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# The operating system for modern tax practice

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# Accfin Sky

## Why Tax Practitioners Should Be Using Sky

### Building a More Efficient, Evidence-Based and AI-Assisted Tax Practice

#### Abstract

SARS is modernising tax administration, and tax practices can no longer rely on manual eFiling, spreadsheets and disconnected records. Sky gives practitioners an integrated platform to manage taxpayers, SARS data, returns, documents, notes, approvals, evidence and workflow across the whole firm at no additional user cost. By following the Accfin methodology, firms can save approximately 30 minutes per taxpayer per year, while improving control, auditability and client service. With AI Taxman now integrated into Sky, practitioners can compare Sky's calculations with SARS calculations, analyse SARS letters and prepare practical responses more efficiently. Sky is built for the future of tax practice: integrated, evidence-based, software-driven and AI-assisted.

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# Why Tax Practitioners Should Be Using Sky

## Building a More Efficient, Evidence-Based and AI-Assisted Tax Practice

### 1. Introduction

The tax profession is changing.

SARS is modernising. Tax compliance is becoming more data-driven, more evidence-based and more dependent on proper systems. Practitioners can no longer rely only on manual eFiling, spreadsheets, email folders, scanned documents and staff memory.

A modern tax practice needs one system that can manage the entire compliance process: taxpayer information, SARS data, calculations, documents, notes, approvals, submissions, receipts, correspondence and evidence.

That is what Sky is designed to do.

Sky is not merely a filing tool. It is a tax practice platform that helps practitioners manage volume, improve workflow, reduce risk, keep better evidence, improve staff control and respond more effectively to SARS.

With AI Taxman now integrated into Sky, the system goes further. It assists the practitioner in analysing SARS correspondence, comparing Sky's calculation with SARS's calculation, identifying issues and preparing practical responses.

The future of tax practice is not manual eFiling. The future is integrated, evidence-based, software-driven and AI-assisted compliance.

Sky is built for that future.

### 2. Why the Profession Needs to Change

The SARS statistics show the scale of the South African tax system. There are millions of individual taxpayers, more than a million companies expected to submit returns, hundreds of thousands of trusts, and almost half a million active VAT vendors.

Yet many practitioners are still handling tax compliance manually or semi-manually. In many firms, the return is prepared in one place, the calculation is kept somewhere else, the documents are in a folder, the approval is in an email, the SARS receipt is downloaded separately, and the notes are in someone's inbox or memory.

That creates inefficiency and risk.

The ISV figures show that only a small portion of the market is currently flowing through integrated software channels. This means that many firms have not yet modernised

their tax workflow. As SARS moves towards more data, more verification and VAT modernisation, this will become increasingly difficult to sustain.

Practitioners need to move from fragmented manual processes to integrated tax practice management.

Sky provides a practical way to do that.

### 3. The Problem with Manual eFiling

Manual eFiling was never designed to be a full practice management system.

It allows returns to be submitted, but it does not properly manage the practitioner's internal workflow, documents, evidence, staff review, client approvals, SARS correspondence and management control.

In many firms, the tax process still looks like this:

- the return is on eFiling;
- the calculation is in a spreadsheet;
- the supporting documents are in a folder;
- the client approval is in an email;
- the SARS receipt is downloaded separately;
- the staff notes are in someone's inbox or memory;
- SARS correspondence is saved inconsistently;
- the partner or manager has limited visibility over the full process.

This creates avoidable pressure.

When SARS requests supporting documents, the firm must search for them. When a client asks what happened, staff must reconstruct the history. When a manager wants to know what is outstanding, the information may be scattered. When a staff member is absent or leaves, important knowledge may leave with them.

This is not how a modern tax practice should operate.

### 4. Sky Creates One System for the Tax Practice

Sky brings the tax compliance process into one controlled environment.

The practitioner can manage the client, SARS data, tax returns, supporting documents, calculations, notes, correspondence, approvals and submission status from one system.

This gives the firm a single view of the client and a single view of the tax process.

That is important because modern tax practice is no longer only about completing and submitting returns. The practitioner must also manage risk, evidence, deadlines, SARS verifications, refund delays, objections, client approvals and internal review.

Sky helps the practitioner control the whole process.

## 5. Sky Can Be Rolled Out Across the Whole Firm at No Additional User Cost

One of the major advantages of Sky is that it can be rolled out across the whole firm at no additional user cost.

Many systems restrict usage by charging per user. This often discourages firms from giving access to everyone who needs to be involved. The result is that only a few staff members use the system, while the rest of the practice continues to work outside it.

Sky works differently.

Because Sky can be rolled out across the whole practice, all relevant staff can work in the same environment. This includes partners, managers, reviewers, tax administrators, trainees, secretarial staff, client relationship staff and support staff.

When the whole firm works on one system, the practice gains:

- better visibility;
- better staff control;
- fewer bottlenecks;
- less duplication;
- less reliance on individual staff members;
- better document control;
- better review processes;
- better management reporting;
- improved continuity when staff are absent or leave.

A system used by only a few people does not transform a practice. A system used by the whole firm changes the way the firm works.

Sky allows the tax practice to move from individual staff handling isolated tasks to a firm-wide compliance workflow.

## 6. Sky Helps Manage Volume

Tax practices operate under pressure.

During provisional tax season and tax return season, firms must deal with large volumes of taxpayers, returns, payments, estimates, statements of account, assessments, supporting documents, queries, deadlines and client approvals.

A manual process becomes difficult to manage at scale.

Sky is designed for volume. It allows firms to work through taxpayers in a structured way, track statuses, manage outstanding work and reduce reliance on repeated manual eFiling interaction.

This is particularly important for:

- provisional tax;
- ITR12 returns;
- ITR14 returns;
- trusts;
- VAT work;
- SARS correspondence;
- tax return reviews;
- client approvals;
- document collection;
- evidence retention.

The more clients a firm has, the more important it becomes to use a system designed for high-volume compliance.

## 7. Sky Saves Time and Improves Practice Efficiency

In many firms, a large amount of time is wasted on administrative work that adds little professional value.

Staff spend time logging into eFiling, checking statuses, downloading SARS documents, searching for receipts, locating supporting documents, following up on client approvals and reconstructing what happened on a taxpayer file.

This is administrative friction.

Sky reduces this friction by bringing the tax process into one system.

The efficiency improvement comes from:

- reducing manual eFiling interaction;

- reducing repeated searches for documents;
- improving access to SARS information;
- keeping notes and evidence in the client file;
- tracking what has been done and what is outstanding;
- managing high-volume work from one screen;
- reducing duplication between staff members;
- improving review and approval workflows;
- keeping SARS receipts and correspondence in the system;
- allowing managers to monitor progress without repeatedly asking staff for updates.

Sky does not only make individual tasks faster. It makes the whole tax process more controlled, more visible and more efficient.

## 8. Saving 30 Minutes Per Taxpayer Per Year

If a practitioner uses the Accfin methodology properly, the expected saving is approximately **30 minutes per taxpayer per year**.

This saving is achieved by using Sky as intended, including SARS integration, one-screen processing, document management, notes, receipts, evidence, client approvals, AI Taxman assistance and structured workflow.

The saving comes from reducing the time spent on:

- logging into eFiling manually;
- searching for taxpayers;
- downloading SARS documents;
- checking return and assessment statuses;
- locating supporting documents;
- finding SARS receipts;
- preparing and reviewing calculations;
- responding to SARS letters;
- tracking what has been done;
- following up on outstanding client information;
- reconstructing the history of a taxpayer file.

The saving may appear small when viewed per taxpayer, but across a practice it becomes substantial.

| <b>Number of taxpayers</b> | <b>Saving per taxpayer</b> | <b>Total annual time saving</b> | <b>Equivalent working days saved*</b> |
|----------------------------|----------------------------|---------------------------------|---------------------------------------|
| 100                        | 30 minutes                 | 50 hours                        | 6.25 days                             |
| 250                        | 30 minutes                 | 125 hours                       | 15.63 days                            |
| 500                        | 30 minutes                 | 250 hours                       | 31.25 days                            |
| 1,000                      | 30 minutes                 | 500 hours                       | 62.5 days                             |
| 2,000                      | 30 minutes                 | 1,000 hours                     | 125 days                              |

\*Based on an 8-hour working day.

A firm with 1,000 taxpayers could save approximately **500 hours per year**. That is equivalent to **62.5 working days**. A larger firm with 2,000 taxpayers could save approximately **1,000 hours per year**, or **125 working days**.

This is time that can be redirected from low-value administration to higher-value professional work, client service, review, advisory work and SARS dispute resolution.

Sky therefore does not only improve compliance control. It can materially improve practice capacity and profitability.

## 9. Sky Improves Evidence and Auditability

One of the most important issues in modern tax practice is evidence.

SARS increasingly asks for supporting documents. SARS verifies returns. SARS delays refunds. SARS asks questions. SARS may reverse claims where documents are missing, incomplete or inadequate.

The practitioner must therefore be able to show:

- what was submitted;
- what calculation was used;
- what documents supported the return;
- what notes were made;
- what was sent to the client;
- what the client approved;
- what SARS issued;

- what response was given to SARS.

If evidence is scattered across emails, folders and staff computers, the firm is exposed.

Sky helps solve this by allowing documents, notes and records to be kept in the client file and linked to the compliance process.

This improves auditability and protects the practitioner.

## 10. Sky Helps Practitioners Respond to SARS

When SARS raises a verification or query, speed and organisation matter.

The practitioner must know what was filed, what evidence exists, what documents are available, what SARS requested and what response must be given.

Sky assists by keeping the tax work, documents and SARS-related information in a structured system.

This means that when SARS asks for documents, the firm is not starting from scratch. The evidence should already be available.

This is a major advantage in a SARS environment where verifications, refund delays and supporting document requests are common.

## 11. Sky Reduces Practice Risk

Tax practitioners carry professional risk.

A practitioner must manage:

- return accuracy;
- deadlines;
- SARS correspondence;
- supporting documents;
- client approvals;
- objections;
- penalties;
- refund issues;
- staff performance;
- internal review;
- evidence retention.

Manual systems increase the risk that something will be missed.

Sky reduces this risk by creating a more structured and visible compliance environment. It allows management to see what has been done, what is outstanding and where the risk lies.

This is not only about efficiency. It is about professional protection.

## 12. Sky Improves Client Service

Clients expect tax practitioners to know what is happening.

They do not want to be told that the firm must “check the file”, “ask the staff member”, or “look on eFiling”.

A practitioner using Sky has better access to the client’s tax position, documents, correspondence and status.

This improves client communication.

It also allows the practitioner to provide a more professional service because the information is centralised and easier to access.

## 13. Sky Supports Company Tax Work

Company tax is one of the areas where the profession should be using better systems.

ITR14 work is complex. It requires financial information, trial balances, tax adjustments, shareholder information, supporting schedules, validations, review and proper document retention.

Sky helps practitioners manage company tax in a more structured way. Where trial balance import and mapping are used, ITR14 preparation can become faster, more controlled and more consistent.

Practitioners who are still preparing ITR14s manually, or using disconnected spreadsheets and eFiling, are missing an opportunity to improve efficiency and reduce risk.

## 14. Sky Supports Trust Compliance

Trust compliance is becoming increasingly important.

Trusts now face more SARS scrutiny, IT3-T reporting obligations, beneficial ownership requirements and document retention pressures.

Sky Trusts allows practitioners to manage trust tax and trust administration in a structured system. This is far better than relying on spreadsheets, emails, manual folders and separate document storage.

For firms with trust clients, Sky gives a practical way to build a proper trust compliance service.

## 15. Sky Supports VAT Modernisation Readiness

VAT modernisation is one of the most important developments now facing the tax profession.

SARS is working on VAT modernisation and is expected to issue a consultative paper. Once issued, stakeholders will have a limited period to respond, and a stakeholder working group is expected to follow.

The direction is clear: SARS wants better VAT data, more structured reporting and improved ability to verify and analyse transactions.

This will affect the way practitioners manage VAT clients.

VAT modernisation will not simply be a SARS project. It will affect accounting systems, ERP systems, point-of-sale systems, tax practitioners, ISVs, supporting documents, reconciliations, audit trails and client workflows.

Practitioners who are still operating manually may find it difficult to adapt.

Sky places practitioners in a better position because it is already built around integrated tax compliance, document management, evidence, workflow and SARS interaction.

If VAT moves towards more structured data and stronger verification, practitioners will need systems that can manage the evidence and the process. Sky is designed for that future.

## 16. AI Taxman is Now Integrated with Sky

AI Taxman is now integrated with Sky.

This is a major step forward because it brings artificial intelligence into the live tax workflow of the practitioner.

AI Taxman is not merely a separate research tool. When integrated with Sky, it becomes part of the tax compliance process.

Sky manages the taxpayer information, SARS data, calculations, documents, correspondence, evidence and workflow.

AI Taxman assists with interpretation, analysis, calculation review and response support.

Together, they give the practitioner a more complete system.

## 17. Comparing Sky's Calculation with the SARS Calculation

One of the important uses of AI Taxman inside Sky is the ability to assist in comparing Sky's tax calculation with the SARS calculation.

This is critical because differences between the practitioner's calculation and SARS's calculation can result in:

- incorrect assessments;
- unexpected tax liabilities;
- refund delays;
- verification requests;
- disputes;
- objections;
- client dissatisfaction.

Where there is a difference, the practitioner needs to understand the reason for the difference quickly.

AI Taxman can assist by analysing the calculation difference and helping the practitioner identify whether the issue arises from SARS data, taxpayer data, return completion, a tax treatment difference, a missing amount, an incorrect pre-populated figure, a timing issue or a SARS processing issue.

This improves the review process and helps the practitioner respond more effectively.

## 18. Advising on SARS Letters and Offering a Response

AI Taxman can also assist with SARS correspondence received in Sky.

SARS letters are often technical, difficult for clients to understand and time-consuming for practitioners to analyse. They may involve verifications, requests for relevant material, additional assessments, penalties, objections, reasons, reduced assessment issues, disputes, debt collection, refund delays or administrative notices.

With AI Taxman integrated into Sky, the practitioner can obtain assistance in understanding the SARS letter and deciding what response is required.

This means the system can help the practitioner:

- identify what SARS is asking for;
- determine whether the request is valid;
- identify the relevant tax issue;
- suggest what documents or evidence may be required;
- explain the risk to the client;
- assist with a response letter;

- support objections, reasons requests, condonation requests or reduced assessment requests where appropriate.

This is a significant benefit because SARS correspondence is one of the most time-consuming areas of tax practice.

The integration of AI Taxman means that the practitioner is not left to deal with SARS letters manually. The system can help interpret the letter, identify the issue and propose a practical response.

## 19. Practical Time Saving from AI Taxman

The integration of AI Taxman with Sky also creates a direct time saving in dealing with difficult SARS and taxpayer matters.

One practitioner reported that, when dealing with a problematic taxpayer matter, the time required to analyse the issue, understand the SARS position and prepare the response was reduced from approximately **3 to 4 hours** to approximately **30 minutes**.

This is a significant improvement.

The saving arises because AI Taxman can assist the practitioner to:

- understand the SARS letter or assessment;
- identify the underlying tax issue;
- compare the SARS calculation with the Sky calculation;
- consider the possible legal or technical basis for the SARS position;
- identify what response is required;
- assist with drafting a practical reply.

This does not remove the practitioner's professional judgement. The practitioner must still review the matter, apply their mind and decide on the correct response.

However, it does mean that the practitioner is no longer starting from a blank page. AI Taxman gives the practitioner a structured analysis and draft response, which can dramatically reduce the time required to deal with difficult matters.

In practical terms, a matter that may previously have taken **3 to 4 hours** can potentially be reduced to **about 30 minutes**, depending on the complexity of the matter and the quality of the information available.

This is one of the strongest reasons why Sky and AI Taxman should be used together. Sky holds the taxpayer information, SARS correspondence, calculations and evidence. AI Taxman assists with the interpretation, analysis and response.

## 20. Sky Supports a More Profitable Practice

A tax practice is also a business.

Manual work reduces profitability. Searching for documents, logging into eFiling, downloading receipts, checking statuses, chasing clients, managing spreadsheets and correcting avoidable errors all consume time.

Sky helps reduce wasted time.

By improving workflow, centralising information and reducing manual intervention, Sky allows a firm to handle more work with better control.

This can improve profitability because staff time is used more effectively.

It also allows the firm to provide higher-value services, such as:

- tax reviews;
- SARS verification support;
- VAT compliance support;
- trust compliance;
- company tax management;
- beneficial ownership;
- FICA;
- document and evidence management;
- AI-assisted tax letters and explanations.

The practice becomes less dependent on manual administration and more focused on professional service.

## 21. Sky Gives the Practitioner a Competitive Advantage

Many firms have not yet modernised.

A firm that moves to Sky now can gain a competitive advantage by being more organised, more efficient and better prepared for SARS modernisation.

This advantage will become more important as SARS demands better data and better evidence.

Practitioners should not wait until SARS forces change. They should modernise their practice before the pressure becomes unavoidable.

## 22. Sky is Part of the Future of Tax Practice

The direction of tax administration is clear.

SARS is moving towards:

- better data;
- more integration;
- more verification;
- more automation;
- faster risk identification;
- improved audit trails;
- structured reporting;
- reduced manual processes.

The profession must move in the same direction.

Sky gives tax practitioners a platform to do that.

It is a system for a modern tax practice: integrated, evidence-based, SARS-connected, AI-assisted and designed for volume.

## 23. Conclusion

The tax profession is at a turning point.

Practitioners who continue to rely on manual eFiling and disconnected records will face increasing pressure. SARS is modernising. VAT is being modernised. Trust compliance is becoming more demanding. Company tax remains complex. Evidence is becoming critical.

Sky helps practitioners meet these challenges.

It gives the firm one system to manage taxpayers, returns, SARS information, documents, calculations, notes, approvals, evidence, submissions and workflow.

Sky can be rolled out across the whole firm at no additional user cost. This means the entire practice can work on one system, creating better visibility, better control, better continuity and better efficiency.

If a practitioner adopts the Accfin methodology properly, the expected saving is approximately **30 minutes per taxpayer per year**. Across a practice, this can translate into hundreds of hours of saved time every year.

With AI Taxman now integrated into Sky, the system becomes even stronger. It can assist in comparing Sky's calculation with SARS's calculation, analysing SARS letters, identifying the issue and offering a practical response. One practitioner reported that a problematic taxpayer matter that would previously have taken **3 to 4 hours** was reduced to approximately **30 minutes**.

Sky helps the practitioner:

- reduce manual eFiling dependency;
- roll out tax workflow across the whole firm;
- improve efficiency;
- save time per taxpayer;
- manage volume;
- keep better evidence;
- respond faster to SARS;
- reduce risk;
- improve auditability;
- improve client service;
- handle company tax more efficiently;
- manage trusts properly;
- prepare for VAT modernisation;
- use AI Taxman to analyse SARS letters and calculations;
- build a more profitable and modern tax practice.

The message to the profession is simple:

The future of tax practice is not manual eFiling.

The future is integrated, evidence-based, software-driven and AI-assisted compliance.

Sky is built for that future.