SIMPLY SORTED

PAIA Manual

Compiled in terms of section 51 of the Promotion of Access to Information Act 2 of 2000 (PAIA), read with the Regulations relating to the Promotion of Access to Information, 2021

Version 1 · Effective July 2026 · Next review: July 2027

1. Introduction

Simply Sorted is a sole proprietorship owned and operated by Stella Terblanche, trading as an administrative support service to small businesses and self-employed persons in South Africa. Services include bookkeeping and data capturing, bank reconciliations, debtors and creditors administration, CIPC filings, file and cloud storage organisation, spreadsheet systems and small-business websites.

Simply Sorted is a "private body" as defined in PAIA. The definition includes a natural person who carries on a trade, business or profession, whether or not that person is registered with the Companies and Intellectual Property Commission.

This Manual explains what records Simply Sorted holds, how a person may request access to them, and how Simply Sorted processes personal information. It is made available free of charge.

2. Contact details

Private body	Simply Sorted (sole proprietorship)
Head of the private body / Information Officer	Stella Terblanche
Registered with	Information Regulator of South Africa
Email	stella@simplysortedadmin.co.za
Website	https://simplysortedadmin.co.za
Postal address	79 Aerodrome Close, George
Telephone	082 732 1132

No Deputy Information Officer has been designated. Simply Sorted is a sole proprietorship with no employees, and only employees of a body may be designated as Deputy Information Officers.

3. Guide of the Information Regulator (section 10)

The Information Regulator has compiled a guide on how to use PAIA. It is available in all official languages and explains how any person may exercise their rights under PAIA and POPIA.

The Guide may be obtained from:

Website	https://inforegulator.org.za
Email (PAIA)	PAIAComplaints@inforegulator.org.za
Email (POPIA)	POPIAComplaints@inforegulator.org.za
General	enquiries@inforegulator.org.za

Address	JD House, 27 Stiemens Street, Braamfontein, Johannesburg, 2001

4. Records available without a PAIA request

Simply Sorted has not published a notice in terms of section 52(1) of PAIA listing categories of records that are automatically available without a request.

The following are, however, freely available on the Simply Sorted website without a formal request:

- Descriptions of services offered and general pricing information
- This PAIA Manual
- The Privacy Policy

5. Records held in terms of other legislation

Simply Sorted keeps records in terms of, among others, the following legislation, insofar as it applies:

- Income Tax Act 58 of 1962
- Tax Administration Act 28 of 2011
- Value-Added Tax Act 89 of 1991 (if and when registered)
- Protection of Personal Information Act 4 of 2013
- Promotion of Access to Information Act 2 of 2000
- Electronic Communications and Transactions Act 25 of 2002

Access to records held under other legislation is not automatic. A request under this Manual is still required.

6. Categories of records held by Simply Sorted

The categories of records held are set out below. Not every record exists for every client or engagement.

6.1 Client records

- Quotations, service agreements and Operator / Confidentiality Agreements
- Correspondence with clients
- Invoices issued and proof of payment received
- Working notes and task records relating to services delivered

6.2 Records processed on behalf of clients (Operator records)

Where Simply Sorted performs bookkeeping, reconciliation or administrative work, it processes records belonging to the client. Simply Sorted is an Operator in respect of these records and the client remains the Responsible Party. These records normally remain inside the client's own systems (for example the client's Google Drive, Xero, Sage or Zoho Books).

- Bank statements and reconciliation working papers
- Invoices, receipts and supporting financial documents
- Debtor and creditor listings
- CIPC filing documents, including Annual Returns and Beneficial Ownership records

Important: a request for access to records belonging to a client must be directed to that client, not to Simply Sorted. Simply Sorted will refer any such request to the client concerned without delay.

6.3 Business and financial records of Simply Sorted

- Accounting and tax records
- Bank statements of the business
- Insurance and supplier records

6.4 Website and enquiry records

- Enquiries submitted through the contact form on the website (name, email address, message)
- Email correspondence with prospective clients

6.5 Employee records

Simply Sorted has no employees. No employee records are held.

7. How to request access to a record

7.1 The prescribed form

A request must be made on Form 2 (Request for Access to Record), as prescribed by regulation 7 of the PAIA Regulations, 2021. Form 2 is available on the Information Regulator's website at https://inforegulator.org.za/paia-forms/.

The repealed Form A may not be used.

7.2 Where to send it

Completed forms must be emailed to the Information Officer at stella@simplysortedadmin.co.za.

7.3 What the request must contain

- Sufficient detail to identify the record requested and the requester
- The requester's postal or email address within the Republic
- The form of access required
- The right that the requester is seeking to exercise or protect, and an explanation of why the record is required to exercise or protect that right

A request that does not comply with these requirements may be returned, and the 30-day period will not begin to run until a compliant request has been received.

7.4 Fees

A requester who asks for a record containing their own personal information (a personal requester) does not pay a request fee.

Any other requester must pay the prescribed request fee before the request is processed. If the request is granted, a further access fee is payable for search, reproduction and preparation before the record is released.

The applicable fees are those set out in Annexure B to the Regulations relating to the Promotion of Access to Information, 2021 (Government Gazette No. 45057, 27 August 2021), as amended from time to time. Simply Sorted charges no more than the prescribed fees.

7.5 Timeframe

The Information Officer will decide on the request as soon as reasonably possible, and within 30 days of receiving a compliant request. This period may be extended by a further 30 days in the circumstances set out in section 57 of PAIA. The requester will be notified in writing of any extension and of the reasons for it.

The outcome of the request and any fees payable will be communicated on Form 3, or in a substantially similar manner.

8. Grounds for refusal

A request may be refused on the grounds set out in Chapter 4 of Part 3 of PAIA, which include:

- Unreasonable disclosure of personal information about a third party (section 63)
- Commercial information of a third party or of Simply Sorted, including trade secrets and information that could harm commercial or financial interests (sections 64 and 68)
- Information supplied in confidence, where disclosure would be a breach of a duty of confidence (section 65)
- Information that could endanger the life or physical safety of a person (section 66)
- Records privileged from production in legal proceedings (section 67)
- Research information of a third party or of Simply Sorted (section 69)

A request will also be refused where the requester has not shown that the record is required for the exercise or protection of a right.

Where a ground of refusal applies to only part of a record, access will be granted to the remainder of the record.

Section 70 of PAIA provides that a record must nevertheless be disclosed where disclosure would reveal a substantial contravention of the law or an imminent and serious public safety or environmental risk, and the public interest in disclosure clearly outweighs the harm.

9. Remedies available to a requester

There is no internal appeal against a decision of the Information Officer of a private body.

A requester who is dissatisfied with a decision of Simply Sorted may:

- Lodge a complaint with the Information Regulator on Form 5, within 180 days of the decision; or
- Apply to a court with jurisdiction for appropriate relief in terms of section 78 of PAIA

Complaints may be sent to PAIAComplaints@inforegulator.org.za.

10. Processing of personal information

This section is included in terms of section 51(1)(c) of PAIA.

10.1 Purpose of processing

- Delivering the administrative, bookkeeping and related services agreed with clients
- Responding to enquiries received through the website or by email
- Invoicing, payment collection and record keeping
- Complying with tax and other legal obligations

10.2 Categories of data subjects and of personal information

- Clients and prospective clients: names, contact details, business details, financial records

- Employees, customers and suppliers of clients: names, identity numbers, contact details, bank details, payroll and remuneration information, transaction records
- Suppliers of Simply Sorted: names and contact details

10.3 Recipients of personal information

- The client concerned (where Simply Sorted acts as Operator)
- Cloud accounting and storage platforms chosen and controlled by the client (for example Xero, Sage, Zoho Books, Google Drive)
- Web3Forms, which processes contact-form submissions made through the Simply Sorted website
- Regulators and authorities where required by law, including CIPC and SARS

Personal information is not sold, rented or shared for marketing purposes.

10.4 Transborder flows

Simply Sorted does not itself transfer personal information outside the Republic. Certain platforms chosen and controlled by clients, and the contact-form provider Web3Forms, may store data on servers outside the Republic. Where this occurs, it is done under the client's own arrangements with those providers, or subject to the safeguards required by Chapter 9 of POPIA.

10.5 Security measures

Simply Sorted applies appropriate, reasonable technical and organisational measures as required by section 19 of POPIA, including:

- Strong, unique passwords and two-factor authentication on every account used in an engagement
- Individual login credentials — shared or generic accounts are not used
- Encrypted, password-protected devices
- Working inside the client's own systems rather than copying data onto Simply Sorted's devices
- Secure deletion of working copies once a task is complete
- Access being surrendered or revoked at the end of an engagement
- A written Operator and Confidentiality Agreement with every client

10.6 Website

The Simply Sorted website uses no analytics, no tracking and no cookies. Only the information a person voluntarily submits through the contact form is collected.

11. Availability of this Manual

This Manual is available free of charge:

- On the Simply Sorted website at https://simplysortedadmin.co.za
- By email on request to stella@simplysortedadmin.co.za
- On the website of the Information Regulator, where it has been submitted

12. Updating of this Manual

This Manual will be reviewed at least once a year and updated whenever there is a material change to the records held, the services offered, or the manner in which personal information is processed.