

FINDING A MISSING TAX DIRECTIVE

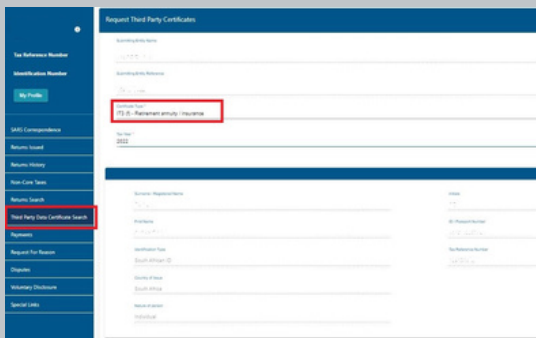
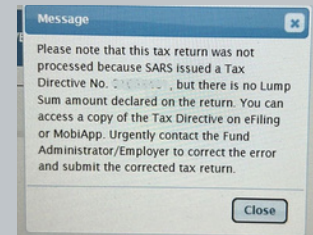
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What is a Tax Directive?

It's an official certificate that SARS issues to your employer or fund manager for a set tax rate, determined by SARS for one specific case (like severance benefits or retirement lump sum payouts)

So what does this error message mean?

This means that the information is not properly reconciled to your eFiling and does not show on the return you are trying to submit. You will need to request the directive on eFiling, and then manually input the details on the return.



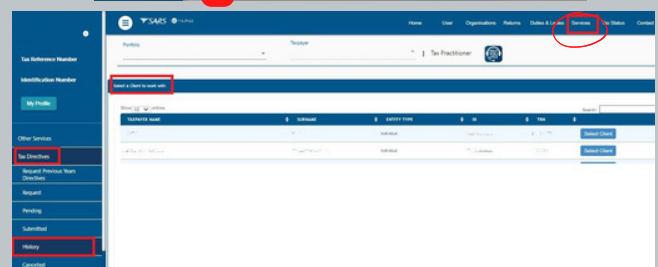
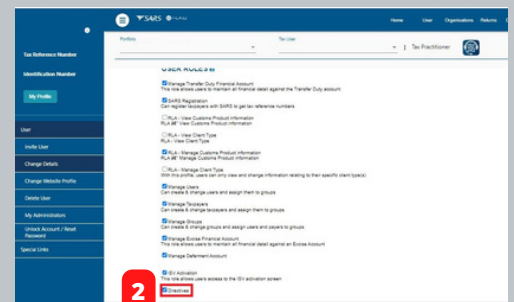
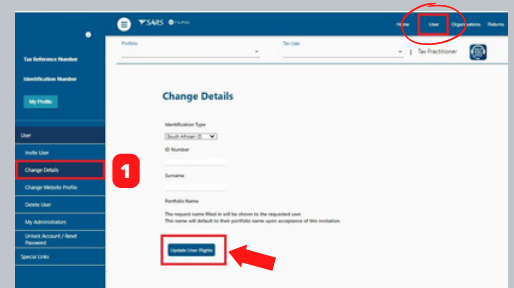
Find it on eFiling:

If you have an "**individual**" eFiling profile;

- Go to the "Returns" tab
- Select "Third Party Data Certificate Search"
- Select "IT3(f) - Retirement annuity/insurance" as the certificate type
- Submit the query and download the certificate

If you have an "**organization**" or "**tax practitioner**" eFiling profile, you will be able to search for directives older than 5 years back, using the SARS Services tab;

- Go to the "User" tab
- Select "Change Details" in the left side menu then "Update User Rights" on the screen below your details
- Scroll down and tick the box next to "Directives", and update the profile (it may take 48 hours to update)
- Once updated, go to the "Services" tab
- Select "Tax Directives", then "history" on the left side menu
- A list of the taxpayers will appear on the screen, search for the taxpayer in question and type the directive number that SARS gave in the error message.
- You will be able to download the directive, with all the necessary information you'll need to manually input the missing details on the return.



If these steps do not solve the issue, you will need to contact the SARS Call Centre. Request the name of the institution to whom the directive was issued, then contact the institution and request that they send you a copy of the directive for tax compliance purposes.