

MANUAL FOR THE ONLINE RESEARCH AND DEVELOPMENT TAX INCENTIVE SYSTEM

M Making < sure > it's
possible



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

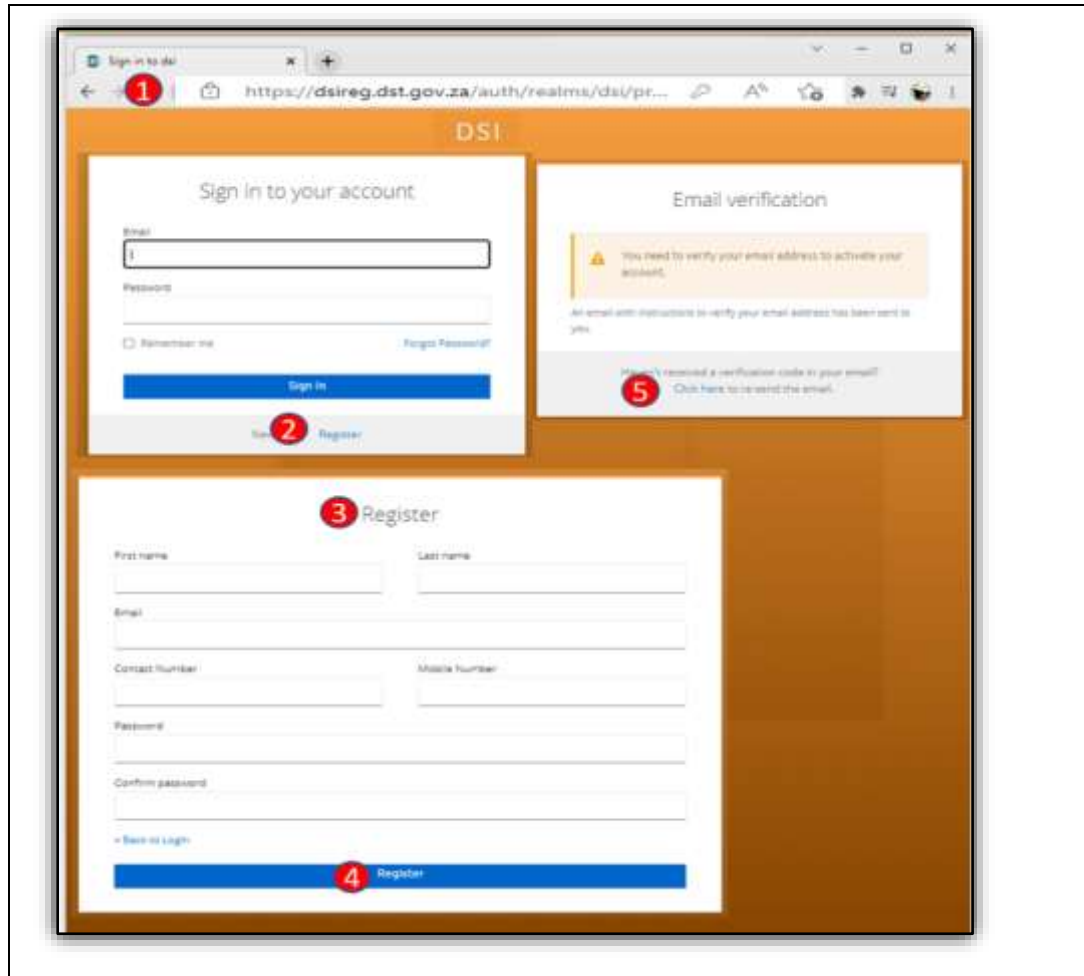
The screenshot shows a web dashboard for 'Tax Incentive | Department of Science & Innovation' at the URL <https://taxincentive.dst.gov.za/dashboard>. The dashboard features a left-hand navigation menu with sections like 'Dashboard', 'Progress Report', and 'Authorized Representative'. The main content area includes two summary cards for 'Managed Projects' and 'Linked Companies', both showing a count of '1'. Below these is a 'Companies Registered' section with a table listing registered companies. The table has columns for 'NAME', 'DATE CREATED', and 'ACTIONS'. A search bar is located to the right of the table. Below the table are two dropdown menus for contact information and a set of radio buttons for selection. At the bottom right, there are 'BACK' and 'UPDATE AND CONTINUE' buttons. Numerous blue callout boxes provide annotations for various UI elements.

Annotations:

- Expanding function (allow user to view or hide the full navigation bar)
- View board (View the amount of company linked to the user)
- Managed Projects
- Linked Companies
- Textbox to filter company name
- Allow user to add repeating functions
- Container
- Sub-containers
- Edit company icon
- Option icon
- Checkbox (Orange is for the selected one)
- Button
- Log out the system
- BACK
- UPDATE AND CONTINUE

| NAME | DATE CREATED | ACTIONS |
|-------------|---------------------------|-----------------|
| BBD HOLDING | Jan 13, 2022, 12:00:00 AM | [Edit] [Delete] |

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

The image displays three sequential screenshots of a web application's user interface, illustrating the login and password recovery process. Each screenshot is overlaid with a red circle containing a number from 1 to 7, indicating the step in the process.

- Step 1:** The login page titled "Sign in to your account". It features input fields for "Email" and "Password", a "Remember me" checkbox, and a "Sign In" button.
- Step 2:** The "Forgot Your Password?" page. It includes an input field for "Email" and a "Submit" button.
- Step 3:** The "Update password" page. It contains a "New Password" field, a "Confirm Password" field, and a "Submit" button.

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

Companies Registered

NAME STATUS DATE CREATED ACTIONS SEARCH **1**

2 AUTHORIZED REPRESENTATIVE DETAILS

As an authorized representative of a company, you will be able to link other companies to your company profile. Typically the committees you use for the R&D tax incentive. You will also be requested to provide a list of employee e-mail addresses to identify the employees that are allowed to work on this and other R&D tax incentive project applications. On the next screen, you will be required to provide a letter from your company authorizing that you can fulfil this role.

Organization Type: Private Co. - Organization Name: YEYE

Title: M - First Name: Mpumehle Last Name: Pitso

Tel No: 0112109874 Alternate Tel: 0718918714 Email Address: mpumehle@gmail.com

Address Line: TESTING Suburb: TESTING City: WITBANK

Postal Code: 1035

Are you a company employee/director, industrial association applying on behalf of your members or a consultant authorized to submit an application on behalf of the Applicant? Yes No

- if any material fact changes which would have had the effect that approval under section 11D(5) of the Income Tax Act would not have been granted had that fact been known to the Minister at the time of granting approval; or
- if I fail to submit a report to the committee as required by section 11D(13) of the Act; or
- if am guilty of fraud or misrepresentation or non-disclosure of material facts which would have had the effect that approval under section 11D(5) of the Income Tax Act would not have been granted.

3 Save

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

COMPANY INFORMATION
Capture information for the company applying for the R&D tax incentive

1 COMPANY DETAILS

Company Name
Company Name is a required field

Company Registration Number
Company Registration Number is a required field

Company Tax Ref Number
Company Tax Ref Number is a required field

Company Role
Company Role is a required field

Financial Year End (CCYY/MM/DD)
Financial Year End (CCYY/MM/DD) is a required field

Annual R&D budget for the current tax year
Annual R&D budget for the current tax year is a required field

Total revenue for the last financial year
Total revenue for the last financial year is a required field

Principal industrial Activity
Principal industrial Activity is a required field

SIC Codes
SIC Codes is a required field

Number of employees in the company
Number of employees in the company in the latest financial year is a required field

BBEE Status
BBEE Status is a required field

2 PARTICULARS OF A COMPANY

Company Physical Address

Company Postal Address

Company Division

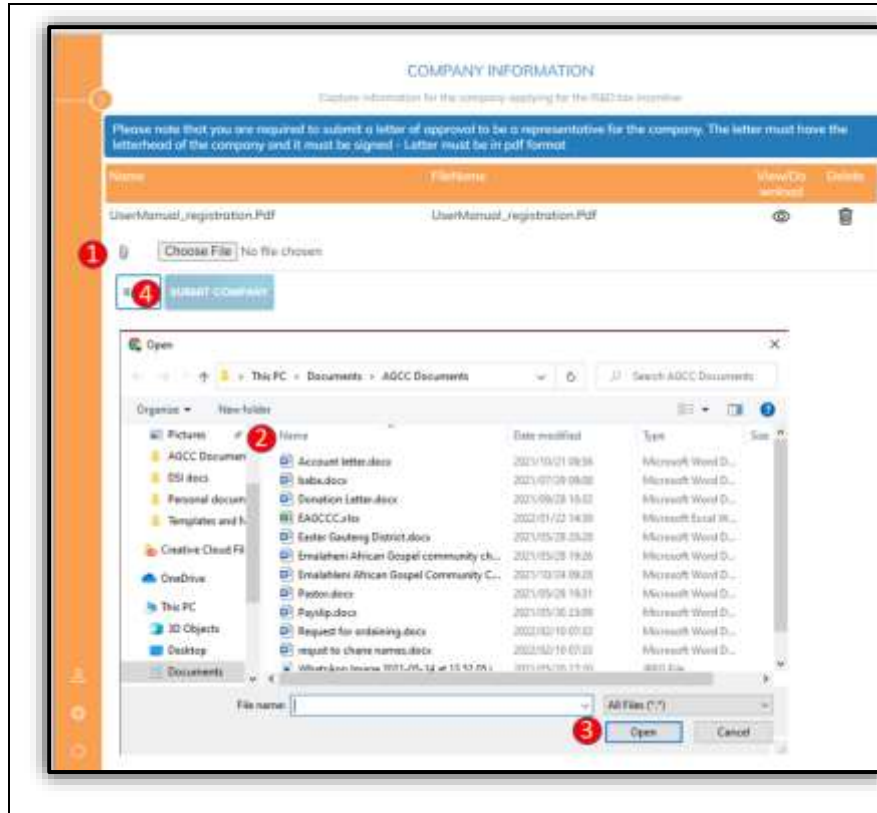
3 SAVE AND CONTINUE

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.

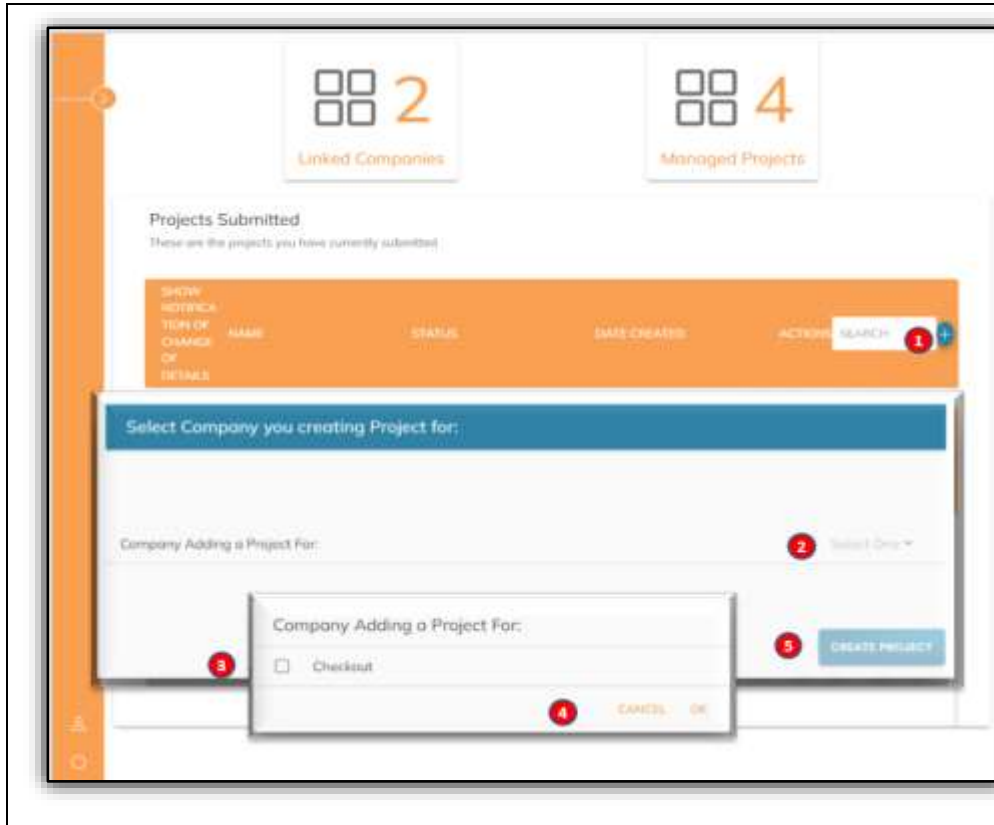
9. How to attach a document



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.

TAX INCENTIVE - NEW PROJECT REGISTRATION

1 2 3
 Project Details Project Technical Information Attach Documents & Submit

1 PROJECT DETAILS

Project Name
BBD

Field of Science Animal science ▾

Is the R&D activity in a different industrial activity? Y N

Project Timelines:

| | |
|----------------------------------|--------------------------------|
| Expected start date (CCYY/MM/DD) | Expected end date (CCYY/MM/DD) |
| 2022-02-13 | 2022-02-13 |

Expected Project budget
8000

R&D Location Gauteng ▾

2 CONTACT PERSON FOR FINANCIAL INFORMATION

3 CONTACT PERSON FOR TECHNICAL INFORMATION

4 CONTRACTED R&D

Are you contracting the Research and Development to another entity? Y N

5 [SAVE AND CONTINUE](#)

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.

TAX INCENTIVE - NEW PROJECT REGISTRATION

1 2 3
 Project Details Project Technical Information Attach Documents & Submit

1 PROJECT TECHNICAL INFORMATION

What is the scientific or technological o... In terms of the definition of R&D, activit...

It is a requirement that activities releva...

2 For what purpose is the systematic investigative or systematic experimental activities conducted?

(1)(a) Discovering non-obvious scientific or technological knowledge

(b) Creating or developing: Knowledge essential to the use of:

(iii) A computer program

(d) Creating or developing a multisource pharmaceutical product

(e) Conducting a clinical trial

3 KNOWLEDGE ESSENTIAL TO THE USE OF: INVENTION

Describe the knowledge that you intend to create or develop in relation to a Inve...

BAC **4** UPDATE AND CONTINUE

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

COMPANY INFORMATION
Capture information for the company applying for the R&D tax incentive

2 AUTHORIZED REPRESENTATIVE DETAILS

As an authorized representative of a company, you will be able to link other companies to your company profile (typically the consultancies you use for the R&D tax incentive). You will also be requested to provide a list of employee e-mail addresses to identify the employees that are allowed to work on this and other R&D tax incentive project applications. On the next screen, you will be required to provide a letter from your company authorizing that you can fulfil this role.

| | | | |
|-------------------|-------------------|-------------------|------------|
| Organization Type | Private C... | Organization Name | VEVE |
| Title | M | First Name | Mpumela |
| | | Last Name | Ntsh |
| Tel No. | 0112199874 | Alternate Tel. | 0719910714 |
| Email Address | mpumela@gmail.com | | |
| Address Line | TESTING | Suburb | TESTING |
| | | City | WITBANK |
| Postal Code | 1025 | | |

Are you a company employee/owner, industrial association applying on behalf of your member(s) or a consultant authorized to submit his application on behalf of the Applicant? YES NO

- if any material fact changes which would have had the effect that approval under section 11D(9) of the Income Tax Act would not have been granted had that fact been known to the Minister of the time of granting approval; or
- if I fail to submit a report to the committee as required by section 11D(13) of the Act; or
- if am guilty of fraud or misrepresentation or non-disclosure of material facts which would have had the effect that approval under section 11D(9) of the Income Tax Act would not have been granted.

1 mpumela@gmail.com
3

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.

ANNUAL PROGRESS REPORT

1 Project Progress 2 Project Specific Details 3 R&D Expenditure and Non-Government Funding 4 Attachments

1 PROJECTS SPECIFIC DETAILS

Project Name
Makru-app project approve

Project Objective
Companies are required to submit applications to the DSI to obtain pre-approval from the Minister of Science and Technology on proposed R&D activities they intend undertaking. The companies are also required to submit annual progress reports on approved R&D activities and NCD (where necessary to request changes to their company details and/ or submitted projects).

Expected completion date
2022/11/02

(ii) Describe how the project has progressed toward achieving the scientific or technological object.
Companies are required to submit applications to the DSI to obtain pre-

2 COLLABORATIVE RESEARCH AND DEVELOPMENT

3 OUTPUTS OF R&D SUPPORTED THROUGH THE INCENTIVE DURING THE REPORTING PERIOD

4 BACK SAVE AND CONTINUE

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.

The screenshot shows a web-based form titled "ANNUAL PROGRESS REPORT". At the top, a progress bar indicates four steps: 1. Project Progress, 2. Project Specific Details, 3. R&D Expenditure and Non-Government Funding (the current step), and 4. Attachments. The main form area is titled "1 R&D EXPENDITURE AND NON GOVERNMENT FUNDING" and contains several sections, each with a red arrow icon on the right side:

- 4. R&D EXPENDITURE
- 5. OTHER GOVERNMENT FUNDING
- 6. NATURE OF R&D WORK (ESTIMATE THE APPROXIMATE DISTRIBUTION OF YOUR TOTAL R&D ACTIVITIES ACROSS THE FOLLOWING CATEGORIES)
- 7. WHAT PERCENTAGE OF THE COMPANY'S TOTAL R&D SPENDING RESULTED IN PRODUCTS, SERVICES, PROCESSES, OR PLATFORM TECHNOLOGIES THAT ARE NEW TO THE INDUSTRY, SOUTH AFRICA, OR TO THE WORLD?
- 8. R&D PERSONNEL (R&D PERSONNEL DIRECTLY INVOLVED IN THE PROJECT(S) LISTED IN PART 4 ABOVE)
- 9. INPUT ADDITIONALITY
- 10. SUPPORTING DOCUMENTATION

At the bottom right of the form, there are two buttons: a red "BACK" button and a blue "SAVE AND CONTINUE" button. A red circle with the number "2" is positioned above the "BACK" button.

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.

ANNUAL PROGRESS REPORT

1 Project Progress 2 Project Specific Details 3 R&D Expenditure and Non-Government Funding 4 Attachment(s)

Please attach any document you consider will be of assistance for the assessment of the Annual progress report.

| Name | FileName | View/Do-wnload | Delete |
|-------------------------------|----------|----------------|--------|
| 1 Choose File: No file chosen | | | |

2 BACK SUBMIT

DECLARATION BY APPLICANT /COMPANET ACTING ON BEHALF OF THE APPLICANT/INDUSTRY ASSOCIATION ACTING ON BEHALF OF ITS MEMBERS

I have written this, to the best of my knowledge, the information compiled by me on behalf of [Company Name] [Member's name]

is this progress report is true and correct and accurate in all material details.

Name: [Name]

3 Capacity: [Capacity]

Capacity is a required field

Signature: [Signature]

Date: [Date]

4 ACCEPT DECLINE

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

The screenshot shows the SARS portal interface. On the left is a sidebar with navigation options. The main area is titled 'Projects Submitted' and contains a table of projects. A project is selected, and a 'PROJECT DETAILS' form is displayed. The form includes a declaration section, a 'Capacity' field, and a 'Choose File' button. A 'CHANGE REQUEST' button is visible at the bottom right. Red numbered callouts (1-8) indicate the steps for submitting 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

The screenshot displays the 'Company and project linking' interface. The sidebar on the left contains the following navigation items: Dashboard (1), Overview, Companies, Projects, Company linking (2), Annual Progress Report, Submit Annual Progress Report, Submit Annual Progress Report, Mjwamala (mjwamela@bbsd.co.za), and Logout. The main content area is titled 'Company and project linking' and shows 'Representing Organization: Makro Org'. Below this, there is a section 'MANAGE REPRESENTATIVES FOR: MAKRO ORG' with a sub-section 'Link new users to the organization:'. A table lists a user named 'Lindy' with role 'Analyst'. An 'ADD REPRESENTATIVE' button is visible. At the bottom, a table lists existing representatives, including an 'Admin' user with a 'Delete' icon (5) and a 'Logout' icon.

| NAME | LAST NAME | EMAIL ADDRESS | ROLE | TELNO | STATUS | ACTIONS |
|-------|-----------|--------------------|---------|------------|--------|----------|
| Admin | AdminS | dsadmin@dst.gov.za | Analyst | 5234534534 | Active | 5 Logout |

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

The screenshot shows a web application interface for managing company and project linking. On the left is a sidebar with a 'Company linking' menu item. The main content area has a title 'Company and project linking'. Below the title is a table of companies with columns 'NAME' and 'DATE CREATED'. A yellow row is highlighted, and a red '2' points to it. Below this is a section 'Company Authorized users' with a sub-section 'MANAGE REPRESENTATIVES FOR COMPANY NAME'. This section contains a form with fields for 'Name' and 'Email', and a 'Role' dropdown. Red '3' points to the 'Name' field, and red '4' points to the 'ADD REPRESENTATIVE' button. Below the form is a table of existing representatives with columns 'NAME', 'EMAIL ADDRESS', 'ROLE', 'TEL NO', and 'ACTIONS'. A red '5' points to the 'Delete' icon in the 'ACTIONS' column of the first row.

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

The screenshot displays a web application interface for managing company and project data. The interface is divided into several sections:

- ADD REPRESENTATIVE:** A table with columns for Name, Email, Role, and Action. A red callout '1' points to the 'ADD REPRESENTATIVE' button.
- Projects Linked:** A table with columns for Name, Date Created, and Action. A red callout '2' points to a plus sign (+) in the Action column. A red callout '4' points to a minus sign (-) in the Action column. A red callout '3' points to an 'OK' button in a modal window.
- CONTACT PERSON FOR FINANCIAL INFORMATION:** A form with fields for Title, First Name, Last Name, and Telephone No. A red callout '5' points to the 'UPDATE EXPERT' button.
- CONTACT PERSON FOR TECHNICAL:** A form with fields for Title, First Name, Last Name, and Telephone No. A red callout '6' points to the 'UPDATE EXPERT' button.

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.