### **Licensed Tax Practitioner**

### 12 Simple steps to a successful future

### **Transfer from other RCB**

Applicants are required to be in good standing with their current Recognised Controlling Body (RCB). If there has been a lapse in membership or if the applicant is not in good standing with another RCB, they should proceed to apply as a first-time applicant.





# 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. Please observe the time-lines. A supporting document checklist is provided on the membership system - My Applications > Apply for a License.



### Verification of documentation

The membership department verifies your application.
Please provide 7 working days for the assessment and verification of your application. The verification expires within 5 working days.



#### 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.



#### Certification Verification

Upload to your CIBA Membership profile your cpd.myciba.org certificates where applicable:

- Competency Assessment required for CIBA Licensed Tax Practitioner
- 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

If you only registered with another RCB after 1 July 2022 you will be required to:

- Provide proof of successful completion of the SARS Readiness Programme or
   Complete the Programme
- Complete the Programme on your membership profile, under My To-Do list. The completion should be within 3 months of submitting your application.



#### Complete Programmes and Assessments (if applicable)

You will have to complete a declaration on cpd.mycpd, a link will be made available on your membership profile, under My To-Do list. You should also ensure you are familiar with CIBA's Statements on Standards for Tax Services. Available on CIBA's Practice Support Library, under the Tax Practitioner tab. The Practice Support Library can be accessed from the footer on www.myciba.org, under the Features heading.



# Register from within your own eFiling profile

Login to your SARS eFiling profile and select CIBA as your preferred Recognised Controlling Body (RCB).

For the detailed steps on how to link your Tax Practitioner Profile on eFiling.

Click **here** for the SARS Guide

Click **here** for the CIBA Guide



#### Upload screenshot of CIBA selection

Upload a screenshot of CIBA as the selected RCB on the CIBA membership system. Go to My To-Do List > Tax Practitioner Number Request. Lack of notification could lead in deregistration from SARS.



### Start providing taxation services

After receiving the screenshot 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.