MANUAL FOR THE ONLINE RESEARCH AND DEVELOPMENT TAX INCENTIVE SYSTEM

science & innovation

Department:
Science and Innovation
REPUBLIC OF SOUTH AFRICA

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1. Terms

Applicant	A person who makes a formal application for the R&D Tax Incentive
External users	Applicants and associates wishing to apply for the R&D tax incentive
Pending	The "Pending" status means that your application has been successfully submitted, but the system requires more information from you before further action can be taken.

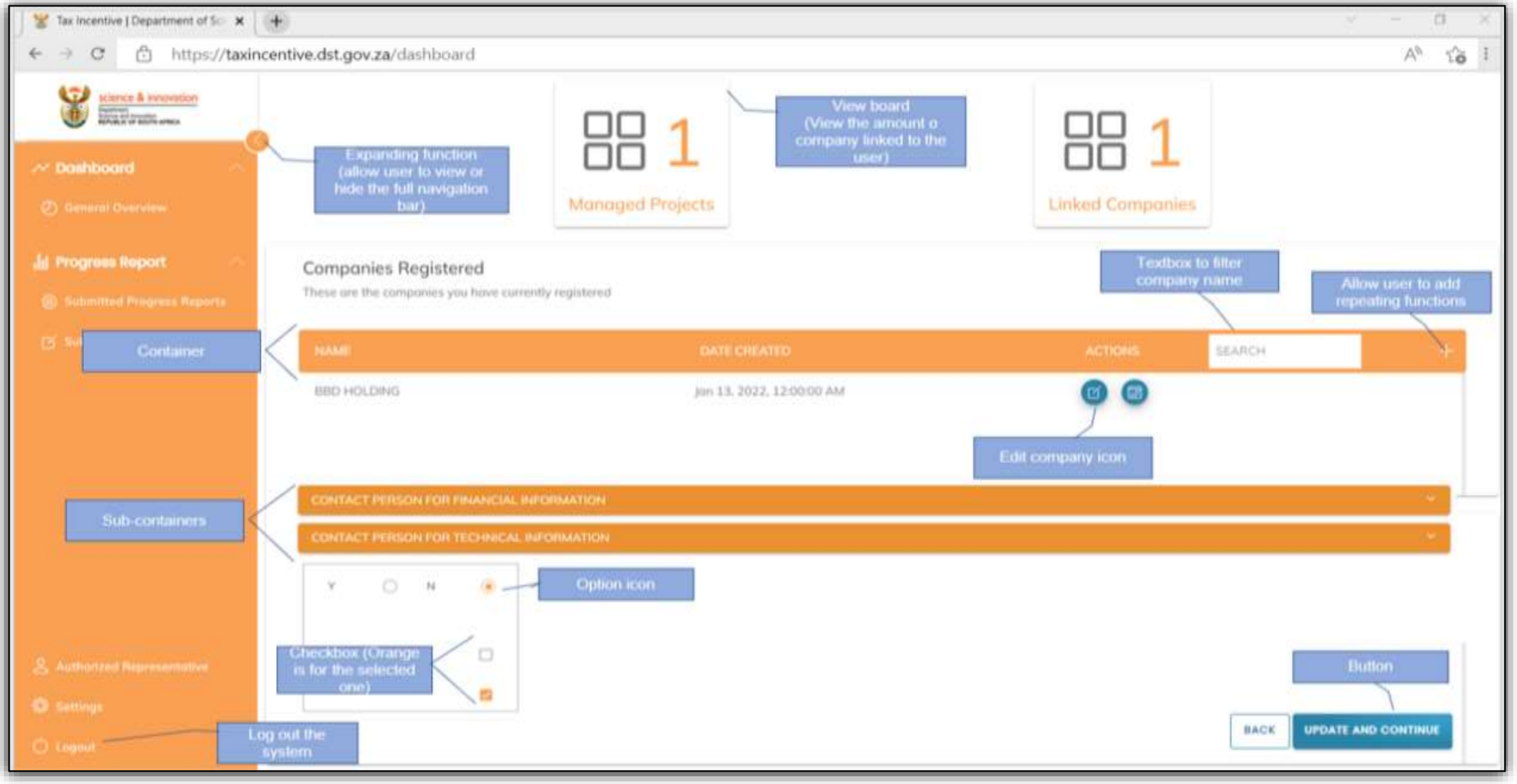
2. Icons

Icon	Name	Click on the icon to –
	View project	Get a full view of the project application
	Edit project	Edit your company profile or project application details
	Project case history	See which stage your project is at
	Withdraw/Delete	Withdraw the project created on the system
	Add additional information	See additional information required about the project
	Add company or a new project	Adding of a new record
	Unlink project	Unlink a representative from company profile or project application
*	A red asterisk	This indicates that project details have been changed.

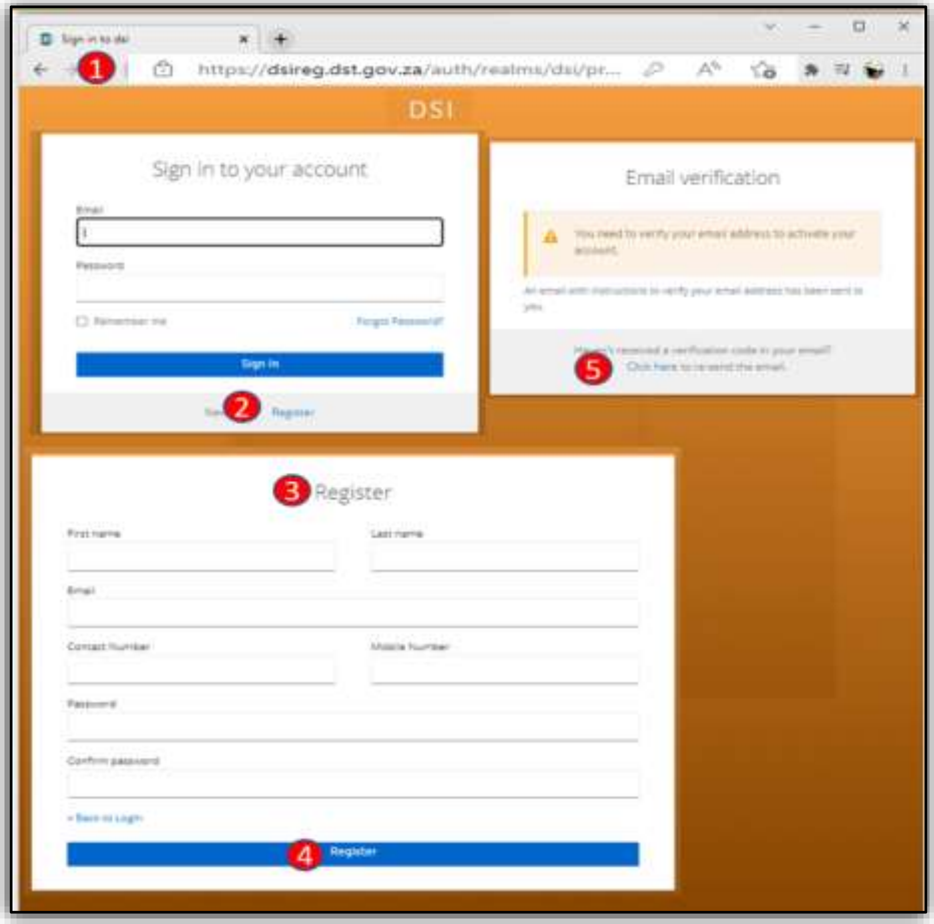
3. How to access the R&D Tax Incentive system

- Open your Internet browser.
- Type in https://www.dst.gov.za/rdtax/
- On the R&D tax incentive webpage, click **Submit Online** tab.
- Then, in the application process section, click on https://taxincentive.dst.gov.za

4. The dashboard



5. How to register on the system



How to access the system

1. Type http://taxincentive.dst.gov.za into your browser.

How to register as a new applicant

2. Click on Register link.

3. Enter all the required information.

4. Click on the Register button.

Verify your email address

- Open your verification email and click "Link to email address verification" to verify your email address.
- The email verification link will either take you back to the login screen or automatically log you into the system.

Resend verification link

5. Click on the Click Here link to verify your email address.

- The system will resend the email to the captured email address.
- Click on the link sent to your email address.
- The system will open the R&D Tax Incentive system.

6. How to log in to the system

How to log in to the system

1. Enter your registered email address and password.
2. Click on the Sign In button.

   The R&D Tax Incentive system will open.

How to reset your password

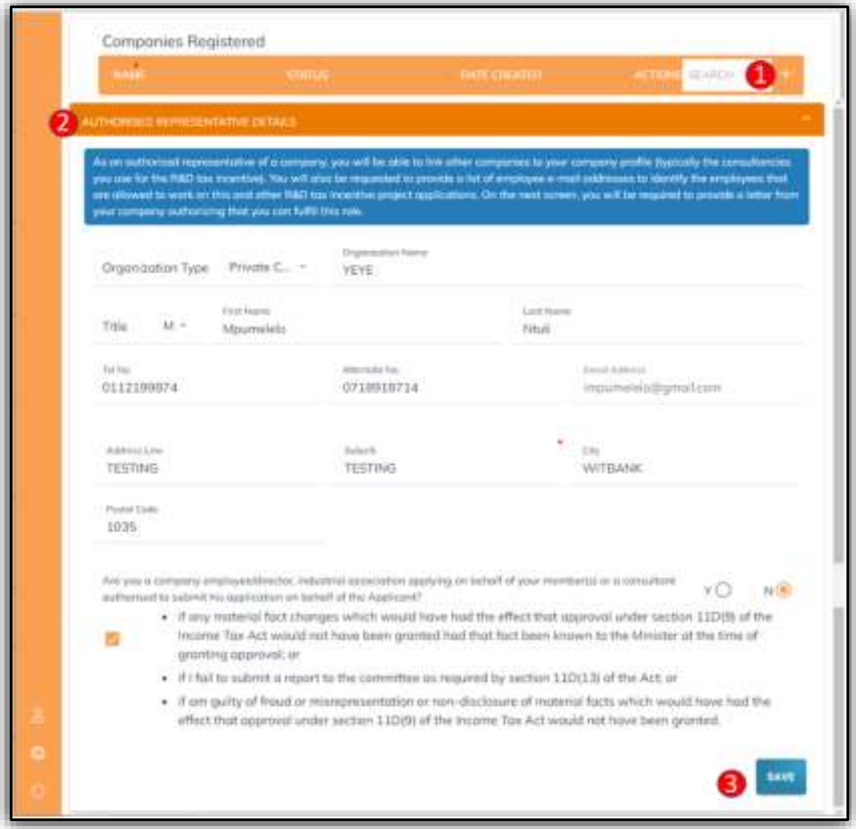
3. Click on Forgot Password?
4. Enter your registered email address.
5. Click the Submit button.
   - The system will send an email to the address provided.
   - Click on the link sent to your email address.

Capture new password

6. Enter new password.
7. Click the Submit button.

   The system will open the login screen.

7. How to register an authorised representative



After you have logged into the system successfully, the system will display the dashboard page.

How to register an authorised representative

1. Click on the plus (+) sign.

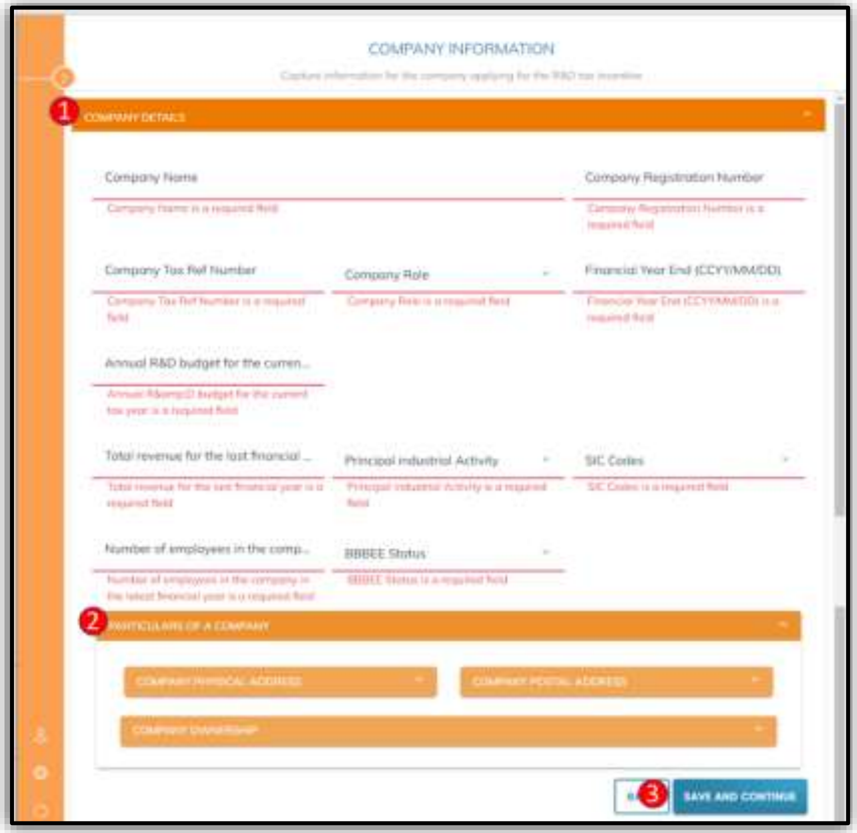
   The system will display the authorised representative details page.

2. Enter all the information in the fields displayed.
3. Click on the Save button.

   The system will display the company details page.

Please note that the form saves automatically every 5 seconds. If you log out and later log back in, the system will display what was previously captured.

8. How to register a company's profile and attach the mandatory supporting documents



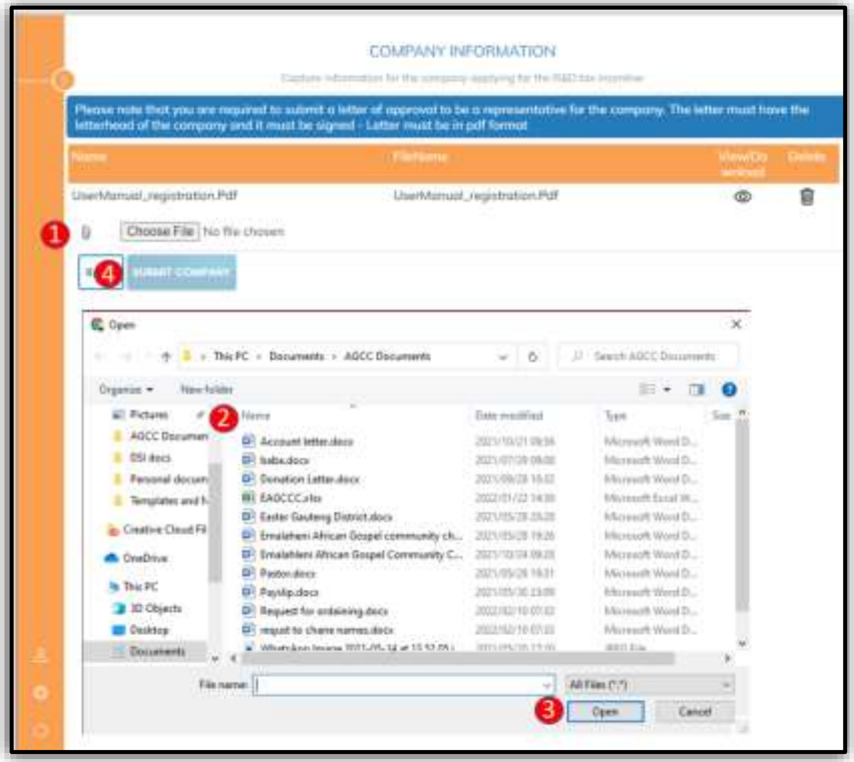
How to register a company's profile

1. Enter the company's details.
2. Click on the Save and Continue button.

   The system will display the attach document page.

Please note that the form saves automatically every 5 seconds. If you log out and later log back in, the system will display what was previously captured.

9. How to attach a document

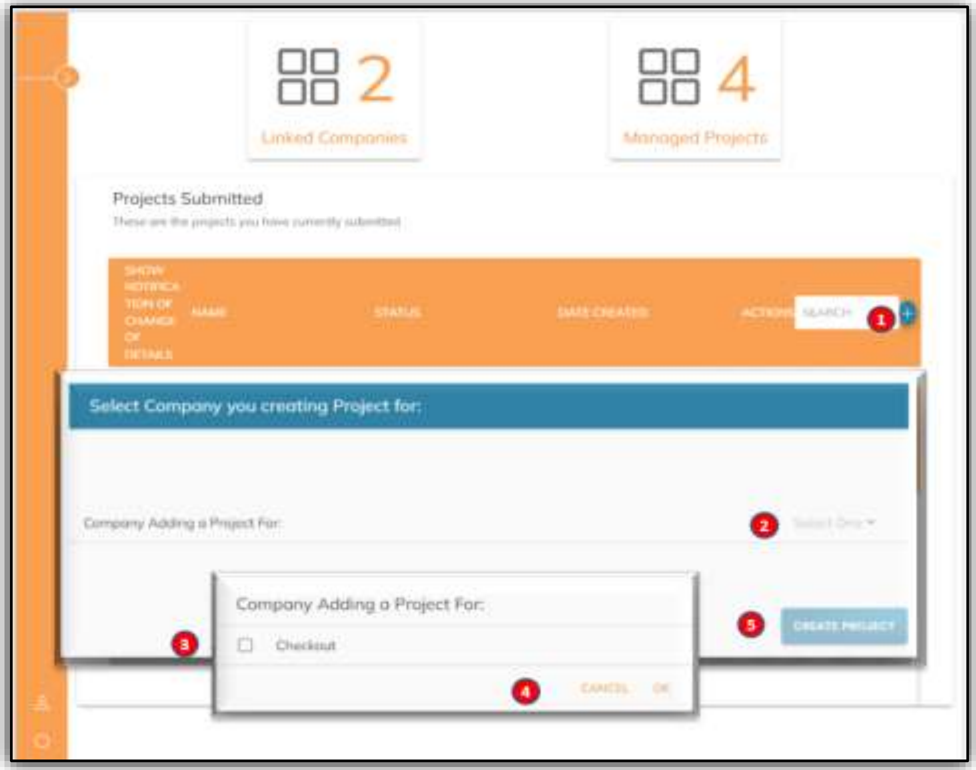


How to attach a document

1. Click on the Choose File button.

   The system will display the Windows browser so you can select the document you want to upload.
2. Select the document in the Windows browser.
3. Click on the Open button.
4. Click on the Submit Company button.
   - The system will send the applicant an email acknowledging receipt.
   - The system will display the dashboard page.

10. How to create and submit a new project



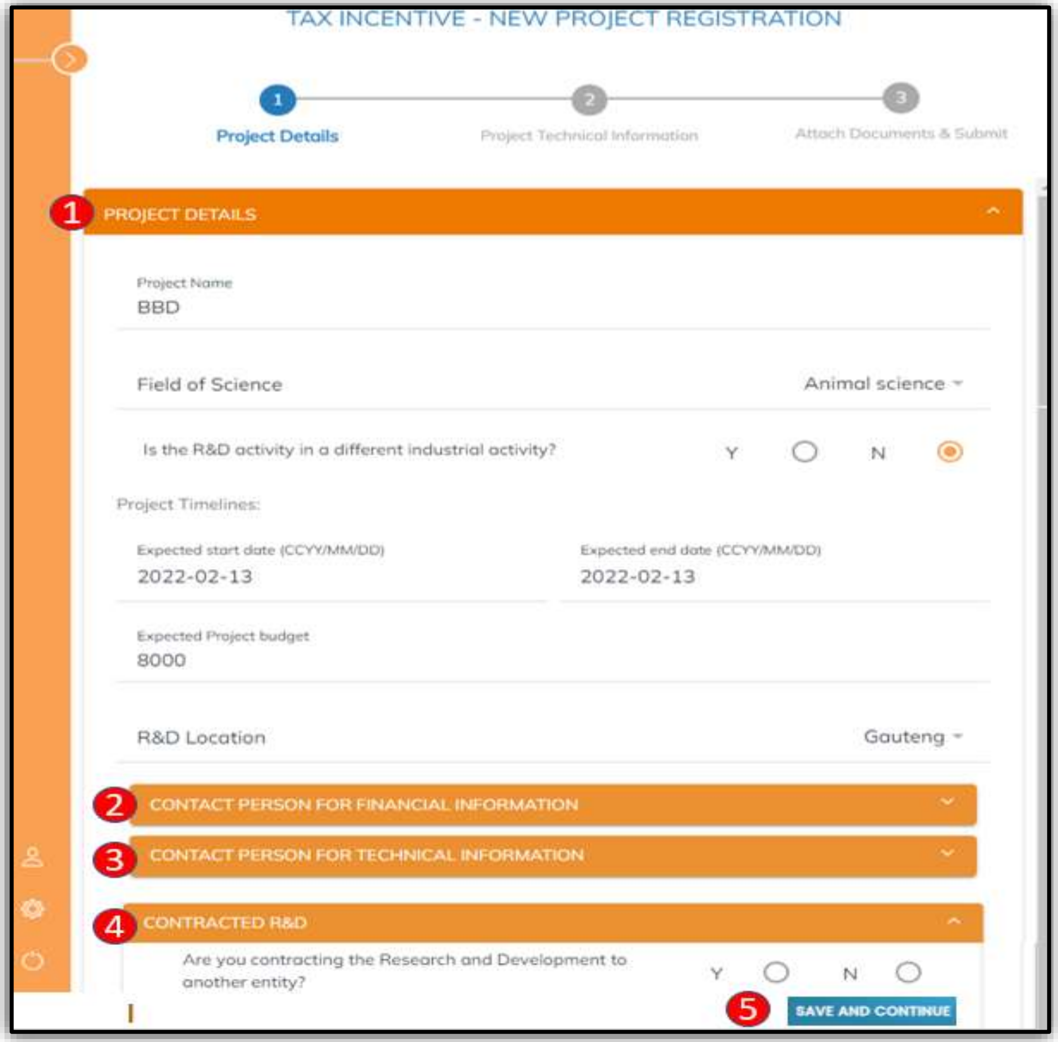
How to create a project

1. Click on the plus (+) sign.

   The system will display a pop-up message allowing you to select a company for the project.
2. Click on the dropdown list to select a company
3. Select a company to be linked to the project.
4. Click on Cancel to return to the previous screen or click Ok to select the company
5. Click on the Create Project button.

   The system will display a form on which you can fill in project details.

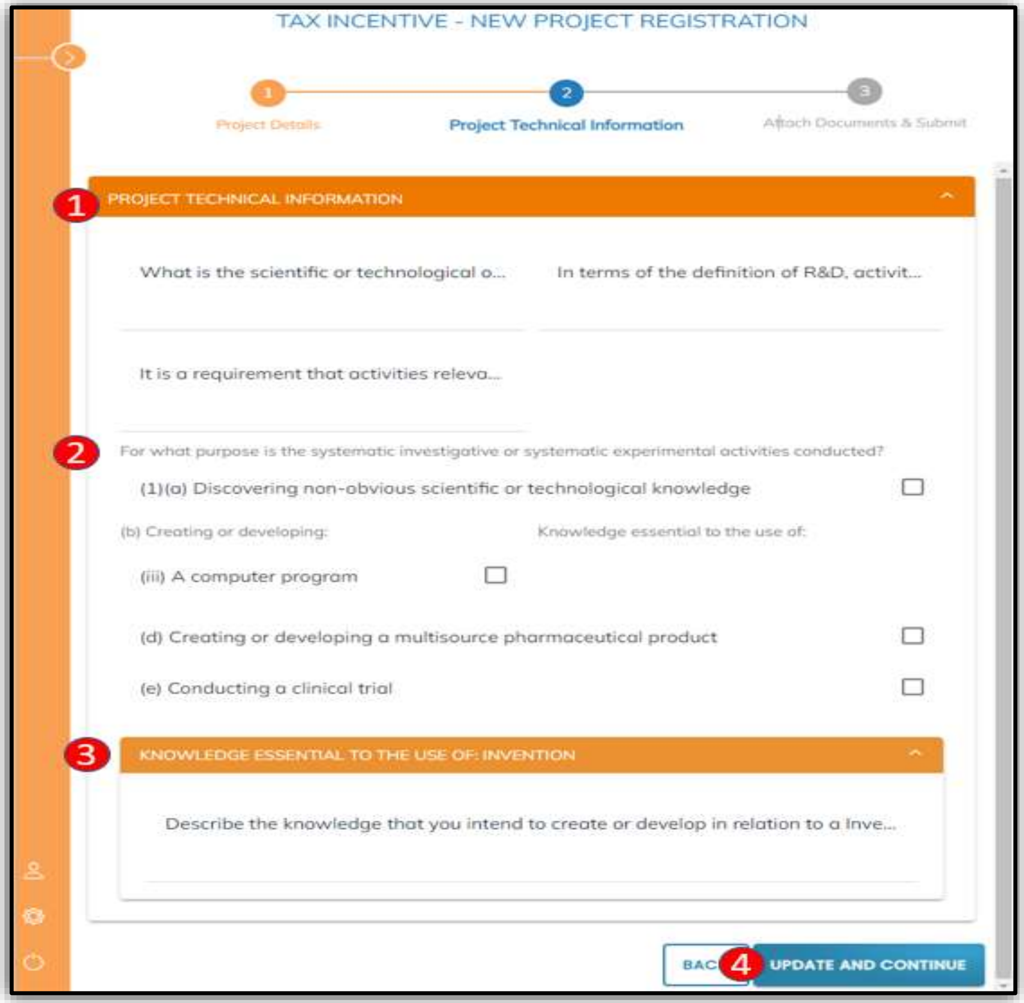
Please note that the form saves automatically every 5 seconds. If you log out and later log back in, the system will display what was previously captured. The system will link the previously saved information to the selected company or companies.



How to capture project details

1. Enter project details.
2. Enter the contact person for financial information.
3. Enter the contact person for technical information.
4. Enter the contractor's R&D information.
5. Click on the Save and Continue button.

   The system will display the project technical information page.

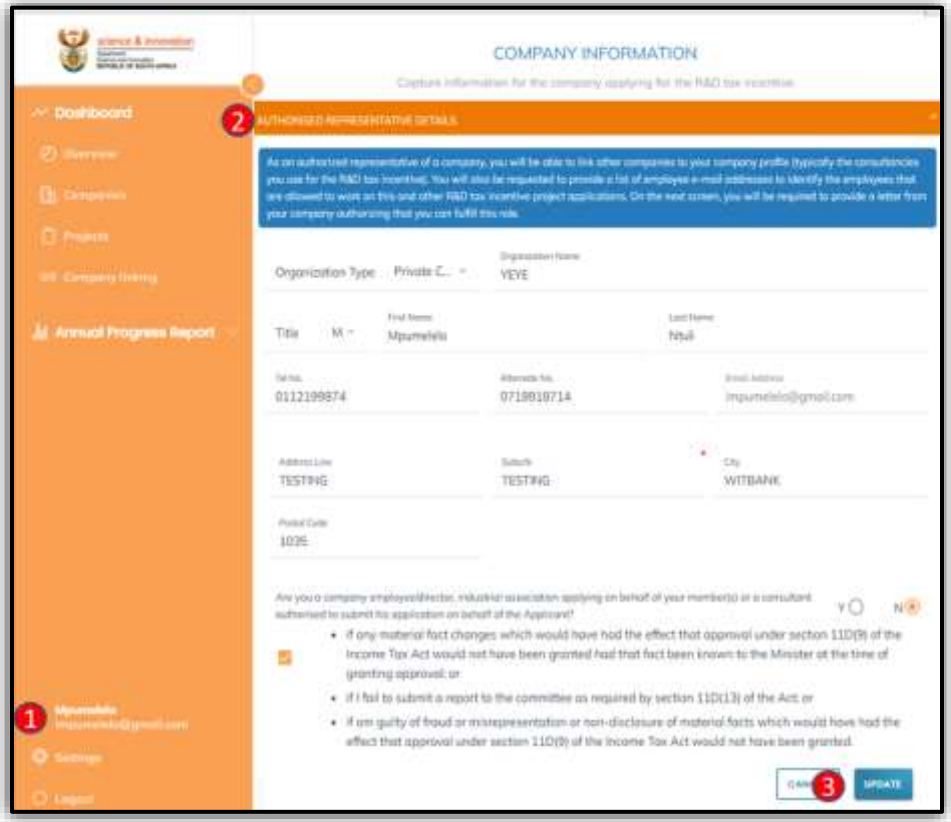


How to capture technical information on the project

1. Enter the technical information on the project.
2. Select the relevant claim or claims.
3. Enter supporting information for the claim.
4. Click on the Update and Continue button.

   The system will display the attach document page.

11. How to edit and save an authorised company representative details



How to edit and save a company representative profile:

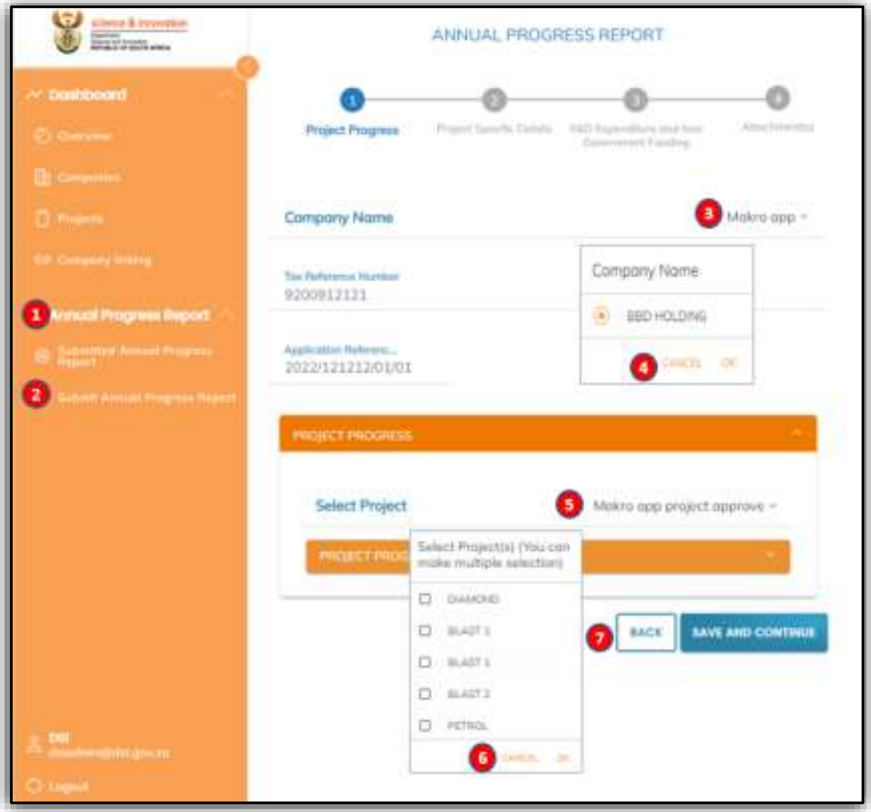
1. Click on the Username link.

   The system will display the authorised representative details screen.
2. Fill in the details of the authorised representative.
3. Click on the Update button.

   The system will display the dashboard screen.

Please note that the form saves automatically every 5 seconds. If you log out and later log back in, the system will display what was previously captured.

12. How to submit an annual progress report

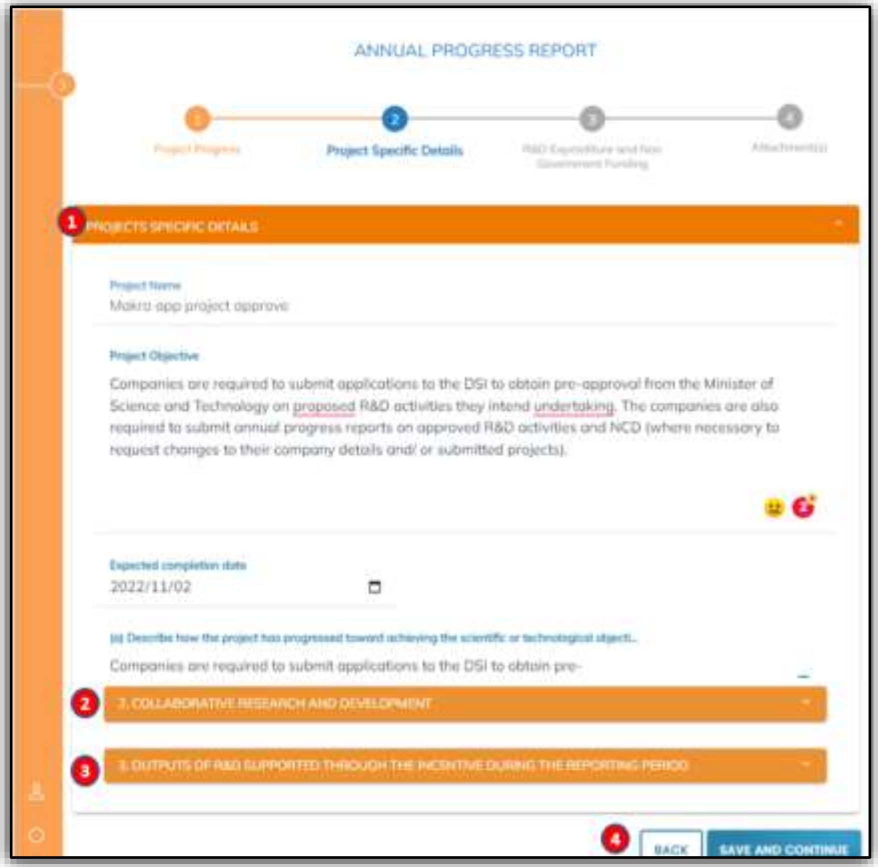


Step 1: How to create an annual progress report for an approved project

1. Click on the Annual Progress Report link.
2. Click on the Submit Annual Progress Report link.
3. Select the company for which you are submitting the annual progress report.
4. Click on the OK button Cancel button to cancel selection.
5. Select the project for which you are submitting the report.
6. Click on the OK button or Cancel button to cancel selection.

   Fill in the fields for project progress section.
7. Click on the Save and Continue button or the Back button to return to the previous page.

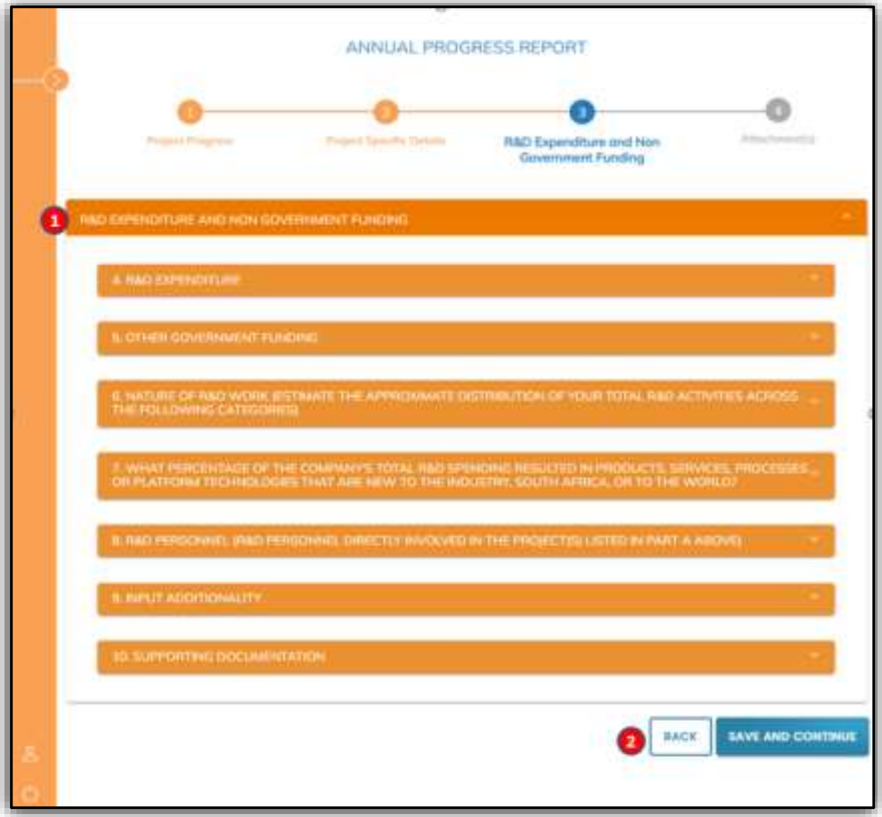
Please note that the form saves automatically every 5 seconds. If you log out and later log back in, the system will display what was previously captured.



Step 2: How to capture project specific details

1. Fill in the fields of the project specific details section.
2. Fill in the fields for collaborative research and development section
3. The sections to be completed are dependent on what was selected by the applicant upon lodging the application for a project.
4. Fill in the fields for output of R&D supported through the incentive during the reporting period.
5. The sections to be completed are dependent on what was selected by the applicant upon lodging the application for a project.
6. Click on the Save and Continue button or the Back button to return to the previous page.
   When you click the Save and Continue button, the system will display the R&D Expenditure and Non-Government Funding page.

Please note that the form saves automatically every 5 seconds. If a user logs out and logs back into the system, the system will display what was previously captured.

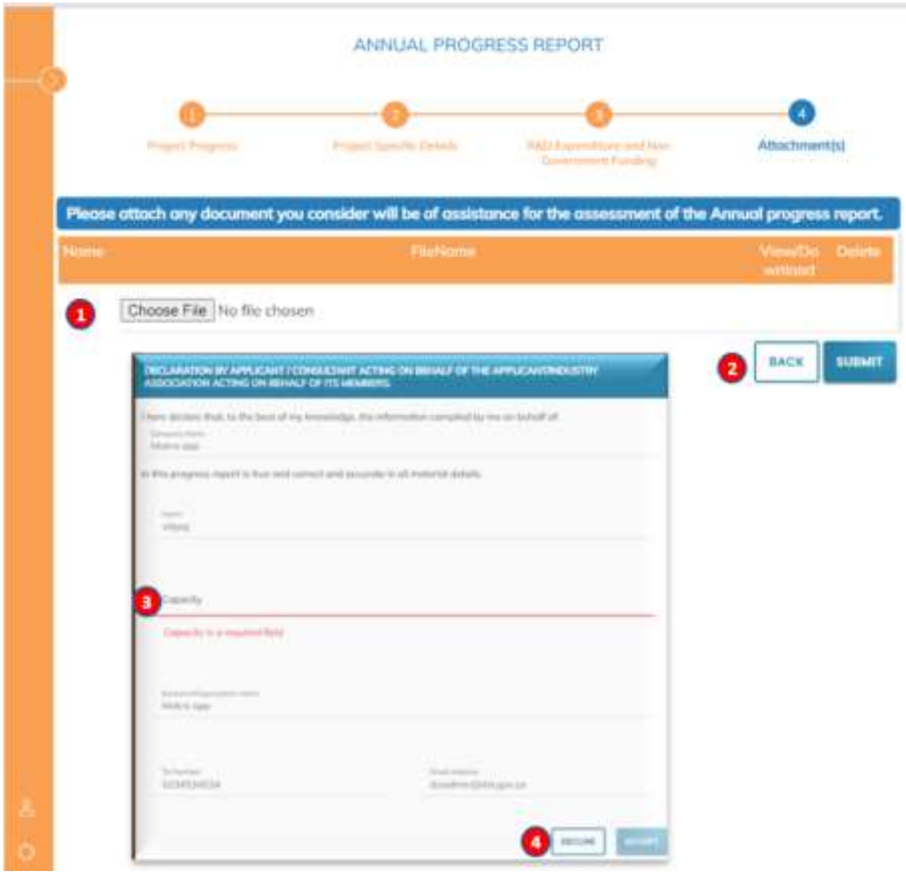


Step 3: How to capture R&D expenditure and non-government funding

1. Fill in the fields for R&D expenditure and non-government funding.
2. Click on the Save and Continue button or the Back button to return to the previous page.

   When you click the Save and Continue button, the system will display the attachment screen.

Please note that the form saves automatically every 5 seconds. If a user logs out and logs back into the system, the system will display what was previously captured.

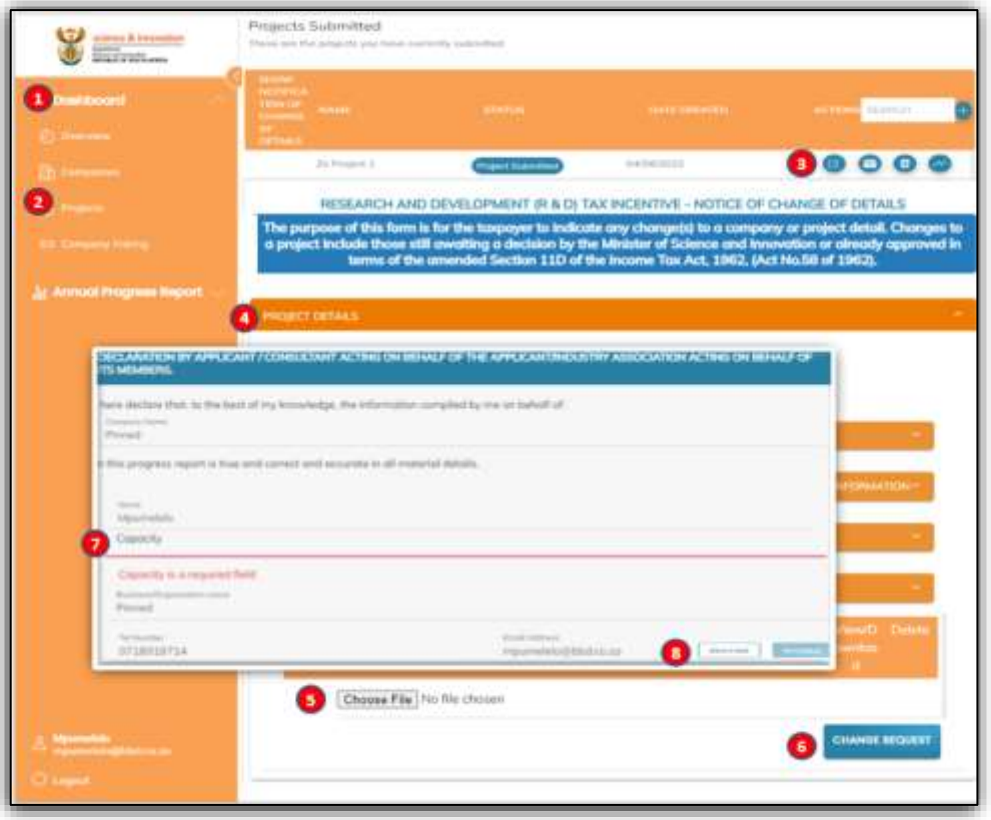


Step 4: How to submit an annual progress report for a project – *Attachment(s)*

1. Click on the Choose File button.
    a. The system will allow you to select the document to upload.
    b. Select the document.
    c. Click on the Open button
    d. Click on View/Download icon to view the attached document. This icon appears when an attachment is attached.
    e. Click on Delete icon to delete the attached document. This icon appears when an attachment is attached.
2. Click on the Submit button. The system will display the declaration popup Where the applicant clicks on the Back button, the system will display the previous page.
3. Enter capacity.

Click on Accept to submit the application or Decline to return to the previous screen.

13. How to submit a notification of change of details



How to submit a notification of change of details for a project

1. Click on the Dashboard link.
2. Click on the Project link.
3. Click on the Edit icon on the project you wish to change.
4. Amend the particulars of the project.
5. If desired, attach a supporting document.

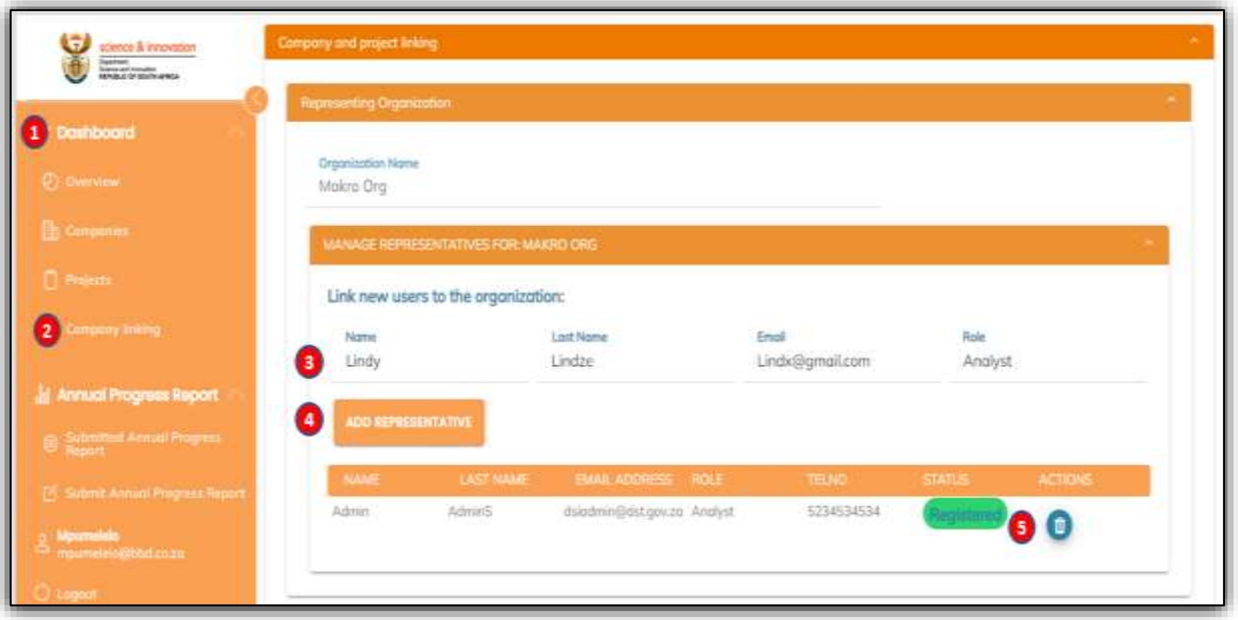
   The system will display the attach document page. Please follow the steps to attach supporting document to submit the notification of change of details.

   Please follow the steps set out on this page.
6. Click on the Change request button.

   The system will display the declaration pop-up.
7. Enter Capacity.
8. Click on Accept to submit the application or Decline to return to the previous screen

Please note that the form saves automatically every 5 seconds. If you log out and later log back in, the system will display what was previously captured.

14. How to link users to an organisation



How to link a user to a company

1. Click on Dashboard link.
2. Click on the Company linking link.

   The system will display the organisation linked to the user.
3. Enter the details of the user to which the organisation is to be linked.
4. Click on the Add Representative button.

   The system will display the users that are already linked to the organisation.

How to unlink a user from a company

5. Click on the Delete icon.

   The system will remove the user from the list.

15. How to link users to a company

How to link a user to a company

1. Click on the Company linking link.

   The system will display the company that has been added to the system.
2. Select the relevant company for which to link a user to.

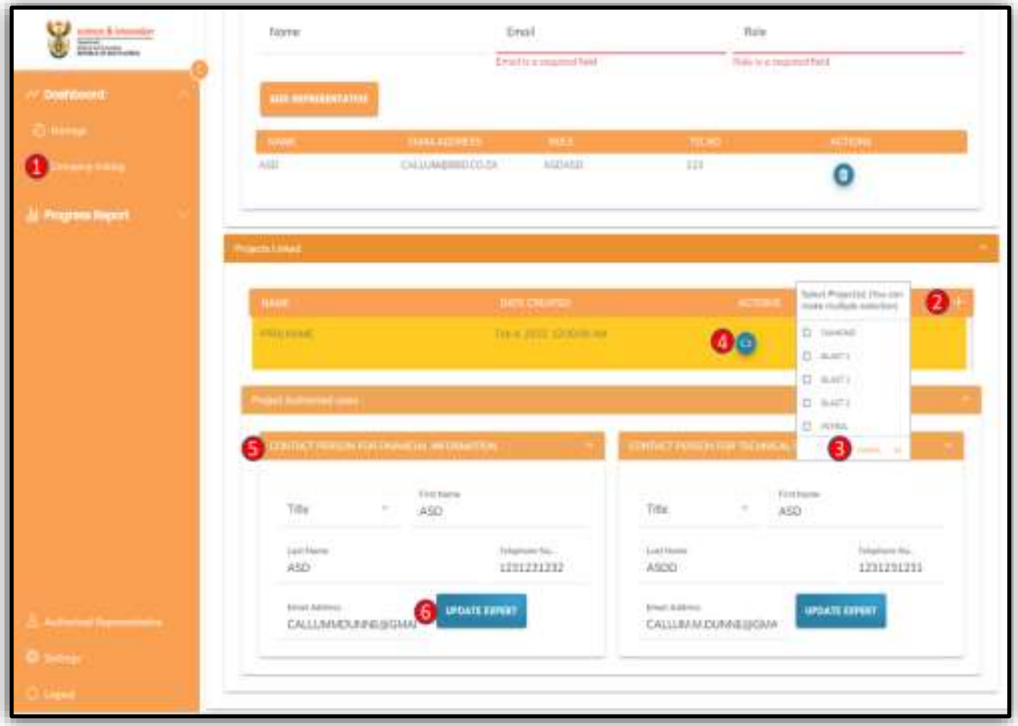
   The system will display the users that are already linked to the project.
3. Fill in the user's details
4. Click on the Add Representative button.

How to unlink a user from a company

5. Click on the Delete icon.

   The system will remove the user from the list.

16. How to link projects to a company



How to link project(s) to a company

1. Click on the Company linking link.
2. Click on the plus (+) sign to select a project(s) you want to link.
3. Select the projects then click the OK button.

How to unlink a company

4. Click on the Delete icon.

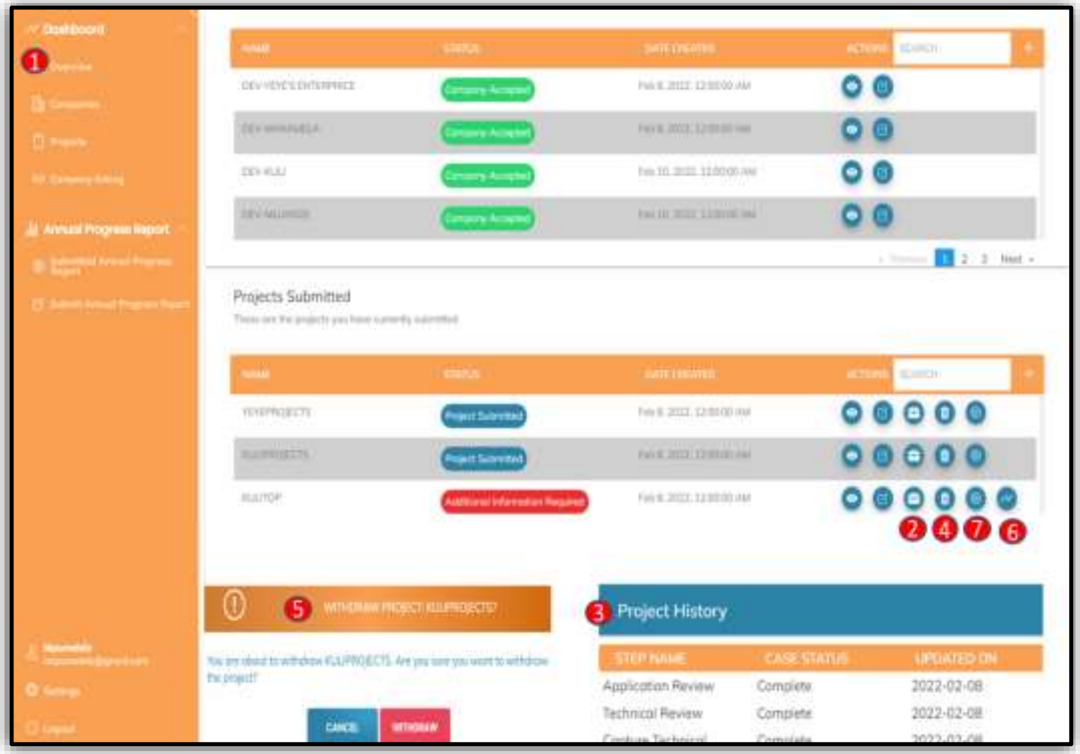
   The system will remove the project from the list of linked projects.

How to update the technical or financial contact person's details

5. Fill in the new details of the contact person.
6. Click on the Update Expert button.

   The system will check to see if the user is already on the system. If the user is not on the system, the system will send an email requesting the user to register.

17. How to navigate through the dashboard



How to navigate through the dashboard

1. Click on the Overview link.
2. Click on the Briefcase icon.
   The system will display a pop-up with the status update page.
3. View status update. Click outside to exit the pop-up.
4. Click on the Withdraw icon.
   The system will pop-up the withdraw page.
5. Click on Withdraw Project icon.
   Click outside the status update pop-up to close it.
6. Click on the Attach Document icon.
   The system will display the attach document page.
7. Click on the View Progress Report icon to view the progress report that was submitted.