

Taxpayer and Trader Education

23rd Sep 2021

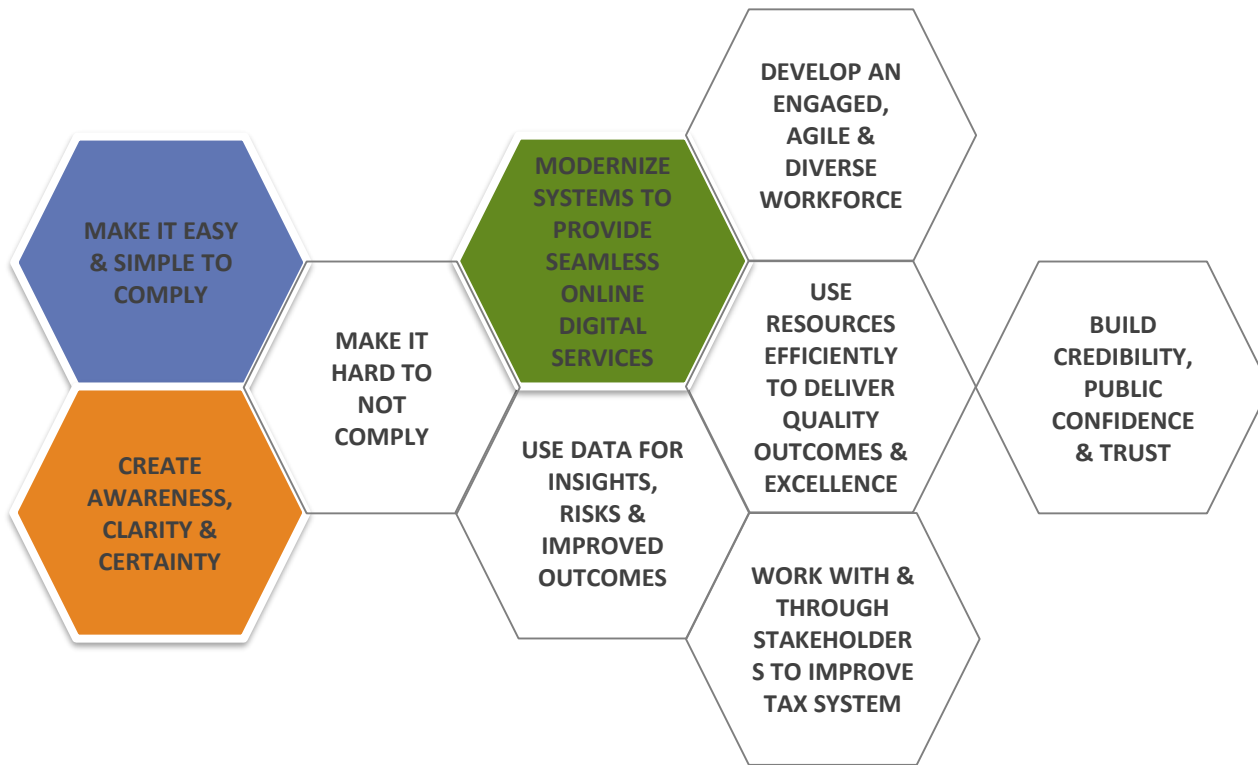
SARS' Vision



**“A smart, modern SARS with
unquestionable integrity,
trusted & admired”**

Our focus:

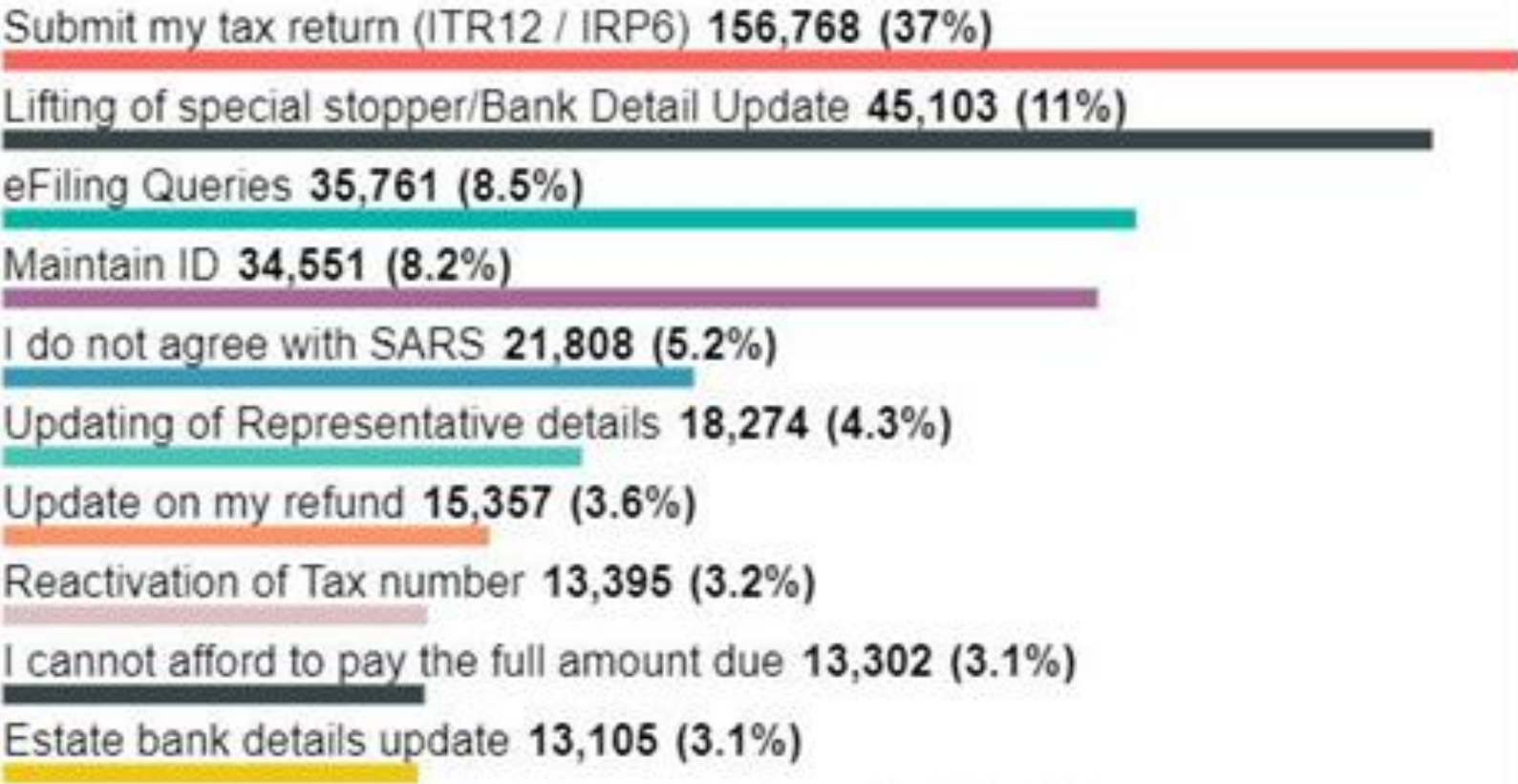
The webinar will focus on the following strategic intends



Our analysis illustrated that:

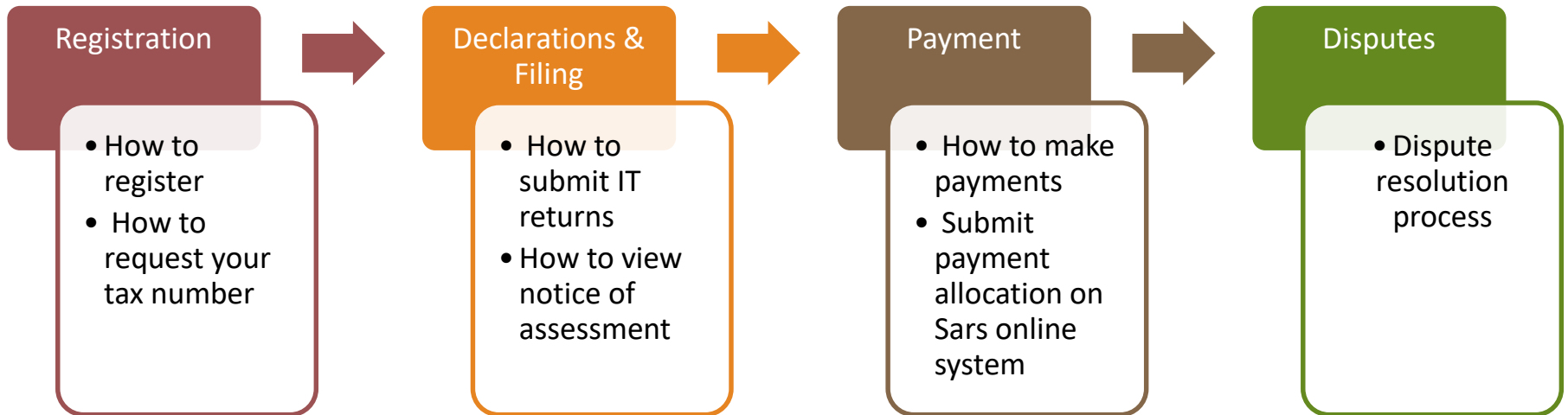
- Taxpayers are not aware, clear and certain of their tax obligations therefore require guidance from SARS
- Taxpayers do not know where and how to access (tax information & processes) as well as how to engage with SARS
- Taxpayers do not know that SARS offers free tax educational training
- Taxpayers require simplified tax materials

Queries received



Our solution

- We have SARS internet and SARSTV with consolidated useful information for taxpayers and traders updated regularly
- Developed simplified education materials and videos through the entire value chain to empower taxpayers to conduct their tax matters at their leisure





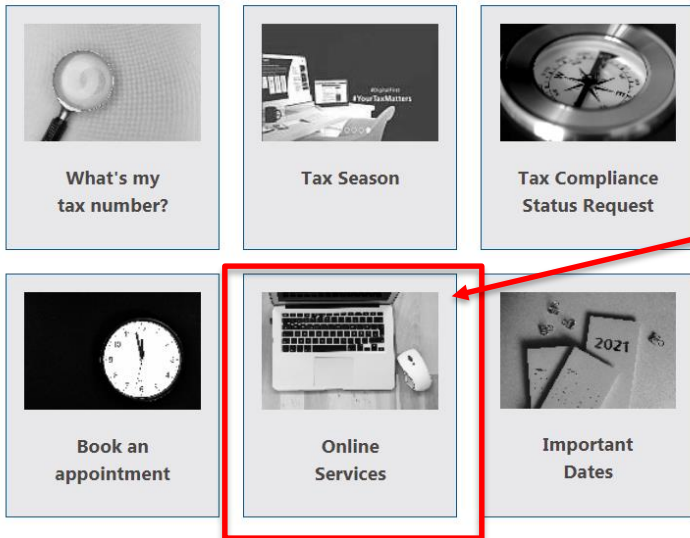
Our SARS Online System

Overview of SARS online Services



www.sars.gov.za

- On the landing page
- Bottom left icons
- Select online service

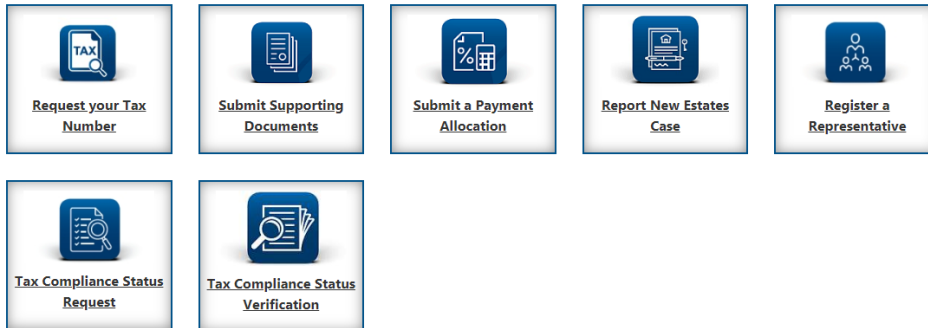


Online services options



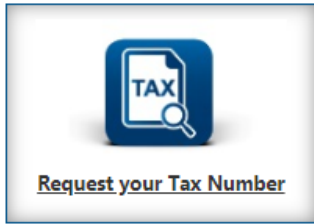
[Home](#) » [Individuals](#) » [I need help with my tax](#) » Use our Digital Channels

Use our Digital Channels



- Request for tax number
- Submit supporting documents
- Submit payment allocation
- Report new estate case
- Register a representative
- Tax compliance status request
- Tax compliance status verification

Request for Tax Number



SARS What's My Tax Number?
South African Revenue Service

Query Type: What's My Tax Number? Send By: SMS (highlighted)

Title: * Ms Initials: *
Name: * Surname: *
Trading Name:
Email:
Mobile: * Telephone:

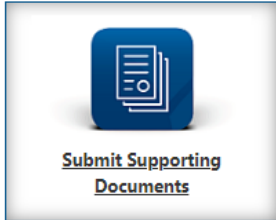
ID Type: South African ID Number ID No: *

Submit Reset

Important requirements

- Personal details
- Identity number
- Options: to receive by SMS or email as highlighted
- Submit and you will receive your tax number via email or sms
- This is an instant process.

Submit Supporting documents



SARS Supporting Document Upload
South African Revenue Service

Query Type: Case No:

Title: Initials:
Name: Surname:
Trading Name:
Email:
Mobile: Telephone:

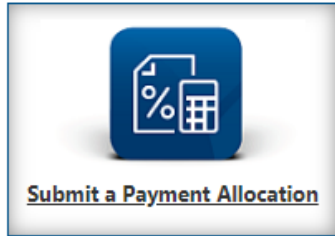
Tax Type: Tax No:
ID Type: ID No:

Notes:

Important requirements

- Personal details
- Case number
- Tax number
- Identity number
- Upload the supporting document and Submit.
- Option for special notes to SARS
- **Turn around time is 21 w/days from the date you submitted**

Submit a Payment Allocation



SARS Account Query
South African Revenue Service

Query Type: Account Query Category: Payment Allocation

Title: * Ms Initials: *
Name: * Surname: *
Trading Name: *
Email: *
Mobile: * Telephone: *

Tax Type: Income Tax Tax No: *
ID Type: South African ID Number ID No: *



Important requirements

- Personal details
- Tax number
- Identity number
- Upload the supporting document and Submit.
- Option for special notes to SARS

Request to be updated as the Registered Representative



Request to be Updated as the Registered Representative

South African Revenue Service

Query Type:	<input type="text" value="Request to be Updated as the Registered Representative"/>	Capacity:	<input type="text" value="Treasurer"/>
Entity Details:		<div>Treasurer Curator Liquidator / Executor / Administrator (Estates) Main Partner Main Trustee Public Officer Main Member Parent/Guardian Accounting Officer</div>	
Name:	<input type="text"/>	Type:	<input type="text"/>
Tax Type:	<input type="text" value="Income Tax"/>	Tax No: *	<input type="text"/>
ID Type:	<input type="text" value="South African ID Number"/>	ID No: *	<input type="text"/>

Important fields

- Capacity

Request to be updated as the Registered



South African Revenue Service

Request to be Updated as the Registered Representative

Query Type: Request to be Updated as the Registered Representative ▾

Capacity: Treasurer ▾

Entity Details:

Name:

Type: Individual ▾

Tax Type: Income Tax ▾

Tax No: * Individual

ID Type: South African ID Number ▾

ID No: * Company

Trust
Other

Important fields

- Entity type
- Tax number
- Identity number

Request to be updated as the Registered Representative



Request to be Updated as the Registered Representative

Entity Details:

Name:	<input type="text"/>	Type:	<input type="text" value="Individual"/>
Tax Type:	<input type="text" value="Income Tax"/>	Tax No: *	<input type="text"/>
ID Type:	<input type="text" value="South African ID Number"/>	ID No: *	<input type="text"/>

Representative Contact Details :

Title: *	<input type="text" value="Ms"/>	Initials: *	<input type="text"/>
Name: *	<input type="text"/>	Surname: *	<input type="text"/>
EEmail: *	<input type="text"/>		
Mobile: *	<input type="text"/>	Telephone:	<input type="text"/>

Representative Additional Details :

Tax Type:	<input type="text" value="Income Tax"/>	Tax No: *	<input type="text"/>
ID Type:	<input type="text" value="South African ID Number"/>	ID No: *	<input type="text"/>

Documents (0)

Important Mandatory fields

- Representative details
- Representative Tax number
- Representative Identity number
- Turn around time is 21 w/days



Our eFiling Processes

Electronic platforms



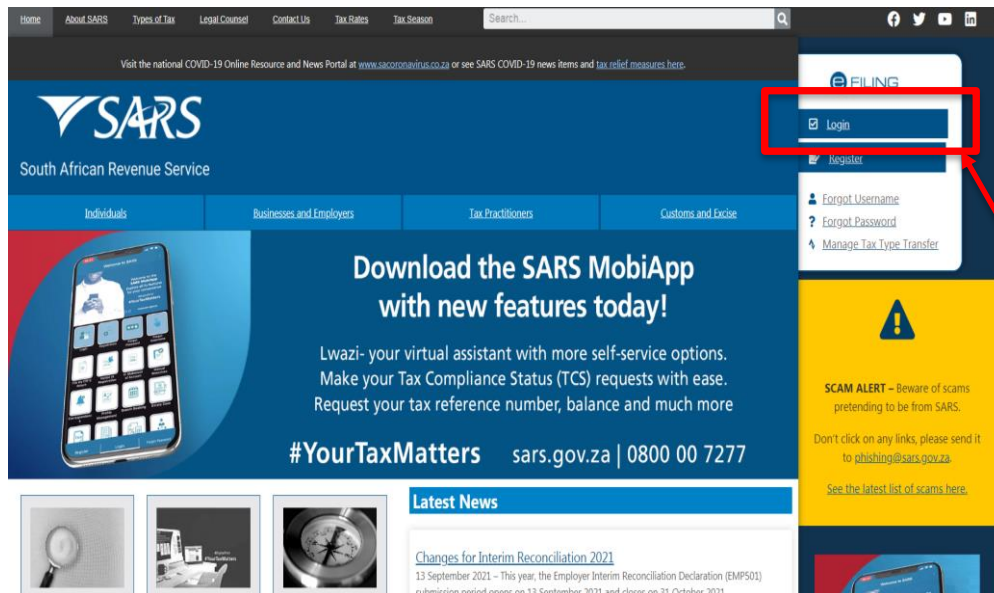
Download SARS Mobile eFiling Application
Android

IOS

Huawei

Log in to
www.sars.gov.za

- Top right corner
- Login to efiling

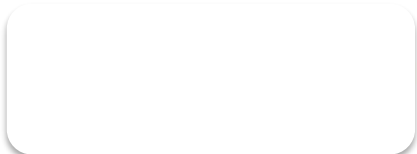


Submit Income tax return



South African Revenue Service

Understanding the ITA34



INCOME TAX

ITA34

Notice of Assessment

Enquiries should be addressed to SARS:

Contact Centre

ALBERTON

1528

Tel: 0800007277

Website: www.sars.gov.za

Details

Reference number:
 Document number: **45**
 Date of assessment: **2021-07-23**
 Year of assessment: **2021**
 Type of assessment: **Original Assessment**
 Period (days): **365**
 Payment Due date: **2021-08-01**
 Interest free period/
 Grace period until: **2022-01-31**
 PRN Number **00000000**

Always quote this
reference number
when contacting
SARS

Balance of Account after this Assessment

Description	Amount
Amount refundable to you by SARS	-1450.97

Compliance Information

Unprocessed payments	0.00	Provisional taxpayer	N
Selected for audit or verification	N		

Assessment Summary Information

	Previous Assessment	Current Assessment	Account Adjustments
Income	0.00	446673.00	
Deductions allowed	0.00	-72977.00	
Taxable Income / Assessed Loss	0.00	373696.00	
Calculated Tax Liability:			
Assessed tax after rebates (Tax calculated, Including Foreign Tax Credits discharged / refunded & additional tax / penalties)	0.00	52939.76	
Tax credits and adjustments	0.00	-54390.73	
Assessment Result	0.00	-1450.97	
Net credit amount under this assessment			-1450.97
Less:			
Add:			
Net credit amount			-1450.97

Understanding the ITA34

Year of assessment:

2021

Income			
Code	Description and detail	Computations & adjustments	Amount assessed
Employment income [IRP5/IT3(a)]			446673.00
3601	Income - taxable	288060.00	288060.00
3605	Annual payment - taxable	22612.00	22612.00
3713	Other allowances - taxable	83137.00	83137.00
3817	Pension fund contributions Fringe Benefit (defined contribution)	46694.00	46694.00
3808	Payment of employee debt	6170.00	6170.00
3714	Other allowances non-taxable	2485.00	0.00
	Non-taxable allowance	-2485.00	
Local Interest Income			0.00
4201	Interest excluding SARS Interest (Local)	1231.00	0.00
	Investment exemption	-1231.00	
Income			446673.00

Deductions allowed			
Code	Description and detail	Computations & adjustments	Amount assessed
Retirement fund contributions			-72977.00
4029	Retirement fund contributions	72977.00	-72977.00
	Amount b/f from previous year	0.00	
	Pension fund contributions	68299.00	
	Retirement annuity fund contributions	4678.00	
	Deduction limited to lessor of R350 000 or (27,5% of the greater of the taxable income R 446673.00 or remuneration R 446673.00)		
	Deduction limited to Taxable income excluding CGT R 446673.00, excess amount R 0.00 included in carry-over amount		
Deductions Allowed			-72977.00

Taxable income		
Code	Description and detail	Amount assessed
	Taxable income – subject to normal tax	373696.00

Tax calculation			
Code	Description and detail	Computations & adjustments	Amount assessed
	Normal tax		83293.76
	Rebates		-30354.00
	Primary	14958.00	
	Medical Scheme Fees Tax Credit	15396.00	
Subtotal			52939.76
4102	Employees' tax		-54390.73
	PAYE - pay as you earn	54390.73	
	Previous assessment result		0.00
Net amount refundable under this assessment			-1450.97

*This amount is separately reflected on your Statement of Account.

Refund not paid

SARS will withhold your refund based on the following reasons:

- Taxpayer has been selected for verification and supporting documents are required
- Taxpayers has outstanding returns on their profile
- Taxpayers has banking details mismatch

How to register Income tax return



Contact Us

Your compliance changes lives – get your tax matters in order for the 2021 Filing Season

#YOURTAXMATTERS

We've made it easier for you.

Go Digital!

- Download the SARS MobiApp via your app store.
- Register for eFiling
- Visit SARS website for a list of services that are available on our digital platforms

▪ **Need a Tax Number?**

Register for eFiling and you will be automatically registered for personal income tax and receive a tax reference number

- For more information, visit the:
 - ☐ SARS YouTube channel www.youtube.com/sarstax
 - ☐ SARS website on www.sars.gov.za

Auto Assessment on eFiling



Thank you
Re a leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza