



GUIDE TO SARS MOBILE TAX SERVICES

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1 SUMMARY

- a) SARS has embarked on an extensive journey to digitise its service offerings on the mobile platform as part of its strategic intent to make it easy for taxpayers to comply. As a result, extensive mobile, online, and self-help services are now available, allowing taxpayers to engage with SARS for faster, easier and customer friendly service.
- b) This guide lists the mobile phone tax services available for taxpayers, helping them resolve tax related queries more easily and highlighting what to look for when using these services.

2 INTRODUCTION

- a) Studies show that one third of the South African population uses smart phones, and this figure is forecasted to increase in the coming years. Additionally, a study conducted by Pew Research, in 2018, found that although 51% of adults in South Africa own smartphones, an additional 40% of adults, own a standard mobile phone.
- b) Given the increasing use of mobile phones in South Africa and the aim to facilitate easier tax compliance and enhance customer services, SARS has introduced additional mobile tax services for both standard and smart mobile phone owners. Taxpayers can now access tax services from SARS using either their smart phone or their standard mobile phone.
- c) Taxpayers who own smartphones and have data can access a variety of online tax services via the SARS MobiApp. Additionally, they can interact with SARS in real time by texting their tax related queries to a service consultant via the SARS Live Chat functionality available on the App. Taxpayers can now interact with SARS via the social platform WhatsApp to ask general tax questions and requests for specific personal income tax-related services.
- d) Alternatively, taxpayers with no internet connectivity or smart phones can request specified tax services for free. Taxpayers who have standard mobile devices or does not have access to data can send an SMS or dial the SARS USSD code to access specified tax services related to their personal income tax. However, do note the following:
 - i) The SMS or USSD SARS service channels will resolve selected tax related queries.
 - ii) Additionally, an eBooking option can be selected to request a call back from SARS.
 - iii) When the eBooking option is selected, a SARS Service Consultant will call and engage with the taxpayer, to ultimately book a telephonic appointment for the resolution of any tax related query, on behalf of the taxpayer.
- e) In addition to the tax mobile services provided by SARS, there is the Contact Centre toll free number (0800 00 7277), available for taxpayers who prefer voice engagement in resolving their tax affairs.

3 LEGISLATIVE REQUIREMENTS

- a) In line with the Protection of Personal Information Act, Chapter 6 of the Tax Administration Act, (which includes the rules of electronic communication issued under section 255(1)) a two-tier authentication technology has been incorporated throughout the SARS mobile tax services.
- b) This technology facilitates ease of communication while simultaneously ensuring that the correct taxpayer receives the correct information.

4 SARS TAX SERVICE MOBILE PROVISIONS

- a) An interaction with SARS to resolve your tax query can be initiated on your mobile device via the following mobile provisions –
 - i) Telephone
 - ii) SARS MobiApp

- iii) WhatsApp
 - iv) SMS, and
 - v) USSD
- b) Most standard mobile devices provisions feature, dialling a telephone number, sending a SMS, and dialling a USSD code. In contrast, smart mobile devices have additional features, such as an ability to download applications accessible via the online store and accessing the social media platform.
- c) The telephonic provision involves engaging with SARS by calling the SARS Contact Centre. The SARS Contact Centre has skilled service consultants who will assist you on your tax related queries. However, please note that this service is only available during working hours.
- d) The SARS MobiApp is a frontline application that taxpayers can access and download onto their smart phone devices from the online stores. Once the SARS MobiApp is downloaded, taxpayers can use the SARS MobiApp on their smartphones to resolve most tax related queries 24 hours a day. SARS WhatsApp is an additional channel that taxpayers can use to interact with SARS remotely. Taxpayers can use this channel to request general tax advice or request specific Personal Income Tax (PIT) self-help service requests.
- e) The SMS and USSD tax related services are channels introduced by SARS to engage with taxpayers who may only have standard mobile phones. In the SARS SMS channel, taxpayers send a specific text message to SARS for stipulated tax related queries. SARS then engages with the taxpayer to resolve their tax related query by responding to the SMS request.
- f) The SARS USSD channel involves dialling a service code to access SARS. In response, SARS presents a menu option on the mobile device. Once the taxpayer selects a menu option, SARS validates the taxpayer and presents the resolution of their tax-related query on their device.

5 SMART MOBILE DEVICE TAX SERVICES

5.1 SARS MobiApp

- a) The SARS MobiApp is a mobile application which individuals can install on their smart mobile devices. The application is compatible with the following operating systems, Android (version 5.0 or higher), iOS (version 10.0 or higher) or the Huawei app gallery. When using this service, users must always ensure that they have downloaded the latest application from Google play, Apple iStore or the Huawei App Gallery.
- b) The SARS MobiApp caters for individual taxpayers and registered tax practitioners with full access for the submission of the Income Tax Return for Individuals. Taxpayers can use the SARS MobiApp for compliance purposes, which includes registration, submission of Income Tax return (ITR12), making payments to outstanding personal income tax debt, and resolving other tax related issues. Additionally, taxpayers can access their auto assessment via this channel.
- c) For more information on how to use this application in resolving tax related queries, please refer to the following external guides:
- i) How to register for the use of the SARS MobiApp
 - ii) How to use the SARS MobiApp to submit your Income Tax Return
 - iii) How to make payments to SARS via the SARS MobiApp
 - iv) Services offered by SARS via the SARS MobiApp

5.1.1 SARS Live Chat

- a) Live Chat is an extension of software technology available on SARS MobiApp. This technology allows taxpayers to communicate directly (human to human) with a SARS service consultant in real-time.

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- b) The Live Chat service allows taxpayers to reach a SARS service consultant in that exact moment when they have a Personal Income Tax (PIT) query or tax related issues that requires resolution. Do note that the Live Chat service is only available during the following times:
- i) Monday to Friday (Public holidays excluded) from 08:00 a.m. to 04:00 p.m., and on Wednesdays from 09:00 a.m. to 04:00 p.m.
- c) Also, to note is, where the SARS MobiApp user is logged in on their profile, he/she can initiate a chat with a SARS Service Consultant immediately. However, where the SARS MobiApp user has not logged in, he/she will be prompted to enter their 13-digit ID number for verification purposes.
- i) To access this **Live Chat** functionality, proceed as follows:
- The 'Live Chat' icon will be displayed as one of the pre-login menu options within the "Need Help" icon on the SARS MobiApp. However, if the user is already logged in, it will be displayed as part of menu options.**
- A) Tap on the SARS MobiApp, to open the application.
 - B) Tap on the **Need Help** icon displayed as part of the pre login services.
 - C) Tap on the **Live Chat** icon.
 - D) Follow the prompts displayed on the functionality.
- ii) For further clarity on the use of this functionality, kindly refer to the following external guide: How to resolve tax queries via the SARS Live Chat.

5.1.2 SARS Lwazi - Ask a Question

- a) The Lwazi 'Ask a question' functionality is available as part of the tax services offered on the SARS MobiApp. This functionality responds to frequently asked tax related queries in real-time.
- i) To access this functionality,
 - A) Simply select the **"Need Help"** icon.
 - B) Select the **'Ask a Question'** icon.
 - C) On the visible text box, text your tax related question.
 - ii) In response, the answer/s to your query will be populated/displayed onto your mobile device.
- b) The Lwazi functionality also offers a tax service menu that incorporates a callback option. The callback option can be selected to either arrange a telephonic, video, or SARS Branch appointment with a SARS Service Consultant or to get assistance of your query by a Service Consultant.
- c) The following tax service menu is available on the Lwazi – Ask a Question functionality.
- i) Tax Reference Number
 - ii) Statement of Account
 - iii) Refund Status
 - iv) Audit Status
 - v) Notice of Assessment
 - vi) Request SARS to call back.
- d) For further clarity on the use of this functionality, kindly refer to the following external guide: Services offered by SARS via the SARS MobiApp

5.2 SARS on WhatsApp

5.2.1 How to request tax services on WhatsApp

- a) Taxpayers can use WhatsApp to interact with SARS regarding general tax advice or specific Personal Income Tax-related queries. To access SARS via WhatsApp, taxpayers should save the SARS WhatsApp number, 0800 11 7277, on their contact list and then commence to contact SARS.
- b) When the taxpayer contacts the SARS WhatsApp number, they will be presented with the terms and conditions for using this platform. Do note that taxpayers should first accept the terms and conditions to be permitted to make use of this platform. Once the terms and conditions have been accepted, taxpayers may then text their greeting or tax related query to SARS. In response, SARS will present a tax service menu related to their Personal Income Tax (PIT).
- c) The following tax service menu will be presented:
 - i) Tax Reference Number
 - ii) Statement of Account
 - iii) Refund Status
 - iv) Audit Status
 - v) Notice of Assessment
 - vi) Let SARS call you back.
 - vii) Register for Tax
 - viii) Two-Pot Calculator
 - ix) Two-Pot Progress
- d) Upon selecting a service from the menu options, authentication will commence. Once the taxpayer has been successfully authenticated, the resolution of their tax query relating to the IT150, SOA and ITA34 will be emailed to them. **Do note that the taxpayer must have an email address for their resolution to be sent through to them.**
- e) The Two-Pot progress service request should be used where the requestor wants to know the progress of their two-pot tax directive application. As a response SARS will display various statuses.
 - i) The statuses displayed imply the following:
 - A) **Finalised** – Your two-pot directive application has been finalized. This implies that the directive application has been approved. You may proceed to engage with your fund administrator regarding the payment.
 - B) **Declined** – Your two-pot directive application has been declined. Engage with your fund administrator regarding reasons the application was declined.
 - C) **In Progress** – Your two-pot directive application is in progress. Do check your status later.
 - ii) If there is no application for a directive received, the following message will be displayed:
 - A) *“There are no tax directive applications received on the tax reference number provided”*

5.2.2 Things to note when contacting SARS on WhatsApp

- a) The following should be considered when using this platform:
 - i) To access services provided by SARS on this platform, you must be registered as a personal income taxpayer with SARS. However, this platform can be used by anyone to answer general tax related questions.
 - ii) The number you use to contact SARS via WhatsApp must be your registered contact details with SARS.
 - iii) This service is not available for tax practitioners.
 - iv) You must have data or internet access.

5.2.3 WhatsApp Terms and Conditions

- a) First-time users, when sending a message to the WhatsApp number, will receive a response with the Terms and Conditions of using this platform.
- b) Kindly access and read the full Terms and Conditions by clicking on the link presented.
 - i) Once having gone through the terms and conditions and you agree.
 - A) Tap on the **Accept** button.
 - B) Do note that where the Terms and Conditions has not been accepted, you will not be permitted to use this platform.
- c) The Terms and Conditions has an expiration period. After the expiration period has lapsed, you will be prompted to accept the terms and conditions again.

5.2.4 How to request general tax advice on WhatsApp

- a) To request general tax advice on WhatsApp, proceed as follows:
 - i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select the SARS WhatsApp number saved under the list of your contact details.
 - ii) Text and send your query.
 - A) SARS will respond with the answer to your query or display various clarifications relating to your query.
 - B) Follow the prompts in clarifying your query, until your query has been resolved.
 - I) Kindly rephrase your question
 - iii) Where your query still has not been resolved,
 - A) Kindly call the SARS contact centre on 0800 007277 or visit the SARS website www.sars.gov.za.
 - B) Alternatively text and send **menu**.
 - I) Select the **'Let SARS call you back'** option.
 - II) You will be requested to provide a set of contact details. Once provided, you will then be queued for a service consultant to call you back.

5.2.5 How to request your tax reference number on WhatsApp

- a) Communicate with SARS via the SARS WhatsApp number using your contact number registered with SARS.
- b) Request your tax reference number on WhatsApp as follows:
 - i) Select WhatsApp on your mobile device:
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select the SARS WhatsApp number saved under the list of your contact details.
 - ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**.
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
 - C) Select the query you want to resolve.
 - I) Tap on **Tax Reference Number**.
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.

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Ensure that the demographics completed is your registered details with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **ID/Passport Number**
- E) Retrieve your resolution.
 - I) Your tax reference number will be displayed on the chat. Additionally, your Notice of Registration document (IT50) will also be attached on the chat for you to save or download.
 - Do note that the IT150 file will be encrypted and will require the capturing of your ID Number/ Passport Number to open the file. (Characters/Letters completed for all passports must be in UPPERCASE)

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.6 How to request your statement of account on WhatsApp

- a) Communicate with SARS via the SARS WhatsApp number using your registered contact number.
- b) Request your Statement of Account on WhatsApp as follows:
 - i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select SARS WhatsApp number saved under the list of your contact details.
 - ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
 - C) Select the query you want to resolve.
 - I) Tap on **Statement of Account**.
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.

Ensure that the demographics completed is your registered details with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **Tax Reference Number**.
- II) Text and send your **email address**.
- E) Retrieve your resolution.
 - II) Take note of the email address on the response message
 - Retrieve your statement of account (SOA) sent through to your email address.
 - Do note that to receive correspondence for the selected service, an existing email address on SARS records is required.

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.7 How to request your refund status on WhatsApp

- a) Communicate with SARS via the SARS WhatsApp number using your registered contact number.
- b) Request your **Refund Status** on WhatsApp as follows:
 - i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select SARS WhatsApp number saved under the list of your contact details.
 - ii) Send a greeting or message.

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- A) For example, text and send **Hi** or **Hello**.
 - I) SARS will respond with a description of the service offerings and a service menu.
- B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
- C) Select the query you want to resolve.
 - I) Tap on **Refund status**.
 - II) Tap on **Send**.
- D) Complete the requested demographics for authentication purposes.

Ensure that demographics completed is your registered details with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **Tax Reference Number**.
 - II) Text and send your **email address**.
- E) Retrieve your resolution.
 - I) Take note of the response message displayed.

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.8 How to request your audit status on WhatsApp

- a) Communicate with SARS via the SARS WhatsApp number using your registered contact number.
- b) Request your **Audit Status** on WhatsApp as follows:
 - i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp **Chats** icon and select **search**.
 - I) Find and select the SARS WhatsApp number saved under the list of your contact details.
 - ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
 - C) Select the query you want to resolve.
 - I) Tap on **Audit Status**.
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.

Ensure that the demographics completed is your registered details with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **Tax Reference Number**.
 - II) Text and send your **email address**.
- E) Retrieve your resolution.
 - I) Take note of the response message displayed relating to your request.

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.9 How to request your notice of assessment on WhatsApp

- a) Communicate with SARS via the SARS WhatsApp number using your contact number registered with SARS.
- b) Request your **Notice of assessment (ITA34)** on WhatsApp as follows:

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- i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select the SARS WhatsApp number saved under the list of your contact details.
- ii) Send a greeting or message.
 - A) For example, text and send Hi or **Hello**
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
 - C) Select the query you want to resolve.
 - I) Tap on **Notice of Assessment**.
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.

Ensure that the demographics completed is your registered details with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **Tax Reference Number**.
 - II) Text and send your **email address**.
- E) Retrieve your resolution.
 - I) Take note of the email address on the message
 - Retrieve your statement of account sent through to your email address.

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.10 How to request a callback from SARS on WhatsApp

Kindly note the following regarding the “Let SARS call you back” service option:

- This callback service is subject to operational demands and might be regulated during our peak tax seasons.
- Do note that SARS will call you back during working hours, which includes Monday to Friday (Public holidays excluded) from 08:00 a.m. to 04:00 p.m., and on Wednesdays from 09:00 a.m. to 04:00 p.m.

- a) Contact the SARS WhatsApp number using your contact number registered with SARS.
- b) Request SARS to call you back on WhatsApp as follows:
 - i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select the SARS WhatsApp number saved on your contact details.
 - ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**.
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
 - C) Select the query you want to resolve.
 - I) Tap on **Let SARS call you back**.
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.
 - I) Text and send your **name and surname**.
 - II) Text and send your preferred **contact details**.
 - E) Retrieve your resolution.
 - I) Retrieve your acknowledgment of the request.

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.11 How to register for Personal Income Tax on WhatsApp

- a) To register for Personal Income Tax on WhatsApp, proceed as follows:
 - i) Select WhatsApp on your mobile device.
 - A) Select the WhatsApp icon and select **search**.
 - I) Find and select SARS WhatsApp number saved under your list of contacts.
 - ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**.
 - C) Select the query you want to resolve.
 - I) Tap on **Register for Tax**.
 - II) Tap on **Send**.
 - D) Complete the requested demographics.
 - I) Text and send your **ID Number**.

Do note that the completed ID number must be a valid RSA ID number.

- II) Text and send your **First Name**.
- III) Text and send your **Surname**
- IV) Indicate whether you have an email address
 - Tap on either **Yes or No**.
 - If **yes** is selected, complete your email address
- V) Text and send **Street Number** of your residential address
- VI) Text and send the **Street Name** of your residential address
- VII) Text and send the **Suburb** of your residential address
- VIII) Text and send the **City** your residence is in
- IX) Text and send your **Postal Code**.
- F) Retrieve your resolution.
 - I) Your tax reference number will be displayed on the chat. Additionally, your Notice of Registration document (IT50) will also be attached on the chat for you to save or download.
 - Do note that the IT150 file will be encrypted and will require the capturing of your ID Number/ Passport Number to open the file. (Characters/Letters completed for all passports must be in UPPERCASE)

If the menu option is not displayed, simply type “menu” and the tax service menu option will be displayed.

5.2.12 How to calculate your two-pot tax directive on WhatsApp

- a) A taxpayer who intends to withdraw from their Two-Pot Retirement System can make use of the tax calculator which will produce an estimated amount of what they can possibly expect as a payout.

When using this functionality, do note the following:

- The Tax Directive profile being requested must have an active Personal Income Tax number.
- Relevant and accurate information must be provided to get a clear estimate of the payout.

- b) To request a calculation of the possible payout from your two-pot tax directive, proceed as follows:

- i) Select WhatsApp on your mobile device
 - A) Select the WhatsApp icon and select **search**
 - I) Find and select the SARS WhatsApp number saved under your list of contacts.
- ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**
 - C) Select the query you want to resolve
 - I) Tap on **Two-Pot Calculator**
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.

Ensure that the tax reference number completed is of an active taxpayer with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **South African ID Number**
 - II) Text and send your **Tax Reference Number**
 - III) Text and send your **Annual Income Amount**
 - IV) Text and send the **amount you plan to withdraw**
- E) Retrieve your resolution.
 - I) Click on the link: **Calculation**
 - The link provided will route you to the Two Pot Retirement system
 - II) Retrieve your resolution
 - Your resolution will be displayed

5.2.13 How to enquire on the progress of your two-pot tax directive application on WhatsApp

- a) To enquire on the status of your two-pot tax directive application on WhatsApp, proceed as follows:

- i) Select WhatsApp on your mobile device
 - A) Select the WhatsApp icon and select **search**
 - I) Find and select the SARS WhatsApp number saved under your list of contacts.
- ii) Send a greeting or message.
 - A) For example, text and send **Hi** or **Hello**
 - I) SARS will respond with a description of the service offerings and a service menu.
 - B) Select the tax service menu option to open the menu list.
 - I) Tap on **Choose an option**
 - C) Select the query you want to resolve
 - I) Tap on **Two-Pot Progress**
 - II) Tap on **Send**.
 - D) Complete the requested demographics for authentication purposes.

Ensure that the tax reference number completed is of an active taxpayer with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- I) Text and send your **South African ID Number**
 - II) Text and send your **Tax Reference Number**
- E) Retrieve your resolution.
 - I) Your resolution will be displayed and sent through via SMS.

6 STANDARD MOBILE DEVICE TAX SERVICES

6.1 SARS SMS Channel

- a) The SARS SMS channel involves sending a free SMS to SARS requesting a specified tax related service from SARS. SARS will respond to the SMS and provide the taxpayer with the requested information of the tax service request. Where the SMS request was eBooking related (requesting an appointment with a SARS service consultant), SARS will respond by calling the taxpayer back to ultimately create an eBooking appointment on behalf of the taxpayer.
- b) The following services are available on the SARS SMS channel:
 - i) Confirmation if your Personal Income Tax (PIT) return is due for submission. SARS will respond via SMS to notify you of outstanding PIT return submissions due, or whether no PIT submission is required.
 - ii) Requesting your tax reference number. SARS will respond by issuing you with your Notice of Registration (IT150).
 - A) Note that this service is available only to registered taxpayers.
 - iii) Requesting your account balance statement. SARS will respond by issuing you with your Statement of Account (SOA).
 - iv) Requesting an appointment with a SARS Service Consultant SARS will respond by calling you and create an eBooking appointment on your behalf.

6.1.1 Things to note when using the SARS SMS Channel

- a) This service is not available for tax practitioners and is free of charge to Individual Taxpayers for Personal Income Tax (PIT). Additionally, for eBooking related queries, the taxpayer must be registered for Personal Income Tax (PIT).
 - i) If a taxpayer is not registered, refer on how to register for PIT on SARS website www.sars.gov.za. Alternatively call the SARS Contact Centre and engage with a SARS service consultant.
 - ii) **Note 1:** Where there are concerns regarding your registration status such as the duplication of your personal information (e.g., tax reference or ID number), kindly follow the prompts on the SARS SMS response or alternatively call the SARS Contact Centre.
 - iii) **Note 2:** This service will not be available until your registration matters are rectified.
- b) Always ensure that the SMS you send contains the relevant amount of detail (i.e., mandatory ID/passport/Asylum number). If the SMS contains missing or incorrect details, your tax service request will not be resolved.

6.1.2 How to request tax services via the SARS SMS Channel

- a) To send a SMS to SARS, ensure that the SMS is worded correctly and sent through to the correct number. Below are the steps to following when utilising the SMS service channel

Step 1: Complete the SMS text field with the applicable wording that is reserved for the specified service together with demographic information. (Note: The specific wording as demonstrated below)

If a taxpayer would like to receive the balance of his/her personal income tax account. The relevant SMS should be "BALANCE followed by a "space" followed with the ID number/Passport number/Asylum Seeker number".

Example: Balance 8308245* or Balance A0296*****

Step 2: Send the completed text wording (SMS) to the following number: 47277

b) **Unpacking Step 1:**

- i) Complete an SMS which contains a word that is reserved for each tax service as well as the required demographic information required.
- ii) Always ensure that you submit an SMS to SARS detailing the specific service you require.

If you would like to receive your balance account, then SMS "BALANCE followed by a "space" followed with the ID number/Passport number/ Asylum Seeker number"

<Balance> Space <ID number/Passport number/ Asylum Seeker number>
 e.g., Balance 8308245*** or Balance A0296***

iii) Below is the listed tax services and their respective SMS Syntax

- A) Tax services lists the service offered.
- B) SMS syntax is the SMS syntax that must be used when requesting a specific tax service
- C) <Space> implies the user must create a space in-between when texting.

Tax Service: Confirmation if you should submit a Personal Income Tax (PIT) return.

SMS Syntax: **File <Space> ID number/Passport number/Asylum Seeker number**

- File 8308245*** or File A0296***

Tax Service: Request the issuing of your Notice of Registration (IT150)

SMS Syntax: **TRN <Space> ID number/Passport number/Asylum Seeker number**

- TRN 8308245*** or TRN A0296***

Tax Service: Request account related queries (balance statements) and Statement of Account (SOA)

SMS Syntax: **Balance<Space> ID number/Passport number/Asylum Seeker number**

- Balance 8308245*** or Balance A0296***

Tax Service: Request an eBooking appointment.

SMS Syntax: **Booking <Space> ID number/Passport number/Asylum Seeker number**

- Booking 8308245*** or Booking A0296***

c) **Unpacking Step 2:**

- i) Send the SMS to **47277**
- d) In response to your SMS request, authentication will be performed, and SARS will respond with the requested information in the most appropriate channel(s), which includes SMS and/ or email.

6.1.3 How to request an eBooking appointment via the SARS SMS Channel

- a) Send an SMS to SARS requesting an eBooking appointment. SARS will respond by calling you back to book an appointment on their behalf.
- b) Below are the steps to follow when requesting this service.

i) **Step 1:**

- A) Send an SMS to SARS by texting the following message:

- i) **<Booking> Space <ID number/Passport number/ Asylum number>**
 • e.g., Booking 8308245*** or Booking A0296***

ii) **Step 2:**

- A) Send the SMS to **47277**

- c) If the information sent through is correct
 - i) A response SMS will be sent confirming receipt of SMS request.
 - ii) A SARS service consultant will call back and book an appointment for you.
- d) Note that for more information on what will be required when booking an appointment refer to the Book an Appointment at a SARS Branch - External Guide which is available on the SARS website.

6.2 SARS USSD Channel

- a) The SARS USSD channel activation involves users typing a string of characters which comprises of an asterisk (*), followed by a few digits and ending with a hashtag (#) e.g., *134*7277# and dialling.

This channel utilises the dialling portion of your mobile device, where you dial the following SARS USSD string of characters.

***134*7277#**

Once dialled your mobile phone device will recognize these characters as a USSD string and transmit a text message request to SARS. Upon successful transmission, your mobile device will display a menu option of tax services. You are required to select the applicable tax service option by replying to the menu option displayed. Upon successful verification by SARS, your tax resolution will be displayed on your device.

- b) Kindly note the sequence flow when using this channel:
 - i) Once the correct USSD string is dialled, the user's mobile device will display a list of SARS tax service menu options. The user will be prompted to select the applicable tax service for resolution.
 - ii) Once the user selects the applicable tax service resolution, a verification process will be done, where the user will be requested to provide their personal information (such as their ID number etc).
 - iii) Once the user has submitted their personal information, SARS will validate the user's personal information.
 - iv) Where the information is validated as correct by SARS, the user's mobile device will present the tax resolution, and an email will be sent through to the user containing his/her tax resolution.
 - v) Once the resolution is displayed on the mobile device, the user is presented with the option of either returning to the main menu to request further tax resolutions or exit the channel.
- c) The following services are available on this channel:
 - i) What's my Tax number?
 - A) This service should be used where the requestor wants to verify that he/she is registered for PIT. This service will display the requestors tax number on their mobile device.
 - ii) Account balance
 - A) This service should be used where the requestor who is registered for PIT wants to determine whether he/she has a debit or credit tax balance. This service will display the requestors tax balance which includes his/her PIT account and admin penalties.
 - iii) Do I need to file a tax return?
 - A) This service should be used where the requestor wants to verify whether he/she is registered for PIT and is liable to submit an Income Tax return.
 - iv) Two-pot tax calculator
 - A) This service should be used where the requester who intends to withdraw from their Two-Pot Retirement System, wants to view the estimated amount of what he/she can possibly expect as a payout. This service will display the calculation results on their mobile device. Note that the step's to this service is detailed in section 6.2.3
 - v) Register for Tax

Effective Date: 9 December 2024

- A) This service should be used where the requestor wants to register for personal income tax. This service will display the allocated income tax reference number on their mobile device. Note that the step's to this service is detailed in section 6.2.4.
- vi) Two-Pot Progress
 - A) This service should be used where the requestor wants to know the progress of their two-pot tax directive application.
 - l) The statuses imply the following:
 - **Finalised** – Your two-pot directive application has been finalized. This implies that the directive application has been approved. You may proceed to engage your fund administrator regarding your payment.
 - **Declined** – Your two-pot directive application has been declined. Engage with your fund administrator regarding the reasons why the application was declined.
 - **In Progress** – Your two-pot directive application is in progress. Do check your status later.
 - B) If there is no application for a directive received, the following message will be displayed:
 - l) *"There are no tax directive applications received on the tax reference number provided"*

6.2.1 Things to note when using the SARS USSD Channel

- a) This service is not available for tax practitioners and is free of charge to Individual Taxpayers for Personal Income Tax (PIT).

6.2.2 How to register for Personal Income Tax via the USSD Channel

- a) To register for Personal Income Tax, proceed as follows:
 - i) **Step 1:** Dial the SARS service code
 - A) Dial ***134*7277#**
 - i) **Step 2:** Select the tax service option
 - A) Select **Register for tax**
 - ii) **Step 3:** Complete the requested demographics.
 - A) Text and send your **ID Number**.

Do note that the completed ID number must be a valid RSA ID number.

 - B) Text and send your **First Name**.
 - C) Text and send your **Surname**
 - D) Indicate whether you have an email address
 - l) Tap on either **Yes or No**.
 - If **yes** is selected, complete your email address
 - E) Text and send **Street Number** of your residential address
 - F) Text and send the **Street Name** of your residential address
 - G) Text and send the **Suburb** of your residential address
 - H) Text and send the **City** your residence is in
 - I) Text and send your **Postal Code**.
 - iii) **Step 4:** Retrieve your Income Tax Number allocated to you
 - A) A SMS will be sent through to the user's cell number.
 - l) Do note that where you have completed your email address, your resolution will be sent through via email.

6.2.3 How to request tax services via the SARS USSD Channel

a) Step 1: Initiate USSD

- i) Dial the following SARS USSD string characters.
*134*7277#
- ii) Once the USSD characters are correctly typed and dialled, a menu option will be presented on your mobile device.

b) Step 2: Select Tax Resolution Request

- i) Note the message displayed on your mobile device depicting how to make an applicable selection.
 - A) Select the applicable tax resolution request as per direction from the message.

c) Step 3: SARS Verification

- i) After a selection is submitted from the menu options, SARS will request you to complete personal information for verification purposes.
 - A) Complete the required information on your mobile device and select submit as per the prompt of your mobile device.

d) Step 4: Tax Resolution

- i) Upon successful verification by SARS, your tax resolution will be displayed on your mobile device and an email will be sent through on selected service requests.

6.2.4 How to calculate your two-pot tax directive via the USSD Channel

When using this functionality, do note the following:

- The Tax Directive profile being requested must have an active Personal Income Tax number.
- Relevant and accurate information must be provided to get a clear estimate of the payout.

a) To request a calculation of the possible payout from your two-pot tax directive, proceed as follows:

- i) **Step 1:** Dial the SARS service code
 - A) Dial ***134*7277#**
- ii) **Step 2:** Select the tax service option
 - A) Select **Two-pot tax calculator**
- iii) **Step 3:** Complete the requested demographics for authentication purposes.

Ensure that the tax reference number completed is of an active taxpayer with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

- A) Text and send your **South African ID Number**
 - B) Text and send your **Tax Reference Number**
 - C) Text and send your **Annual Income Amount**
 - D) Text and send the **Amount you plan to withdraw**
- i) **Step 4:** Retrieve your resolution.
 - A) A SMS will be sent through to the user's cell number.

6.2.5 How to enquire on the progress of your two-pot tax directive application via the USSD Channel

When using this functionality, do note the following:

- The Tax Directive profile being requested must have an active Personal Income Tax number.
- Relevant and accurate information must be provided to get a clear estimate of the payout.

a) To request a calculation of the possible payout from your two-pot tax directive, proceed as follows:

i) **Step 1:** Dial the SARS service code

A) Dial ***134*7277#**

ii) **Step 2:** Select the tax service option

A) Select **Two-Pot Progress**

iii) **Step 3:** Complete the requested demographics for authentication purposes.

Ensure that the tax reference number completed is of an active taxpayer with SARS. Additionally, please note that the cell number of the device used to request a service offering is authenticated against your profile details.

A) Text and send your **South African ID Number**

B) Text and send your **Tax Reference Number**

ii) **Step 4:** Retrieve your resolution.

A) The status will be displayed on your device and a SMS will be sent through to the user's cell number.

7 CALL CENTRE SERVICES

a) The SARS Contact Centre offers services for any tax-related query. This includes requesting your tax reference number, requesting your statement of account, or following up on your previous tax queries, etc. Although most of the services can be resolved via this channel, others, such as updating your profile information or updating your banking details, are associated with risk and thus cannot be resolved via this channel.

b) To solve complex or risk related tax queries, taxpayers can request an eBooking from the Contact Centre service consultant. The service consultant will assist in booking an appointment and advise on the documentation required to resolve your complex query during your appointment.

7.1 How to request tax services telephonically

a) You can call the SARS Contact Centre on the toll-free number of **0800 00 7277**. A SARS service consultant will answer and resolve your tax related query. Please note the menu options and select the applicable option related to your query.

b) This platform can be used to request an eBooking appointment with a service consultant to resolve complex or risk related queries. For information on details required when requesting an eBooking appointment, refer to "Book an Appointment at a SARS Branch - External Guide".

International callers can engage with the SARS Contact Centre by calling the number:
+27 11 602 2093

8 DEFINITIONS, ACRONYMS AND ABBREVIATIONS

Link for centralised definitions, acronyms, and abbreviations: [Glossary A-M | South African Revenue Service \(sars.gov.za\)](#)

DISCLAIMER

The information contained in this guide is intended as guidance only and is not considered to be a legal reference, nor is it a binding ruling. The information does not take the place of legislation and readers who are in doubt regarding any aspect of the information displayed in the guide should refer to the relevant legislation or seek a formal opinion from a suitably qualified individual.

For more information about the contents of this publication you may:

- Visit the SARS website at www.sars.gov.za.
- Make a booking to visit the nearest SARS branch.
- Contact your own tax advisor / tax practitioner.
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277); or
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).