



COMPLAINT ABOUT SUBMITTING IRP5 CERTIFICATES ON **eFILING**

Taxpayers regularly experience challenges with IRP5 certificates, either with incorrect information reflecting on the certificates or not receiving the IRP5 certificates from their previous employers.

It is important to note that the above issues should be directed to employers and not the South African Revenue Services (SARS). However, the case below, which can be taken up with SARS, illustrates another problem that can be quickly resolved. In this instance, a taxpayer had an IRP5 certificate that did not automatically populate on the income tax return on eFiling.

What was the complaint about?

The taxpayer could not file tax returns on eFiling after realising that the **IRP5** certificates for the 2018 and 2020 tax years did not prepopulate information on the income tax return for the respective years.

What the OTO discovered

The OTO investigated the matter and confirmed that a taxpayer representative lodged a complaint with the SARS Complaints Management Office. The taxpayer's desired resolution was for SARS to clear the error and upload the 2018 and 2020 **IRP5** certificates on the respective income tax returns on eFiling, with the required information for returns to be filed. The OTO accepted the taxpayer's complaint on the ground that SARS had failed to resolve the complaint within 21 business days as per the undertaking in the SARS Service Charter.

It transpired that the taxpayer only needed to press the refresh button on eFiling for the **IRP5** certificates to be populated with the required information, and the taxpayer was able to file the tax returns.

Lesson learnt

While SARS might not have resolved the complaint timeously before it reached the Office of the Tax Ombud, the problem could have been resolved had the taxpayer known that the solution was to press the refresh button on eFiling. It is also important to note that in cases where **IRP5** information or any other information, for example, medical or retirement annuity fund contributions, does not prepopulate on eFiling, taxpayers can still file the return by completing the required details on the return or submitting it physically.

An **IRP5** form not automatically populated with the required information should not be a reason for taxpayers to refrain from filing their tax returns, except in circumstances where there is a specific error message when the taxpayer wants to file after capturing information.

NOTE: TAXPAYER'S DETAILS WITHHELD FOR CONFIDENTIALITY REASONS.

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