



SARS Operations and eFiling

**SAIT Webinar
4 July 2024**

YOUR KEY TO THE TAX COMMUNITY

Anchors:

- **Yolisa Dyasi** – (Tax Technical Specialist at SAIT)

Yolisa is the Tax Technical Consultant at SAIT. She is responsible for management of the SAIT Tax Technical Helpline, SARS escalations and SARS operational submissions.

- **Cecile Bothe** – (Consultant at SAIT)

Cecile Bothe is Consulting to SAIT (ex SARS) with 44 years of experience at SARS. Specialises in Income Tax, Provisional tax, Deceased and insolvent estates, Donations Tax and Estate duty.

Agenda:

This session will contain a brief overview of SARS Operations, reporting and eFiling including the following aspects:

- ❖ Important filing, payment and/or reporting dates
- ❖ Expert Corner
- ❖ Question and Answer Session



Important filing, payment and/or reporting dates

Important filing, payment and/or reporting dates

01/07/2024	Income Tax	ITR12 – Issuance of 2024 Auto Assessment
15/07/2024	Income Tax	ITR12 - Opening of Filing Season 2024
16/09/2024	Income Tax	ITR12T - Opening of Trust Filing Season
30/09/2024	Third-Party Data	Third-Party Data (IT3) - End of third-party annual submissions for Trusts
21/10/2024	Income Tax	ITR12 - Submission due date for a return that is submitted electronically through the assistance of a SARS official at a SARS office or manually
21/10/2024	Income Tax	ITR12 - Submission due date for a return for non-provisional taxpayers and is submitted by using the SARS eFiling platform
20/01/2025	Income Tax	ITR12 - Submission due date for a return for provisional taxpayers and is submitted by using the SARS eFiling platform
20/01/2025	Income Tax	ITR12T - Submission due date for the Trust Income Tax returns.

Expert Corner

Trust Third-Party Data Submission and Trust Income Tax Returns

Agenda:

Relevant Legislation

Getting the eFiling profile ready for IT3 submissions

Submitting the IT3(t)

Key Considerations when submitting the ITR12T and ITR12T problem areas

Relevant Legislation

Relevant Legislation

A “trust” as defined in section 1 of the Income Tax Act, that is a “resident” as defined in that section, or a non-resident that is required to submit an annual income tax return, excluding—

- a Collective Investment Scheme as defined in the Collective Investment Schemes Control Act, 2002, a “portfolio of a collective investment scheme” and any “portfolio of a hedge fund collective investment scheme”; and
- an Employment Share Incentive Scheme Trust.

Information Concerned	Form
Any amount vested in a beneficiary including income (nett of expenditure), capital gains and capital amounts.	IT3(t); or Data compiled in accordance with SARS’ Business Requirement Specification: IT3 Data Submission

Getting the eFiling profile ready for IT3 submissions

ACTIVATE THIRD-PARTY TAX TYPE

Home

User

Organisations

Returns

Customs

Duties & Levies

Change Details

Tax Types

Manage Tax Types

View Request History

Legacy: Activation Requests

Legacy: Transfer Requests

Legacy: Pending Registration

Manage Tax Types

Tax Type Description	Reference Number	Status	Action
Provisional Tax (IRP6)		Successfully Activated.	<input type="checkbox"/> Deactivate
Individual Income Tax (ITR12)		Successfully Activated.	<input type="checkbox"/> Deactivate
IT3		Successfully Activated.	<input type="checkbox"/> Deactivate
Medical Scheme Contribution		Not Active.	<input type="checkbox"/> Activate
Insurance Payment		Not Active.	<input type="checkbox"/> Activate

ACTIVATE THIRD-PARTY TAX TYPE

The screenshot displays the SAIT web application interface. On the left is a dark blue sidebar with navigation options: My Profile, Organisation, Register New, Change Details, Tax Types, Manage Tax Types, View Request History, Legacy: Activation Requests, Legacy: Transfer Requests, Legacy: Pending Registration, Banking Details, ISV Activation, Summary, VAT Vendor Search, and Delete Taxpayer. The main content area is white and shows the 'Organisation' dropdown and logo at the top. Below are input fields for 'Taxpayer Name', 'Registration Number', and 'Contact Details'. The 'Tax Types Details' section contains a table with the following data:

Tax Type Description	Reference Number	Status
IT3		Successfully Activated
Medical Scheme Contribution		Successfully Activated
Insurance Payment		Successfully Activated
Foreign Tax Information (FTI)		Successfully Activated
CBC		Successfully Activated

At the bottom of the main content area, there are three buttons: 'Edit Contact Details', 'Manage Tax Types', and 'Access Rights'.

Update submission user rights to allow the submission of IT3 data

UPDATE GROUP DETAILS

Group Name	<input type="text" value="System Default"/>
Authorisation Level	<input type="text" value="Submissions"/>
Access To Payments	<input checked="" type="checkbox"/>
Tax Types	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Provisional Tax (IRP6)<input checked="" type="checkbox"/> Value Added Tax (VAT201)<input type="checkbox"/> Organisation Income Tax (ITR14/IT12EI/ITR12T)<input checked="" type="checkbox"/> Individual Income Tax (ITR12)<input checked="" type="checkbox"/> Employee's Tax (EMP201)<input type="checkbox"/> IT56 - Secondary Tax On Companies (STC)<input checked="" type="checkbox"/> EMP501 - Submission<input type="checkbox"/> Customs Agent<input type="checkbox"/> Excise Agent<input checked="" type="checkbox"/> VAT Admin Penalty<input checked="" type="checkbox"/> PAYE Admin Penalty<input checked="" type="checkbox"/> IT Admin Penalty<input type="checkbox"/> Transfer Duty<input type="checkbox"/> Third Party Appointment Banks<input type="checkbox"/> Dividends Withholding Tax (DWT)<input type="checkbox"/> Third Party Appointment Employers<input type="checkbox"/> Third Party Appointment Other<input checked="" type="checkbox"/> Tax Compliance Status<input checked="" type="checkbox"/> Tax Compliance Status Verification<input checked="" type="checkbox"/> IT3<input checked="" type="checkbox"/> Medical Scheme Contribution<input checked="" type="checkbox"/> Insurance Payment<input checked="" type="checkbox"/> Withholding Tax on Interest(WTI)<input checked="" type="checkbox"/> Foreign Tax Information (FTI)<input type="checkbox"/> Mineral Royalties (MPR3)<input type="checkbox"/> CBC<input type="checkbox"/> TRN (Tax Reference Number)

Enrolling technical administrators

Business Administrator	Technical Administrator	Technical User
<p>This user is the same as the current eFiling full administrator. The role of this user is to enrol the legal entity/organisation that will be submitting data to SARS and the Technical Administrator. The taxpayer is not required to allocate new eFiling administrators for the purposes of 3rd party data submissions if one already exists.</p>	<p>The role of this user is to request the security certificate and to enrol technical users. If the taxpayer decides to change the Technical Administrator, a new Technical Administrator must be added before the existing one can be removed. There must always be at least one Technical Administrator for each enrolled organisation.</p>	<p>The role of this user is to submit the data files to SARS via the Direct Data Flow channel. An organisation can have multiple Technical Administrators and Technical Users in order to allocate work according to the organisation's requirements. The technical user must be a different person from the technical administrator.</p>

Important to note: eFiling recognises the user who enrolls the organisation successfully, as the Business Administrator of the organisation. This implies that they (the Business Administrator) cannot be enrolled as a Technical Administrator or a Technical User.

Enrolling technical administrator

my Profile

SARS FILING

Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out

Portfolio: CCN MOTORS BK Taxpayer: CCN MOTORS BK Organisation

Enroll Technical Administrator for 3rd Party Data Submission

ORGANISATION DETAILS

Organisation Name: CCN MOTORS BK
Registration Number:
Tax Reference:

NAME	ID NUMBER/PASSPORT NUMBER	ENROLLMENT DATE	STATUS	
VALARIE		2022/06/10	Link Enrolled	Open

[Find Technical Administrator](#)

Other Services
Tax Directives
Tax Directives - prior 2017
Additional Services
Tax Clearance Certificates
Enrol 3rd Party Data
Enrol Organisation
Enrol Technical Admin
Request Certificate
Enrol Technical User
Submission Dashboard
Secure File Submission
My TP Configuration
Complaints
Live Help?
Special Links

LIVE CHAT ASK A QUESTION?

Enrolling technical administrator

The screenshot displays a web application interface for enrolling a technical administrator. On the left is a dark blue sidebar with the user's name 'Mrs SUSAN' and a notification icon. Below the name are fields for 'Tax Reference Number', 'Identification Number', and a 'My Profile' button. Further down are links for 'Other Services', 'Tax Directives', 'Tax Directives - prior 2017', 'Additional Services', 'Tax Clearance Certificates', 'Enrol 3rd Party Data', 'Enrol Organisation', 'Enrol Technical Admin', 'Request Certificate', and 'Enrol Technical User'. The main content area is titled 'Enroll Technical Administrator for 3rd Party Data Submission'. It features a 'Search for Tax User' form with input fields for 'Surname', 'Email Address', 'Login Name', and 'First Name', and a 'Search' button. A note below the form states 'The wild character (*) may be used.' At the bottom right of the form area is a 'close' link. At the very bottom of the page are 'LIVE CHAT' and 'ASK A QUESTION?' buttons.

S Mrs SUSAN

Tax Reference Number

Identification Number

My Profile

Other Services

Tax Directives

Tax Directives - prior 2017

Additional Services

Tax Clearance Certificates

Enrol 3rd Party Data

Enrol Organisation

Enrol Technical Admin

Request Certificate

Enrol Technical User

Enroll Technical Administrator for 3rd Party Data Submission

ORGANISATION DETAILS

Organisation Name

Registration Number

Tax Reference

NAME

VALARIE SHIRLEY G

Find Technical Administ

Search for Tax User

Surname:

Email Address:

Login Name:

First Name:

The wild character (*) may be used.

Search

close

LIVE CHAT

ASK A QUESTION?

Enrolling technical administrator

The screenshot shows a user interface for enrolling a technical administrator. On the left is a dark blue sidebar with the user's name 'Mrs SUSAN' and a notification icon. Below the name are sections for 'Tax Reference Number', 'Identification Number', and a 'My Profile' button. Further down are links for 'Other Services', 'Tax Directives', 'Tax Directives - prior 2017', 'Additional Services', 'Tax Clearance Certificates', 'Enrol 3rd Party Data', 'Enrol Organisation', 'Enrol Technical Admin', 'Request Certificate', and 'Enrol Technical User'. The main content area is titled 'Enroll Technical Administrator for 3rd Party Data Submission'. It contains a form with fields for 'Organisation Name', 'Registration Number', and 'Tax Reference'. Below these is a 'NAME' section with the value 'VALARIE SHIRLEY'. A modal window is open over the form, titled 'Enrol Technical Administrator for 3rd Party Data Submission'. Inside the modal, under the 'USER DETAILS' header, are fields for 'Name: UJU', 'ID Number:', 'Email Address:', 'Cell Phone:', and 'Telephone Number:'. At the bottom of the modal is a button labeled 'Enrol Technical Administrator' with a green arrow pointing to it. A 'close' button is located in the bottom right corner of the modal.

Enrolling technical administrator

Portfolio: CCN MOTORS BK | Taxpayer: CCN MOTORS BK | Organisation

Enroll Technical Administrator for 3rd Party Data Submission

ORGANISATION DETAILS

Organisation Name: CCN MOTORS BK
Registration Number:
Tax Reference:

NAME	ID NUMBER/PASSPORT NUMBER	ENROLLMENT DATE	STATUS	
VALARIE		2022/06/10	Link Enrolled	Open
UJU UJU		2023/07/20	Link Enrolled	Open

[Find Technical Administrator](#)

[LIVE CHAT](#) | [ASK A QUESTION?](#)

Enrolling technical users

Tax Reference Number

Identification Number

My Profile

Other Services

Tax Directives

Tax Directives - prior 2017

Additional Services

Tax Clearance Certificates

Enrol 3rd Party Data

Enrol Organisation

Enrol Technical Admin

Request Certificate

Enrol Technical User

Submission Dashboard

Secure File Submission

My TP Configuration

Home User Organisations Returns Customs Duties & Levies **Services** Tax Status Contact Log Out

Portfolio: CCN MOTORS BK

Taxpayer: CCN MOTORS BK Organisation

HELP YOU GROW

Enroll Technical User for 3rd Party Data Submission

ORGANISATION DETAILS

Organisation Name: CCN MOTORS BK

Registration Number:

Tax Reference:

NAME	ID NUMBER/PASSPORT NUMBER	ENROLLMENT DATE	STATUS	
THISEN I		2022/06/10	Delete requested	Open
Sonja		2023/05/25	Delete requested	Open
HEN		2023/07/11	Enrolment requested	Open

Find Technical User

Enrolling technical users

LIVE CHAT

ASK A QUESTION?

Enrolling technical users

- Tax Reference Number
- Identification Number
- My Profile
- Other Services
- Tax Directives
- Tax Directives - prior 2017
- Additional Services
- Tax Clearance Certificates
- Enrol 3rd Party Data
- Enrol Organisation
- Enrol Technical Admin
- Request Certificate
- Enrol Technical User
- Submission Dashboard
- Secure File Submission
- My TP Configuration

Enroll Technical User for 3rd Party Data Submission

Organisation Name: [input]
Registration Number: [input]
Tax Reference: [input]

Search for Tax User

Surname: [input] Email Address: [input]
Login Name: [input] First Name: [input]

The wild character (*) may be used.

NAME

- THISEN BAMDOD
- Solja Svel
- HON HSEI

close

Enrolling technical users

The screenshot shows a web application interface for enrolling technical users. On the left is a dark blue sidebar with navigation options: My Profile, Other Services, Tax Directives, Tax Directives - prior 2017, Additional Services, Tax Clearance Certificates, Enrol 3rd Party Data (highlighted), Enrol Organisation, Enrol Technical Admin, Request Certificate, Enrol Technical User, Submission Dashboard, Secure File Submission, My TP Configuration, Complaints, and Live Help?. The main content area is titled 'Enroll Technical User for 3rd Party Data Submission' and has a 'ORGANISATION DETAILS' tab selected. Below this, there are fields for Organisation Name, Registration Number, and Tax Reference. A 'NAME' section lists 'THISEN NADIGO' and 'HEN HEN'. A 'Find Technical User' button is visible. A modal window titled 'Enrol Technical User for 3rd Party Data Submission' is open, showing 'USER DETAILS' for a user named 'POP'. The details include ID Number, Email, Address, Cell Phone, Telephone Number, and Source Identifier. A note asks for the Secure Web username used for SARS file submissions. A text input field for 'Secure Web Username' contains 'POP2023'. A button labeled 'Enrol Technical User' is at the bottom of the modal. A 'close' link is in the bottom right corner of the modal. At the bottom of the page, there are 'LIVE CHAT' and 'ASK A QUESTION?' buttons.

Enroll Technical User for 3rd Party Data Submission

ORGANISATION DETAILS

Organisation Name:
Registration Number:
Tax Reference:

NAME:
THISEN NADIGO
HEN HEN

Find Technical User

Enrol Technical User for 3rd Party Data Submission

USER DETAILS

Name: POP
ID Number:
Email:
Address:
Cell Phone:
Telephone Number:
Source Identifier: 112F23D2-CAA7-4A80-ADCB-C4A91C8109ABE82716EA-76A5-45DE-AD55-748D4DD2E2FD

Please provide us with the Secure Web username used when submitting a file to SARS:

Secure Web Username: POP2023

Enrol Technical User

close

LIVE CHAT

ASK A QUESTION?

th African
stitute of
ation

Enrolling technical users

My Profile

SARS FILING

Home User Organisations Returns Customs Duties & Levies Services Tax Status Contact Log Out

Portfolio: CCN MOTORS BK Taxpayer: CCN MOTORS BK Organisation

Enroll Technical User for 3rd Party Data Submission

ORGANISATION DETAILS

Organisation Name: CCN MOTORS BK
Registration Number:
Tax Reference:

NAME	ID NUMBER/PASSPORT NUMBER	ENROLLMENT DATE	STATUS	
THISEN		2022/06/10	Delete requested	Open
Sonja		2023/05/25	Delete requested	Open
HEN		2023/07/11	Enrolment requested	Open
POP		2023/07/20	Enrolment requested	Open

Find Technical User

LIVE CHAT ASK A QUESTION?

Submitting the IT3(t)

Submitting the Data

Home

User

Organisations

Returns

Customs

Duties & Levies

Services

Tax Status

Contact

Returns Search

Third Party Data Certificate
Search

Third Party Data

Non-Core Taxes

Third Party Data

Submit New Data

IT3

Submitted Data

Submit New Return

Submitted Return

IT3(t) Reporting Institution

LIVE DEMO

IT3(t) Reporting Institution

DATA SUBMISSION WORK PAGE



Taxpayer Name

Tax Reference

Return Type

IT3C

eFiling Status

Filed

Submission Status

Partial upload 

[For More info click here](#)

Type	Status	Date	Version	Last Updated By
IT3C	Filed through eFiling	2023/09/13	1	Mr

[Back To Search](#)

Key Considerations when submitting the ITR12T and ITR12T problem areas

Trust Income Tax return

- **Updates to the wizard on the Trust return**
- **A Simplified Return for Passive Trusts**
- **Beneficial Ownership Declaration**
- **Nature retention of income distributed**

https://www.sars.gov.za/wp-content/uploads/Ops/Forms/SARS_2022_LookFeel_ITR12T_v2023.00.15-Prototype.pdf



Thank you