigned? | The functionality allows default taxpayers to view their tax users through a Grid or Drag and drop view by clicking: "Rights Groups; Manage Groups; Manage Users; and Switch to Grid View". |
| 12. If I switch over to the new functionality, will I be able to switch back to the existing functionality? | No, therefore it is important to make sure that the set ups have been done correctly. |
| 13. What does merging of profiles mean? | As part of the new setup process certain admin users will now have their own profile. If there are more than one administrative user in your organisation each having their own profile, you can now merge these profiles into one in order to better manage your organisation's profile and information. |
| 14. How long can I continue using the old user rights? | You will have to convert to the new structures. It is envisioned that the old rights will be available for at least 3 months to allow all admin users to complete the setup of their new profiles. |
| 15. How Many Taxpayers can I add in a group? | You can add as many taxpayers to a group as what you need. |
| 16. If I require more information, who can I contact? | You can contact the SARS Call Centre on **0800 00 SARS** (7277). |