HOW TO eFILE YOUR TAX RETURN !

STEP 1: REGISTER FOR EFILING

NEW USERS:

You will need to register as an eFiling user before you can file your income tax return electronically.

To register, go to **www.sarsefiling.co.za**.

Click **"Register"**. **1**

Once you have read through and accepted the eFiling Terms and Conditions, check the "**I Accept**" box and then click **"Continue"** to proceed with your registration. **2**

You will need to enter all your personal information in order to register as an eFiler. Ensure that all captured information is correct. You need:

- Tax reference number
- ID number
- Bank account details
- Personal details
- Date of birth

Complete your registration by choosing your Login Name and Password and entering the special security PIN.
Click on the "**i**" information button for futher information about your login and the password rules. **3**

Click "**Register**" and you will automatically receive your unique login name - which is the login you chose along with four digits.

REGISTERED USERS:

Simply login to eFiling using your existing Login Name and Password.

If you have forgotten your Login Name and/or Password, click on the question mark icon. **4**
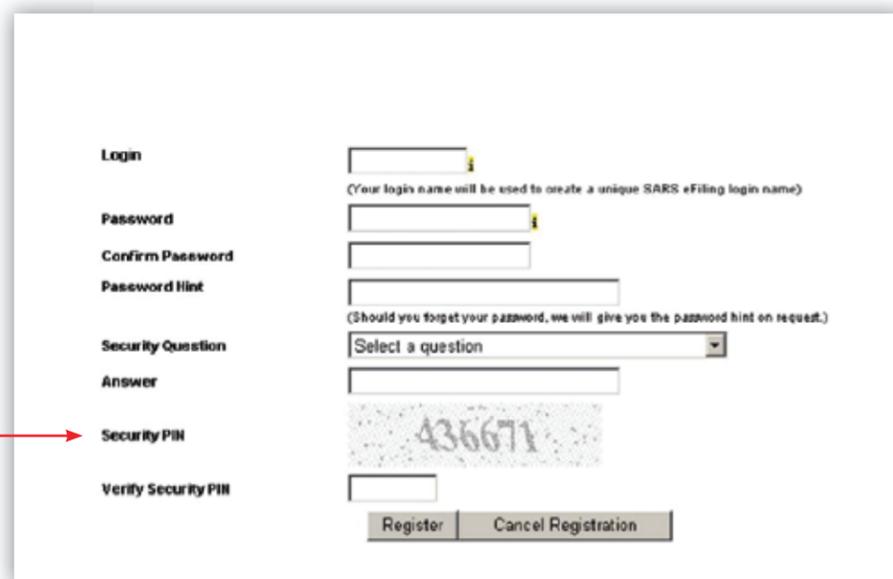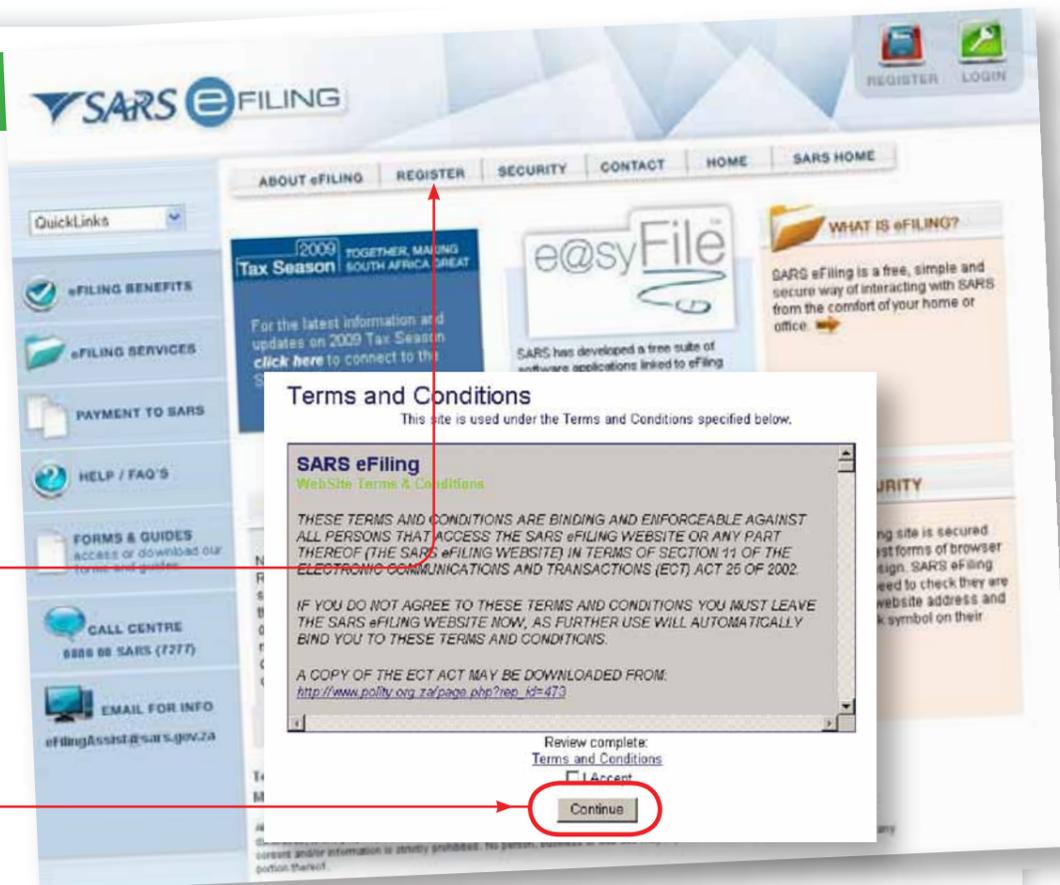
2009
Tax Season *TOGETHER*, MAKING SOUTH AFRICA GREAT

0800 00 SARS (7277)

SARS
At Your Service

www.sars.gov.za

THE INCOME TAX WORK PAGE:

The Income Tax Work Page is displayed when you login to eFiling.

It is within this page that you request, complete, save and file your income tax return to SARS.

Your Income Tax Return (ITR12) has been issued to you and appears within the Income Tax Work Page, displayed within the grid.

Open your income tax return by clicking on the ITR12.

If your Income Tax Return (ITR12) has not been issued, this means that your registration information could not be verified against SARS's systems. Please call the SARS call centre on 0800 00 SARS (7277) to resolve the problem

1

2

The Income Tax Work Page also provides you with the ability to obtain a preliminary calculation of your tax liability once you have completed your Income Tax Return (ITR12).

Click on "**Tax Calculator**" to gain a preliminary indication of your likely assessment

Use the "**Tax Calculator**" button only after you have completed your Income Tax Return (ITR12).

3

Click "**Refresh IRP5 Data**" to ensure that your pre-populated Income Tax Return (ITR12) contains the most updated data as supplied to SARS by your employer/s.

4

If you have already filed your Income Tax Return (ITR12) to SARS via one of the provided manual channels, you can update your eFiling profile to reflect your submission.
Click "**Manually submitted**" to change the status of your Income Tax Return (ITR12) to "**Filed**".

*You will be prompted to confirm the manual submission of your Income Tax Return (ITR12), as you will not be able to File after clicking "**Manually submitted**".*

TAX RETURN (ITR12):

Click "**ITR12**" from your Income Tax Work Page to access your Income Tax Return (ITR12).

A message is displayed which informs you that your Income Tax Return (ITR12) contains the latest information SARS has on record for you.

If your return is not fully pre-populated with your tax certificate information, save the return and try again later by clicking on the "Refresh IRP5 Data" button on your Income Tax Work Page

1

A questionnaire is displayed as the first page of your ITR12. This is a wizard which will help you to create a customised Income Tax Return. However, you only need to use it if your tax affairs have changed over the past year, as your ITR12 will be customised with the same fields that you requested last year. To add extra income and deductions sections to your ITR12, select the relevant options on the wizard. Once completed click 'Create Form'.

2

The first page of your ITR12 is displayed containing your personal information.

You will notice that your residential address information is blank. As part of a standardisation process and for verification purposes, you need to enter your address.

Make sure all the information on the first page is correct and up to date.

If it is not, you can delete the pre-populated information and write the correct information.

3

Note: If you would like to get rid of the left hand menu to make the screen bigger, click on the double arrows in the top right hand corner. Also, if you click on the zoom percentage arrow and click on Fit Width, it will also enlarge your screen.


Check your IRP5 information as provided by your employer that is pre-populated onto your Income Tax Return (ITR12). Where it is pre-populated, check it for accuracy against your IRP5.

Where your employer has not submitted your IRP5 information to SARS, your ITR12 will not be pre-populated. You have 2 choices:

1. Try again later
2. Fill in the data yourself from your IRP5

To try again later, save your partially completed ITR12 and login at a later stage to check if it has been updated. You do this by clicking "**Refresh IRP5 data**" to ensure that your Income Tax Return (ITR12) contains the most updated data as provided by your employer/s to SARS.

If you choose to file your ITR12 when all your IRP5 information has not been submitted by your employer/s, your assessment may be delayed and you may be required to submit supporting documentation.

4
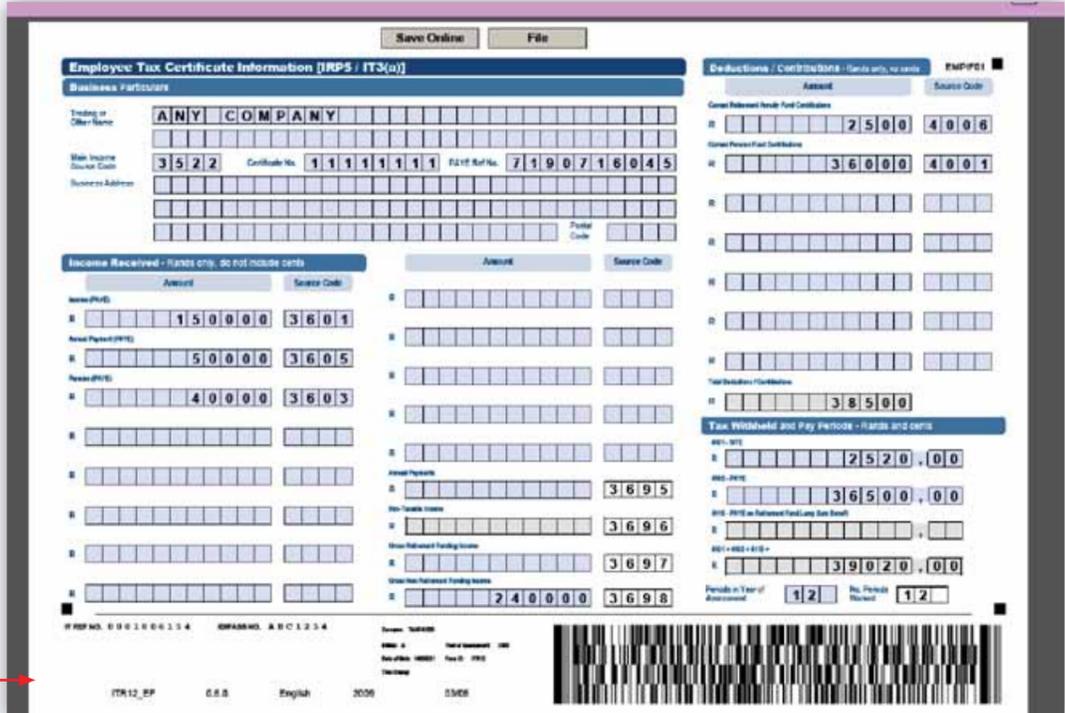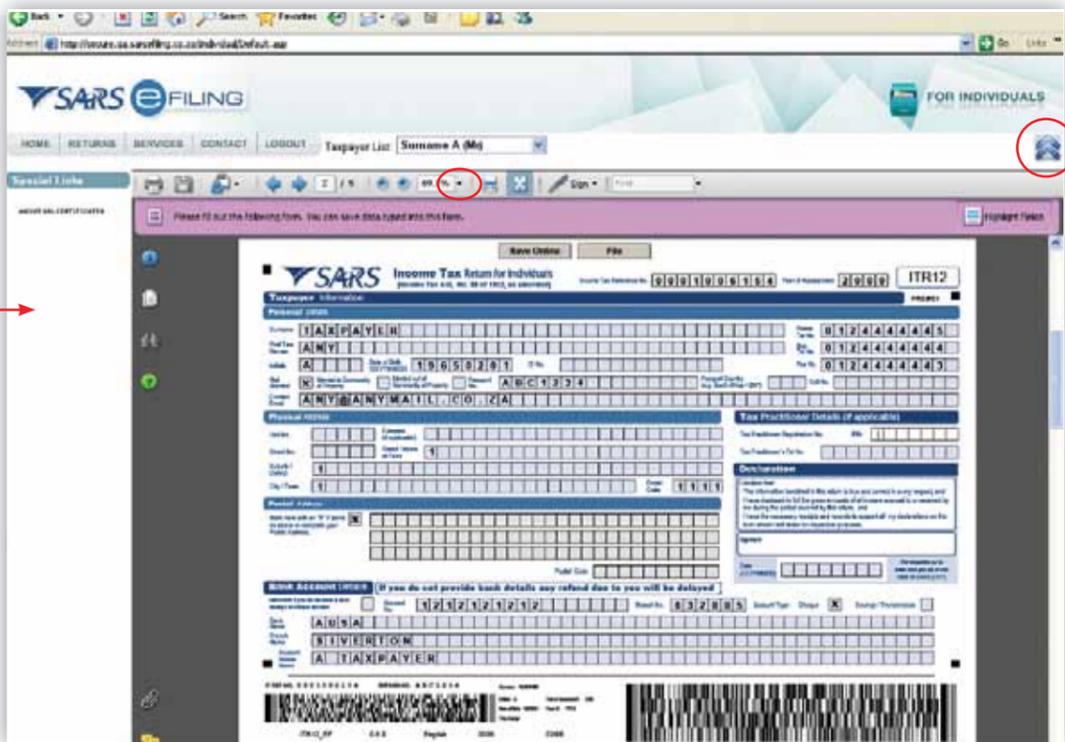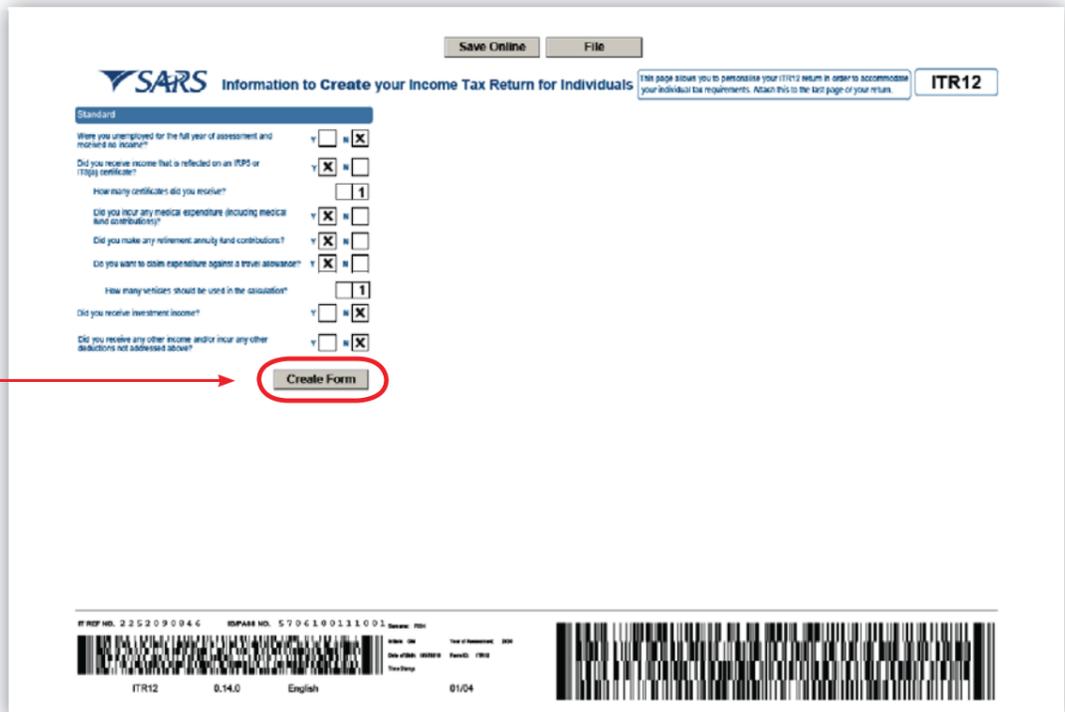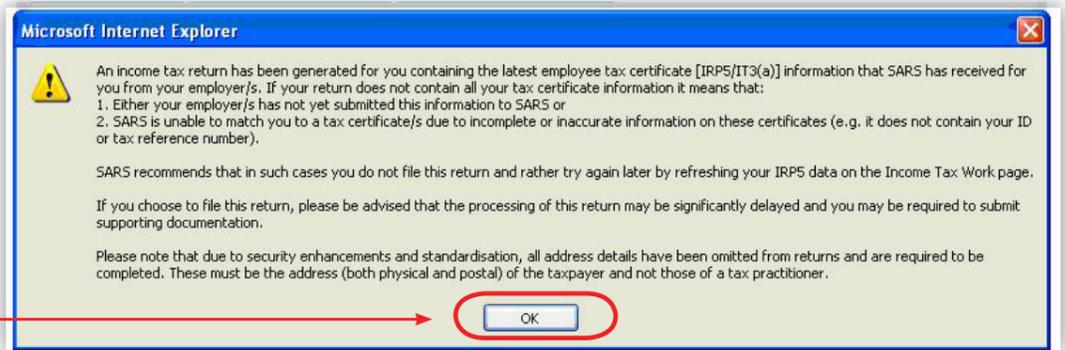
STEP 4: COMPLETE THE REMAINING PARTS OF THE ITR12:

Depending on which of the Wizard options were selected earlier, sections on additional incomes and deductions must also be completed.

Refer to the ITR12 guide on the SARS website (www.sars.gov.za) for more information on how to complete your income tax return.

STEP 5: USE THE TAX CALCULATOR TO CHECK FOR ACCURACY:

Before filing your return to SARS, we recommend that you check your return for accuracy using the tax calculator function which will provide you with an indicator of your assessment. If the result is significantly different from what you are expecting, you may have made an error in completing your return. To use the tax calculator, save your return ("Save Online") and click on "Tax Calculator" from your Income Tax Work Page.

Depending on the complexity of your return, you will get either a standard or complex calculator. Pictured is an example of a standard calculation. If you use the complex calculator, the results may only be available within 72 hours.

This version will be saved and is accessible on the work page under Calculation Results. If you make changes on your return subsequent to this, a message will appear giving you the option to recalculate.

STEP 6: FILE YOUR INCOME TAX RETURN (ITR12):

At any stage, you can save your Return before filing by clicking "**Save Online**". Once you have captured all the information onto your Income Tax Return (ITR12), and are ready to submit it to SARS, simply click "**File**".

1

If you would like to change something on your return after you have filed, click on the "**Request Correction**" button on the work page. Your return will appear and you can make the necessary changes and resubmit.

When you click "**File**", your Income Tax Return (ITR12) will be submitted to SARS. eFiling will check the correctness of specific information. Where information is incorrect or incomplete, eFiling will prompt you to correct the captured information.

2

You will receive a confirmation when your Income Tax Return for Individuals has been Filed.

3

Once you have clicked "**Continue**", a button will appear on the work page, saying you can query the status of your return.

This is an example of a status report:

4

STEP 7: VIEW YOUR ASSESSMENT (ITA34):

Once your return has been assessed by SARS, the ITA34 will appear under Notice of Assessment. Click on that to view your assessment.

You can also request a previous Statement of Account by going to Returns Issued in the left hand menu and selecting "I want to request a historic Notice of Assessment".

STEP 8: VIEW YOUR STATEMENT OF ACCOUNT (ITSA):

If you wish to view your history of transactions with SARS, you must request a Statement of Account.

Under Returns Issued in the left hand menu, click on "I want to request a Statement of Account."

You must then select how far back you want to view your transactions with SARS. Your Statement of Account will then appear.

STEP 9: OBJECTING TO YOUR ASSESSMENT:

If you object to the way SARS has calculated your assessment, click on Notice of Objection on the work page.

Complete it and submit to SARS.