Licensed Tax Practitioner

12 Simple steps to a successful future

First Time Applicants





Apply for the CIBA License

CIBA members: Login to your membership profile at www.myciba.org and navigate to My Applications and select Apply for a License. Non-CIBA members: Join at https://accounts.myciba.org/register.



Pay the application fee online

Settle the once-off application fee or invest in CPD Channel 2: Growth, which includes a Tax License application fee. If your application documents are not submitted within the required time-lines, the application fee may need to be paid again.



Submission of documentation

Submit your supporting documentation. This will happen in two phases to ensure SARS timelines are adhered to. A supporting document checklist is provided on the membership system - My Applications > Apply for a License. The membership department verifies

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Verification of documentation

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CIBA registers you on SARS's portal

CIBA will load your information within 7 working days of the certificates being issued on SARS's portal. Allow SARS 14 working days to activate the upload. For foreign nationals this process is manual.



Submission of phase 2 documentation and Certificates Verification

Upload phase 2 documents to your CIBA Membership profile plus your cpd.myciba.org certificates:

- Competency Assessment required for CIBA Licensed Tax Practitioner
- SARS Tax Practitioner Readiness Programme
- Tax Compliance Status Pin from SARS that is valid for 12 months
- Independently verified Criminal Check Certificate not older than 1 month



SARS Tax Practitioner Readiness Programme

The SARS Tax Practioner
Readiness Programme is
available on your
membership profile,
under My To-Do list.
The completion date of the
Programme should be within
3 months of submitting all
your documentation for the
application.



Complete the Programmes and Assessments (if applicable)

Depending on your experience and qualification you will have to complete on cpd.myciba.org:

- SARS Readiness Programme (mandatory to complete for first time applicants)
- 2. A technical assessment
- An assessment on CİBA's Statements on Standards for Tax Services standards.

Links to (2) and/or (3) will be made available on your membership profile, under My To-Do list.



Register from within your own eFiling profile

First time applicants should link their eFiling profile as a Tax Practitioner. For the detailed steps on how to link your Tax Practitioner Profile on eFiling:

Click <u>here</u> for the SARS Guide

Click **here** for the CIBA Guide



Receive your Tax Practitioner number

SARS issues your PR number and will email a registration letter to confirm your Tax Practitioner Number. Upload the letter to your membership profile within 5 day.
Go to My To-Do List > Tax Practitioner Number Request.
Delays in notifying CIBA could lead to suspension. Lack of notification could lead in deregistration from SARS.



Start providing taxation services

CIBA will verify your PR number from our side with SARS. After our verification we will send an email with your Privy Seal Digital Verification that can be used in your email signature. Start to enjoy the benefits of being a CIBA Licensed tax practitioner.



Annual renewal

You will be required to renew your license annually by:

- completing a declaration,
- submitting your independently verified criminal clearance check certificate,
- submitting your SARS Tax Compliance Status Pin,
- completing CPD and
- pay your annual fee.