

E-Book

How to Use SARS eFiling

*Your Step-by-Step Guide to Filing Your
Tax Return Online*



How to Use SARS eFiling

SARS eFiling lets you submit your tax return from your phone or computer—**no queues, no fuss!** Here's how to do it, even if it's your first time.

Step 1: Register for eFiling

1. **Visit:** www.sarsefiling.co.za
2. Click “**Register**” at the top right.
3. Have the following ready:
 - Your South African ID
 - Your SARS tax number (ask your employer or SMS SARS on 47277)
 - Your latest payslip or IRP5
 - Your personal details (email address, phone number, bank account)
4. Follow the prompts to set up a **secure login and password**.

Step 2: Log In & Check for Auto-Assessments

Once logged in, SARS may show an auto-assessment (based on what your employer/medical aid submitted).

If it's correct, you can accept it with one click.

If you want to claim extra deductions, click “**Edit Return**” to open your tax form.

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Step 3: Gather the Right Documents

You'll need:

- **IRP5/IT3a** from your employer
- **Medical aid certificates**
- **RA** (Retirement Annuity) **certificates**
- Donations (**Section 18A certificates**)
- Proof of **travel or home office expenses** if you claim those
- **Bank details** for any refunds

Step 4: Complete & Submit Your Return

1. On your dashboard, click "**Returns Issued**" → "**Personal Income Tax (ITR12)**"
2. Answer the questions step-by-step (income, deductions, etc.)
3. If you're unsure, use the **Help icon** on each screen or get additional help by visit sites like www.taxtim.com

Click "Submit" once complete.

Step 5: Check the Outcome

After a few minutes or days, SARS will issue a **Notice of Assessment (ITA34)**.

- If you're due a refund: It usually reflects in your bank account in **2–3 business days**.
- If you owe tax: Pay by the due date via EFT or SARS Pay Now.

Some Tips

- **Don't rush** through it. Take 15–30 minutes to do it properly.
- **Always check** that your personal and banking info is up to date.
- **Submit early** to avoid the last-minute rush and possible penalties.
- Use www.taxtim.com for an easier Q&A-style filing experience.

If you are still unsure: Go onto the SARS website again and “*make an online booking*”

It is VERY simple; you choose a date and time that suits you and they call you back on that date (and at that time!). It works well and is very efficient.

Another option is to call SARS at 0800 00 7277 or visit your nearest branch with your ID and tax number.

