



# HOW TO SUBMIT YOUR INDIVIDUAL INCOME TAX RETURN (ITR12) VIA THE SARS MOBIAPP



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## 1 SUMMARY

- a) SARS is committed to making it easy and simple for taxpayers to comply. One of the taxpayer's compliance responsibilities is to submit their income tax return (ITR12) to SARS during the filing season or at the end of the financial year. To make it simpler for taxpayers to submit their income tax return (ITR12), SARS digital channels have introduced the SARS MobiApp, which can be installed on your smart mobile phone or device.
- b) This guide demonstrates how taxpayers can navigate the SARS MobiApp for the purpose of submitting their income tax return to SARS. The guide also includes functionalities that may be utilised when filing income tax returns, such as how to respond to duplicate income tax certificates (IRP5) or how to view tax assessments before an official return is submitted. Additionally, where SARS has engaged and requested supporting documents, there is a section that demonstrates how to upload the requested supporting documents.

## 2 INTRODUCTION

- a) Income tax is imposed under the Income Tax Act No. 58 of 1962. It is a tax levied on all income and profit received by a taxpayer (which could include individuals, companies, and trusts). Collecting taxable income is a SARS mandate, inter alia by assisting the citizens of South Africa in complying with their tax responsibilities. One of the compliance requirements for individuals is to file or submit the personal Income Tax return (ITR12) every year. The completion and submission of the ITR12 return is to determine whether the taxpayer is indebted to pay any taxes or eligible for a tax refund.
- b) Various SARS service channels are available in which taxpayers can file/submit their return. These service platforms, amongst other duties, ensure that taxpayers are serviced efficiently and the information pertaining to their tax affairs are up to date, accurate and credible. This ultimately results to more reliable and credible assessments. The SARS MobiApp is one such service platform within the SARS digital domain. The SARS MobiApp mainly caters for individual taxpayers and registered tax practitioners with full access for the submission of the Income Tax Return for Individuals.

### Note the following:

- The SARS MobiApp cannot be used to dispute income tax outcomes.
- The SARS MobiApp cannot be used to submit tax returns for future years.

## 3 PREREQUISITES FOR USING THE SARS MOBIAPP

- a) The following should be considered for effective use of the SARS mobile application:
  - i) The SARS MobiApp caters only for individual taxpayers and registered tax practitioners.
    - A) Registered tax practitioners who have linked their client's profile will have full access to their client's profile.
  - ii) You must be a registered SARS income taxpayer who is liable for the submission of an Income Tax return (ITR12).
    - A) For more information on how to register refer to the SARS website <u>www.sars.gov.za</u>
  - iii) You must be registered for the use of eFiling or the SARS MobiApp.
  - iv) You must have downloaded the SARS MobiApp on your smart device.
    - A) Ensure that you have downloaded the latest SARS MobiApp.
    - B) Ensure your device has the latest iOS/Android/Huawei Operating System Software
  - v) Your device must have data or connected to a functioning Wi-Fi system.
  - vi) You must have the correct username and password to be able to transact on the SARS Mobile Application.



SARS Mobi App

## 4 DOWNLOADING THE SARS MOBIAPP

- a) You can easily install the SARS MobiApp from the Apple Store, Google Play Store, or the Huawei App Gallery.
- b) The following are the operating systems versions required for your smart phone/device to enable the downloading of the SARS MobiApp:
  - i) Android Version 5.0 or Higher
  - ii) Huawei Version 5.0 or Higher
  - iii) iOS Version 10 or Higher
- c) To Download:
  - i) Tap on the Apple App Store /Google Play Store/Huawei App Gallery to open the store.
  - ii) Type **"SARS MobiApp**" into the Search box displayed. Once the SARS MobiApp appears as part of the search results, download the Application to your device.
    - A) Note that SARS Mobile eFiling (Beta) will be displayed as the application to download from the Apple Play Store.
  - vii) Download and install the App as per requirements of your device. When the installation is complete, the **SARS MobiApp** icon will be displayed on your mobile device home screen.





Note	e the following:	
•	Taxpayers are encouraged to download the Where the latest SARS MobiApp has not error message will be displayed.	e latest SARS MobiApp version. been downloaded on your device, the following
	Warning Your version of the s application has expi and install latest ver	ARS MobiApp red. Please visit store sion of the app.
		EXIT UPDATE
•	Respond by tapping on <b>UPDATE</b> .	
	<ul> <li>This will redirect you to the Apple Apple</li> <li>Proceed by downloading the SARS M</li> </ul>	b/Google Play/Huawei App Gallery store. IobiApp as described above.

## 5 METHODS OF SUBMITTING YOUR INCOME TAX RETURN VIA THE SARS MOBIAPP

- a) Once you are registered and activated for Personal Income Tax (PIT), the applicable Personal Income Tax return (ITR12) will be issued and made available during filing season on your eFiling profile and the SARS MobiApp. You can then either submit your ITR12 return via the auto assessment process or submit your ITR12 Income Tax return.
- b) Where you request your return prior to filing season, an error message will be displayed on your device.
  - i) Please note the message and the date when your income tax return will be made available to you for submission.





- c) Below is a brief description of the various ways to submit your income tax return to SARS.
  - i) **Auto-Assessment** is when SARS pre-populates your income tax (ITR12) return with your most recent third-party certificate/s and proceeds by submitting the generated estimated assessment result of your income tax on your behalf.
    - A) If you agree with the auto-assessed results, you do not have to accept it or to submit a personal Income Tax Return (ITR12) because your generated assessment is regarded as final.
      - I) This process is further unpacked in section 6.1 of this guide.
  - ii) **Completing and submitting your income tax return** is when you open your prepopulated ITR12 return and proceed by completing/updating your return accordingly.
    - A) Once you have completed/updated your income tax return, you are required to submit the updated return to SARS.
      - I) This process is further unpacked in section 6.2 of this guide.

### 6 HOW TO SUBMIT YOUR INCOME TAX RETURN

a) This section details how to respond to an auto estimated assessment and how to edit and submit your ITR12 return via the SARS MobiApp.

## 6.1 AUTO ASSESSMENT

a) Once an auto estimated assessment of your income tax return (ITR12) has been made available to you by SARS, an SMS or email correspondence will be sent through to your preferred channel of communication.

## 6.1.1 HOW TO KNOW IF YOU HAVE BEEN SELECTED FOR AN AUTO ASSESSMENT

- a) To determine whether you have been selected for an auto assessment, proceed as follows on the SARS MobiApp:
  - Select My Auto Assessment displayed as part of the pre-login page icons.
     A) This will display the SARS Assessment Screen

• -		•				•		•			
09:49	**	14:16	at 🗢 C		4:17				1255		•
Welcome to SARS	: Sername at the bottom	Back My Auto Assessment     SARS 2024     Asses     Enter Details —      Captcha	sment		ID Typ Sout ID Nur Tax Ty	My Aut e* h Africat mber* pe* me Tax	n ID Ni	umber	ent St	atus	•
STEP 3: NBI Beware of scams! SARS won't ask for your via email, SMS, or websites	SARS At the Server	Title*	-	C	Incom	e Tax Num	ber* —				
Q. Search for Menu Items		Name*									
	504	Initials* Surname*			RESI		•			CONTI	Done
Two-pot Calc File My ITR12 Notice of Return Registration	IT Statement of Account	South African ID Number	-	*15	1764	3142"					
		ID Number*		-	2	:	; (	)	£	8	9 C
Correspondence My Auto Tax Return Status Dashboard	Submit Supporting Docs	Income Tax	-				,	?	1	,	$\langle \times$
		Income Tax Number*			ABC		s	pace			return
Register Forgot Username Forgot Password	Login	RESET FORM	CONTINUE	(		-			_		Ŷ
0							(	$\sum$			



- ii) Capture all the details requested on the form. A) Once completed tap on **CONTINUE**
- iii) The **Captcha** screen will be displayed.
  - A) Complete the displayed captcha
  - B) Tap on SUBMIT



- iv) To access your results
  - A) Select the applicable channel to receive your result.
    - I) Tap on either "CLICK HERE TO SEND THIS RESULT AS SMS TO" or "CLICK HERE TO SEND THIS RESULT AS EMAIL TO"
  - B) Your results will be sent through to the selected channel.

## 6.1.2 HOW TO RESPOND TO AN AUTO ASSESSMENT

- a) You can respond to the automated assessment by filing your original return where you do not agree with the assessment raised by SARS, else if you agree with the automated assessment, no action is required.
- b) You are given until the end of filing season to respond to an auto assessment. Where you require an extension, kindly refer to section 9.5 of this guide.
- c) When an auto assessment has been issued to you via the SARS MobiApp, you will be able to view your Notice of Assessment (ITA34).
- d) Once you have viewed your automated estimated assessment results.
  - i) If you agree to the assessment results, no action is required.
  - ii) If you are **not in agreement with** your automated estimated assessment results, respond by updating your ITR12 return (Request for Correction) and submitting your updated return to SARS, before the end of filing season.



#### Effective Date: 27 June 2025 6.1.3 HOW TO NAVIGATE ON THE SARS MOBIAPP IN RESPONSE TO AN AUTO ASSESSMENT

- a) Login to the SARS MobiApp.
  - i) On the Landing Page, tap on **Tax Returns**
  - ii) Select the applicable Year of Assessment
- b) Note the auto estimated pop-up message displayed.



- c) To View your income tax estimated assessment results
  - i) Tap **OK** on the pop-up message.
  - ii) This will route you to the Notice of Assessment (ITA34).

11:39 🗢 👄	11:39	* *	≡ Work Page	e
Back: Notice of Assessment	← Notice of Asse	ssment (ITA34)	Tax Ref No:	
RIGINAL ESTIMATE ASSESSMENT			ITR12	FILED
ate of Assessment: 2024/04/30			Year of Assessment	20:
	Net amount P	ayable: R0.00	Version 1 Last Modified	: 2024/06/0
	Reference Number	3	eFiling Status	
	Date of Assessment	: 2024/04/30	ASSESS	MENT RECEIVED
	Year of Assessment	: 2024	Calculation Results	CALCULATED
	Type of Assessment	ORIGINAL ESTIMATE ASSESSMENT		
	Period (days)	: 366		
	Payment Due Date	: 2024/05/01		
	Account Summ	ary Information	Requests fair Query Status View Assessment	View Tax Calc Retu
	Income	: R0.00	Refund Status	
I	Deduction Allowed	: R0.00		
I	Taxable Income Assessed tax after rebates	: R0.00		
	Tax credits and adjustments	: R0.00	Done	
	Amount Due	- R0.00		I



- d) Once you have viewed the auto estimated assessment:
  - i) If you agree with the estimated assessment resultsA) No further action is required for this purpose.

Note that you can download the estimated assessment results on your device, by tapping on the **DOWNLOAD** icon displayed at the bottom of your device.

- ii) If you are not in agreement with the estimated assessment resultsA) On the Work Page
  - I) Tap on the **REQUEST RETURN** icon.
    - This will route you to the standard income tax return form.

- II) Proceed to complete/update your income tax return (ITR12).
- III) Once your income tax return has been completed/updated, tap on **SUBMIT**.
  - Refer to section 6.2 of this guide on further details to submit your updated ITR12 return.







## 6.2 HOW TO COMPLETE AND SUBMIT YOUR INCOME TAX RETURN

#### 6.2.1 COMPLETING/EDITING YOUR INCOME TAX RETURN

- a) To complete and submit your return,
  - i) Tap on **Tax Returns**,
  - ii) Select the applicable financial tax year.
    - A) The standard income tax return form will be displayed on your device.
    - B) Note what is on the creation wizard and once you viewed and agree with it, tap on **OK**.



b) Complete the form as detailed on the Income Tax ITR12 comprehensive external guide available on the SARS MobiApp and the SARS website.

÷	Standard Form		- <del>6</del>	Standard Form	
Form Wizard INFORMATION INCOME TAX	N TO CREATE YOUR PERSONAL RETURN	<b>^</b>	This page return in o tax require	allows you to personalize der to accommodate yo ments.	e your ITR12 ur individual
This page a return in or tax requirer	allows you to personalize yo der to accommodate your ir ments.	ndividual	Standard		,
Standard		~	Is this decla Practitioner	ration made by a Tax	YON
Taxpayer Infe	ormation	~	Mark with an resident of th assessment.	"X" if you ceased to be a e RSA during this year of	
Bank Details Employse Ta [IRP5/IT3(a)]	x Certificate Information	~ ~	Were you un year of ass receive any capital gain	temployed for the full essment and did not income including any / loss?	YON
Taxpayor Info	ermation - Deductions	× I	Were you period dur assessment	unemployed for any ing this year of ?	YON
Form Ver	sion - 2019.81.00 Schem - 8.2	a Version	Did you re- reflected or	eive income that is an IRP5 or IT3(a)	Y 🔘 N (
SAVE			SAVE		SUBA



- c) Complete your income tax return form by tapping on the following icons displayed, to open or close the income tax return components.
- d) Note the red fields on the form.
  - i) This indicates that these fields are mandatory and should be completed.
- e) Note the following when completing/updating your income tax return (ITR12):
  - i) Where the pre-populated information (third party data/certificates) displayed on your ITR12 return is incorrect and uneditable, the taxpayer is advised to view/download their third-party certificates which have been submitted by their financial service provider to SARS.
    - A) Refer to GEN-ENR-01-G09 How to view submitted third party data returns or data files via eFiling - External Guide for information on how to view/download your thirdparty certificates/data via eFiling.
  - ii) Where there is a query on the third-party certificate/s or the certificate/s are found to contain incorrect information, the taxpayer should then contact their financial service provider or employer (if for example the error relates to the IRP5 certificates) and engage them regarding the incorrect information.
    - A) Once the financial service provider has been engaged and informed, they will then update the taxpayer's information accurately on their system and submit an updated file to SARS.
    - B) Once the financial service provider or employer (if for example the error relates to the IRP5 certificates) has made the updated file containing accurate taxpayer information available to SARS, the taxpayer can then **refresh** their ITR12 return via the SARS MobiApp to populate their return with the updated information.
      - I) To **Refresh** (re-populate the ITR12 form with the latest third-party data/certificates), kindly refer to section 9.3 on this guide.

#### 6.2.2 SUBMITTING YOUR INCOME TAX (ITR12) RETURN

- a) Once you have completed the mandatory fields on your Income Tax (ITR12) return, you are required to submit your return.
- b) To do this, on the Standard Form Page, select '**SUBMIT**' displayed at the bottom of the page.
  - i) Tap on **SUBMIT**
- c) You will then be routed to the **Declaration Page**.
  - i) Take note of the declaration and when in agreement, select 'Confirm'.
  - ii) Note that if **Cancel** is selected, your Income Tax (ITR12) return will not be submitted to SARS.
- d) Once **Confirm** is selected, an interim status of "**In Progress**" will be displayed on your device.
  - i) This indicates that your return has been submitted and is being processed by SARS.
- e) Once SARS has processed and assessed your Income Tax return,
  - i) The Work Page will indicate your Income Tax return as "Filed".





**Note** that where the ITR12 return was submitted through another channel, the status for the Income Tax return ITR12 will reflect as "*Filed through another channel*".

- Where your ITR12 return is opened and you tap on the native back button of your device, the following message will pop-up.
  - i) Select **Cancel** for the ITR12 return to remain open.
  - ii) Select **Ok** for the ITR12 return to close.



## 7 HOW TO ACCESS YOUR PERSONAL INCOME TAX RETURN (ITR12) STATUS DASHBOARD

- a) To access your income tax return status dashboard in relation to your Personal Income Tax return submission journey/ progress, proceed as follows:
  - Select Tax Return Status Dashboard displayed as part of the pre-login page icons.
     A) This will display the SARS Dashboard Screen
  - ii) Select the capacity of the person submitting the request
    - A) Select by tapping on the applicable selection
  - iii) Select the applicable tax year
    - A) Tap on the drop-down button and select the applicable year.



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EXT |

Effective Date: 27 June 2025



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14:22 all 💎 🕞	14:23 et ♥ <ul> <li>Tax Return Status Dashboard</li> </ul>
SARS Dashboard	SARS Dashboard
0 0 0	0 0
I'd like to see the Tax Return Status Dashboard for:	I'd like to see the Tax Return Status Dashboard for:
Myself	Myself
Someone else in my capacity as their Tax Practitioner Someone else in my capacity as their Registered Representative	<ul> <li>Someone else in my capacity as their Tax Practitioner</li> <li>Someone else in my capacity as their Registered Representative</li> </ul>
For the Tax Year:	For the Tax Year:
NEXT	2023 NEX
$\overline{\bigcirc}$	

- iv) Once selected, tap on **NEXT.**
- v) The Taxpayer Details screen will be displayed.
   A) Complete all the required fields.

Tax Return Status Dashbo	ard	<	1:24	Tax F	tetur	n Stat	us Da	ash <u>b</u>	oard		-	< Tax	Return Statu	ıs Dashboard	
	d	5	Num	Afric	an ID	Numi	ber					VS.	4RS	Dashboard	
	0	- Ta	к Тур	e*	6							0	0	0	
Taxpayer Details			come	Tax Nu	mber*	_						Taxpay	/er Detail:	s	
Jame*											-	Name*			
Surname*		R	EST/	RT					VERI	FY M		- Sumame*			
o Type" South African ID Number	•	_								Do		ID Type*	can ID Numbe	br	
0 Number*										00		- ID Number*			
ax Type" Icome Tax	~	1	2	3	4	5	6	7	8	9	0	Tax Type"	DK.		
come Tax Number*		-	1	:	;	(	)	£	&	@	"	- Income Tax P	lumber*		
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V	ERIFY ME	A	BC			spa	ce			retur	n	RESTART		VER	IFYI
		G	•							J					

- vi) Once completed, tap on **VERIFY ME**.
- vii) The OTP Verification Method screen will be displayed.



14:24 at ♥ ● Tax Return Status Dashboard	14:24 at The Address Stress St	14:25 at ♥ 0 < Tax Return Status Dashboard SARS Dashboard ()
CLICK HERE TO SEND AN OTP SMS TO CLICK HERE TO SEND AN OTP EMAIL TO BACK	Please enter the OTP sent to 08154*****   4 6 8 -     4 6 8 -     2:30   Time remaining    BACK SUBMIT	Tax No: Tax Year.20 Not Required To File A Personal Income Tax Return Personal Income Tax Return Auto Assessed Dur return has been auto assessed to make to easier for you to comply. We auto-assess based on the data we receive from employen financial institutions, medical schemes, retirement amulty fund administrators and other 3rd party data providers. If you agree with the auto-assessment, you do not need to do anything further. If you are not in

- viii) Select the applicable channel to receive the OTP code A) Select by tapping on your selection.
- ix) Complete the OTP code and tap on SUBMIT
- x) The dashboard will be displayed.
- b) Note the **Time Legend** that will be displayed on the dashboard and its meaning.





## 8 SERVICE OFFERED ON THE WORK PAGE

- a) The **Work Page** on your profile lists services SARS offers you regarding your Income Tax Return. This section will list these services and their use.
- b) To access the **Work Page**, proceed as follows:
  - i) Login
  - ii) On the Landing Page, tap on Tax Returns
  - iii) Select the applicable Year of Assessment
  - iv) The **Work Page** will be displayed.

•	• -	•
09:33 a = 1 = Welcome to SARS :	FROM	E Work Page
Welcome to the SARS MobiApp,	2023 GISPM	Tax Ref No: ITR12 FILED
to access eFiling services.	#TOULFIAXMATCETS DURING FILING SEASON 2023 #FilingSeason2023 #V®urlashistlers ○ ○ ▼SARS #TilingSeason2023 #V®urlashistlers	Year of Assessment 2011
WourTauMatters         O         O         S425           Hi         Lost Login: 2023-06-13 20:42         Image: Compare the second	Last Login: 2024-05-24 11:39 Request Return	Version Last Modified: 2019/06/10
Tax Returns Manage your Tax Returns »	2024	ASSESSMENT RECEIVED
My Services Manager your takes you Correspondence View your correspondence	2023	Calculation Results CALCULATED
Profile Management View your Profile	2021	Regard for Query Safety Dee Update Dee
My Compliance Profile Manager your Tax Compliance Status »	2020	Versioners Payment Version Call Vers
		Done
$\overline{\mathbf{O}}$		

c) Below are the descriptions of the various service options displayed on your **Work Page**:

Statement of Acc	This will route you to the Statement of Account page
Request for Corrections	This will route you to edit the income tax return form
2 Query Status	This will display the status of your income tax return
View Assessment	This will route you to your Income Tax Assessment page
Payment History	This will route you to the payment page
View Return	This will route you to the income tax return form
Upload/View Docx	This will route you to the supporting documents page.
View Tax Calc	This will route you to the <b>Tax Calculation</b> page
Refund Status	This will communicate your refund status



## 9 HOW TO SUBMIT YOUR INCOME TAX RETURN FOR PREVIOUS TAX YEARS

- a) The SARS MobiApp enables you to submit/ file your tax return for the current or the previous five tax years. To open and view your ITR12 return, login using your username and password.
- b) Once logged in, on the Landing Page
  - i) Tap on **Tax Returns**
- c) Select by tapping on the applicable year.
- d) On the standard income tax return form page,
  - i) Note the information is on the wizard.
- e) Once you have viewed and agree with the information on the wizard, tap on **OK**.

•	•
09:39	FROM
Welcome to the SARS MobiApp, a quick and convenient way	TAKE CONTROL OF PVOUL TAXK MAILTERS DURING FLING SEARCH 2023
PloutavMatters	effingSeason2023 ef@rfaldddtfris · · · · · · · · · · · · · · · · · · ·
ti ast Logín: 2023-06-13 20:42	Request Return
Tax Returns Manage your Tax Returns	2024
My Services	2023
Correspondence **	2022
Profile Management	2021
My Compliance Profile	2020
Manage your Tax Compliance Status	Cancel

- f) Complete the form as detailed on the Income Tax ITR12 comprehensive external guide available on the SARS website <u>www.sars.gov.za</u>
- g) Tap on the applicable field to expand the form.

09:53	- • • • • · ·	09:53		
← Standard Form	4	÷	Standard Form	
Form Wizard INFORMATION TO CREATE YOUR PERSONAL INCOME TAX RETURN		This page all return in order tax requirem	ows you to personalize in to accommodate you ents.	your ITR12 Ir Individual
This page allows you to personalize your IT return in order to accommodate your indivi- tax requirements.	TR12 dual	Standard		
Standard		Is this declarat Practitioner?	ion made by a Tax	YON
Taxpayer Information	~	Mark with an "2 resident of the R assessment.	" if you ceased to be a SA during this year of	
Bank Details Employee Tax Certificate Information [IRP5/IT3(a)]	¥ ¥	Were you uner year of asses receive any int capital gain / k	nployed for the full sment and did not come including any pss?	YON
Taxpayor Information - Deductions	~	Were you un period durin assessment?	employed for any g this year of	YON
Form Version - 2019.81.00 Schema Ve	ersion	Did you receil reflected on a	ve income that is in IRP5 or IT3(a)	Y 🔘 N
		SAVE		Sur

- h) Once completed, to submit the return tap on **SUBMIT**. To save the return and work on it later, tap on **SAVE**.
- i) Please note that to request and submit tax return(s) older than 5 years, make an appointment with a branch office for further assistance.



## 10 SERVICES TO MANAGE YOUR INCOME TAX RETURN

a) At the bottom of your ITR12 return (Standard Form Page), the following services are offered.



b) The use of these service icons are as follows:

P	To <b>Save</b> your Income Tax Return
SAVE	
TAX CALC	To calculate a <b>Tax Calculation</b> of your Income Tax Return
	To update your Income Tax Return with the latest third-party certificates/data
	To <b>Submit</b> your Income Tax Return

## 10.1 HOW TO REQUEST A TAX CALCULATION

- a) You can request a tax assessment of your completed Income Tax return. This is done by selecting the **TAX CALC** option displayed at the bottom of the Standard form screen.
- b) Once logged in, on the Landing Page, tap on Tax Returns. This will open your saved Income Tax return.
- c) Once your Income Tax form is open,
  - i) Tap on TAX CALC
- d) This will display the **TAX Calc Results** Page.
- e) To download the Tax Assessment
  - i) Tap on **Download**

Standard Form [ Onli	ine] 💷	< Back	TAX Calc Results	
Income Received continued	^	<b>V</b> SA	RS me	
R Non-Taxable Income	3696		Elizaba     Annone fundar     Indeninsena     Indeninsena     Indeninsena     Indeninsena     Indeninsena     Indeninsena     Indeninsena	
Gross Employment Income (Ta	Source Code	Fine American Marcine America	hanipita Ul P Toulut Nata	Read -
R 350000	3699	Tele Report for	Reserved on the second s	
Deductions / Contributions / Informati		States and a state Appendix States and Appendix Exc. Exc. Appendix State States and Appendix States States States States and Appendix States States States States and Appendix States States States States States States States and Appendix States States S	en ment for type and Ardinan men	_
		Anticipa de encretarios portes en desenante de constantes desenante de constantes desenantes de constantes desenantes desenantes de constantes desenantes desenantes de constantes desenantes desenantes de constantes desenantes de constantes de constantes de constantes de constantes de constantes de constantes de constantes de constantes de constantes de constantes de constantes de constantes de const		
Tax Credits and/or Employer/Employer Contribution	• •	Republication Control		
R PAYE	4102	A Section Control of Control     A Section Control     Control of Control     Control of Control     Control of Control     Control of Control     Contro     Control     Control     Control     Control     Control		
R PAYE on Lump Sum Benefit	4115			1
R Employee and Employer UIF 0	C 4141			
	8==			

Note that you can request a tax calculation whenever you select the **Tax Calc** icon and not only when your ITR12 return was saved.

## 10.2 HOW TO REFRESH THIRD PARTY DATA (CERTIFICATES)

a) You can update your Income Tax return (ITR12) with the latest Third-Party Data information available at SARS. This includes the latest IRP5 information.



- b) Begin by opening your Income Tax return (ITR12). To do this, on the Landing Page, tap on Tax Returns
- c) On the icons displayed at the bottom



- d) Select the applicable **data** by tapping the check box.
- e) Once selected, tap on **OK**
- f) To cancel the request, tap on the **Cancel** option.



#### Note the following:

- Expect a warning message. Once noted, tap on **OK** and your selected third-party information will be updated on your IRP5 information and populated on your Income Tax Return.
- You may select any of the following Third-Party Data options using the checkbox displayed on your popup screen:
  - o IRP5
  - Medical Details
  - Retirement Annuity
  - Investment Income
  - Tax Free Investment
  - Farming (IT48)
  - Farming (IT48V)
- The SARS MobiApp will display the ITR12 with updated third-party data/certificates.
- g) In instances where your Third-Party Data on your saved return has been automatically refreshed, the following message will be displayed.
- h) Take note the message and tap on **OK**.





Note that you may be prompted to refresh Third Party data of your ITR12 return issued and/or saved before filing season opening date to ensure that the return contains the latest Third-Party data information. The following options will be displayed on your device for selection.

- *View the saved return* This will direct you to the saved return in **read-only mode**. This will allow you to either copy or capture any information prior to refreshing the data.
- *Refresh the data* This will initiate the refresh process and update all the information related to the third-party data.

## 10.3 HOW TO UPDATE YOUR BANKING DETAILS ON YOUR INCOME TAX RETURN

- a) To update your banking details, follow these steps to navigate to your Income Tax return:
  - i) Tap either on the 'LOGIN' button or the File My ITR12 Return icon on the pre-login screen.

11:32	🗢 100	No Service 🗢 Kack Welc	11:02 ome to SARS
Welcome	to SARS		
MAKE TAX MATTERS PRIORITY	rgotten your x number?	~	SARS
Tap on 'Request Tax Numbe	r' on the App landing page	South Afric	an Revenue Service
₽YourTaxMatters ○●○○	•••• <b>VSARS</b> At free faceto		
Q Search for Menu Iten	ns	Hi	
		Welcome, please sign	in to your mobile eFiling acco
Ask the Al Two-pot Calc Assistant	File My ITR12 Notice of Return Registration		
			Forgot Passw
of Account	Assessment Status Dashboard		
		Don't have	an account? Register
Register Forgot Username	Forgot Password Login	SWITCH USER	LOGIN
0			$\sim$

- ii) Complete your username and password.
- iii) Once completed successfully, two factor authentication will commence.
  - A) Select **APPROVE** on the notification request.
  - B) On the **Success** notification screen, tap on **Finish**.





- iv) The Landing screen will be displayed A) Tap on Tax Returns.
- v) To request your return, select the applicable Year of Assessment.
  - A) E.g. Tap **2024**



vi) Tap on Edit Return





- vii) Scroll down and select **Bank Details.** A) Tap on **Edit**
- viii) Note the Confirmation message displayed and tap on YES.



ix) Proceed by completing the fields with the updated banking details.





- x) Once all the banking details have been captured or updated,
  - A) Tap Update
  - B) Tap SUBMIT
- xi) An OTP Banking Details Pop-up message will be displayed

Bank Details	SARS
Bank Account Holder Declaration	South African Revenue Service
Account Holder Declaration	Please capture the OTP sent to the following contact details
Banking Details efiling Security Details are used to send you a One-Time Pin(OTP) for eFiling authentication	072*****85
Cancel Ok	3514 -
Bank Account Status	3 7 2 2 0 6
Account No.*	Pin expires in: 2 min 37 sec RESEN CANCI

- xii) Take note of the message and tap on **OK**.
- xiii) Complete the OTP code and tap on **SUBMIT**.





xiv) After selecting Submit, the bank details will successfully be updated, and the user will be routed back to the ITR12 form for completion and submission.

## 10.4 HOW TO SAVE UPDATED INFORMATION ON YOUR INCOME TAX RETURN

- a) You can edit and save your Income Tax ITR12 return to work on it later. This section will demonstrate how to save your return on the **Work Page**.
- b) Once logged in, on the Landing Page,
  - i) Tap on **Tax Returns**.
- c) When the Income Tax return is open, you can update the return.
- d) To save the updated information
  - Tap on **Save**

i)

e) The status on the **Work Page** will change to **Saved**.





#### Effective Date: 27 June 2025 10.5 HOW TO CONFIRM YOUR CONTACT DETAILS ON YOUR INCOME TAX RETURN

- a) When SARS sends an email or SMS to verify your security contact details for authentication purposes, you will be required to confirm or update your cell phone number and/or email address.
- b) To verify your contact details on your ITR12 return, proceed as follows:
  - i) Login
  - ii) Select **Tax Returns**, choose the applicable tax year, and open your ITR12 return.



- iii) On the ITR12 standard form.
  - A) Scroll down.
  - B) Select **Contact Details**.







IT-AE-46-G01 – How to submit your individual income tax return via the SARS MobiApp – External Guide



- iv) On the Contact Details container.
  - A) Enter your **Email address**.
  - B) Confirm by re-entering the same **Email address** you provided above.
    - I) If you do not have an **Email address**, please indicate this by checking the check box.
  - C) Enter your **Cell Number**.
  - D) Confirm by re-entering the same **Cell Number** you provided above.

Standard Form	1	■ Torm
Taxpayer Information	~	
Personal Details	- I	Mark here with an 'X' if you declare that you do not have a cell-phone number.
Contact Details	~	Home Tel No.
Email*		Bus Tel No.
Confirm Email *		Do you confirm that the email and YON ( telephone number(s) supplied are correct?
Mark here with an 'X' if you declare that you do not have an email address. - Cell No.*		IMPORTANT: Any changes made to your contact details on your return will not update your eFiling Security Contact Details. eFiling Security Contact Details can be maintained via 'My Profile' on SARS eFiling. SARS eFiling Apor at a SARS
Confirm Cell No. *		branch."

v) After verifying or updating your email address and cell number (providing the contact information), please confirm by selecting "**Y**" on the radio button.

## **10.6 HOW TO CHANGE YOUR RESIDENCY STATUS**

- a) To change your tax residency status, you can apply via your eFiling profile. Upon application SARS will send correspondence which details the list of documents required by SARS to verify your application. This letter will be sent to all your correspondence digital platforms (eFiling or the SARS MobiApp).
- b) You will then be required to provide supporting documents to substantiate your application. The supporting documents are used to measure your qualifying basis. They usually include amongst others the following:
  - i) The signed declaration indicating the basis on which you qualify (you can download the form from the SARS website <u>www.sars.gov.za</u>)
  - ii) A letter of motivation setting out the facts and circumstances in detail to support the disclosure that you have ceased to be a tax resident.
  - iii) A copy of your passport and travel diary.
- c) Upon successful submission of the required supporting documents, SARS will send correspondence which will disclose the results of your application.
- d) This section will detail on how you can enquire to change your residency via eFiling. Furthermore, we will demonstrate on the SARS MobiApp where to locate the correspondence and lastly show you how to upload the required supporting documents for the completion of your application.



e) You can also refer to the SARS website on how to access your eFiling profile www.sars.gov.za

#### Note the following:

- It is required that this verification process takes place before the period of assessment is performed.
- Once SARS receives and accepts the supporting documents, you will be coded as a "Non-Resident" on the SARS system. Additionally, correspondence will be issued to you confirming that your tax resident status has been updated.
- f) Login to your eFiling profile and navigate eFiling to access the RAV01 form.
  - i) Once logged in
    - A) Click on SARS Registered Details icon under My profile.
    - B) The Maintain SARS Registered Details screen will display.
    - C) Confirm that you are authorised to perform maintenance functions of the registered details of the company or individual.
    - D) The "Saved Details" message will display if SARS has received updated information for the legal entity.
    - E) After making the applicable selection, the RAV01 screen will be opened.
- g) Once the RAV01 form is opened:
  - i) Click on the **<Tax Type Demographics>** container on the form.
  - ii) Note the field <Income Tax Liability Details>

Tax Type Demographics				
Income Tax Liability Details				<b>^</b>
Taxpayer But-Category * 1 - NORMAL	* ~	Initial Year of Liability (CCYY)	۵	
Taxyayer Classification *	* ✓			

iii) Click on the arrow to display the drop-down list and select <4 – Non-Resident>
 A) The second drop down <Taxpayer Classification> will be activated.

Income Tax Liability Details			
Taxpayer Sub-Category * 4 - NON-RESIDENT	* ~	Initial Year of Liability (COYY) 2001	â
Taxpayer Classification * Taxpayer Classification is a mandatory field.	* i	Date ceased to be a resident (CCYYNMDD)* C C Y Y / M M / D D  Date ceased to be a resident (CCYYMMDD) is a m	

iv) Select the applicable **<Taxpayer Classification>** as well as the date when you ceased to be a resident.



Taxpayer Type: Non Provisional	Category: Individual	^
BU - BUSINESS INCOME		
S - SALARY		
SB - SALARY INVESTMENT		
SE - OLD SITE RETURNS		
SS - SALARY WITHOUT ALLOWANCE		
		-

Income Tax Liability Details			^
Taxpayer Suc-Category * 4 - NON-RESIDENT	*~	Initial Year of Liability (CCYY) 2002	
Taxpayer Classification * S - SALARY	• ~	Date ceased to be a resident (CCYYMMDD) *	

#### h) Save and submit the form.

Back Save Submit form					- 100
My Menu ×	Income Tax				
🖹 My registered particulars 🗸	Reference No.	Account no.		Status	
My Tax Products ^			ACTIVE		
		Items per page: 10	1 - 1 of 1	< <	> >1
Income Tax					
Payroll Taxes					
VAT					
Customs					
Excise					
My Representatives					

 Note that this will trigger SARS to issue correspondence detailing the list of supporting documents required for this application. This letter will be sent through by SARS and is available under the SARS Correspondence menu on your eFiling profile or on the Correspondence tab of your SARS MobiApp.



Welcome to the SARS MobiApp,

- j) To access SARS correspondence regarding your application
  - i) Login to the SARS MobiApp
  - ii) On the Landing Page
    - C) Tap on **Correspondence**
    - D) This will list all SARS correspondence.
    - E) Select and open the applicable correspondence sent through.



- I) Once all the required supporting documents have been obtained, upload them as follows:
- m) On the corresponding letter



- i) Tap on Add Documents
- ii) Follow the prompts to upload supporting documents.
- iii) Note that you can tap on the **Download** tab

to download the letter.



Note that you can also use your eFiling profile or the SARS Online Query System to upload the required supporting documents.



- n) Once the supporting documents have been uploaded and verified by SARS, you will receive another correspondence detailing your application result.
- o) This letter can be found under the correspondence tab on efiling or the MobiApp as well.
- p) You can tap on **Download** to download the letter.

Notice of h	on-resident tax status
<b>V</b> SARS	Update Tax Residency Status works of non-residency fixs status
	Comment Bartants Comment Bartants
	Enter Less Ve del  E 117 1971 estate un any pro- Estate Taper Molecure In Taper Molecure In Taper Ve
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	÷

## 10.7 HOW TO REQUEST AN EXTENSION OF YOUR SUBMISSION DATE

- a) Taxpayers can request an extension to submit relevant supporting documents or their income tax return where they are of the view that they can only submit after their submission due date has lapsed.
- b) This implies that when the extension days has been granted by SARS, there will be no penalties imposed to the taxpayer during the granted extension days.
- c) On the Work Page,
  - i) Tap on the **Reason for Extension** icon.
  - ii) This will display, the **Reasons for Extension Page**



Note that the taxpayer cannot request an extension post the 3 years of SARS raising the estimated assessment.



- d) On the **Reason for Extension** Page
  - i) Tap on **Reason for Extension** field **and** complete your reason for extension.
  - ii) Tap on the **Date of Extension** and select the applicable date.
  - iii) Once completed, tap on **SUBMIT.**

Reason for Extension         Testing         Reason For Extension Description         Request received within 40 business days of notice of assessment         Date Of Extension         16 May 2022	1000 (1000 (1000 (1000)))	Reason for Extension
Testing Reason For Extension Description Request received within 40 business days of notice of assessment Date Of Extension 16 May 2022	Reason	for Extension
Reason For Extension Description Request received within 40 business days of notice of assessment Date Of Extension 16 May 2022	Testing	
Request received within 40 business days of notice of assessment Date Of Extension 16 May 2022		For Future in Description
Date Of Extension 16 May 2022	Reques days of	t received within 40 business notice of assessment
16 May 2022	Date Of	Extension

- e) In response, SARS will send you correspondence with regards to your request. This will be in the form of a letter which can be accessed via the SARS MobiApp.
- f) To access the letter, navigate as follows:
  - i) On the Landing Page,
    - A) Tap on Correspondence
    - B) The Correspondence Page will be displayed.

09:39			■ Correspondence	
-	Welcome to SARS		Letter	
			Request For Extension to Submit Relevant Material or Return(s) Receipt Confirmation	2022/05/1
Welcon	ne to the SARS MobiA		Letter	
a quick	and convenient way ss eFiling services		Request For Extension to Submit Relevant Material or Return(s) Outcome	2022/05/1
to acce	ss er ning services.		Letter	
#Digit/First		WCARC .	PIT EMAIL REMINDER	2022/05/0
#YiourTaxM	atters 0000	A fine local	Letter	
Hi Last Login: 2	023-06-13 20:42		PIT EMAIL REMINDER	2022/04/2
	Tax Rieturns Managei your Tax Returns			
	My Services Manager your tales			
	Correspondence View your correspondence			
	Profile Management View your Profile			
9	My Compliance Profile Manage your Tax Compliance St	tatus 39		

- g) The letters will be displayed.
- h) Note that a letter of acknowledgement will be sent for your request. Thereafter, SARS will respond by sending another letter which will detail the outcome of your request.



<b>V</b> SARS	Manager for Parliments to Radicel Manager Materials of Manager for Parliments
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## 11 INCOME TAX ASSESSMENT (ITA34)

- a) Once you have filed your return, you can view your assessment by tapping on the **View Assessment** icon on your **Work Page**.
- b) This will display the **Notice of Assessment (ITA34)** page. Tap on the selected Original Assessment to view your notice of assessment.

≡ Work Page :	Rack Notice of Assessment	13:55
AR .	ORIGINAL ASSESSMENT	← Notice of Assessment (ITA34)
ax Ref No:	Date of Assessment: 05/06/2019	Hi
TR12 (FILED		
		Net amount Payable: R0.00
rear of Assessment 2019		Reference Number :
/ersion 7 Last Modified: 2019/06/05		Date of Assessment : 2019/06/11
San and		Year of Assessment : 2019
Filing Status		Type of Assessment : ORIGINAL ASSESSMENT
CORRECTION FILED		Period (days) : 365
Calculation Results CALCULATED		Payment Due Date : 2019/07/31
		Account Summary Information
Statement Request for Query Status View of Acc Correct ons Assessment		. B. 450 000.00
		Deduction Allowed : R100,000.00
		Taxable Income : R-450,000.00 Assessed tax after rebates : R0.00
Upload/View View Letters Payment Dock History View Tax Calc		Tax credits and adjustments : R0.00
-		Amount Due : R0.00
Done		View ITA34 Pdf



## 12 HOW TO UPLOAD SUPPORTING DOCUMENTS

- a) To upload the required supporting from your submission, proceed by tapping on **Upload/View Docs** icon displayed on your **Work Page**.
- b) This will route you to the **Supporting Documents** page.
  - i) Tap on **ADD DOCUMENTS** displayed at the bottom of your page.
  - ii) Choose location to upload your documents from



- c) Once found, tap on **Upload.** The document(s) will be uploaded to the **Supporting Documents** page.
- d) To submit the document(s), tap on **SUBMIT DOCUMENTS**.

The following pop-up messages will be displayed on your device.



- e) Confirm by selecting Yes. To decline select No.
- f) Once Yes and OK is tapped the status of your uploaded documents will change from <u>uploaded</u> to <u>submitted</u> and a pop-up message will be displayed detailing that your supporting documents have been uploaded successfully.



Take note that the maximum document size must be 5MB X10 Files

## 13 ERROR MESSAGES

## 13.1 VOLUNTARY DISCLOSURE PROGRAM (VDP)

- a) Where your income tax return submission includes an error relating to VDP information, the status of your income tax return will be "Rejected by SARS".
  - i) The following error message will be displayed on your device.

Message from SARS	
The Return you are submitting does n meet the Voluntary Disclosure Progra legislative framework. Please contact Voluntary Disclosure Unit for more information.	ot mme the
	O

b) Proceed by contacting the SARS Voluntary Disclosure Unit.

## 14 DEFINITIONS AND ACRONYMS

Link for centralised definitions, acronyms, and abbreviations: <u>Glossary A-M | South African Revenue</u> <u>Service (sars.gov.za)</u>

#### 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).