





### Agenda

eFiling Profile types Post-Death Registration Scenarios Process to a successful Registration Acquiring a secondary tax number

Additional Estate Duty payment process Saving Banking details Creating payment





### **Profile Types**

The functionality exists under Individual Organisation and Tax Practitioner profiles



# Individual profiles can be converted to Organisation profiles for existing eFiling users.





### Deceased Estate Registration Scenarios

**Scenario 1**: The tax payer has an existing individual eFiling registration

Scenario 2: The tax payer does not have an existing eFiling profile

Scenario 3: The tax payer exists under a Tax Practitioner Profile





### Deceased Estate Registration Scenarios

# Scenario 1: The tax payer has an existing eFiling registration







### Deceased Estate Registration Scenarios

**Note**: The deceased person's tax reference number must simply be coded as a Deceased Estate on the SARS system before a DE can be registered.

Applicable only to deaths on or after 1 March 2016 where the deceased estate requires registration at SARS. The assessment of income applies only to the new number that is issued by SARS.







## eFiling Login





Enter Login credentials of the profile where the deceased income tax is Pas registered

n Name	1
	6
word	
woru	

Please provide your login details





For a reminder of your Login Name or to reset your password click here





### **eFiling Landing Page**

<b>V</b> SARS	FILING	
HOME RETURNS	SERVICES TAX STATUS CONTACT LOGOUT User List	
SARS Registered Details Maintain SARS	Login Name > Select SARS Registered Details	
Registered Details Saved Details Maintain Registered Details History	How do I use the User menu?	
Merge Entities Entity Merge History	As the only User against your Individual TaxPayer profile, the User Menu offers you a vanety of options to manage all your personal eFiling details. Some of the functionality offered is explained below:	
Register Withholding Tax on Interest	<ul> <li>The Change Details page displays your personal and demographic information as captured during the registration process. Should any of this information change, you may select the 'Change Details' option and update the necessary changes to your eFiling profile.</li> </ul>	
Special Links		





### **SARS Registered Details**

User	MAINTAIN SARS REGISTERED DETAILS
SARS Registered Details	Maintain SARS Registered Details
Maintain SARS Registered Details Saved Details Maintain Registered Details History Merge Entities Entity Merge History Letters Register Withholding Tax on Interest Special Links	This functionality allows you to view and maintain registered details of the entity selected from the 'Taxpayer List' above. Click on 'Continue' below to obtain the existing detail from SARS. You may then view or update this information as necessary. I hereby confirm that I am duly authorised to perform Maintenance of SARS Registered Details on behalf of the company or individual. I agree
	Continue





## **RAV 01**

SARS EFILING	
HOME RETURNS SERVICES TAX STATUS CONTACT LOGOUT User Lis	t 🔹 🔹
Back to ehiling	
Mymenu	Edit Save File Cancel
My registered O A A 1 / 2 S A 48% -	Hide menu
My registration details My addresses My bank accounts My contact numbers My reail addresses My trading names Notest Addresses Addresses My trading names Address	SARS         Registration Amondments And Verification form         But is a B & B & T & T & B & B & B & T & T & D & T & T & T & T & T & T & T
My tax products	0     0
Revenue  Select 2	
Select 3	





### **Estate Coding done on IT12**

My menu	Add new product registration   Save   File   Canc						
My registered particulars 😑	Income tax registratio	ns					
My registration details >	Reference no.	Account no.	S	Status	Deactivate		
My addresses >	/44444444	8276157283	Ir	nactive	Deactivate		
My bank accounts >		、 、					
My contact numbers >		Now product	• ontio	n ic now			
My email addresses >	inew product option is now available						
My tax products 😑							
Revenue 😑							
Income tax							
Payroll taxes >							
VAT >							
Customs >							
Excise >							
My representatives >							
SARS	South African Revenue Service		SA		NG		

### **Deactivate Tax Number & Set Year of Liability (FILE)**

,	SARS Registration Amendments And Verification form	RAV01
Appli	icant Details - Individual	INDIF01
Nature of Entity		
Sumame		
First Name		
Other Name		
Initials	N     Date of Birth (CCYYMMDD)     ID No.	
Passport / Permit No.	Passport Country / Country of Origin (e.g. South Africa = ZAF)	
Trading Name	My trading names	
Tax T	Type Demographics	CEDEM01
Reference Number	Product Status: ACTIVE Deactivate	
Trading Name	My trading names	
Bank A	Account Details	
		BNKAG01
Select	ct from my bank accounts Create new bank account	BNKAG01
Select Bank Account Status	Create new bank account     Create new bank account       Int     V     A     L     I     D     Account No.     Marked for Deletion	BNKAG01
Select Bank Account Status Branch No.	Create new bank account     Create new bank account       Int     V     A     L     I     D     Account No.     Marked for Deletion       4     7     0     0     1     0     Account Type:     Cheque     Savings     X     Transmission	BNKAG01
Select Bank Account Status Branch No. Bank Name	Create new bank account       Create new bank account       Marked for Deletion         Int       V       A       I       D       Account No.       Marked for Deletion         4       7       0       1       0       Account Type:       Cheque       Savings       X       Transmission         C       A       P       I       T       E       C       B       A       N       K       L       T       D       Image: Cheque       Image:	BNKAG01
Select Bank Account Status Branch No. Bank Name Branch Name	Create new bank account       Marked for Deletion         Int       V       A       I       D       Account No.       Marked for Deletion         4       7       0       1       0       Account Type:       Cheque       Savings       X       Transmission         C       A       P       I       T       E       C       B       A       K       L       T       D       I	
Select Bank Account Status Branch No. Bank Name Branch Name Account Hold	Create new bank account     Marked for Deletion     Account No.     Account Type:     Cheque     Savings     Transmission     C A P I T E C B A N K L T D     A C D C A P I T E C B A N K C P C     I T E C B A N K C P C	
Select Bank Account Status Branch No. Bank Name Branch Name Account Hold Name (Account as registered at b	Create new bank account       Marked for Deletion         Int       V       L       I       D       Account No.       Marked for Deletion         4       7       0       1       0       Account Type:       Cheque       Savings       X       Transmission         T       C       A       P       I       T       E       C       B       N       K       L       T       D       Image: Cheque       Savings       X       Transmission       Image: Cheque       Image: Cheque       Image: Cheque       Savings       X       Transmission       Image: Cheque       <	BNKAG01
Select Bank Account Status Branch No. Bank Name Branch Name Account Hold Name (Account as registered at b	Create new bank account       Marked for Deletion         Int       V       A       I       D       Account No.       Marked for Deletion         4       7       0       1       0       Account Type:       Cheque       Savings       X       Transmission         C       A       P       I       T       E       B       N       K       L       T       D       I	BNKAG01
Select Bank Account Branch No. Bank Name Branch Name Account Hold Name (kocunt as registered at b Incom Taxpayer Sub-Categoro	Create new bank account     Int   VALID   Account No.   Account Type:   Cheque   Savings   Transmission     CAPITEC BANK     CAPITEC BANK     CAPITEC BANK     CAPITEC BANK     Count Type:     Cheque     Savings     Transmission     Marked for Deletion	BNKAG01
Select Bank Account Status Branch No. Bank Name Branch Name Account Hold Name (Account as ngetised at b Cincom Taxpayer Sub-Category Taxpayer	Create new bank account     Int     VALID     Account No.     Account Type:     Cheque     Savings     Transmission     Marked for Deletion     Marked for Deletion     Marked for Deletion     Marked for Deletion     Account Type:     Cheque     Savings     Transmission     Marked for Deletion     Mar	BNKAG01
Select Bank Account Status Branch No. Bank Name Branch Name Account Hold Name (Account Account Hold Name (Account Account Hold Name (Account Sub-Category Taxpayer Classification	Create new bank account     Int     VALID     Account No.     Account Type:     Cheque     Savings     Transmission     Marked for Deletion     Marked for Deletion     Marked for Deletion     Account Type:     Cheque     Savings     Transmission     Marked for Deletion     Mar	BNKAG01

### **Notice Of Registration**



#### <ALL TAX TYPES\*>

NOTICE OF REGISTRATION

#### Enquiries should be addressed to SARS:

#### **Contact Detail**

<SARS Details>

Contact Centre Tel: 0800 00 SARS (7277)

Website: www.sars.gov.za

#### Details

<Taxpayer Reference No:> <Case No:> <Date:>

Always quote this reference number when contacting SARS

#### Look & Feel: Project: Estate Reform Production date: 2016-12-09 V2016.00.02 ID SL000002

Dear <Taxpayer><Representative Taxpayer>

#### NOTICE OF REGISTRATION

{Field Address line 4} {Field Postal Code}

The South African Revenue Service (SARS) confirms registration of the following taxpayer:



### **Notice Of Registration**

<b>SARS</b>	FILING					REG	GISTER	
QuickLinks	ABOUT eFILING	REGISTER	SECURITY	CONTACT	HOME	SARS HOME	)	

The New number will than be issued

•We will now touch on how to Register the New number in the following segment.





# Individual Profile Tax Types (Existing)

VSARS	EFILING			
HOME RETURNS	SERVICES TAX STATUS CONTACT LOGOUT User List		T	
User Change Details Banking Details Tax Types Transfer Requests Summary Change Website Profile Chair & Own Password Pending Registration SARS Registered Details 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 Please note that you will automatically be activated to receive SARS notices for this tax type online. Individual Income Tax (ITR12) Reference Number Tax Office PRETORIA Please note that you will automatically be activated to receive SARS notices for this tax type online. Individual Income Tax (ITR12) Reference Number Tax Office PRETORIA Reference Number Tax Office PRETORIA Please note that you will automatically be activated to receive SARS notices for this tax type online. Please note that you will automatically be activated to receive SARS notices for this tax type online. Please note that you will automatically be activated to receive SARS notices for this tax type online. Please note that you will automatically be activated to receive SARS notices for this tax type online. Please note that you will automatically be activated to receive SARS notices for this tax type online.	status: Successfully Activated Status: Successfully Activated	Click on Home T Select User Select Change We Profile	Tab ebsite
	Register Reset			



# **Converting the Website Profile (Existing)**

VSARS	FILING			
HOME RETURNS	SERVICES TAX STATUS CONTACT LOGOUT User List:		¥	(TELE)
User	Change User	Personality		
Change Details Banking Details	Login Name	NT		
Tax <sub>.</sub> Types Transfer Requests	First Name	Nt		
Summary	Surname			
Change Website Profile	ID Number	9203		
Change Own Password	Current Personality	Individual		
Pending Registration	New Personality	Organisation		Select
SARS Registered Details		Organisation Tax Practitioner		Organisation as
Special Links	Sub	mit		new Personality



<b>V</b> SARS	FILING			FOR TAX PE	ACTITIONER
USER ORGANISATI	NS RETURNS DUTIES & LEVIES SERVICES TAX STATUS CONTACT LOGO	UT Taxpayer List:		T	
Organisation					
Register New	Tax Office ALBERTON T				
Change Details					
Banking Details	Provisional Tax (IRP6)				
Organisation Tax Types	Reference Number				
Request Tax Types	Tax Office ALBERTON <b>v</b>	Status:			
ISV Althjvation	Please note that you will automatically be activated to receive SARS notices for this	Successfully			
Sullmäry	tax type online.	Deactivated			
VAL Vendor Search					
Pending Registration	✓ Individual Income Tax (ITR12)				
Bulk Registration	Reference Number 1234567890				
Admin Reports	Tax Office PRETORIA 🔹				
Diable Crowne	Please note that you will automatically be activated to receive SARS notices for this	Status:			
	tax type online.	Successfully			
SARS Registered	Note: Click Here to activate/deactivate individual Income Tax activation for	Activated	Click on Drovided	link	
	deseased estate purposes.		Click on Flovideu	IIIIK	
Special Links					
	✓ IT Admin Penalty				
	Reference Number				
	Tax Office PRETORIA 🔹	Status:			
	Please note that you will automatically be activated to receive SARS notices for this tax type online.	Successfully Activated			



### **Deceased Income Tax Activation**

VSARS	EFILING	FOR TAX PRACTITIONER
USER ORGANISATI	ONS     RETURNS     DUTIES & LEVIES     SERVICES     TAX STATUS     CONTACT     LOGOUT     Taxpayer List:	T
Organisation Register New Change Details Banking Details Organisation Tax Types Request Tax Types ISV Activation Surfmary VAT Vendor Search Delete Taxpayer Pending Registration Bulk Registration	<ul> <li>Individual Income Tax (ITR12)         <ul> <li>Reference Number 24923456780             <ul></ul></li></ul></li></ul>	
Admin Reports Rights Groups SARS Registered Details Special Links	Continue Click on Continue to begin activation process	



<b>V</b> SARS	EFILING	FOR TAX P	RACTITIONER
USER ORGANISATIO	ONS RETURNS DUTIES & LEVIES SERVICES TAX STATUS CONTACT LOGOUT Taxpayer List:	۲	(TERN)
Organisation	✓ Individual Income Tax (ITR12)		
Register New	Peterence Number 2/9023456780		
Change Details			
Banking Details	Tax Office ALBERTON    Successfully		
Organisation Tax Types	Please note that you will automatically be activated to receive SARS notices for this tax Activated type online.		
Request Tax Types			
ISV Activation	Individual Income Tax (ITR12 - Estate - after date of death)		
Suphyary	Beference Number 100 45 (7000 Status: Awaiting		
VAI Vendor Search	Registration Validation		
Delete Taxpayer	Tax Office ALBERTON T		
Pending Registration	Please note that you will automatically be activated to receive SARS notices for this tax		
Bulk Registration	type online.		
Admin Reports	Continuo		
Rights Groups	Continue		
SARS Registered Details			
Special Links			



# Scenario 2: The tax payer was never registered on eFiling







### www.sarsefiling.co.za







### VSARS EFILING



	ABOUT eFILING REGISTER	SECURITY	CONTACT	HOME	SARS HOME
QuickLinks •	Registration				
efiling benefits	To enjoy the full benefits and convenience information. Note: Registration for and the use of eFili	e of eFiling, you need	to first register t ed is internet acc	to gain secure ess.	e access to your own tax
© eFILING SERVICES	To complete the registration process y	you will need at har	nd:		
PAYMENT TO SARS	Your ID number     Your personal details	and click on the	annronriato or	ntion holow	A •
HELP / FAQ'S	er ners win register as (riease select	and click on the a	appropriate of	ption below	ŋ.
FORMS & GUIDES access or download our		Select the I	Individua	als opti	on
torms and guides		FOR TAX	PRACTITIONE	RS P	FOR ORGANISATIONS
CALL CENTRE 0800 00 SARS (7277)	An individual if they are operating in their personal capacity.	A tax practitioner i returns on behalf o individuals or busi	f they submit of other	A busi return	ness if they are submitting s on behalf of the company ich they work
		internetione of bush	100000	101 111	ion anoy morn.



### **Profile Registration**

VSARS EFILING			
	Register Log-in -	(Your Details) (Organisation) (Registered) (Your Tasks) User Login Information	
	I wish to register as a: Individual : Personal Tax Company : Company Tax Tax Practitioner	Services Services (Including Sole Proprietors)	
- AFA-	Login Details		
	Login Name	(Your login name will be used to create a unique SARS eFiling login name)	
	Password	į	
	Confirm Password		
	Password Hint	(Should you forget your password, we will give you the password hint on request.)	
	Security Question 1	What is your favourite hobby?	
	Answer		
	Security Question 2	What is your favourite holiday destination?	
	Answer		
	Security Question 3	What is your favourite make of vehicle?	



### **Profile Registration**

Security Question 2	What is your favourite holiday destination?
Answer	
Security Question 3	What is your favourite make of vehicle?
Answer	
Security Question 4	What is your favourite radio station?
Answer	
Security Question 5	What is your mother's maiden name?
Answer	
Identification Type	South African ID V
ID Number	
Do you wish to receive SMS noti • After activation as an eFiler • After any payment	fications for the following events: $\ {f eta}$ Yes $\ {igodot}$ No
Cell Number	
E-mail Address	
	Register



Register Log-in (	Your Details Organisation Registered Vour Tasks	
	User Login Information	
OU ARE REGISTERING A NEW he ID/Passport number you have ser account.	SARS eFiling ACCOUNT! entered is already associated with an existing SARS eFiling	
<ul> <li>If you would, however, like t business/personal purpose 'Register Again' button.</li> </ul>	to register a second SARS eFiling account for s, please proceed with the registration process by clicking the	
<ul> <li>If you have already register taxpayers, users and regist</li> <li>IF YOU ARE UNCERTAIN, (7277) for a quick diagnosis</li> <li>If you have forgotten your k SARS (7277)</li> </ul>	PLEASE CONTACT OUR CALL CENTRE AT 0800 00 SARS	
<ul> <li>If you have already register taxpayers, users and regist</li> <li>IF YOU ARE UNCERTAIN, (7277) for a quick diagnosis</li> <li>If you have forgotten your loss SARS (7277)</li> </ul>	ed with SARS erning, please note that you can add additional er for additional tax services under your existing profile. PLEASE CONTACT OUR CALL CENTRE AT 0800 00 SARS ogin name or password, please contact our helpdesk at 0800 00 South African ID ▼	
<ul> <li>If you have already register taxpayers, users and regist</li> <li>IF YOU ARE UNCERTAIN, (7277) for a quick diagnosis</li> <li>If you have forgotten your loss SARS (7277)</li> <li>Identification Type</li> <li>ID Number</li> </ul>	South African ID 8810125221089	
<ul> <li>If you have already register taxpayers, users and regist</li> <li>IF YOU ARE UNCERTAIN, (7277) for a quick diagnosis</li> <li>If you have forgotten your loss SARS (7277)</li> <li>Identification Type</li> <li>ID Number</li> <li>Do you wish to receive S</li> <li>After activation as an</li> <li>After any payment</li> </ul>	SMS notifications for the following events: ● Yes ● No eFiler	
<ul> <li>If you have already register taxpayers, users and regist</li> <li>IF YOU ARE UNCERTAIN, (7277) for a quick diagnosis</li> <li>If you have forgotten your loss SARS (7277)</li> <li>Identification Type</li> <li>ID Number</li> <li>Do you wish to receive S</li> <li>After activation as an</li> <li>After any payment</li> <li>Cell Number</li> </ul>	Berling, please note that you can add additional tax services under your existing profile.         PLEASE CONTACT OUR CALL CENTRE AT 0800 00 SARS         ogin name or password, please contact our helpdesk at 0800 00         South African ID ▼         8810125221089         SMS notifications for the following events: ● Yes ● No         0821234567	



### **Profile Registration**



2

#### **Required Details**

Title Initials	Firstname	Surname
Mr 🔻		
Identification Type	South African ID <b>▼</b>	
ID Number	8810125221089	]
Telephone Number	()	
Do you wish to receive SMS noti • After activation as an eFiler • After any payment	fications for the following	events:   Yes   No
Cell Number	0821234567	]
E-mail Address	ayandah@sars.gov.za	
As part of our ongoing efforts to l communications either via email	keep you, the taxpayer, in or SMS.	nformed we send out periodic
Please indicate whether you wou	ild like to be included in t	hese communications. 🔍 Yes 🔍 No
See belo	w for optional details that you ma	y want to capture now.
	Continue rives	61
Optional Details		
Fax Number	()	
Designation		ì
Postal Address		

Continue Reset



### **Declaration To eFile Form**



Tel: 0800 00 SARS (7277) Fax: (011) 602 5312 SARS eFiling

#### SARS eFiling Registration

You have registered as: You have registered the following taxpaying	
Mr Ayanda Hlengwa	Mr J Doe
ID/Passport No: 8810125221089	Individual - By Tax Consultant
ayanda.hlengwa@gmail.com	(031) 7061345
(076) 2236642	ABC
Login name:	SARS
amengwazo49	1234

I/we hereby confirm:

 that I/we have been duly authorised to perform eFiling functions on behalf of the company or individual as specified above;

I further declare that I am duly authorised to create payment instructions on , authorising to instruct the bank to debit the selected bank account and credit the relevant SARS bank account on behalf of the Commissioner for the South African Revenue Service, with the amount due, as reflected on the relevant returns for the payment of respectively.

I, the undersigned, have submitted proof of my identity to the Support Desk. I accept that without receipt of this proof the Support Desk will not allow me to submit forms and payments through the e-filing service. I also warrant that I have been duly authorised to submit the above request.

Signed on the \_\_\_\_\_ day of \_\_\_\_\_

in \_\_\_\_\_



### **New Deceased Estate Registration**

USER ORGANISATIO		LEVIES SERVICES TAX STATUS CONTACT LOGOUT Taxpayer List:
Organisation Register New Change Details Banking Details Organisation Tax Types Request Tax Types	Register New Organisation Mandatory Details What type of taxpayer are you adding? Company Trust Individual/Soc	Select Individual/ Sole proprietor
ISV Activation	Individual Name	Title     First Name     Initials     Surname       Mr     ▼     John     J     Doe
Delete Taxpayer	Trading As	Mr John Doe
Pending Registration	Identification Type	South African ID 🔻
SARS Registered	ID Number	5221095221089 <u>i</u>
Employee Registration	Financial Year End	February <b>v</b>
Admin Reports	Please tell us how you heard about .	Are you a Tax Practitioner? 🔲
Rights Groups	erning customer	
Special Links	Telephone Number Fax Number	(031 ) 7771032 ()
	Physical Address 18 Bamboo Lane Hillcrest Pinetown	Postal Address
1		III b



### **Registering The Deceased**

VSARS	FILING				IISATIONS
USER ORGANISATIC	NS RETURNS CUSTOMS DUTIES &	LEVIES SERVICES TAX STATUS CONTACT	LOGOUT Taxpayer List: Doe J (Mr)	)	<b>(</b>
Organisation Register New Change Details Banking Details Organisation Tax Types Request Tax Types ISV Activation Sumt Dry VAT Vendor Search Delete Taxpayer Pending Registration SARS Registered Details	3610 I declare that this taxpayer does not h Bank Branch Name Branch Number Account Holder Name Account Number Account Type	ABSA  Universal  62500  De Villiers and Associates  92412346759  Cheque/Current Account			
Employee Registration Admin Reports Rights Groups Special Links	Contact Person Title Initials Firstnam Mr A Andrea Designation Telephone Number Cell Number E-mail Address Company Description	e Surname De Villiers Executor (031 ) 7103465 082854283 Andre@devilliersandassosiates.co.za			
			VS		

### **Deceased Registration**

VSARS	EFILING	FOR ORGANISATION	45
USER ORGANISATIO	ONS RETURNS CUSTOMS DUTIES & LEVIES SERVICES TAX STATUS CONTACT LOGOUT Taxpayer List. Doe J (Mr)	•	
Organisation Register New Change Details Banking Details Organisation Tax Types Request Tax Types	Reference Number Tax Office ALBERTON ▼ Provisional Tax (IRP6) Reference Number Tax Office ALBERTON		
ISV Activation Sunmary VAT Vendor Search Delete Taxpayer Pending Penietration	Please note that you will automatically be activated to receive SARS notices for this tax type online.  Individual Income Tax (ITR12) Reference Number		
SARS Registered Details Employee	Tax Office ALBERTON   Please note that you will automatically be activated to receive SARS notices for this tax type online.		
Registration Admin Reports Rights Groups Special Links	IT Admin Penalty Reference Number Tax Office ALBERTON		
	Please note that you will automatically be activated to receive SARS notices for this tax type online.  Customs Agent Reference Number Tax Office ALBERTON		
	Register		





VSARS		ISATIO	NS
USER ORGANISATI	ONS RETURNS CUSTOMS DUTIES & LEVIES SERVICES TAX STATUS CONTACT LOGOUT Taxpayer List: Doe J (Mr)		
Organisation	Individual Income Tax (ITR12)		
Register New Change Details Banking Details Organisation Tax Types Request Tax Types ISV Activation Summary VAT V. Ador Search Delete Taxpayer Pending Registration SARS Registered Details	Reference Number Tax Office ALBERTON Please note that you will automatically be activated to receive SARS notices for this tax type online. Individual Income Tax (ITR12 - Estate - after date of death) Reference Number 1234567890 Tax Office ALBERTON Please note that you will automatically be activated to receive SARS notices for this tax type online. Please note that you will automatically be activated to receive SARS notices for this tax type online. Continue Continue		
Employee Registration Admin Reports Rights Groups Special Links			



<b>V</b> SARS	EFILING	FOR TAX PE	ACTITIONER
USER ORGANISATIO	ONS RETURNS DUTIES & LEVIES SERVICES TAX STATUS CONTACT LOGOUT Taxpayer List:	¥	
Organisation	✓ Individual Income Tax (ITR12)		
Register New	Reference Number 249		
Change Details Banking Details	Tax Office ALBERTON		
Organisation Tax Types	Please note that you will automatically be activated to receive SARS notices for this tax Activated type online.		
Request Tax Types ISV Activation Summary VAT Vendor Search Delete Taxpayer Pending Registration	<ul> <li>Individual Income Tax (ITR12 - Estate - after date of death)         Reference Number 1234567890         Tax Office ALBERTON •         Status: Awaiting Registration Validation     </li> <li>Please note that you will automatically be activated to receive SARS notices for this tax</li> </ul>		
Bulk Registration	type online.		
Admin Reports	Cartinua		
Rights Groups	Continue		
SARS Registered Details			
Special Links			



### Scenario 3: The taxpayer already exists under a Tax Practitioner profile

# Outstanding Returns Required (income tax)





### Outstanding Returns (income tax) – Before Death

### Requesting tax type (income tax) – Process for half registered entity having no tax type linked





### **Tax Payer Has an Active Profile**

USER ORGANISAT	IONS RETURNS	CUSTOMS DUTIES & LE	VIES SERVICES TAX STATUS C	ONTACT LOGOUT	Taxpayer List: Doe J (Mr	)		•
Drganisation Register New	The 'Dequest Tay	Tunas' functionality allow	Requests for Taxpayer's Retu	rn Types	stitioners			
Change Details Banking Details Organisation Tax	To request a new t To view the details Please note: Prior to	types functionality allow tax type transfer, select the of a previously created r requesting a transfer of retur	e 'Create New' Button at the bottom of equest, click on 'View' against the app n types the taxpayer must have been register	the table below. ropriate request from t ed by the requesting tax	he list below. Iser and then selected from the	drop down menu on the left of the scree	n.	
Request Tax Types	Status	Select All	٣					
ISV Activation	Request Type	All	•					
VAT Vendor Search Delete Taxpayer Pending Registration	Request Reference	в [		Search				
SARS Registered Details	Name R	equest Type	Request Reference	Request Date	Last Action	Date Status	View	Cancel
Employee Registration	No Records avai	lable for your selection.						
dmin Reports	Create New							
Rights Groups								
Special Links								
		elect Ora	anisations					
		oloot org						
	→ 2. C	lick Requ	est Tax Types					
			anto Nieur					

### **Capture Income Tax Number**



### **Requesting Tax Types**

A request will go to the holding profile and send a message to the registered holder via email to attend to the request

In the event that there is no response an override code will be issued to the Registered Representative via sms to their mobile phone

Once the override is issued the requesting tax payer can enter it and move the required tax types to their profile

NB: Override codes are issued after 5 working days from date of request.



## **Submitting Outstanding Returns**



## **Tax Return Work Page**





### **Additional Estate Duty Payments**

User must be linked to an online banking profile (Credit Push).

Debit Pull option not available.



## **Saving Banking Details**





## **Saving Banking Details**

<b>V</b> SARS	FILING					SATION
USER ORGANISATIO	NS RETURNS CUSTOMS DUTIES & LEVIES SERVI		Please select ABSA CashFocus / Business Integrator Online ABSA Corporate Banking ABSA Direct - Internet Banking		T	
Organisation Register New			Albaraka Barclays.Net Bidvest			
Change Details Banking Details ଫୁଲୁanisation Tax Types Request Tax Types	Paymer Cre Banking banking	ents can be made from a ba edit Push - Payment trans ig product as bill presentati g product and authorised t	Capitec - Internet Banking CitiBank FNB - CAMS, Online Banking, Internet Banking HBZ HSBC	ented to the ed into the an effective		
ISV Activation Summary VAT Vendor Search Delete Taxpayer Pending Registration	paymer Au to initiat	nt. Credit Push transaction Ithorised Debit Pull - This ate a payment from eFiling	Investec Online Banking Mercantile Bank Nedbank SASFIN Standard Bank (MyBills)	ill not be able		
SARS Registered Details	Account	t Name	Standard Bank Business Online Standard Bank Business Online (nBOL) Standard Chartered			
Employee Registration	Credit Pu	Push	Please select			
Admin Reports						
Rights Groups		Se	lect the relevant bar	nk		

5

SARS EFILING

Special Links

### **Additional Payment process**

VSARS	FILING				
USER ORGANISATI	ONS RETURNS DUTIES & L	EVIES SERVICES TAX STATUS	CONTACT LOGOUT Taxpayer List:	(Mr)	•
Inbox Returns Issued	USER DETAILS User Name:	_	COMPANY DETAILS Trading As Name:		
Returns History Returns Search	Login Name: Date Registered:	2011/07/12	Registration Number: Date Registered:	2011/07/12	
Third Party Data Non-Core Taxes Payments Additional Payments Create Additional Payment SARS Corresponnce Request 1 Disputes	INCOME TAX QUICK SEA Please enter your Income T Introduction of new Adob The enhancements are set tax season can be accesse increased security and bet in a Flash!	Click on the Returns Tab, then select Additional Payments			
Bulk Payı ts Voluntary Disclosure PAYE Maintenance Special Links	Penalties SARS has announced the p obligations. This is part of majority of compliant taxp tough action against non-o	phasing-in of the new system of ad a project to ensure greater fairnes payers, who meet their tax obligation compliant taxpayers, especially tho	ministrative penalties for taxpayers v s and efficiency in the tax system. SA ons and contribute towards our cour se who have consistently failed to co	who fail to comply with their tax RS believes that it is only fair on t htry's development that SARS take omply with their tax obligations.	the es



### **Additional Payment process**

USER	ORGANISATIC	ONS RETURNS CUSTOMS DU	Please select a Tax Type	S CONTACT LOGOUT	
			Company Fees (COF)		
Inhox		Additional Payments to SARS	Donation (DON )		
		,	Estate Duty (ESD)		
Returns Is	ssued		Income Tax (IT)		
Returns H	listory		Mineral Royalties (MINR)		
Returns S	earch	This page allows you to capture	Oil Pollution Tax (OPT)	5	
Leviesan	d Duties	<ul> <li>Tip: You can save payment</li> </ul>	Other Mining Leases (OML)	payments in order to pay	
Third Part	ty Data	<ul> <li>multiple payments at once.</li> <li>The additional payment me</li> </ul>	Pay As You Earn (PAYE ) Provisional Tax (PROV )	it from the VAT extension	
Non-Core	Taxes	date provided by SARS to a eFiling and as result the dea	Retirement Fund Tax (RFT )	nts of VAT returns via	
Payments	;	applicable as the due date.	Secondary Tax on Companies (STC) Small Business Amnesty (SBA)	liable for penalties and	
Additiona	l Payments	Customs and Air Passen	Value Added Tax (VAT )	credit push banking	
Create Ac Payment	dditional	facility as mentioned above	Vat Non Registered (VNR ) Withholding Tax on Royalties (WTR )		
SARS		Тах Туре	Please select a Tax Type	R	
Correspo	ndence	Taxpayer Name	Ostas	u	
Request F	For Reason	Type of Payment	Selec	t the tax type from	
Disputes		Tax Reference Number	dr	op down menu	
Bulk Payr	nents	Tax Period			
Voluntary	Disclosure	Payment Reference Number			
PAYE Mai	ntenance	Amount			
Special Li	inks	Anount		_	
			Make Payment Save	Payment	



### **Estate Duty Additional Payment**

VSARS	FILING					FOR TAX PRA	CTITIONE		
USER ORGANISATI	ONS RETURNS DUTIES & LEVII	ES SERVICES TAX STATUS	CONTACT LOGOUT	Taxpayer List:	(Mr)	۲			
nbox	Additional Payments to SARS								
Returns Issued Returns History	This page allows you to capture	additional tax payment det	ails to SARS		Tax Type Estate Du	e: Select utv (ESD)			
Returns Search Third Party Data Non-Core Taxes Payme ts Additional Payments	<ul> <li>Tip: You can save payments to pay at a later date. You can also save payments in order to pay multiple payments at once.</li> <li>The additional payment mechanism does not entitle the user to benefit from the VAT extension date provided by SARS to all eFilers. The incentive is only for payments of VAT returns via eFiling and as result the deadline of the 25th of the month (or last business day prior) is applicable as the due date. Any payment made after this date will be liable for penalties and interest</li> </ul>				from drop down menu and complete the required fields				
Payment SARS Correspondence	Customs and Air Passen facility as mentioned above	ger Tax payments: need to be	inking	Type of F	Payment:				
' Request For Reason Disputes	Tax Type Taxpayer Name Type of Payment	John Doe Estate Duty Normal Paymer			Payr	nent			
Bulk Payments Voluntary Disclosure		Estate Duty Normal Payment. Pleas be registered for Income Tax. If you branch office. The reference number	e be aware that in order to make are not registered for Income Tax r provided with this payment must	a payment for the selected tax ty please present your payment at be the Income Tax Reference no	pe you are required to the nearest SARS umber.				
PAYE Maintenance Special Links	Tax Reference Number Amount	5000.00							
		Make Payme	ent Save Payment						



### **Estate Duty Additional Payment**

VSARS	FILING						TIONER
USER ORGANISAT	ONS RETURNS DUTIES & LEVI	ES SERVICES TAX STATU	S CONTACT LOGO	Taxpayer List:	(Mr)	¥	
nbox	Additional Payments to SARS						-
Returns Issued							
Returns History Returns Search	This page allows you to capture	e additional tax payment de	ails to SARS				
Third Party Data Non <sub>T</sub> Core Taxes PayThe sts Additional Payments Create Additional Payment	<ul> <li>Tip: You can save payments to pay at a later date. You can also save payments in order to pay multiple payments at once.</li> <li>The additional payment mechanism does not entitle the user to benefit from the VAT extension date provided by SARS to all eFilers. The incentive is only for payments of VAT returns via eFiling and as result the deadline of the 25th of the month (or last business day prior) is applicable as the due date. Any payment made after this date will be liable for penalties and interest.</li> <li>Customs and Air Passenger Tax payments: need to be paid with a credit push banking facility as mentioned above.</li> </ul>					Please note that the income tax number must be captured for	
Correspondence	Тах Туре	Estate Duty (ESD )	•			payment.	
Request For Reason	Taxpayer Name	John Doe	]				
Disputes	Type of Payment	Estate Duty Normal Payme	nt 🔻			Select " <b>Make</b>	
Bulk Payments Voluntary Disclosure		Estate Duty Normal Payment. Plea be registered for Income Tax. If you branch office. The reference number	se be aware that in order to are not registered for Incon er provided with this paymen	make a payment for the selected ne Tax please present your payme t must be the Income Tax Referen	tax type you are required to ent at the nearest SARS nce number.	Payment" for	
PAYE Maintenance	Tax Reference Number	1234567908				Instruction to leave	
Special Links	Amount	5000.00				eFiling	
		Make Paym	ent Save Payment	]		-	



### **Estate Duty Additional Payment**

After clicking on 'Make Payment' the payment instruction will be sent to the clients online banking account to be released.

Please also confirm the payment with the bank.

After you have made the payment you can forward the proof of payment to the <u>estateduty@sars.gov.za</u> mailbox.



### Any Questions ?

# Thank You www.sarsefiling.co.za

