

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

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

3

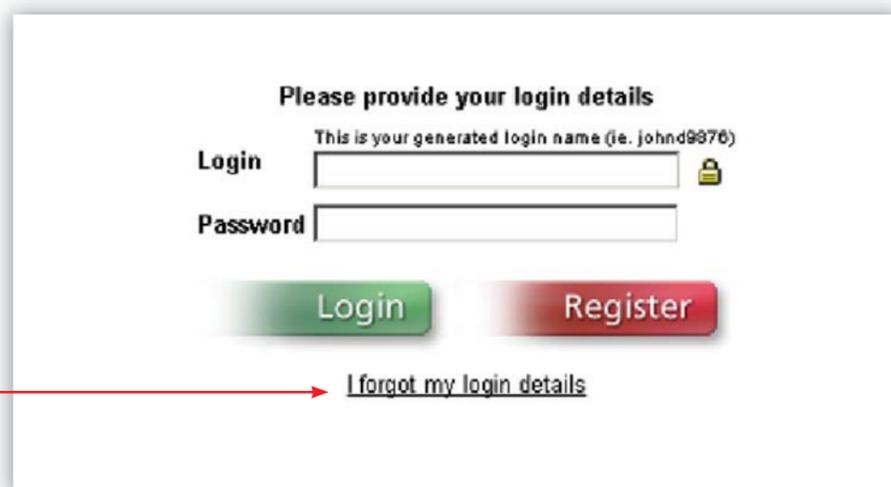
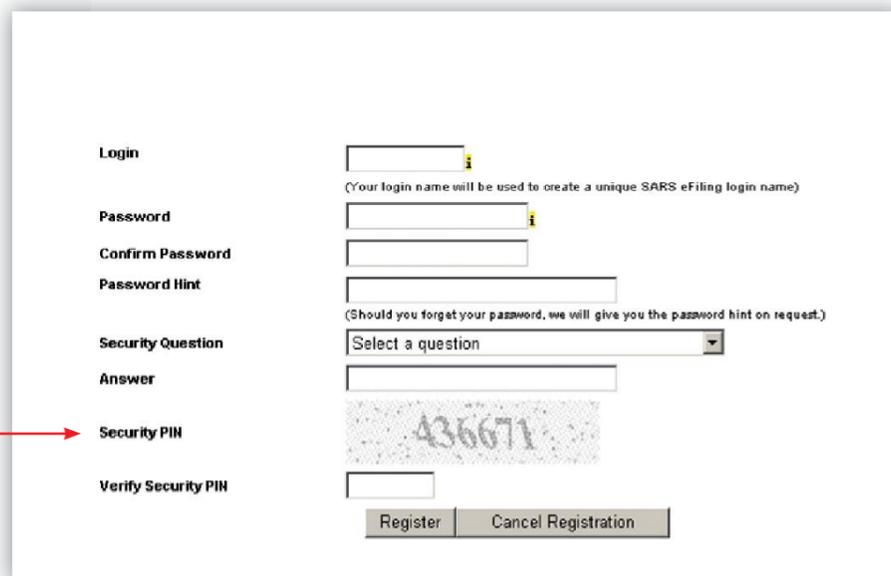
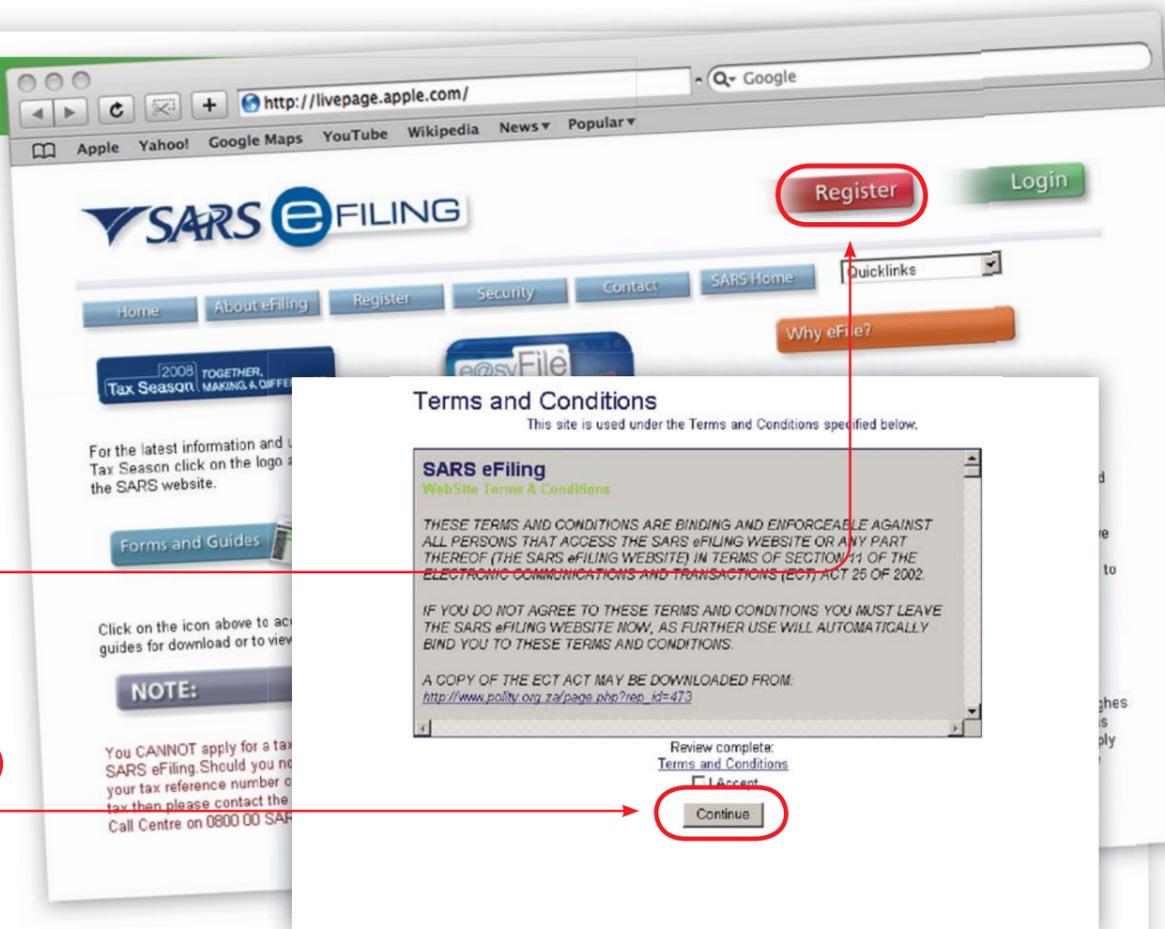
Click "Register" and you will automatically receive your unique login name - which is the login you chose along with four digits.

REGISTERED USERS:

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

If you have forgotten your Login Name and/or Password, you can recover this information by clicking on 'I forgot my login details?'

4



2008
TAX SEASON TOGETHER,
MAKING A DIFFERENCE
0800 00 SARS (7277)

**DEADLINES FOR
INDIVIDUAL TAXPAYERS**
Manual submissions:
21 November 2008
eFiling submissions:
23 January 2009

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

SARS eFILING For Individuals

Home Returns Services Contact Logout Taxpayer List: **msomi t (Mrs)**

Special Links

INCOME TAX WORK PAGE

On this page, you will find a record of the following:

1. Your Income Tax Return/s Issued by SARS
2. Notice of Assessment/s Issued by SARS
3. Supporting Documents you have submitted to SARS

From this page, you are also able to perform the following:

1. Request for the Correction of a return you already submitted to SARS
2. Upload Supporting Documentation
3. Perform a Tax Calculation against your Income Tax Return
4. Lodge a Notice of Objection against an issued Notice of Assessment
5. You can cancel your return if you have already submitted it manually.

RETURN TYPE	STATUS	DATE	VERSION
ITR12	Issued	2008/08/30	1

Taxpayer Name: Mrs t msomi
Tax Period: 2008
Tax Reference: 2218319149
Return Type: ITR12

Tax Calculator Refresh IRP5 Data Manually Submitted Add Supporting Documentation

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'.

5

If you have already Filed your Income Tax Return (ITR12) and received communications back from SARS requesting that you provide supporting documents, click 'Add Supporting Documents' to attach and submit electronic copies of your supporting document to SARS.



WE WILL
D BY
ESSEE

SARS

NO POSTAGE NECESSARY IF POSTED IN SOUTH AFRICA
GEEN POSSEEL NODIG NIE INDIEN IN DIE REPUBLIEK VAN SUID-AFRIKA GEPOS

BUSINESS REPLY SERVICE:
ANSWERSANTWOORDDIENS:

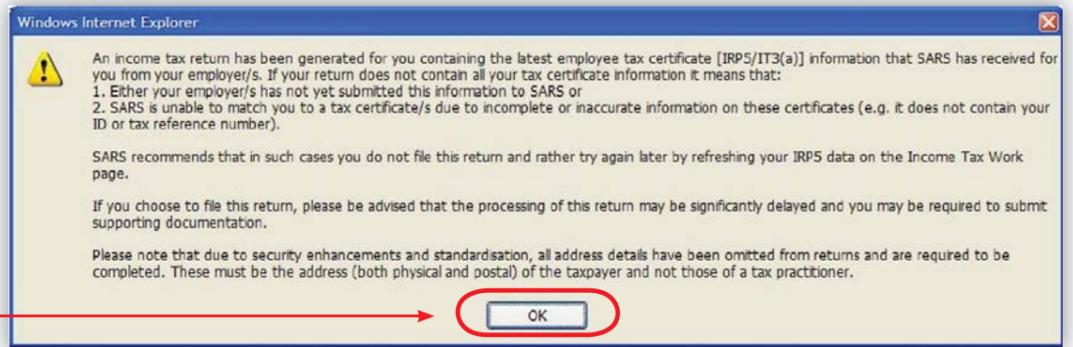
BNT 50K

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.

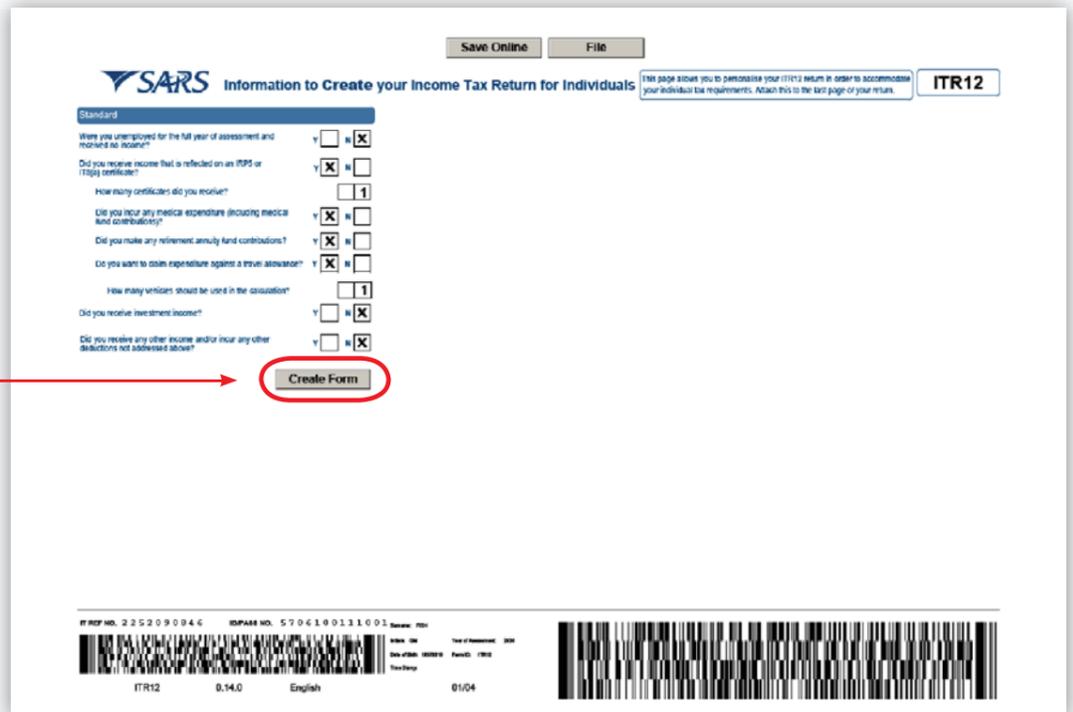
If your return is not fully pre-populated with your tax certificate information, save the return and try again later by clicking on the "Refresh IRP5 Data" button on your Income Tax Work Page



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

Select the relevant options to add applicable income and deduction sections to your ITR12. Once completed click 'Create Form'.

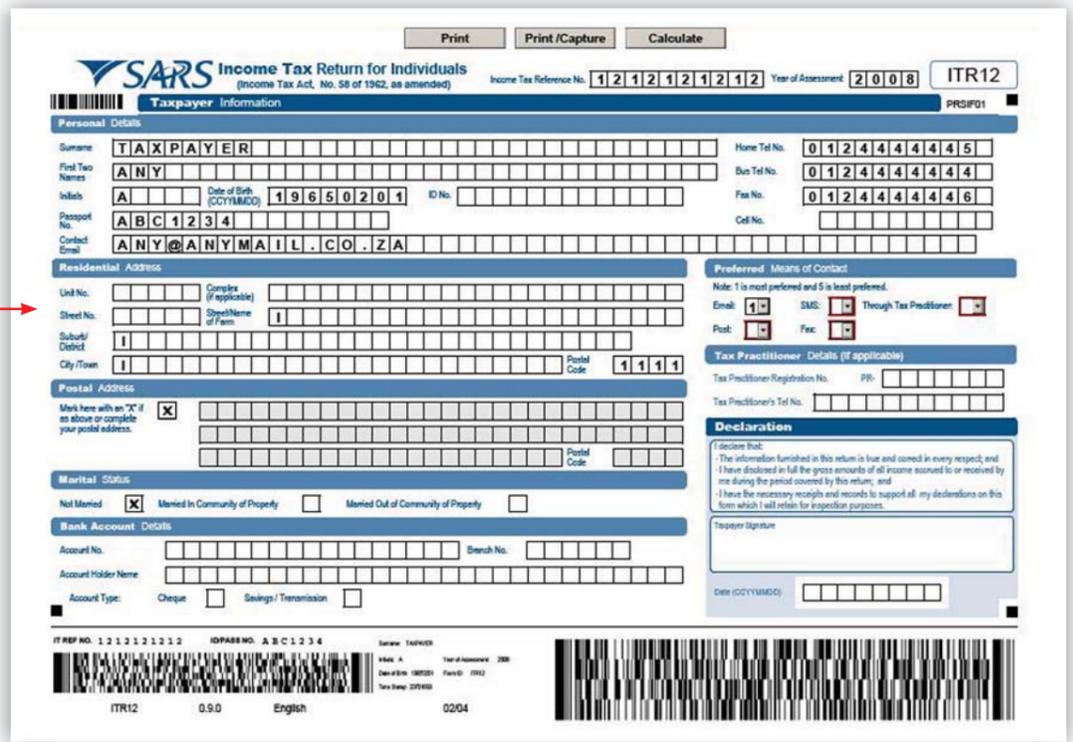


2

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

You will notice that your 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.



3

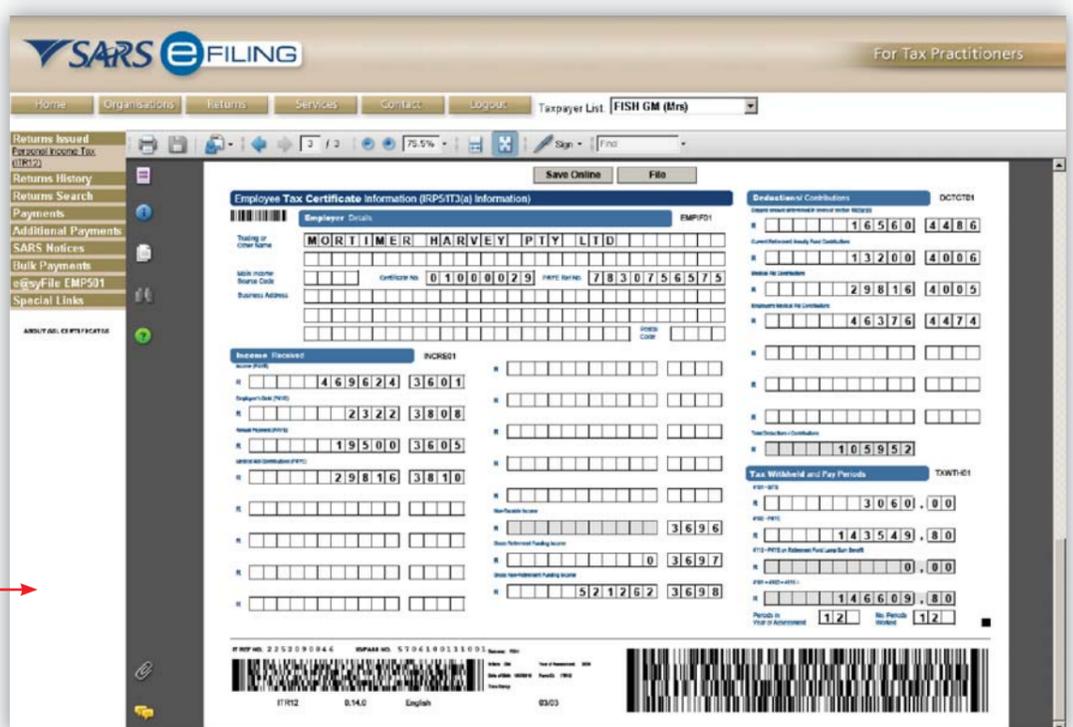
Check your IRP5 information as provided by your employer that is pre-populated onto your Income Tax Return (ITR12). Where it is pre-populated, check it for accuracy against your IRP5.

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 IRP5

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 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.

The screenshot shows the SARS ITR12 form with several sections visible:

- Medical Deductions (MEDIF01):** Includes a question about medical fund contributions, a calendar grid for monthly contributions, and fields for medical fund contributions (R 4805), qualifying medical expenses (R 4828), physical disability expenses (R 4822), and handicap expenses (R 4823).
- Retirement and Income Protection Contributions (RETIP01):** Includes fields for Annual Pension Fund Contributions (R 4802), Current Retirement Annuity Fund Contributions (R 4806), Annual Retirement Annuity Fund Contributions (R 4807), and Income Protection Insurance Contribution (R 4818).
- Travel Claim Against Allowance (TRVIF01):** Includes a question about using a logbook, vehicle registration number, cost price or cash value, and details of kilometres travelled (Starting Date, Closing Date, Opening Km, Closing Km, Total Km, Private Km, Business Km).
- Where Receipts of Actual Expenditure Were Kept:** Includes fields for Fuel and Oil, Maintenance and Repairs, Insurance and License Fees, Wear and Tear, Or Lease Payment, and Other.

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.

The screenshot shows the SARS Income Tax Tax Calculator Result page. It includes a table of amounts assessed and a table of deductions.

Code	Source Code Description	Rand
2001	Income	49624
2808	Employee's debt	2322
3005	Annual payment	16200
3810	Medical aid contributions	7662
Total		56718

Code	Source Code Description	Rand
4008	Allowable medical deduction	3883
Total		3883

Code	Source Code Description	Rand
Taxable Income		56325
Tax Calculation		
Normal Tax on Taxable Income		17615
Rebates		7740
Subtotal		16875
Employee's Tax and Tax Credits		14805.80
Calculated Result		22065.20

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'.

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.

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

Your return has been successfully submitted.

Please note that you may follow up on the SARS assessment progress of your return on the "Income Tax Work Page."

Continue

Save Online

File



Please ensure that you complete the following mandatory fields before printing the form:

- Did you incur any medical expenditure (including medical fund contributions)?
- Did you make any retirement annuity fund contributions?
- Do you want to claim expenditure against a travel allowance?
- Did you receive investment income?
- Did you receive any other income and/or incur any other deductions not addressed above?
- Street/Name of Farm
- Suburb/District or City/Town
- Residential Address Postal Code
- Postal Address
- Postal Address Postal Code
- Marital Status
- Preferred Means of Contact

OK

2008 TAX SEASON TOGETHER, MAKING A DIFFERENCE
0800 00 SARS (7277)

SARS At Your Service

www.sars.gov.za