

# Register for eFiling

You must be a registered taxpayer to register for eFiling

To register for eFiling go to [www.sarsefiling.co.za](http://www.sarsefiling.co.za)



Click on the Register tab in the top right hand corner

To complete the registration process you will need: Your tax reference number, ID number, personal and banking details.

# File the FAST way

## eFile your income tax return in 6 easy steps

If you are a registered eFiler you can file in less than



30 minutes

1

Log in to eFiling at [www.sarsefiling.co.za](http://www.sarsefiling.co.za)

2

**INCOME TAX WORK PAGE**

Open your 2016 income tax return from the **Income Tax Work Page**

3

Standard

Y  N

Create Form



You are now able to open your income tax return. Complete the questionnaire to create your customised ITR12 return. To add extra income and deductions sections to your return, select the relevant options on the wizard. Once completed click "Create Form".

4



You must now check information on income and deductions. Where relevant, you must add information from your medical aid tax certificate, retirement annuity tax certificate, among others.

Make sure you enter the information against the right codes.

5

Save Return

You can save your ITR12 return before filing it by clicking on "Save Return". You can then come back to it later.

6

Submit Return to SARS

Once you have captured all the information and you are ready to submit it to SARS, simply click "Submit return to SARS".

#### Made a mistake?

You can change any information on your return after you have submitted. Click on "Request Correction" on the Income Tax Work Page and your return will appear and you can make the necessary changes and resubmit.

The SMART way with HELP-YOU-eFILE!



Only available during office hours

If you get stuck on eFiling click the Help-you-eFile icon and follow the prompts to speak to a friendly SARS Contact Centre agent who will help you every step of the way while you're eFiling.

#### Save time- let us call you back

Click on the Help-you-eFile icon and select "Call Me". One of our agents will call and assist you step by step with your eFiling needs.

## Common codes

### 4006

Fill in the total amount paid for retirement annuities including contributions paid via your employer (shown on your IRP5) and any amount(s) paid directly by you

### 4020

Fill in the sum of the amount that appears as 'claims not covered by scheme' on your medical tax certificate and you have the proof of payment for these amounts and the amounts on the proof of payment that you have for qualifying medical expenses actually paid by you and such expenses were not claimed from your medical scheme

### 4040

Fill in contributions to a medical aid fund paid by you if self-employed, or if employed and your employer does not offer medical aid cover

# Tax season

made easy for you

VISIT your nearest SARS branch  
OPEN: Monday, Tuesday, Thursday, Friday:  
08:00 to 16:00. Wednesday: 09:00 - 16:00

CALL SARS Contact Centre 0800 00 7277  
Call back option available during office hours.  
OPEN: Monday, Tuesday, Wednesday, Thursday,  
Friday: 08:00 - 17:00.

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

Please go to the SARS website for details on extended operating hours during Tax Season at our branches and Contact Centre

# Payment options

## You can make a payment to SARS:

- \* Electronically using SARS eFiling
- \* Electronically using Internet banking
- \* Over the counter at a bank branch

### Unable to make payment in full to SARS?

In certain circumstances SARS can reach an agreement with you to defer your tax debt for later payment or for payment by instalments. Please bear in mind that you will need to discuss your financial position openly and honestly with SARS.

### To find out if you qualify:

Call our SARS Contact Centre  
Visit a SARS branch.

# Changing banking details

## Change your banking details while completing your ITR12 via eFiling or in person at any SARS branch.

To protect you against fraud, any changes to your banking details will be verified by SARS before updating your banking profile. Any refunds due to you (if applicable) will be processed after your banking details have been verified.

If the validation of your banking details is unsuccessful, you will be requested to visit a SARS branch to validate your banking details in person.

**Take the following documents with you:**  
Valid original or temporary ID, passport or driver's licence and a certified copy of the ID, passport or driver's licence

Original bank statement or ATM/Internet generated statement or ABSA eStamped statement not more than three months old

Proof of residential address (e.g. municipal account).

# Tax practitioners must be registered



Be aware of people who offer to complete your tax return for you and who promise they can get you a refund. Only deal with registered tax practitioners.

Please remember that when you are using a tax practitioner it is your responsibility to verify that your practitioner is registered with a

recognised controlling body (RCB) as well as with SARS. Ask your tax practitioner for their tax practitioner registration number which you can verify on eFiling.

On the eFiling home page, click **QuickLinks** and from the drop-down menu choose "Confirm Practitioner Registration Status".

Please note that even if a tax practitioner completes and submits your ITR12 on your behalf, it is still your responsibility as the taxpayer to make a true declaration.

You are also responsible for any outstanding returns, payments and penalties.

# Forgot your eFiling Login name and Password?

## Reset them on eFiling

Visit [www.sarsefiling.co.za](http://www.sarsefiling.co.za) and click on the Login button and follow the prompts.



For a Reminder of your login name or to reset your password click here

If you have forgotten both your login name and password, you will need to first complete the "I forgot my login name" process, wait for your email and/or SMS notification containing your login name, and then use this login name to complete the "I forgot my password" process.

## Call the SARS Contact Centre



Available during office hours. Have your identity number and tax reference number on hand when you call the SARS Contact Centre on the number 0800 00 7277.

An automated self-service option is now available to reset your password. By entering your ID and tax number you will be authenticated and then prompted with various options. Under the Income

Tax, eFiling menu you will be prompted to reset your eFiling password. Your new password will be sent to you by email or SMS.

If you have forgotten both your login name and password and have since changed your cellphone number and email address, please contact the SARS Contact Centre.

Please note that the temporary password will only be valid for 24 hours and you will be required to change your password once logged into your eFiling profile.

# Submitting at a branch?

You will need the following documents

## 1.

### Proof of identity

ID book, passport, driver's licence



## 2.

### Proof of income

Documents such as IRP5/IT3(a) / IT3(b) certificates, etc.



## 3. Proof of deductions

Documents such as medical aid contribution certificates and proof of medical expenses not paid by your medical aid, retirement annuity contribution certificates, travel logbook, completed confirmation of diagnosis of disability form (ITR-DD) if you want to claim any disability expenses, etc.



## Beware of scams

1. SARS will never request your banking or personal details in any correspondence that you receive via post, email or SMS
2. SARS will not send you hyperlinks to other websites - even those of banks

Please note that the SARS website does not have links to any banks.

# Submit your return on time and avoid any penalties

**PAPER/MANUAL**  
via post or dropping it off in a SARS drop box

23  
September

**AT A SARS BRANCH**  
(provisional and non-provisional)

25  
November

**NON-PROVISIONAL**  
taxpayers who file electronically on eFiling

25  
November

**PROVISIONAL**  
taxpayers who file electronically on eFiling

31  
January 2017