INCOMPASS Forex

Member of the Merchant West Group

Shared Access to e-filing Profiles:

On 7 May 2020 - Enhancement to Tax Type Transfer Process was made by SARS.

The Tax Type Transfer process for Personal Income Tax and Provisional Tax has been enhanced to enable ease of transfer of tax types between taxpayers, tax practitioners and registered representatives on eFiling.
With this enhancement the approval lies directly with the Taxpayer (owner of the PIT) or the Registered Representative of the PIT, to transfer the tax type to the requestor.

The taxpayer/registered representative for that tax type will receive a sms/ email and must approve the transfer request by:

- Visit www.sars.gov.za
- Select 'Manage Tax Type Transfer' in the SARS eFiling space
- Complete the online form by capturing ID/ Passport number and tax reference number
- An OTP will be sent to the taxpayer to capture
- An online POA will be presented to the taxpayer to 'Accept' or 'Decline' the transfer request.

A notification will be sent to the requestor once the taxpayer has 'Accepted' or 'Declined' the transfer request.

Please note:

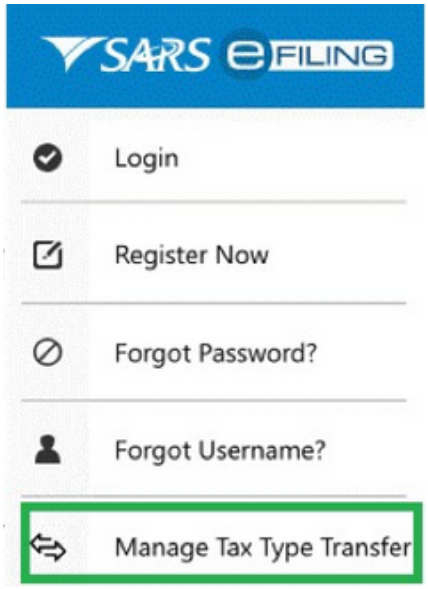
- Transfers for PIT are no longer dependent on the holding user releasing
- Transfers will be immediately cancelled if we are not able to verify the identity of the requested taxpayer.

A tax type transfer will be disallowed if the requestor is not a registered tax practitioner or the registered representative for the requesting taxpayer.

Steps to be taken by the Taxpayer in order to approve the request for Shared Access on SARS e-filing:

The taxpayer/registered representative for that tax type will receive a sms/ email and must approve the transfer request by:

- Logging on to www.sars.gov.za,
- Select 'Manage tax Type Transfer':



- Complete the online form by capturing ID/ Passport number and tax reference number
- An OTP will be sent to the taxpayer to capture
- An online POA will be presented to the taxpayer to 'Accept' or 'Decline' the transfer request.

Please note: Where the request isn't accepted or declined within five working days – a reminder is sent to the taxpayer and/or registered representative to action the request. A notification will be sent to the requestor once the taxpayer has 'Accepted' or 'Declined' the transfer request. Override Codes will no longer be sent to the requestor of the profile.

The Taxpayer or Registered Representative MUST AUTHORISE FROM THEIR SIDE. The Tax Practitioners will no longer be allowed to do this from their side.