TAXPAYER
SERVICE

SARS External Guide

SERVICES OFFERED VIA THE SARS MobiApp

TABLE OF CONTENTS

1 SUMMARY

a) A South African resident is responsible for tax of all their income and profit received (which could include individuals, companies, and trusts) according to the Income Tax Act No. 58 of 1962. Thus, tax compliancy forms part of a South African residents' responsibility. The South African Revenue Services (SARS) assists residence in this by providing services that are readily accessible to all South African residence in their quest to fulfil their tax compliance duties. Interacting with SARS digitally via the SARS MobiApp offers residents a safe and easy way to resolve most tax queries.

b) Some of the services offered via the SARS MobiApp, but not limited to, are:

   i) **Tax Compliance Status Service**
      A) This service allows you to view your tax compliance status and request your tax compliance status (TCS) PIN
   ii) **Profile Management Services**
      A) This service allows you to view and manage your profile information with SARS.
   iii) **Tax Directive Service**
      A) This service allows you to request a historical IRP3b or request historical IRP3b's and IRP3C's
   iv) **Tax Reference Number Request Service**
      A) This service allows you to request your tax reference number from SARS.
   v) **Branch Office location and appointment services**
      A) This service allows you to locate the nearest SARS branch office to your location and/or to book a virtual appointment with a SARS service agent.
   vi) **Estate Case Service**
      A) This service allows you to report a new estate case to SARS.

2 INTRODUCTION

a) The SARS MobiApp caters for individual taxpayers and registered tax practitioners with full access for the submission of the Income Tax Return for Individuals.

b) This application amongst other duties, ensures that taxpayers are serviced efficiently and the information pertaining to their tax affairs can be viewed by them, is up to date, accurate and credible.

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 (ITR12) return.
      A) For more information on how to register for Personal Income Tax, refer to IT-AE-46-G01 - How to submit your Individual Income Tax return via the SARS MobiApp - External Guide
   iii) You must be registered for the use of eFiling or the SARS MobiApp.
      A) For more information refer to IT-AE-46-G01 - How to submit your Individual Income Tax return via the SARS MobiApp - External Guide
   iv) You must have downloaded the SARS MobiApp on your smart device.
      A) Ensure that your downloaded SARS MobiApp is always up to date.
      B) Ensure your device has the latest iOS/Android Operating System Software.
   v) Your device must have data or connected to a functioning Wi-Fi system.
   i) You must have the correct username and password to be able to transact on the SARS Mobile Application.

4   DOWNLOADING THE SARS MOBIAPP

a)   You can easily install the free SARS MobiApp from the Apple Store, Google Play Store, or the Huawei App Gallery.

b)   The following operating systems versions are required for your smart phone/device to enable a successful downloading of the SARS MobiApp:

   i)   Android – Version 5.0 or Higher
   ii)   iOS – Version 10 or Higher

c)   To Download:

   i)   Tap on the **Google Play Store/Huawei App Gallery/Apple App Store** to open the store
   ii)   Type "**SARS MobiApp**" into the Search box displayed.
      A)   Once the SARS MobiApp appears as part of the search results, download the Application to your device.

d)   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.


5   TAX COMPLIANCE SERVICE (TCS)

a)   On the pre-login page (**Home Page**)

   i)   Tap on the **Tax Compliance Status** icon.
   ii)   You will be routed to the **Welcome Page**
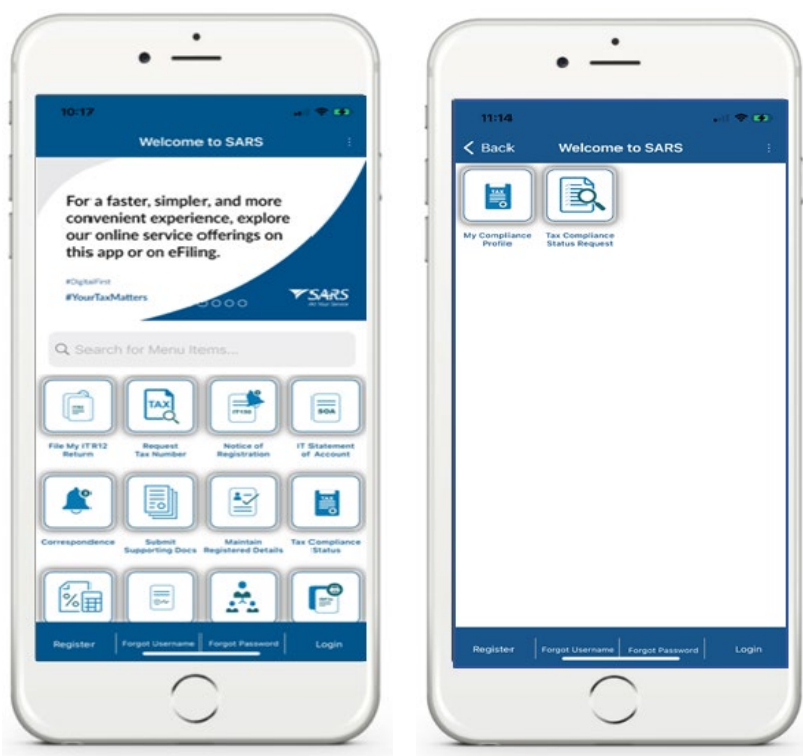
b)   The **Welcome Page**, offers you the following services:

   i)   **My Compliance Profile**
         A)   Select this service to view your compliance profile and associated statuses
   ii)   **Tax Compliance Status Request**
         A)   Select this service to request a Tax Compliance Status (TCS) and access your pin.

5.1   HOW TO ENQUIRE MY TAX COMPLIANCE STATUS

a)   You can access your compliance profile either via the **Home page** (pre – login) or **Landing page** (post – login)

b)   To access using the **Home page** (pre - login), proceed as follows:

   i)   Tap on the **Tax Compliance Status** icon.
   ii)   On the Welcome Page
         A)   Select **My Compliance Profile**
   iii) You will be routed to the Welcome Page prompting you to login.
         A)   Tap and complete your **login** and **password.**
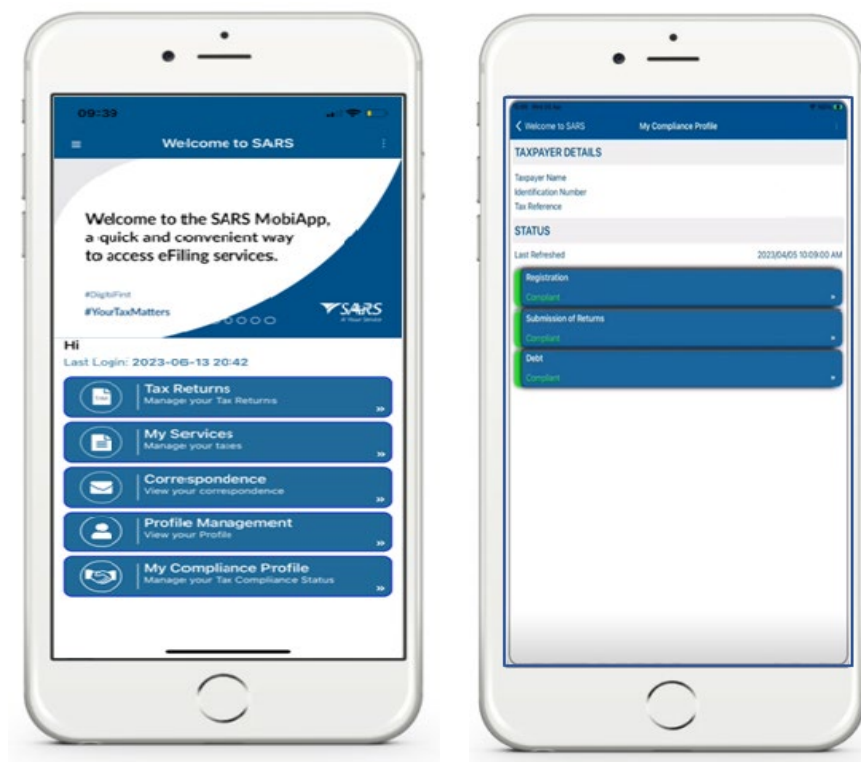   B)   Tap on **Login**
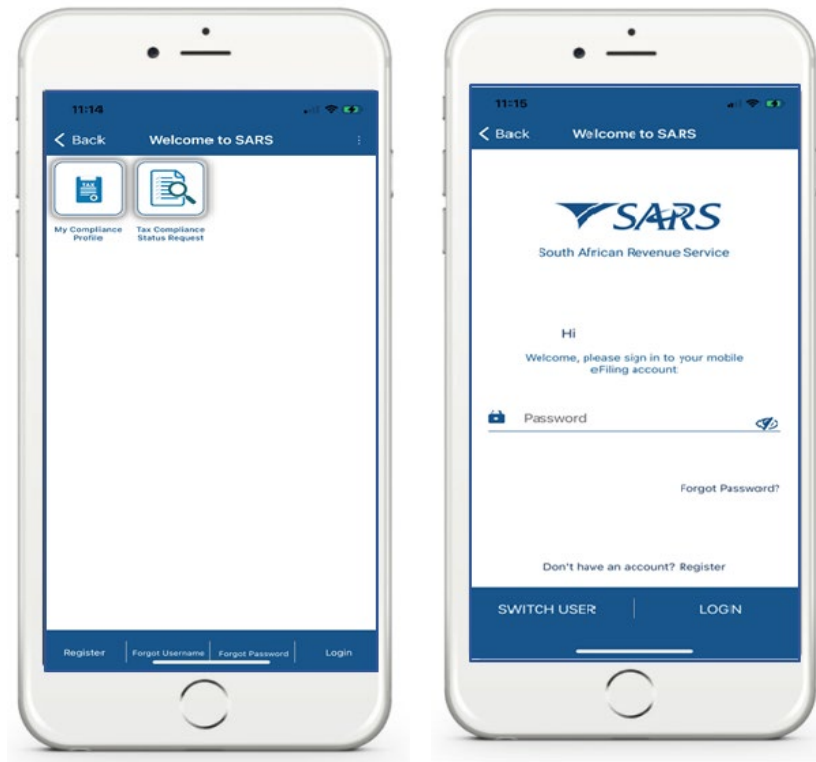
iv)   Once you logged in successfully, the **My Compliance Profile** page will be displayed.
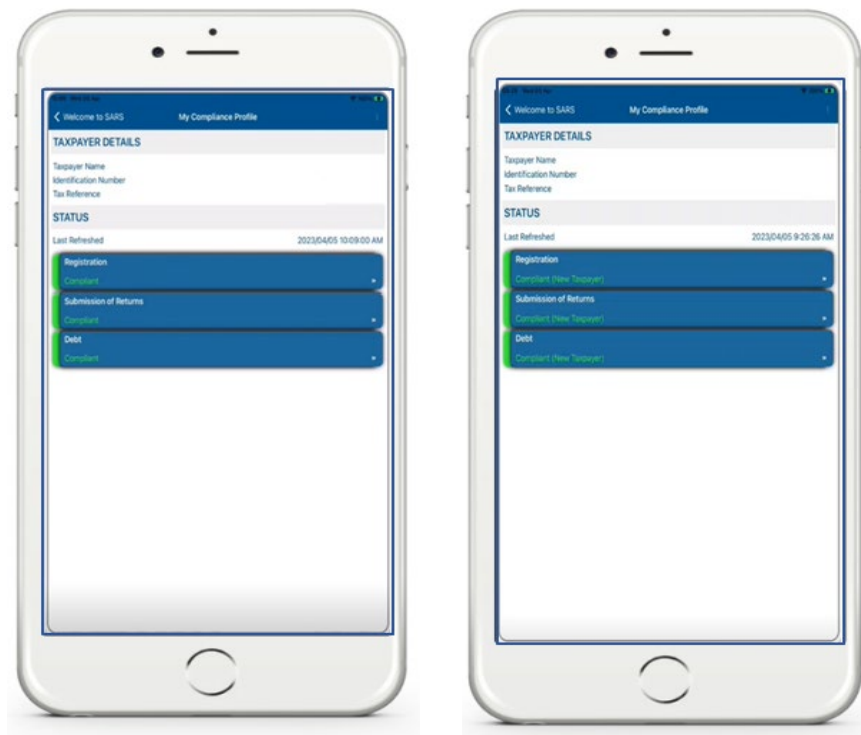
Note that where you are a new taxpayer, the **My Compliance Profile** Page will display that you are indeed a new taxpayer.

c)   To access using the **Landing Page** (post - login), proceed as follows:

i)   Tap on the **My Compliance Profile** icon.

d)   **Things to note when viewing your Tax Compliance Status (TCS)**

i)   The following compliance status can be viewed on the SARS MobiApp.
A)   Registration
B)   Submission of Returns
C)   Debt

ii)   The compliance status will be written below the description tabs and are displayed in the following colours on your device. The colours are indicative of the following:
A)   **Green** – This indicates that the taxpayer is complaint.
B)   **Red** – This indicates that the taxpayer is non-complaint.

iii)   Tap on the applicable button to view your tax compliance.


Your Tax compliance Status (TCS) service is interrelated to eFiling. This implies that as soon as one of the statuses have been updated on eFiling, your compliance status will be updated across all channels.

---

5.2 HOW TO REQUEST YOUR TAX COMPLIANCE STATUS

a)   To request your Tax Compliance Status (TCS) for good standing, and acquire your TCS PIN:

i)   On the Pre-login page, tap on **Tax Compliance Status** icon.
ii)   On the **Welcome Page**, tap on **Tax Compliance Status Request.**

b) The request form will be displayed on your mobile device. Complete the applicable fields to request your TCS.
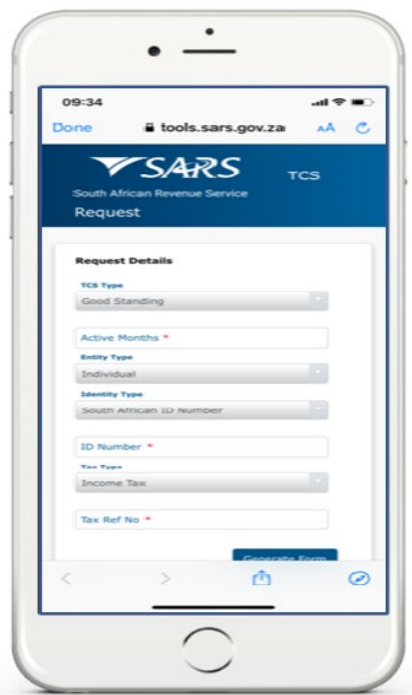
   i) Complete all the fields on the form and tab on **Generate Form.** The form cannot be generated if the mandatory fields are not completed.

c) Once completed and your tax affairs are in order, an SMS/email will be sent through detailing your PIN.

d) To access using the Landing **Page** (post - login), proceed as follows:
   i) Tap on the **Hamburger menu**
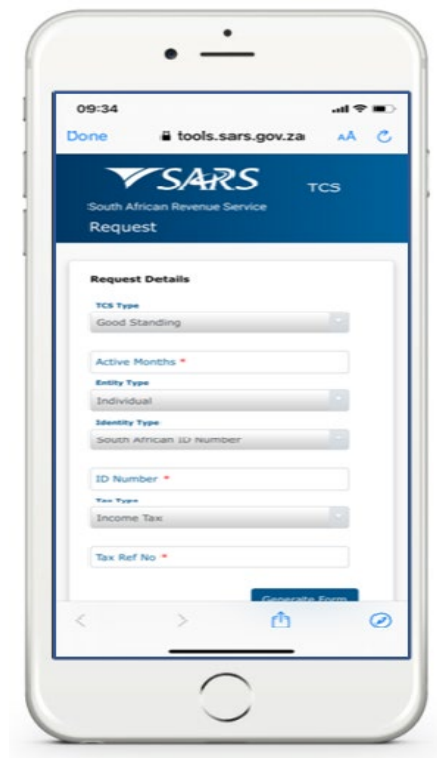   ii) Tap on the **Tax Compliance Status Request** option.
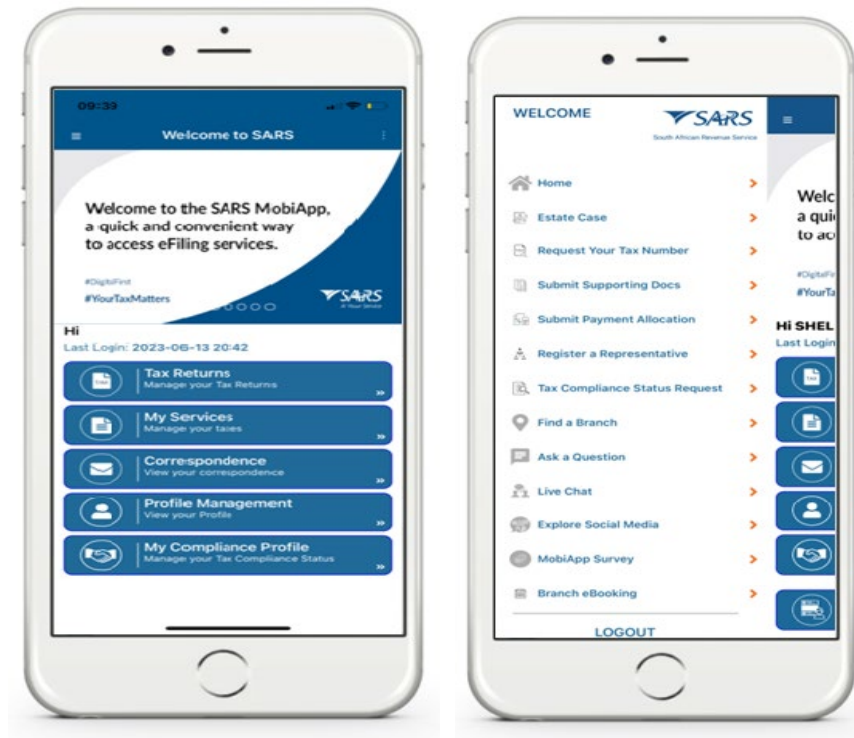
e) The request form will be displayed on your mobile device. Proceed to complete the applicable fields to request your TCS.

f) **Note the following TCS error messages and their meaning.**

> Note that to use this service, you must be activated for Tax Compliance Status (TCS) on eFiling.

g) Where taxpayer is not activated for TCS, or you have not completed your TCS activation on eFiling, this service will not be available. The following error message will be displayed on your device.
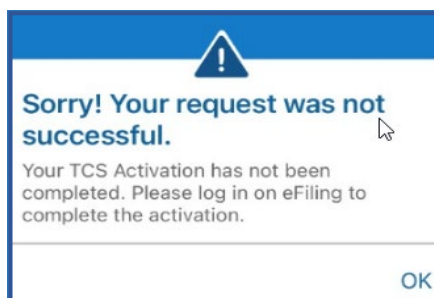
h)   You can respond by logging into eFiling and select **TCS** on your profile. Additionally navigate on the left menu of your eFiling profile as follows:

   i)   **<Tax Compliance Status>**
   ii) **<Activation>**

i)   Follow the prompts displayed on your screen to finalise your activation.

6   SERVICES TO MANAGE YOUR TAX COMPLIANCE REQUIREMENTS

6.1   HOW TO REGISTER FOR PERSONAL INCOME TAX

a)   The SARS MobiApp allows you to register for the use of the app. To register;

   i)   Downloaded the SARS MobiApp
   ii) Refer to the following guide on how to register for Personal Income Tax (PIT)
       A)   IT-AE-47-G01 - How to register for the use of the SARS MobiApp - External Guide.

6.2   HOW TO SUBMIT YOUR INCOME TAX RETURN

a)   The SARS MobiApp can also be used to file/ submit your income tax return. Refer to IT-AE-46-G01 - How to submit your Individual Income Tax return via the SARS MobiApp - External Guide.

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

a)   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. This process allows you not to have to submit a Personal Income Tax Return (ITR12) because your generated assessment is regarded as final if you agree with the auto-assessed results.

   i)   To know whether you have been selected for an auto assessment and further how to respond to an auto assessment, refer to the following external guide available on the SARS website.
       A)   IT-AE-46-G01 - How to submit your Individual Income Tax return via the SARS MobiApp - External Guide.

### 6.2.2   HOW TO VIEW YOUR INCOME TAX RETURN STATUS DASHBOARD

a)   The Tax Return Status Dashboard allows the taxpayer to view the progress and status of their submitted income tax return. From a compliance perspective, this service gives the taxpayer a visual status of the progress of the tax return in terms of submissions, verification / audit and refund processing.

   i)   To access the Tax Return Status Dashboard, refer to the following guide available on the SARS website.
       A)   IT-AE-46-G01 - How to submit your Individual Income Tax return via the SARS MobiApp - External Guide.

6.3 HOW TO MAKE PAYMENTS OF YOUR DEBT

a) The SARS MobiApp can be used to make payments of your personal income tax or penalties related to your personal income tax. Additionally, payment arrangements of your outstanding debt can be requested via the SARS MobiApp.

b) On how to make payments via the MobiApp please refer to the following guide.

   i) IT-AE-48-G01 - How to make payments to SARS via the SARS MobiApp – External Guide.

c) On how to arrange payments on your debt, refer to following guide.

   i) GEN-DC-20-G04 - Deferral of Payment Arrangements on SARS MobiApp - External Guide.
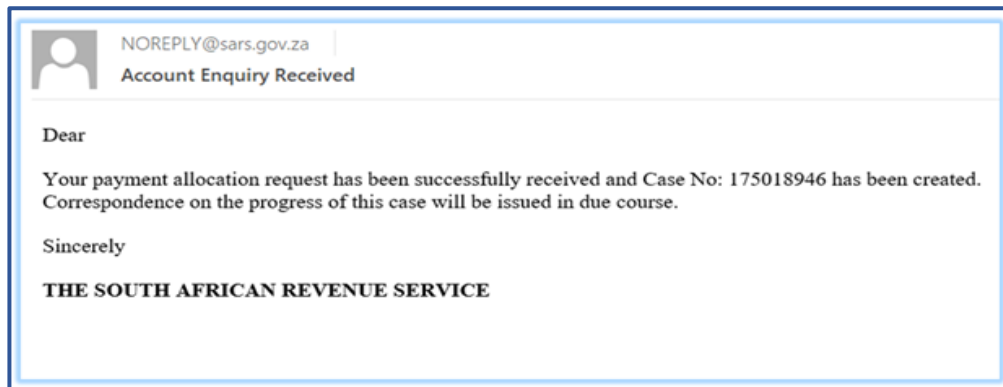
6.4 HOW TO SUBMIT A PAYMENT ALLOCATION ACCOUNT QUERY

a) To submit a payment allocation pre login, tap on **Submit Payment Allocation** icon displayed on the **Home Page**

b) Alternatively, to access the service post login, tap on the hamburger menu option ☰ and select **Submit Payment Allocation**
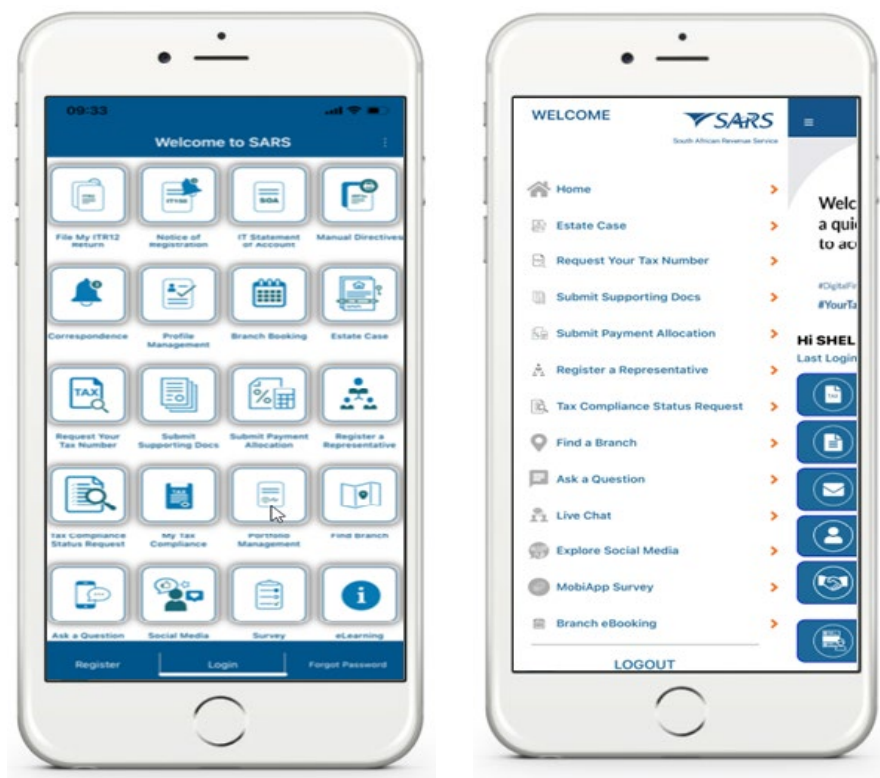
c) The SARS Online Query System form will display.

   i) Complete form with the necessary mandatory fields and upload supporting document required.
   ii) Ensure that your documents are within the limits prescribed by SARS.
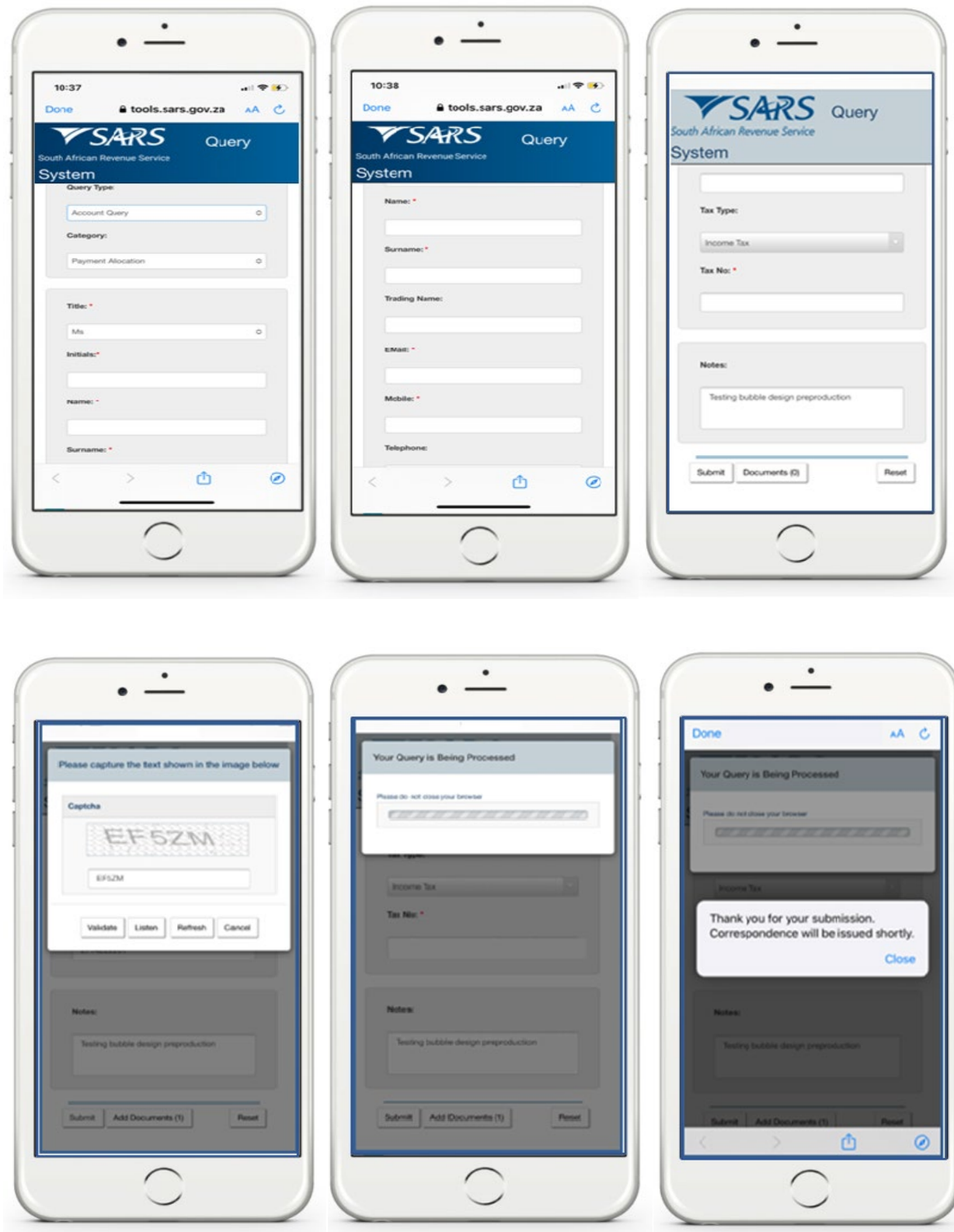
d)   A notification will be sent to the taxpayer via their preferred method of communication once successfully submitted.

NOREPLY@sars.gov.za
Account Enquiry Received

Dear

Your payment allocation request has been successfully received and Case No: 175018946 has been created. Correspondence on the progress of this case will be issued in due course.

Sincerely

THE SOUTH AFRICAN REVENUE SERVICE

6.5 HOW TO SUBMIT SUPPORTING DOCUMENTS

a) SARS sends notifications to the taxpayer for their attention and action. Where the notification received requires the uploading of supporting documents, proceed as follows.

b) On the **Home** page, tap on **Submit Supporting Documents**

c) If on the post login, select **Hamburger menu** and select **Submit Supporting Documents**.

   i) This will display the SARS Online Query system (SOQS) form on your device.
   ii) Complete the form.
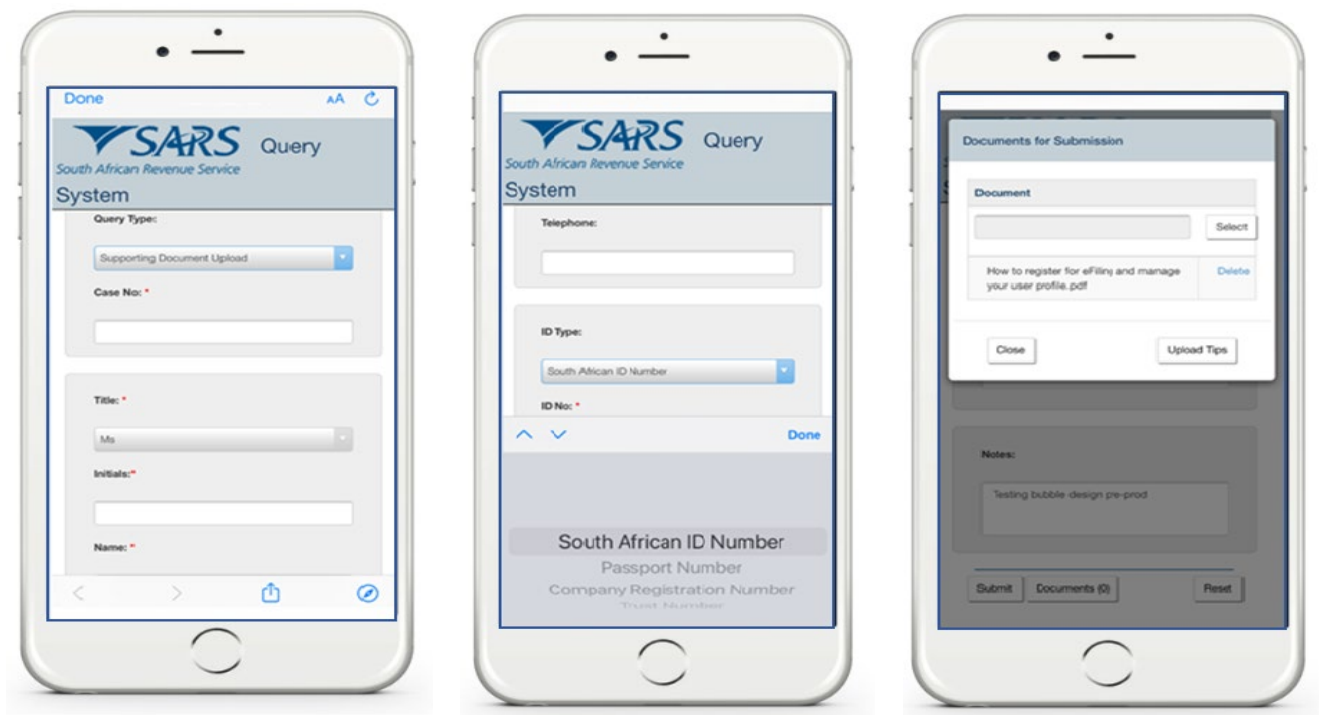

d) The documents you can upload must not exceed 5MB. Where a document size is greater than 5MB, the following warning message is displayed:
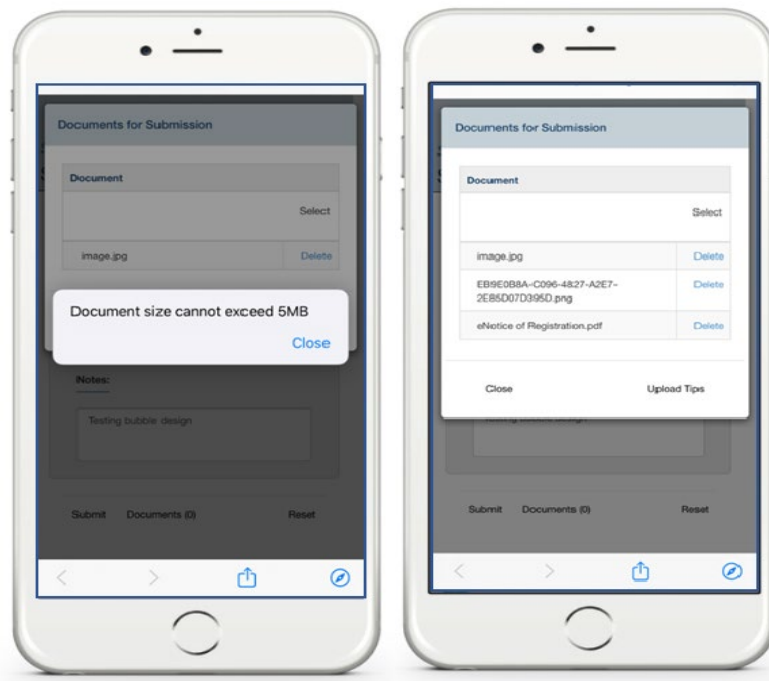
> **Note the following when uploading documents:**
>
> - Documents must be in one of the following formats: pdf, doc, docx, xls, xlsx, gif, jpg, jpeg, bmp and png.
> - Documents should not be blank, password protected or encrypted.
> - Documents may not be more than 5MB per upload and a maximum of 10 documents may accompany a single submission.
> - Document names should not include the characters 'or &.
> - No more than 10 submissions are permitted against a given case number.

e)   Where the documents have been successfully attached, the following message will display on your device, indicating that the document was successfully submitted.
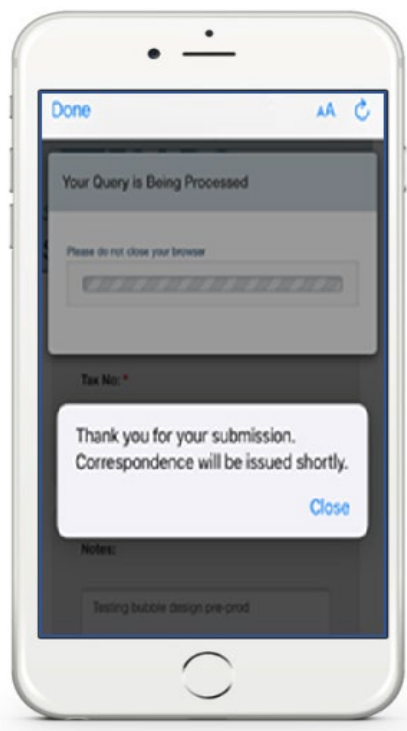
7   PROFILE MANAGEMENT SERVICE

7.1   HOW TO MANAGE YOUR PROFILE INFORMATION

a)   Taxpayers and tax practitioners can update their profile information using the SARS MobiApp.

b)   The following profile information can either be viewed or updated:

    i)   Marital Status
    ii)   Email address (if different from the security details)
    iii)   Contact Number (if different from the security details)
    iv)   Security details (Cellphone and email)
    v)   Postal Address
    vi)   Residential address
    vii)   Bank details
        A)   Account holder
        B)   Account number
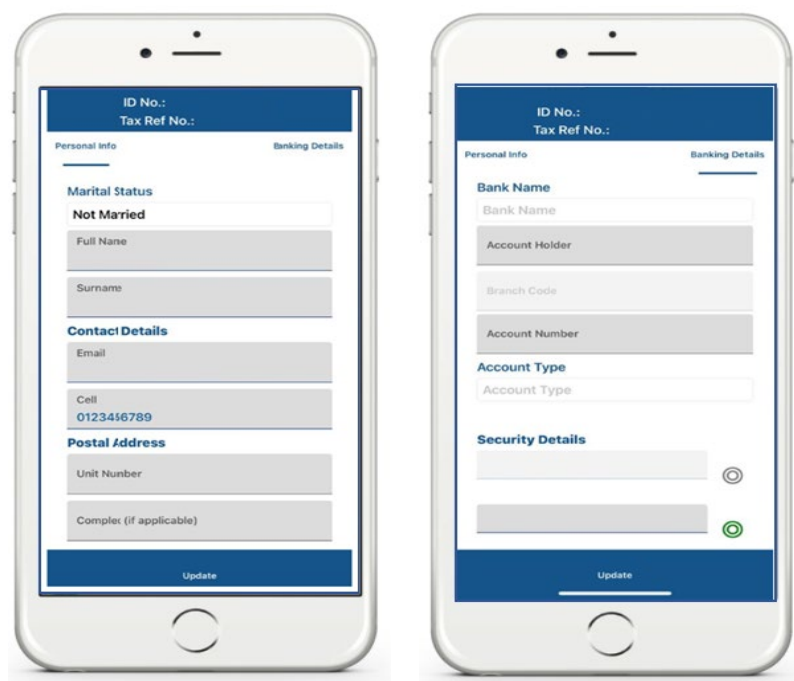   C)   Branch code
        D)   Account type

c)   To view or update your profile using the MobiApp, proceed as follows:

d)   Tap on the **Profile Management** service .

e)   Once selected, the user will be presented with personal information.

f)   To update profile information, select the applicable one by tapping on it on your device.

g)   If personal info is selected, the taxpayer's personal information as described above will be listed. Tap on the applicable personal information to update and tap on "Update."


Note that the tax types that can be accessed via the SARS MobiApp are for Personal Income Tax (PIT) only. When updating your banking details or security details, you will be prompted to complete the OTP for authentication purposes. Also note that the tax practitioner can update their clients profile information by accessing their client's profile as described in portfolio management service. Note however, they cannot update the security details of their clients.
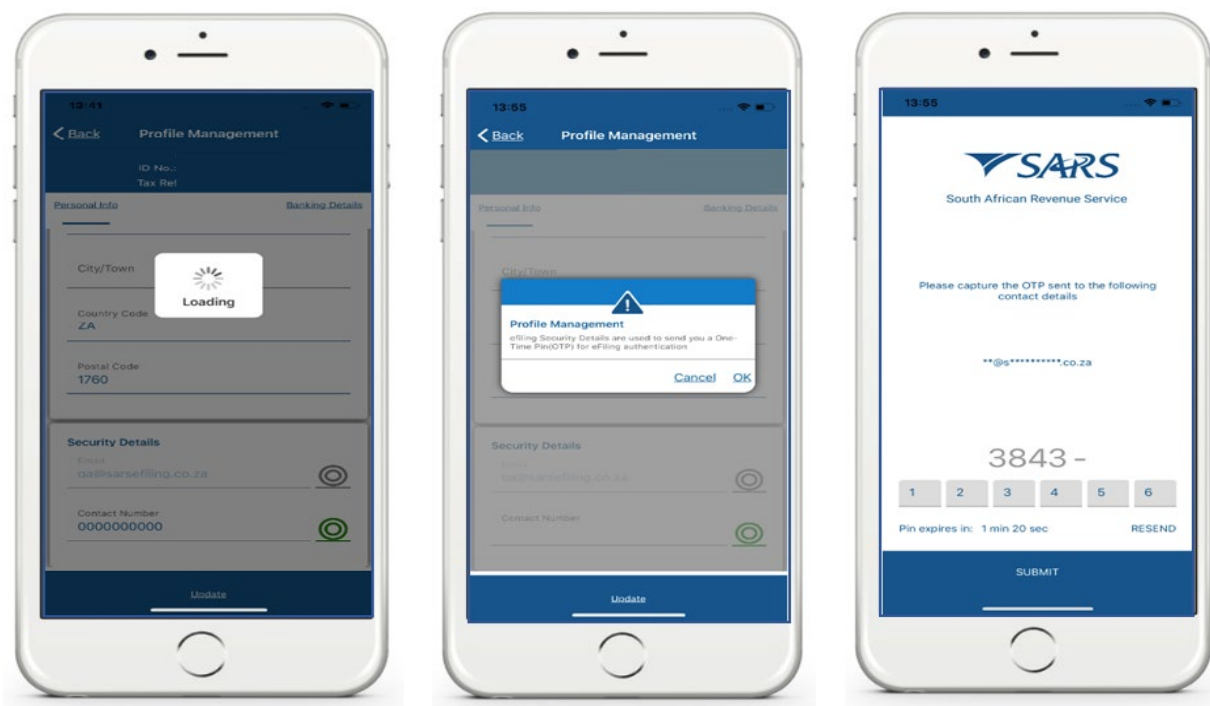
> **Note** that in the event where both the security details must be updated, the taxpayer/tax practitioner is advised to kindly call the SARS Contact Centre or visit the SARS branch to update their security details.

7.1.1 HOW TO RESPOND TO ERROR NOTIFICATIONS

a)   When updating security details (cell number or email address fields), always ensure that the completed information is accurate and correct.

   i)   Where SARS detects the information completed is incorrect or already forms part of an eFiling account, one of the following messages will be displayed on your device:
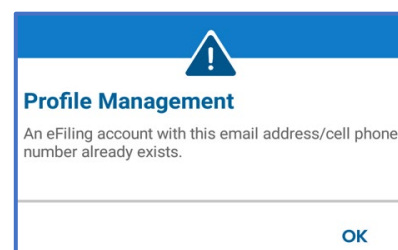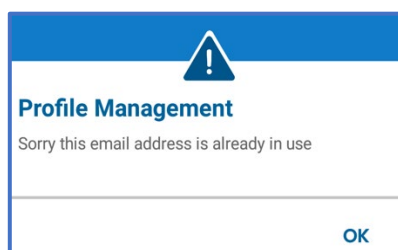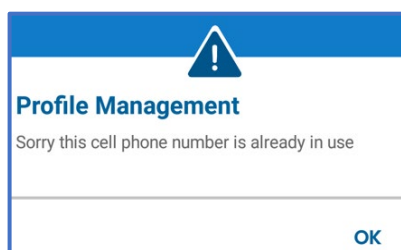

b)   Respond by taking note of the message and clicking on **OK**.

   i)   Proceed by completing the appropriate contact details.
      A)   However, following various failed attempts to complete the security contact details, book an appointment to visit one of our SARS branches to update your security contact details.

7.2   HOW TO CONFIRM YOUR CONTACT DETAILS

a)   To ensure the accuracy of your contact information, SARS will send you an email or SMS requesting confirmation of your details. You will be required to verify or update your mobile phone number and/or email address on the Update Contact Details dashboard available on the SARS MobiApp. This section is designed to assist you in verifying or updating this information.

b) To confirm your contact details, proceed as follows:
   i) Login
   ii) Complete the OTP code.
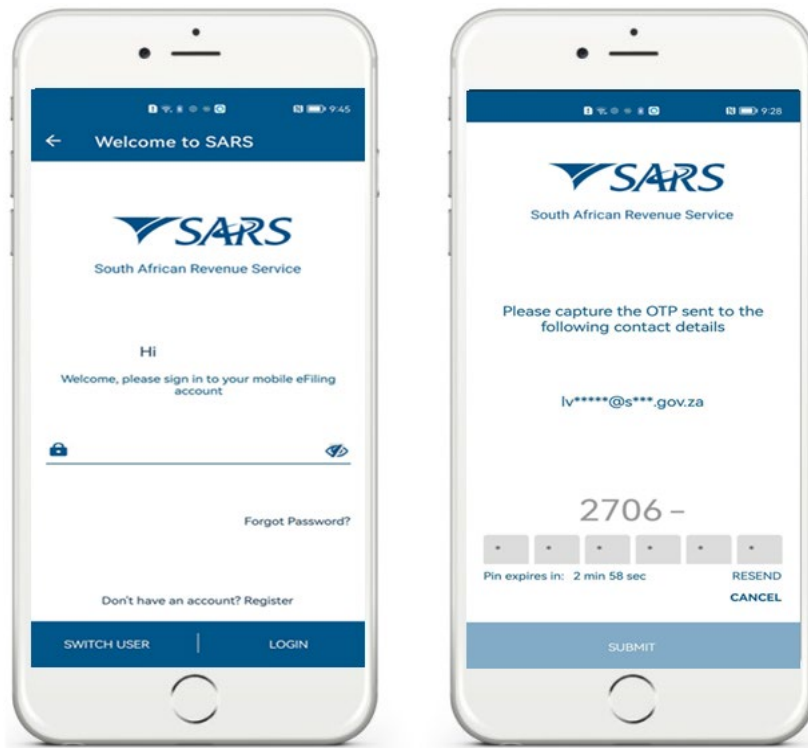
c) On the **Update Contact Details** screen, the **Security Contact Details** associated with your profile will be displayed. Confirm the following:

   i) Your selected **Preferred Method of Communication**
   ii) Check whether your preferred method of communication (cell number or email address) has the correct information. Update where the information is incorrect.
   iii) Tap on **CONFIRM.**
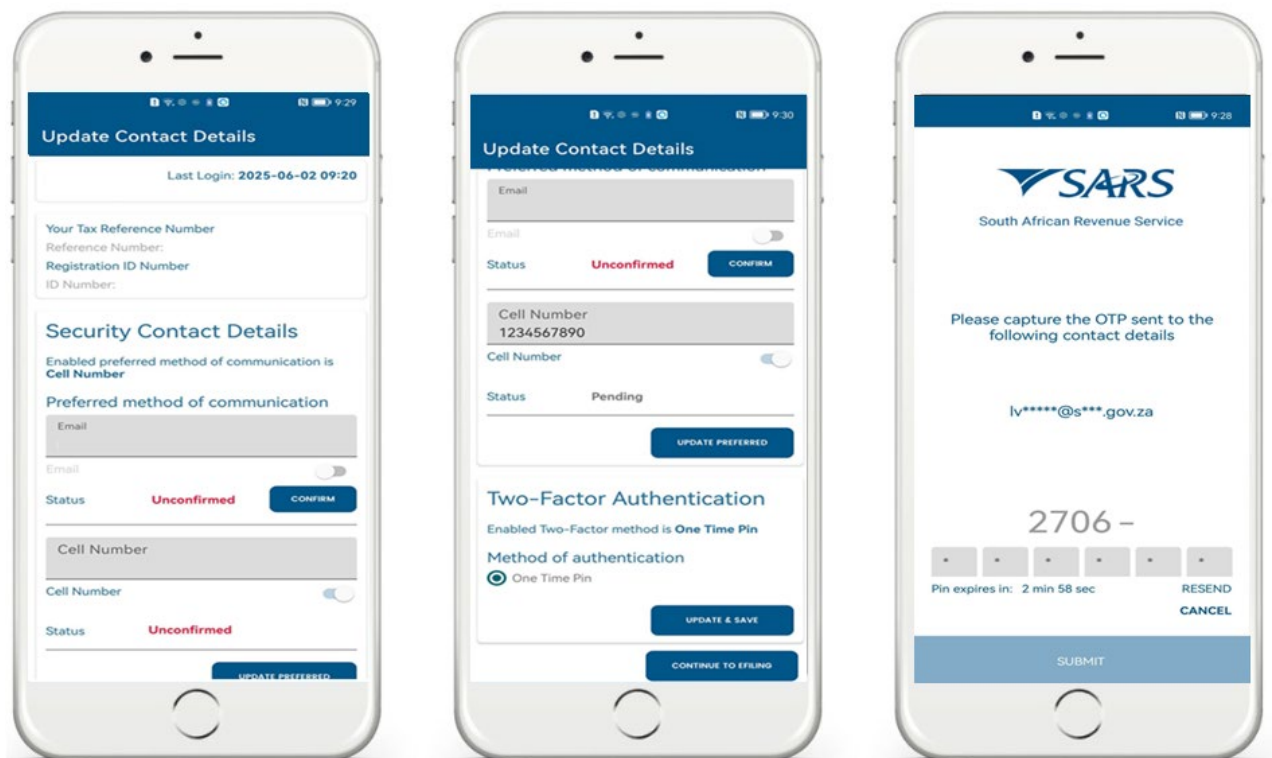
d)   The status will change to **Pending.**

> Note the following information regarding the statuses displayed:
>
> - **Invalid –** This indicates that the entered email address or cell number is invalid. Please correct the email address or cell number and then tap on the **UPDATE PREFERRED** button.
> - **Unconfirmed –** This indicates that the entered email address or cell number has not been confirmed. Please complete the correct email or cell number and tap on the **CONFIRM** button.
> - **Confirmed –** This indicates that the provided information has been confirmed. Please click on the **UPDATE & SAVE** button.
> - **Pending –** This indicates that SARS is validating your verification updates of the contact details. The status will change to **Confirmed** once the verification by SARS has been completed.

e)   Scroll down to the **Two Factor Authentication** section.
    i)   Note that the **Two Factor Authentication** will be enabled and selected for **One Time Pin**.
        A)   Where **One Time Pin** is not selected,
            I)   Select **One Time Pin** by tapping on the applicable radio button.
                •   For setting up **Two-Factor Authentication** on your device, visit the following guide on the SARS website: www.sars.gov.za: IT-AE-47-G01 - How to register for the use of the SARS MobiApp - External Guide.
    ii)   Tap on **UPDATE & SAVE.**

f)   Tap on **CONTINUE TO eFILING.**
    i)   This will redirect you to the **SARS MobiApp Landing** screen.

g)   Where confirmation of your contact details has not been finalised, the **Update Contact Details** dashboard will be displayed as RED.
    i)   Proceed to confirm your details as follows:
        A)   Tap on **Update Contact Details**
        B)   Tap on **+ Entity Contact Details**
        C)   Check whether your cell number and email address are correct.
            I)   Update where the information is incorrect.
        D)   Tap on **CONFIRM**.
        E)   Tap on **UPDATE.**
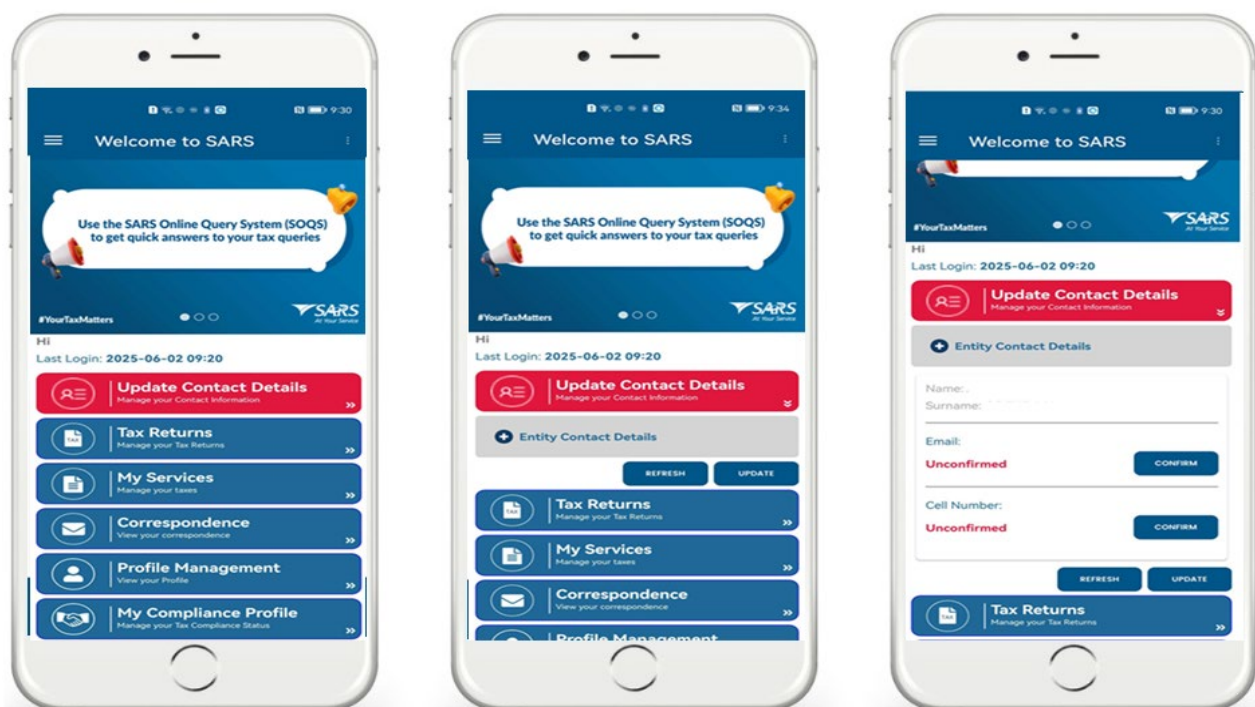
h) The **Update Contact Details** screen will be displayed showing your **Entity Contact Details** and **Security Contact Details**.

    i) Ensure the contact details displayed have been confirmed.
        A) Check if the status is confirmed or unconfirmed.
            I) If unconfirmed, update and tap **Confirm**.
    ii) Enter the OTP code.

i) After entering the correct OTP code, the status will be shown as **Pending**. SARS will then verify the provided information, and upon completion, the status will be updated to **Confirmed**.
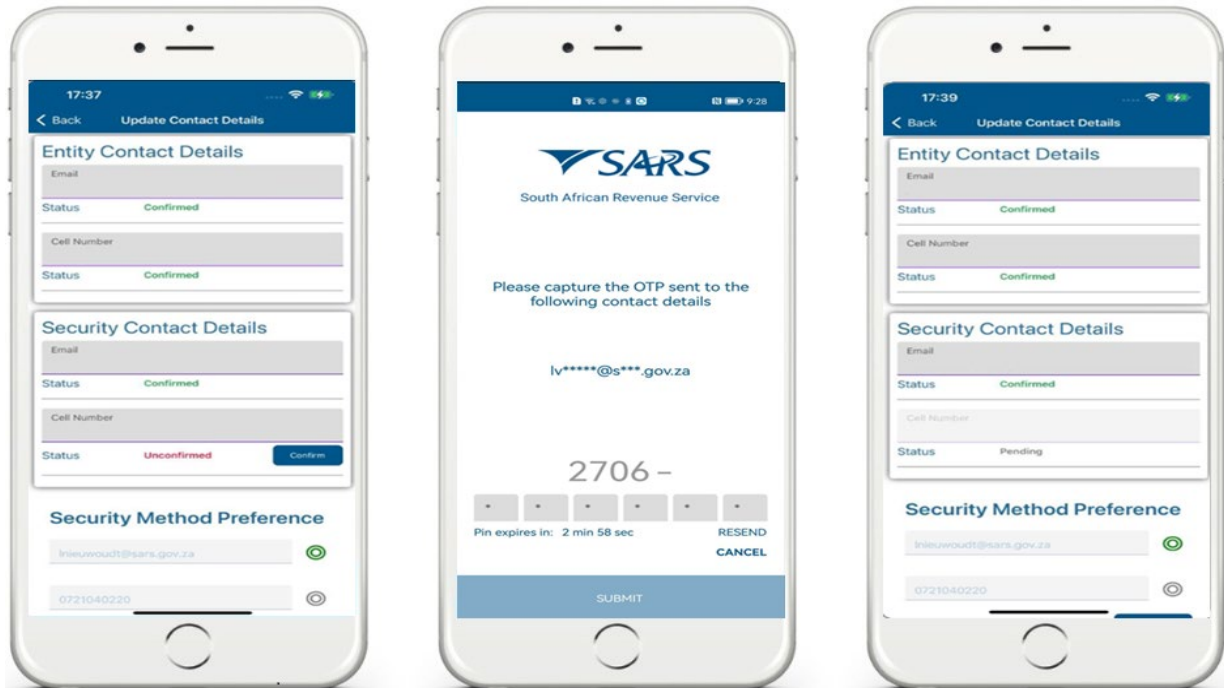
j) Do note that once the contact details have been confirmed, the **Update Contact Details** dashboard will no longer be displayed as RED, and the status will be updated to GREEN.
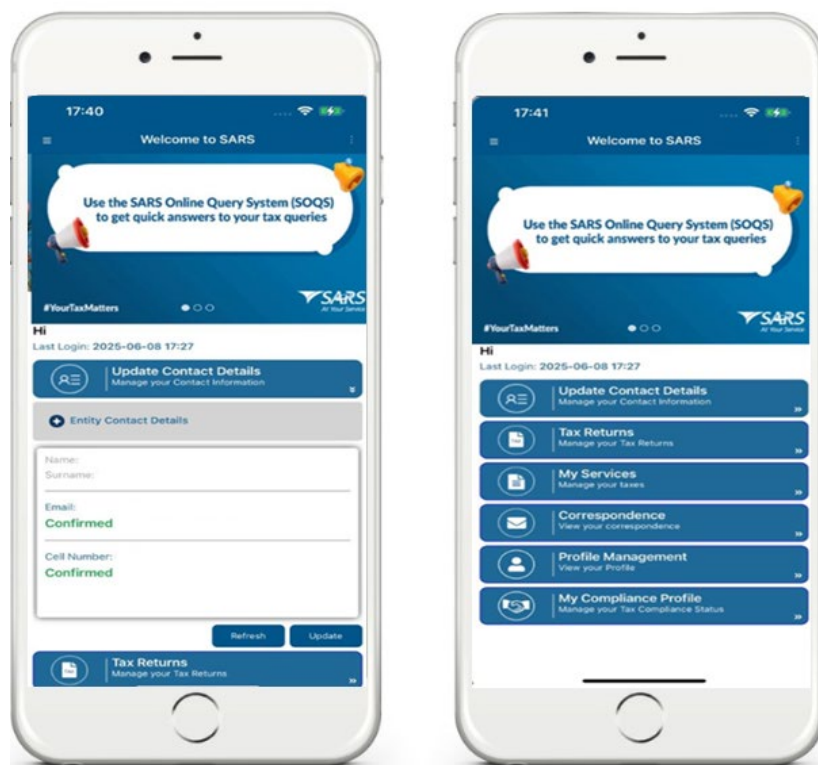
## 7.3 HOW TAX PRACTITIONERS CAN ACCESS THEIR CLIENTS' PORTFOLIOS

a) Where you are a registered tax practitioner, "My portfolios" service (tab) will be displayed on the landing page of your profile once logged in to the SARS MobiApp.

> **Note** that tax practitioners must link their clients via eFiling to access their clients' profiles on the SARS MobiApp.

b) To access your client's profile:

   i) Select '**My Portfolios**' on the **Landing** page.
   - A) This will direct you to the '**Portfolio Management**' page.
   - B) Your portfolios will be listed on your device, and you can search by portfolio name.

c) Tap on the applicable portfolio.

   i) This will list all the taxpayers under your selected portfolio.
   - A) Note that you can also search for a taxpayer by Surname, ID, or tax reference number.

> **Note** that SARS MobiApp only gives you access to Personal Income Tax (PIT) tax type. To access other tax types, kindly utilise eFiling. The portfolios listed are the same as those created and listed on your eFiling profile. To update your portfolio, kindly utilise eFiling. On how to create a portfolio on eFiling, refer to the registration external guide available on the SARS website.

d) Tap on the applicable taxpayer from your list of taxpayers grouped on your selected portfolio.

   i) This will display the **Landing** page of the applicable taxpayer.

e) Below is an example of how to access your PIT client via the MobiApp.
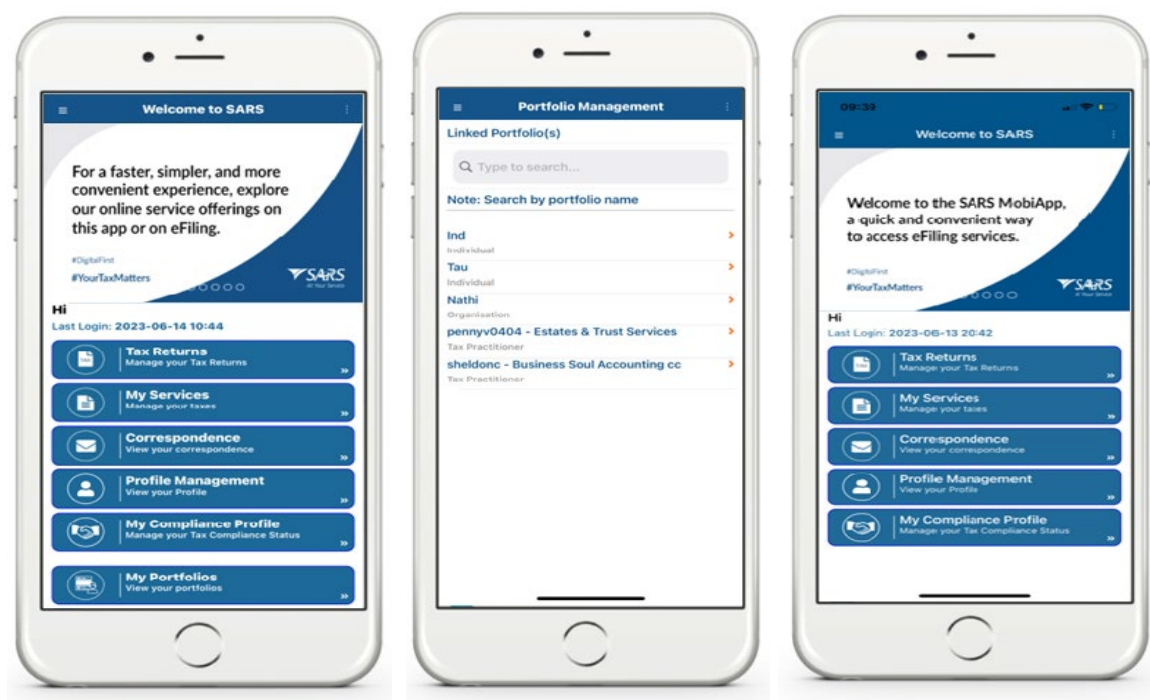

f) Once you are on the **Landing** page of your PIT client, you can access their account and complete their Income Tax return accordingly.

> Note that when you tap on **Correspondence,** you will be able to access the assessment outcome (ITA34) in instances where a request for correction of an auto assessment was made by the taxpayer.
>
> Also, the correspondence outcome of an application by the taxpayer on ceasing to be a resident, can be accessed when you selected this tab.

g)   Refer to the previous sections on the functionalities displayed on the taxpayers **Work** page.
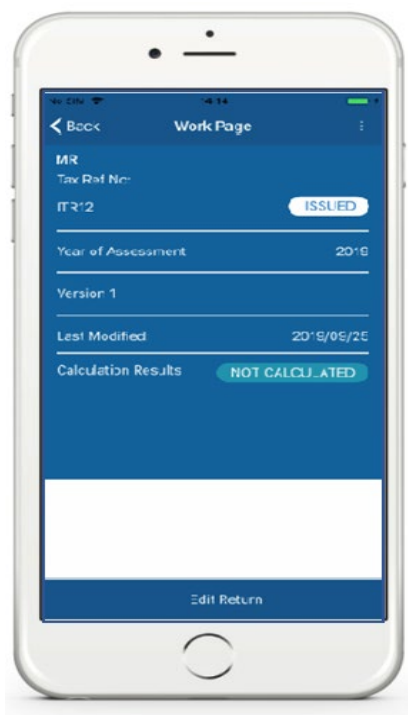
h)   Where you do not have access rights to complete the return of your client or you are not a registered tax practitioner, the following warning message will be displayed. Note the content on the message and tap on **Ok**.
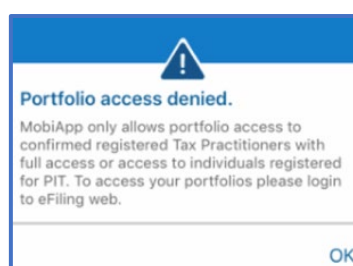

i)   Where you are a registered tax practitioner with **view access** only for your PIT client, the following warning message will be displayed.
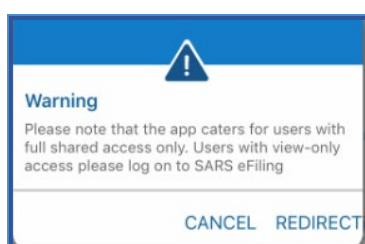
j) **Tax practitioners with shared access users, with view only access, will not be able to use the MobiApp to submit returns for their clients**.

k) If a registered tax practitioner with view only attempts to open their client's profile, the following message will be displayed.
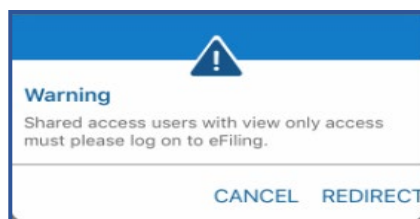
l) The hamburger menu ☰ will list various services, which include the search Taxpayer option that will direct you back to the portfolio management page.
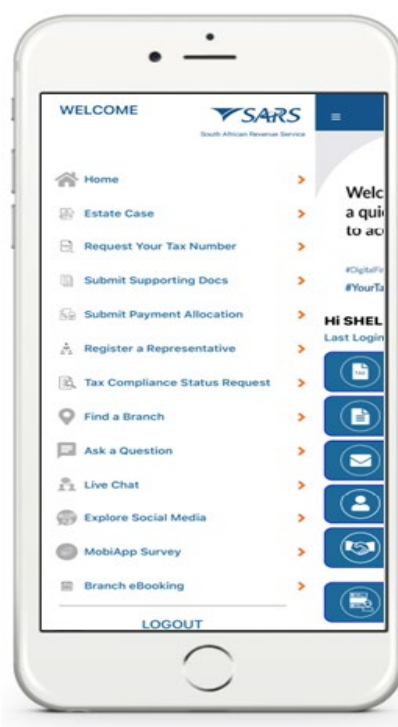

> Please note that this functionality is limited to only Personal Income Tax (PIT) clients and the PIT product.

My Landing Page	**My Landing Page** – will direct you to your **Landing page.**
Search Tax Payer	**Search Taxpayer** – will direct you to the **Portfolio Management** page

7.4 HOW TO UPDATE YOUR REGISTERED TAX REPRESENTATIVE ON YOUR PROFILE
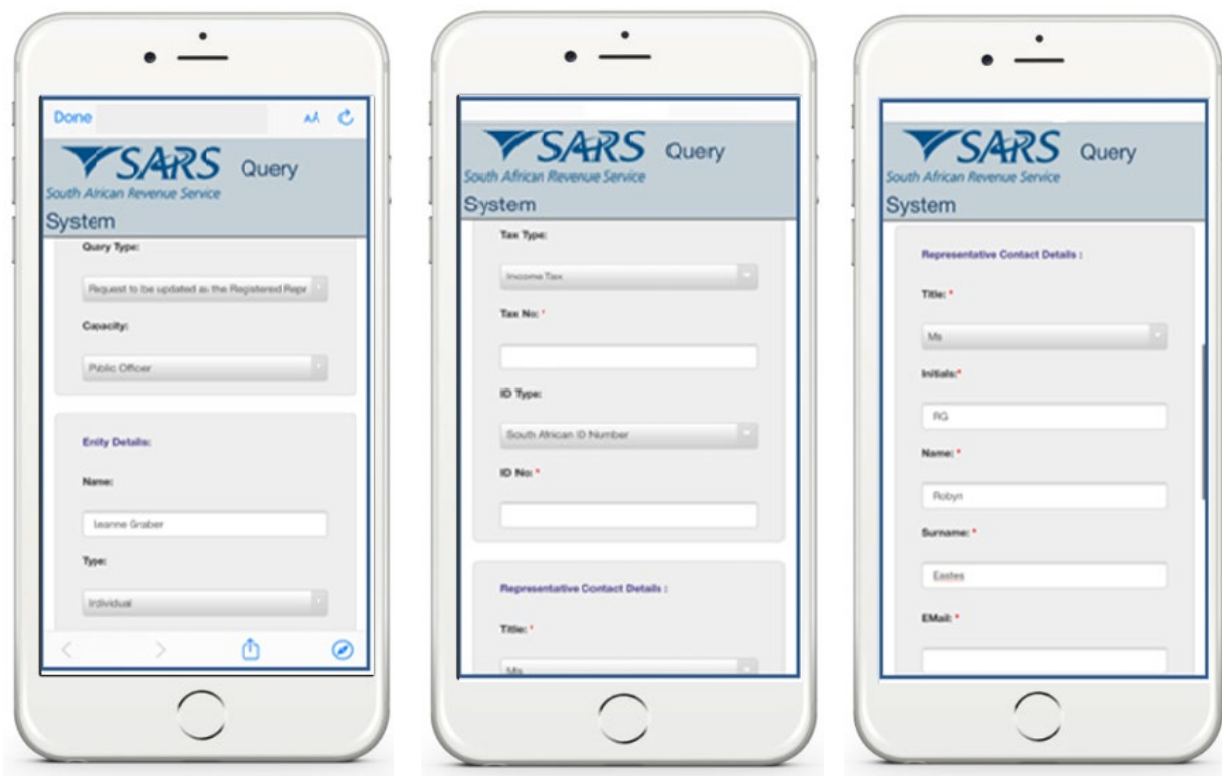
a) To update the registered representative of the taxpayer, proceed as follows:

b) To access the service pre-login,
   i) Tap on **Request to be a registered representative** icon displayed on the **Home Page**.
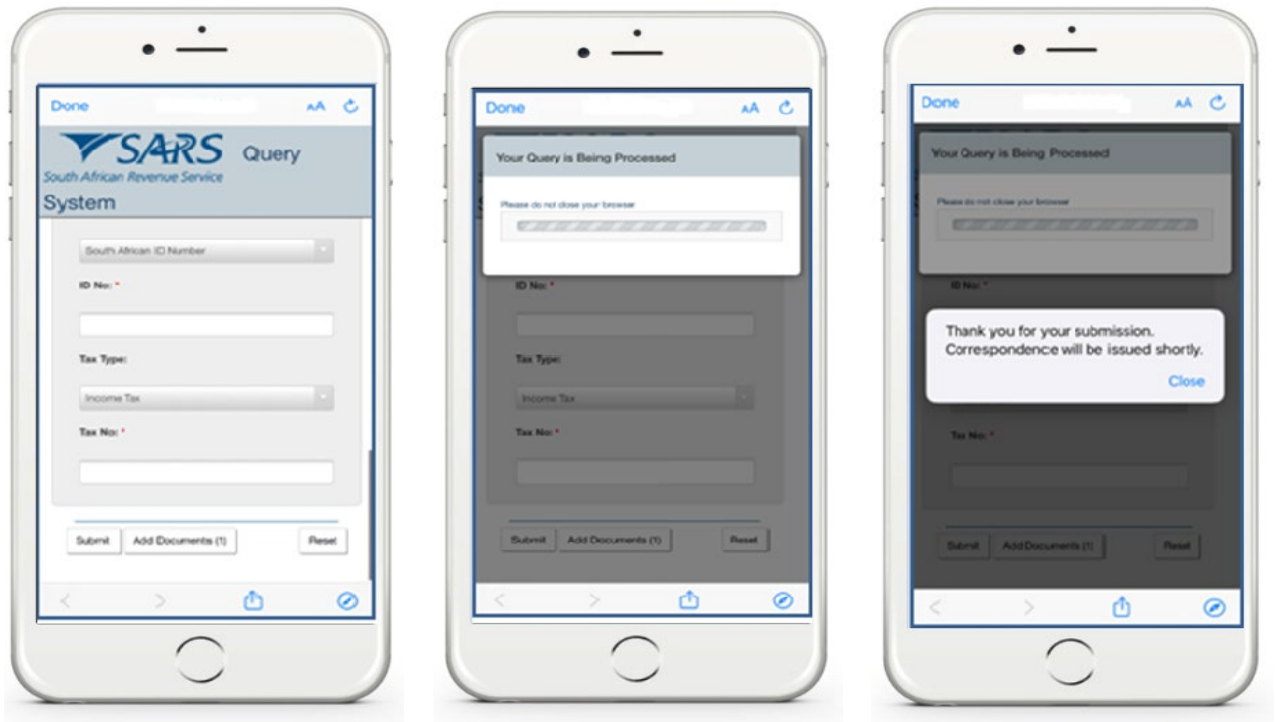
c) To access the service post login,

i) Tap on the hamburger menu option ☰, and
ii) Select **Request to be a registered representative**.
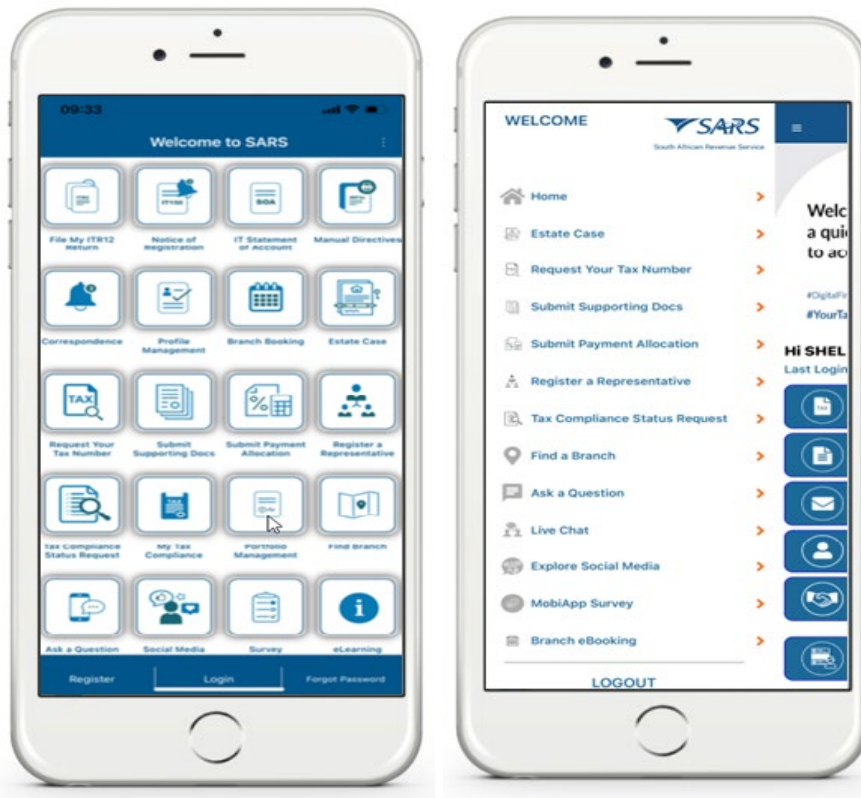
d) The SOQS form will be displayed as below.

i) Complete the form with the necessary mandatory fields.
   A) Capture all the details for the entity and the registered representative.

e) Notification will be sent to taxpayer via their preferred method of communication:

NOREPLY@sars.gov.za
Registered Representative Request Received

Dear

Your request to be updated as the Registered Representative has been received and assigned Case No: 175018957. Correspondence on the progress of this case will be issued in due course.

Sincerely

THE SOUTH AFRICAN REVENUE SERVICE

# 8   SARS BRANCH OFFICE LOCATION AND APPOINTMENT SERVICE

8.1   HOW TO LOCATE A BRANCH OFFICE NEAR YOU

a) To locate a Branch Office near you proceed as follows:

    i)   On the **Home Page,** tap on **Branch Services**


Branch Services

    ii)   This will direct you to two Service icons.
         A)   **Find Branch** – Will direct you to SARS Branch locator which will take you to your nearest Branch via google maps and list all other SARS Branch closer to your location.
         B)   **Branch Booking** – Will open a form for you to complete for booking a virtual appointment with SARS.
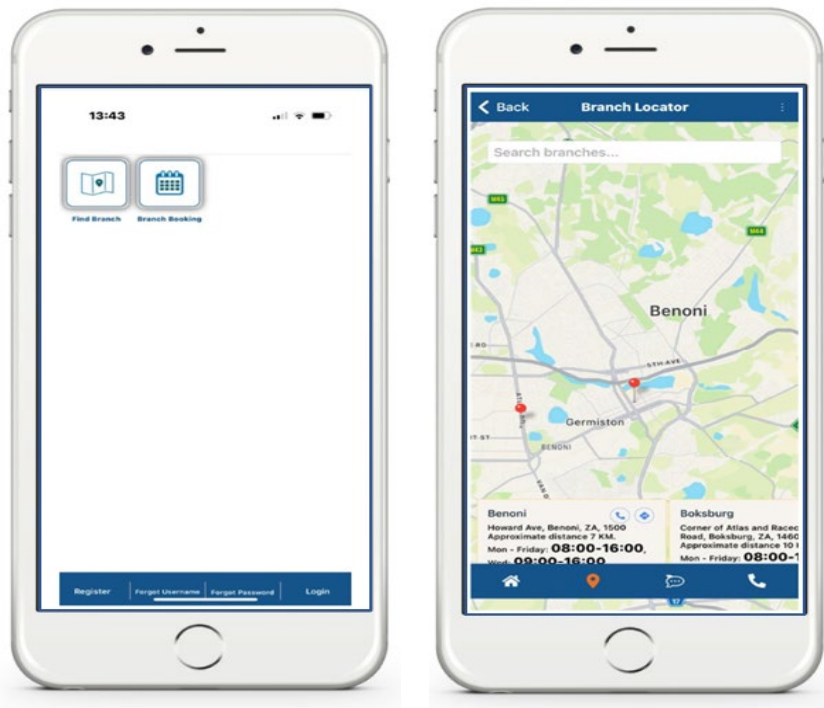
b) Below is the service offered by the icons displayed below the Branch Locator Page

🏠	This will direct you to the home page
📍	This will direct your attention to google maps
💬	This will direct you to the SARS Lwazi Live Chat
📞	This will display the contact details of SARS

c) Where contact details or Lwazi live chat has been selected, the following screens will be displayed.
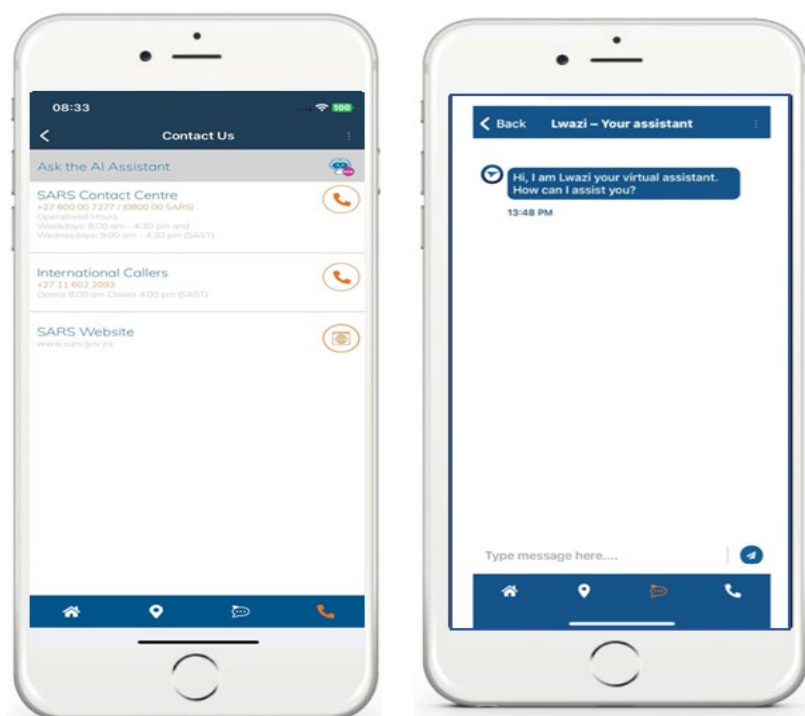
8.2 HOW TO BOOK A VIRTUAL OR BRANCH APPOINTMENT

a) Taxpayers/tax representative can now book an eBooking appointment to resolve their tax queries with SARS via the SARS MobiApp.

b) To make an eBooking appointment, tap on **Branch Booking** on the pre-login

c) Where you are logged in, tap on the menu bar ☰ and select **Branch eBooking.**

d) Once selected, the Branch eBooking form will be displayed.

e) Complete the form with the necessary details.

f)   For more information, refer to the following guide:
   i)   GEN-BO-09-G01 – Book an appointment at a SARS branch – External Guide
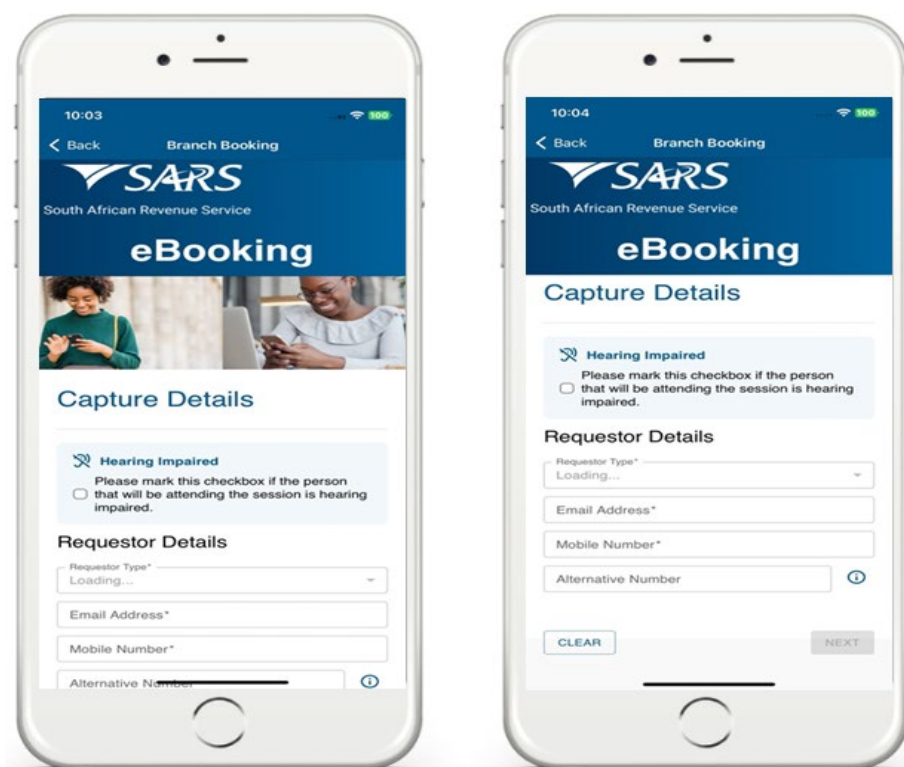
g)   Once completed you will receive an email detailing your eBooking progress and depending on your query you might be required to submit supporting documents prior to your appointment.
    i)   For more information, refer to GEN-BO-09-G01 – Book an appointment at a SARS branch – External Guide
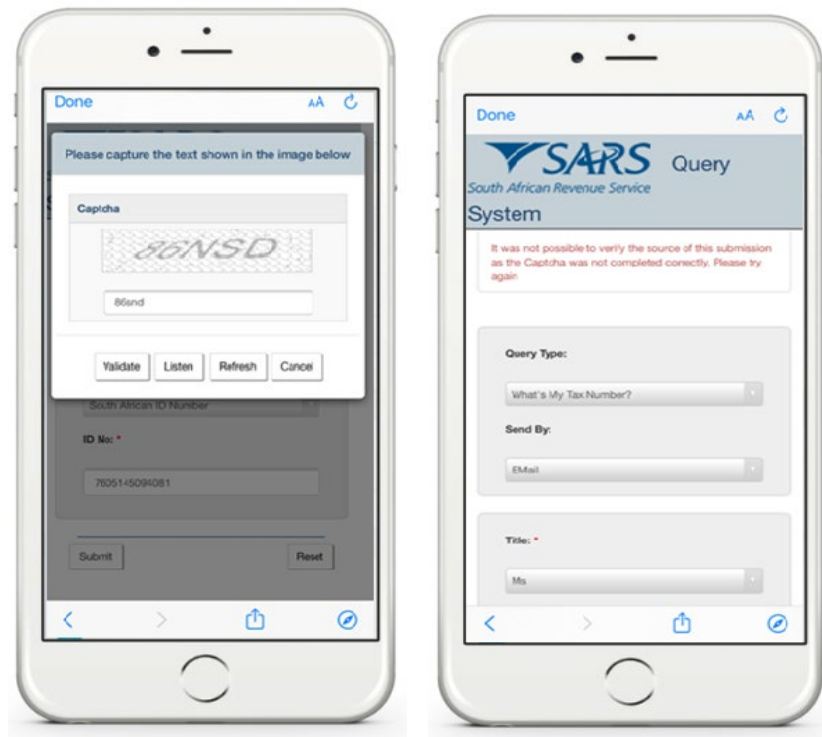
9   TAX REFERENCE NUMBER REQUEST SERVICE

9.1   HOW TO REQUEST YOUR TAX REFERENCE NUMBER (TRN)

a)   On the **Home Page (Pre-Login),** tap on **Request Tax Number** icon.
    i)   Complete the form with the necessary mandatory fields.
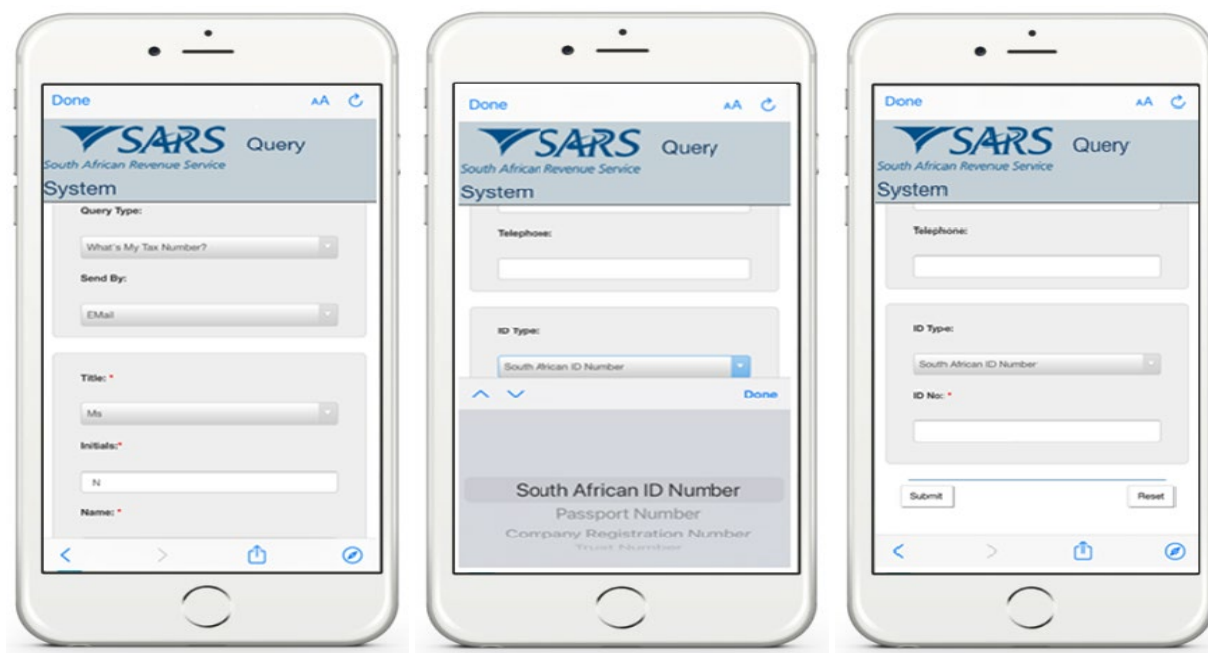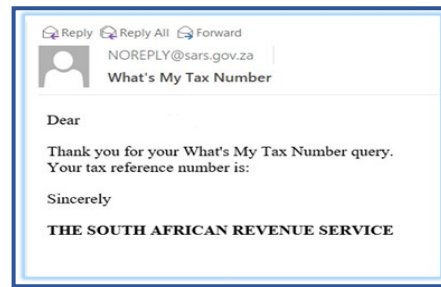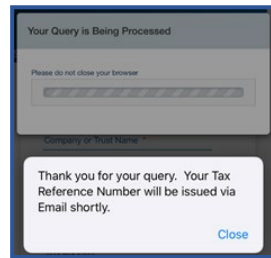
b)   The following error message will be displayed when the incorrect text is entered on the form:

c)   When incorrect contact details are captured, the below correct message is displayed:
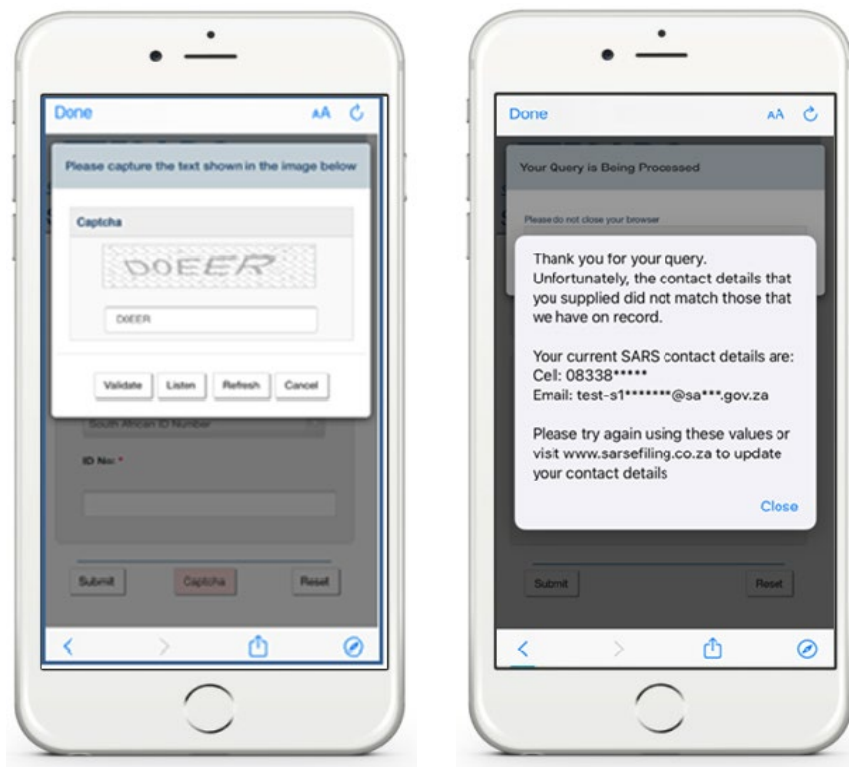
d)   The following message will be displayed when the data captured is correct and successfully validated.

9.2 HOW TO REQUEST YOUR NOTICE OF REGISTRATION

a)   If you have not logged in, on the **Home Page**

   i)   Tap on the **Notice of Registration** icon.
      A)   Complete your password on the **Login Page**, then tap on **Login.**
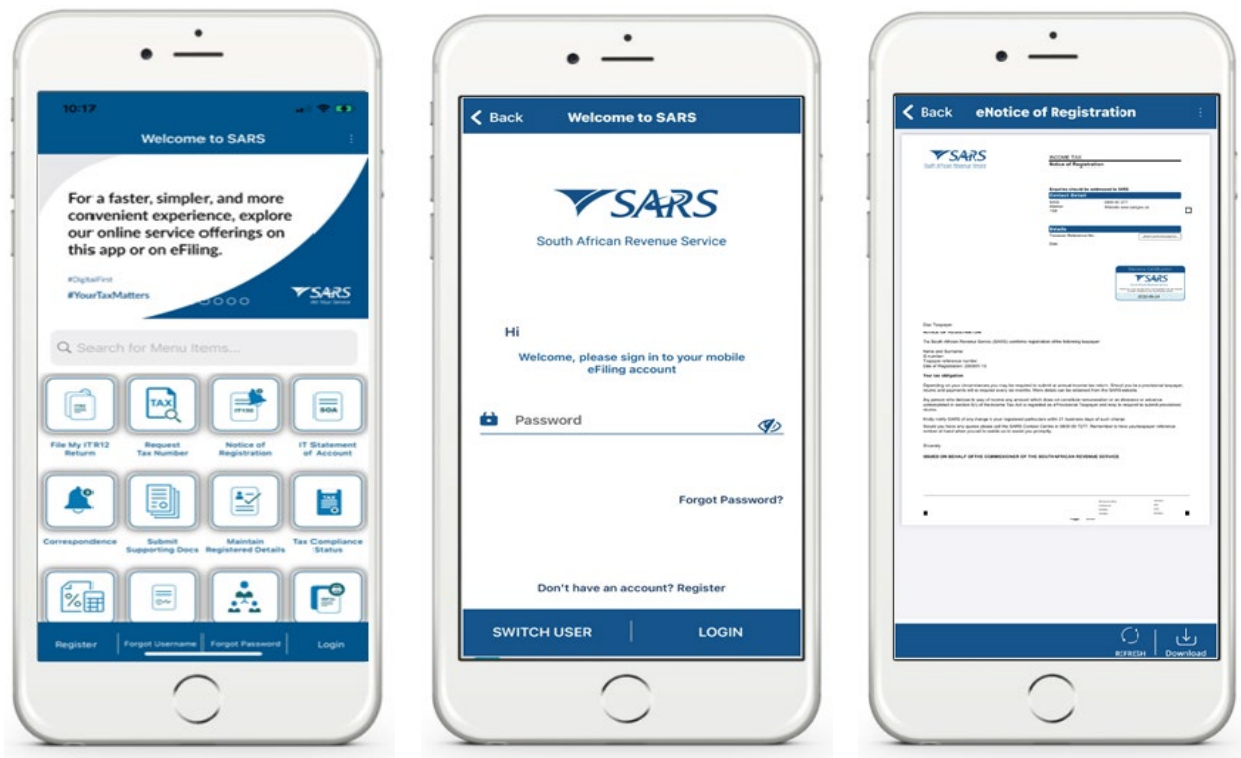
b)   If you have logged in, on the **Landing Page**

   i)   Tap on **My Services**.
   ii)   This will display the **My Services Page**.

c)   Tap on the **Notice of Registration (IT150)** option.

d)   On the Notice of Registration, you will also be able to view your Tax Reference Number (TRN).
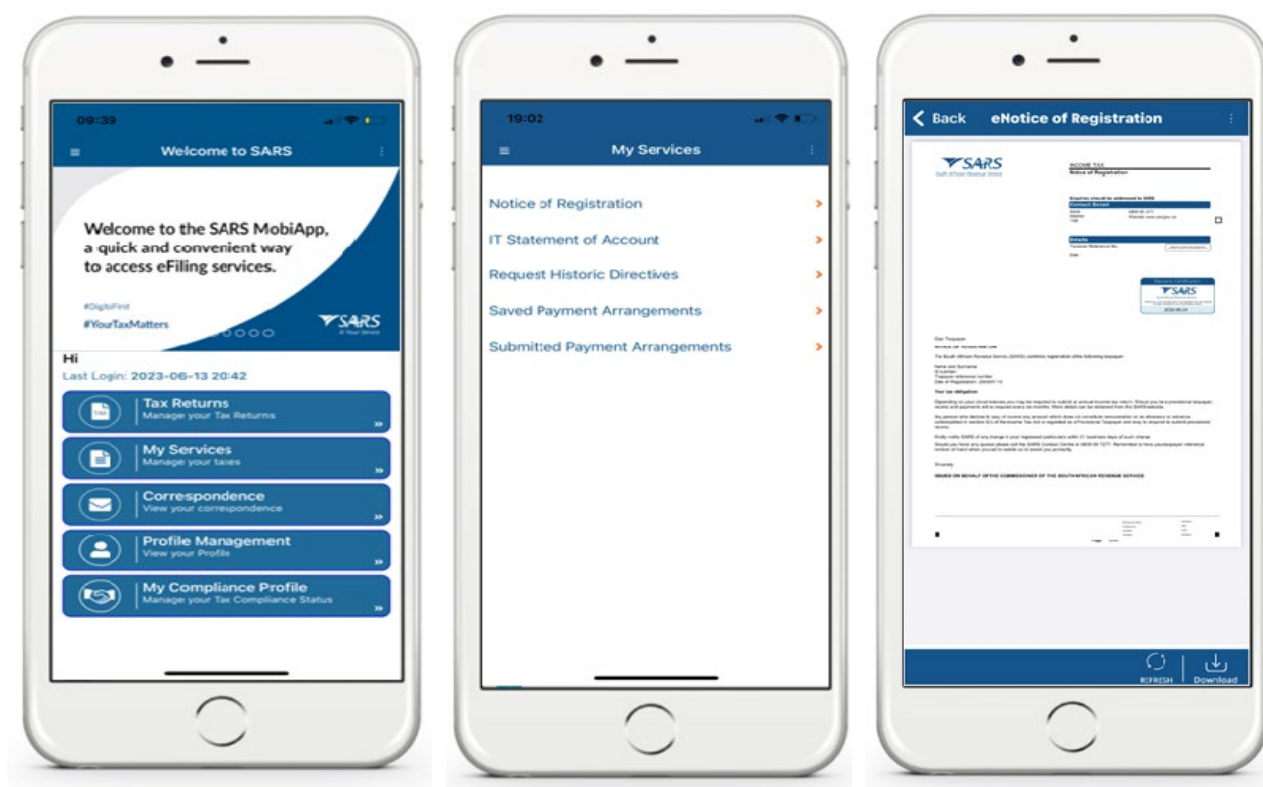
e)   Below the **Notice of Registration Page**, the following icon is displayed.

	To download the document onto your device.
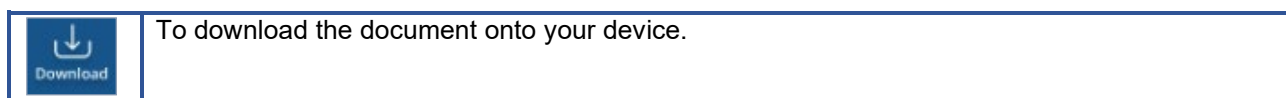
10   TAX DIRECTIVE SERVICE

10.1 HOW TO REQUEST YOUR HISTORIC IRP3B AND IRP3C

a)   Upon successful login, you will be routed to the MobiApp landing page. Select the "My Services" button. From the listed menu displayed, select the "Manual Directive (IRP3e) print". Once the "Manual Directive (IRP3e) print button is selected, the back-end process will be triggered to validate whether there is a Tax Directive stored on your eFiling profile.

> Note the following assumptions that must be met to use this service:
>
> - The user requesting the Tax Directive must be registered on eFiling and have an active profile.
> - To request the Tax Directive on MobiApp, the user must have installed the latest version of the SARS MobiApp.
> - The taxpayer's profile that the Tax Directive is being requested for must have an active Personal Income Tax.
> - Tax Practitioners must have been registered for eFiling and have an active account.

b)   If there is a Tax Directive stored on your eFiling profile, the Tax Directive will be displayed.

c)   If there is no Tax directive stored on your eFiling profile, the following message will be displayed on your device: *"The Directive (IRP3e) request functionality is currently unavailable, please try again later."*

d)   Select the applicable Tax Directive to be displayed on your device by tapping on it. It will be displayed in a PDF format.
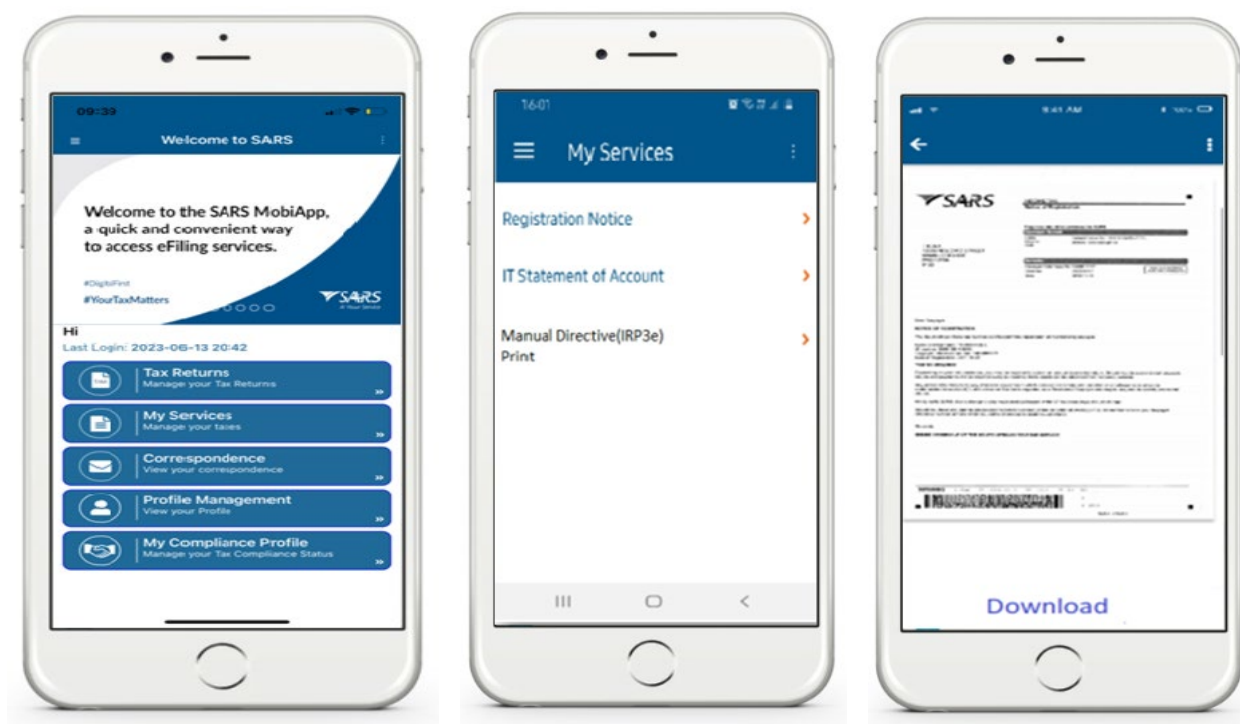
10.2 HOW TO REQUEST A TWO-POT RETIREMENT SYSTEM TAX CALCULATOR

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

b)   To view your possible Two-Pot Retirement payout, proceed as follows:

    i)   Tap on the **Two-Pot Calc** icon displayed on your device

Two-pot Calc

    ii)   This will route you to the Two-Pot Retirement Form for completion


c)   Once the Two-Pot Retirement form is displayed, simply follow the steps below:

    i)   **Step 1:**
        A)   Complete the requested details on the form
            I)   Name and Surname
            II)   ID Number and

III)   Tax Reference Number
B)   Tap on **NEXT**

ii)   **Step 2:**
A)   Select the method of verification

i)   **Step 3:**
A)   Complete the OTP sent through to your method of verification
B)   Tap on **SUBMIT**

ii)   **Step 4:**
A)   Get your results
I)   Your results will be displayed on your mobile device
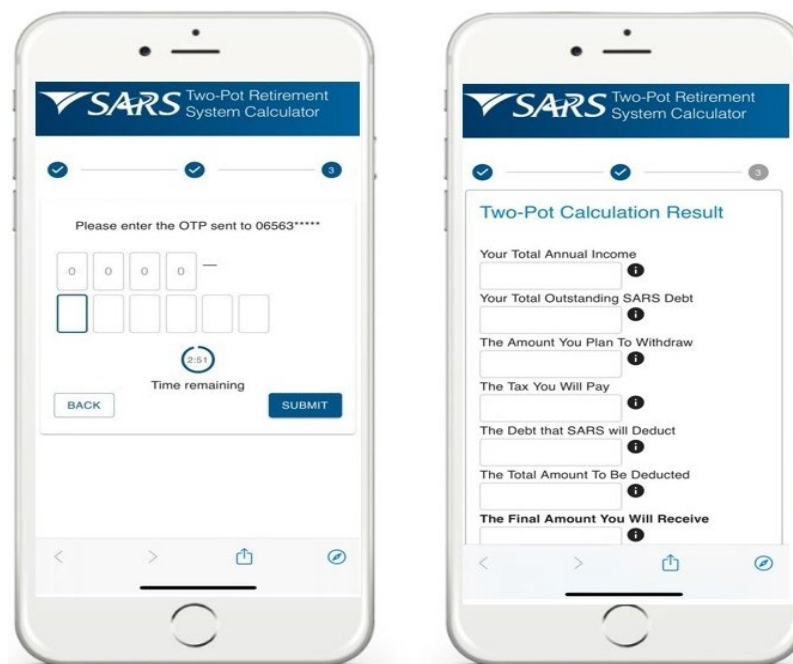
Do note the following when making use of this service:

- The taxpayer's profile that the Tax Directive is being requested for must have an active Personal Income Tax Reference Number.
- Complete relevant and accurate information on the two-pot retirement system calculator to get a clear estimate of the payout.

11   HOW TO REPORT A NEW ESTATE CASE

a)   To report a new estate case, select **Estates Case** icon displayed on the **Home Page**.

b)   To access the service via post login (**Landing Page**)

   i)   Tap on the hamburger menu option ▤ and select Estate Case.
   ii)   The SARS Online Query System (SOQS) form will be displayed.

c)   Note that, there are supporting documentation required when reporting new cases. Kindly refer to the SARS website for the applicable supporting documentation required when reporting a new Estate case.

d)   Once the supporting documents are at hand. Navigate as described and complete the SOQS form mandatory fields, upload, and submit the required supporting documentation.

e)   The mandatory fields include the Taxpayer (Estate) Details, the Requestor Details, and the Requestor Additional Details.
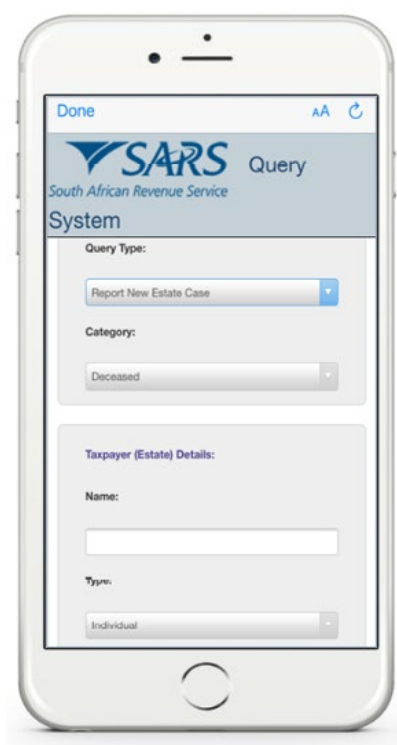

f)   The SARS Lwazi your assistant is a chat platform available via eFiling or the MobiApp. This platform allows you to ask tax related questions and request tax services.

g)   Asking tax related questions involves you texting questions to "Lwazi your assistant," who will interact with you by responding to your question via text. The tax services offered on this platform are Personal Income Tax (PIT) related and listed below.

h)   The following services are offered via Lwazi - your assistant (*Ask a Question*)

   i)   Request Tax Reference Number
   ii)   Request Statement of Account

SARS logo, South African Revenue Service

iii) Request Refunds Status
iv) Request Audit Status
v) Request Notice of Assessment

i) Note that authentication will be required when requesting certain services from SARS.

j) Listed below is the required information for authentication purposes when using this service:

i) ID/ Passport number
ii) Tax Reference Number (not applicable for a request for tax reference number)
iii) Email address
iv) Cell number

12 HOW TO DECLARE YOUR TRAVELLER INFORMATION

a) To declare your travel information on the traveller management system, proceed as follows:

i) On the pre-login screen.
A) Tap on **Traveler Declaration** icon.

ii) The **Traveller Management System** will be displayed.
A) Complete the fields on the form.
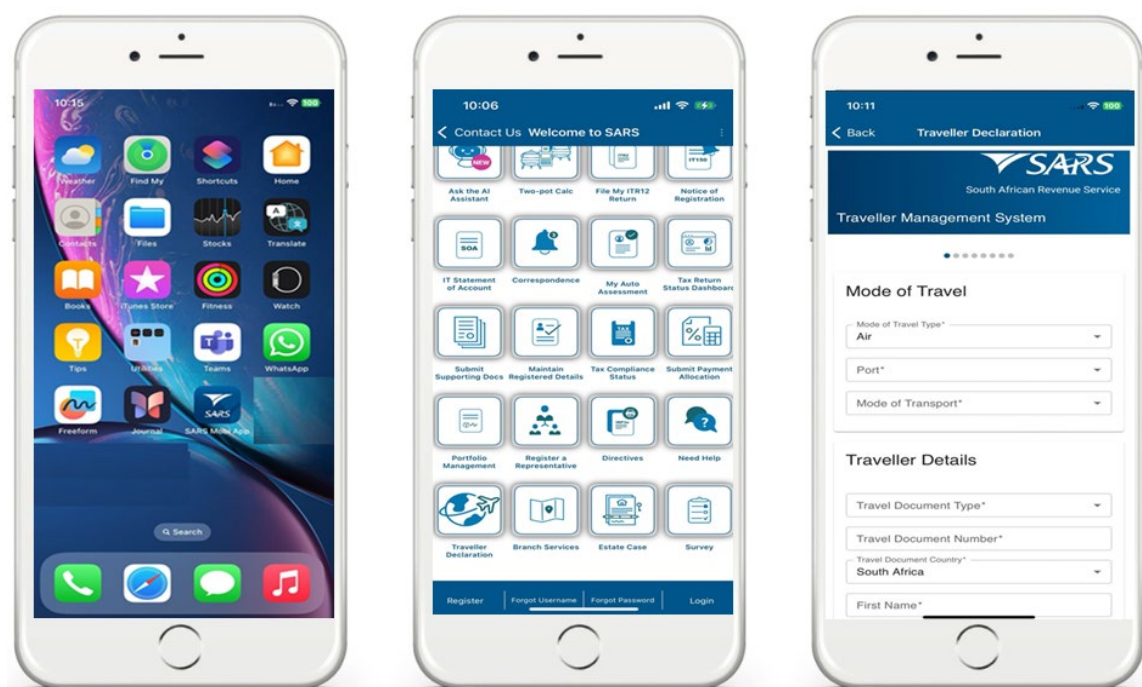
13 SARS HELP SERVICES

a) The SARS MobiApp allows the user to request quick and easy assistance/ help from SARS. SARS can assist the user via the various communication and digital platforms, which include amongst others, voice service, social media, videos, guides, robotics and AI.

b) To access these services, proceed as follows:

c) On the SARS MobiApp Pre-login screen,
i) Tap on **Need Help**

d) The following services will be displayed.
i) **Ask the AI Assistant** – This will direct you to the AI Assistant.
ii) **eLearning**

A)   This will display the SARS YouTube channel which contains all SARS related videos.
B)   This will also display all the relevant external guides.
iii)   **Ask a Question** – This will direct you to the SARS Lwazi ChatBot.
iv)   **Contact Us** – This will display the contact details of SARS.
v)   **Social media** – This will direct you to the SARS social media platforms.
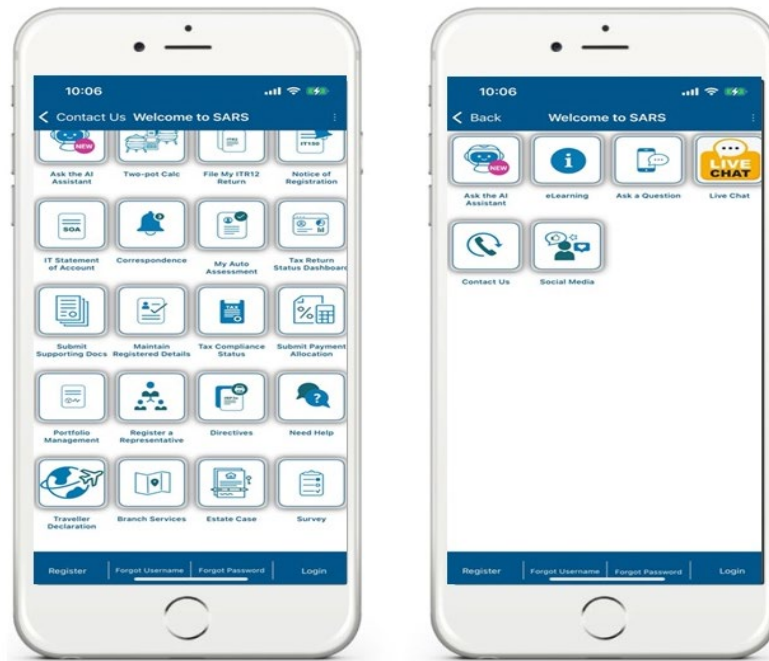
e)   The next sections will unpack what to expect when using these services.

13.1 E-LEARNING

a)   Once **eLearning** is selected, you can access the SARS user videos or guides. The video and guides aid in your compliancy by detailing required information related to your tax matters such as "how to submit your income tax return".

b)   To make your selection.
   i)   Tap on either **Videos** or **Guides**
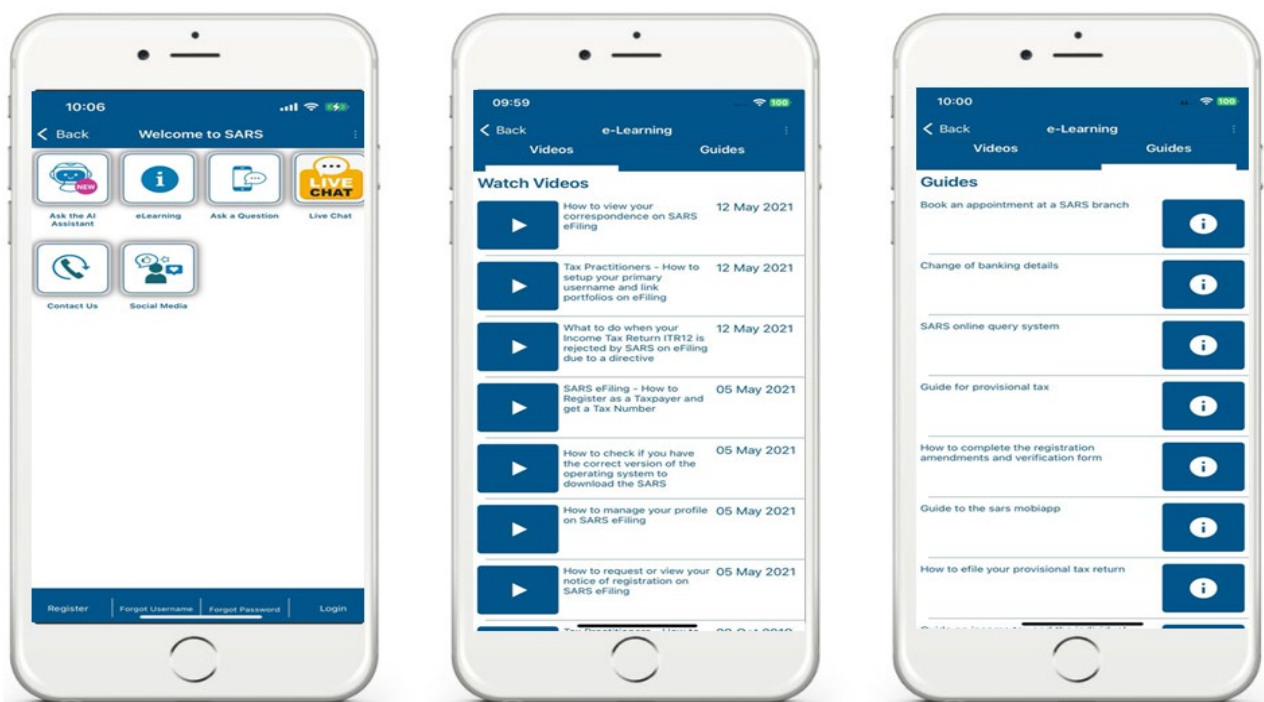
13.2 ASK A QUESTION - LWAZI CHATBOT

a)   The 'Ask a Question' icon will route you to the Lwazi ChatBot. The Lwazi ChatBot allows you to ask any tax related question by texting it and a response will be generated.

b)   Do note that the chat with the SARS Lwazi ChatBot must be initiated using the <u>English</u> native language and must be related to the tax products offered by SARS.

     i)   Example: "*What is my tax number*"
   ii)   Initiate the chat by typing and submitting a question.

Note the following:

- The services offered on this platform only caters for Personal Income Tax (PIT) tax type and individuals.
- To get a quick response, upon greeting, steer the conversation directly to your tax related query. Do this by ensuring that your question is tax related.

---

c)   To access the service, note that the Lwazi ChatBot can be accessed on the pre- and post-login menu options of your SARS MobiApp screen.

     i)   Tap on **Ask a Question**
     ii)   This will open **Lwazi – Your Assistant**.
         A)   The textbox will be displayed to enable the user to type in questions.

d)   To ask a question, type your question, then press 🔵

     i)   Type your tax product query.
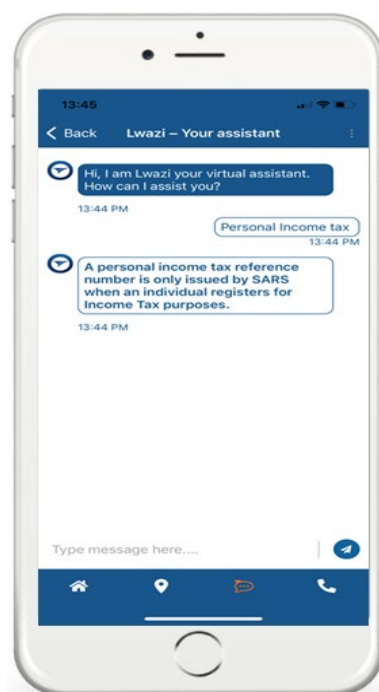

     ii)   Lwazi will respond to your query with the texted solution displayed on your device.

e)   When you type and send the text "**Menu**" Lwazi ChatBot will display the *Service Offerings.*

f)   Tap on the applicable tax service you require service on from the menu options displayed or alternatively tap on the textbox and simply type the number related query.
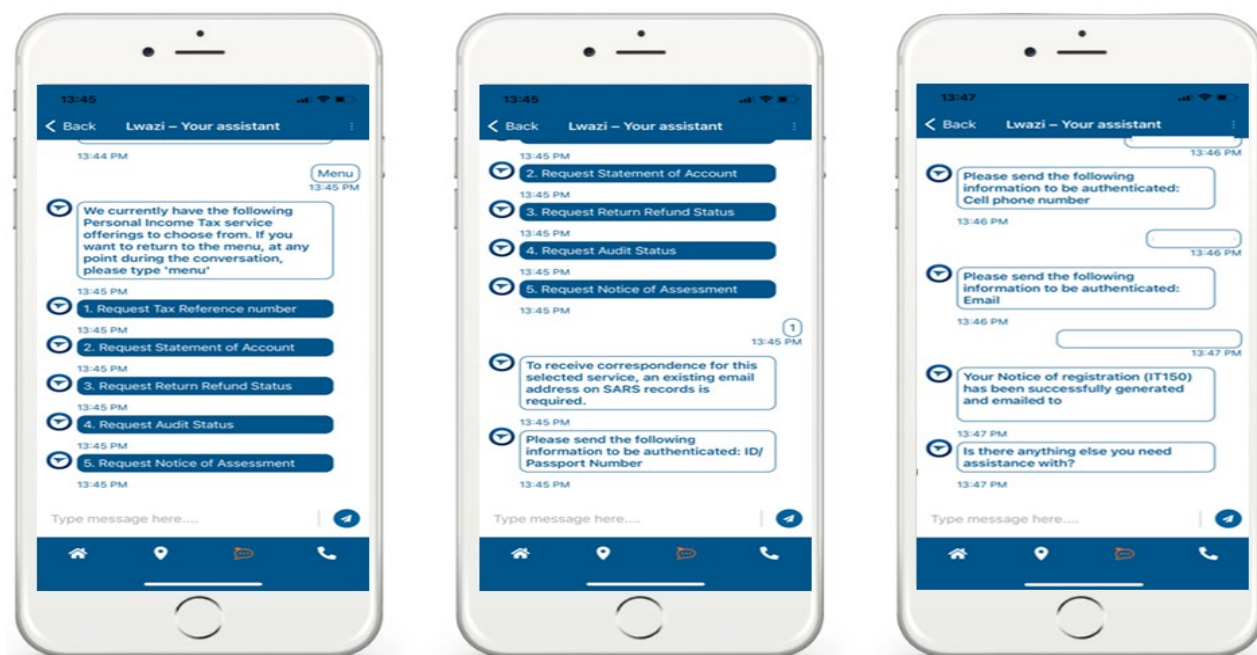
g)   Select by tapping on the applicable tax service or respond with the corresponding number. This will prompt you to complete security questions. Respond by completing the authentication related questions presented.

   i)   Where you have been successfully authenticated, the requested service will be emailed to the users' primary email address.
      A)   Note that Lwazi ChatBot will notify you that the requested service has been emailed to your email address.
      B)   If your tax service request was for your Personal Income Tax Refund or audit status, the status will be displayed on the "Lwazi - Your assistant" page.

h)   Note that if you respond incorrectly to any of the questions, your tax service request will not be resolved.

13.3 LIVE CHAT

a)   This service is temporarily not offered by SARS.
   i)   When selecting this service, the following message will be displayed
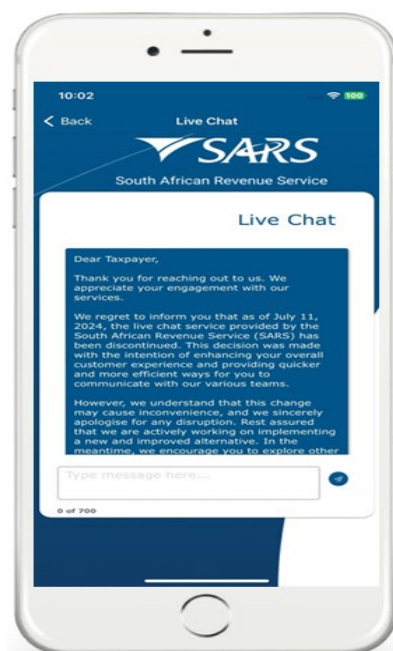
13.4 CONTACT US

a)   This service allows users to request assistance from the SARS service consultants and displays the SARS website.

      i)   Tap on **Contact Us**

b)   Once selected, the SARS contact numbers will be displayed for local and international callers. Additionally, the SARS Website will also be displayed.
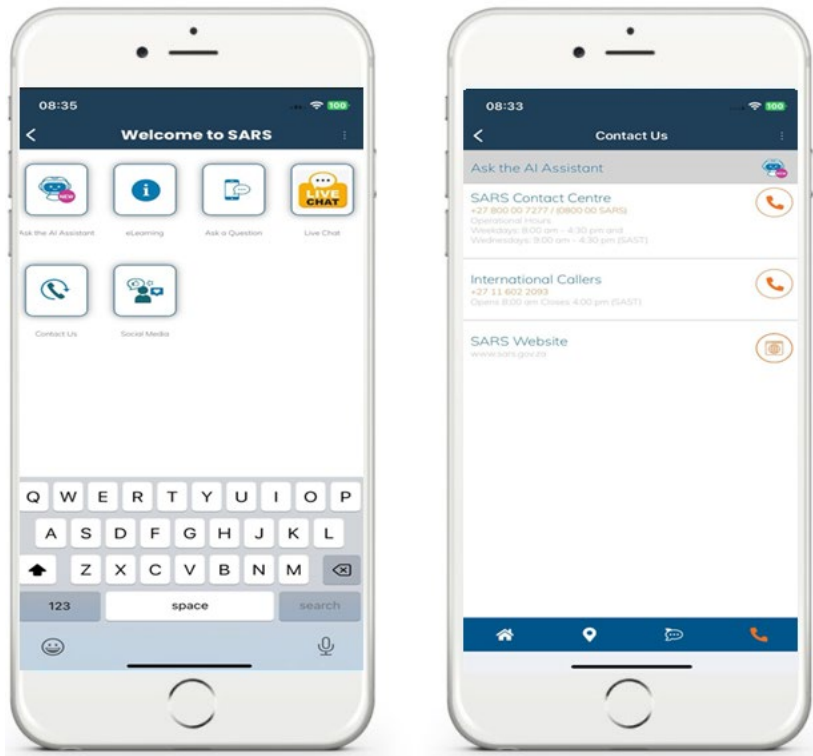

c)   To make a call, tap on either **SARS Contact Centre** or **International Callers.** When the number is displayed, simply tap on the number to dial SARS. On the other hand, to access the SARS Webpage, simply tap on the **SARS Website** button.
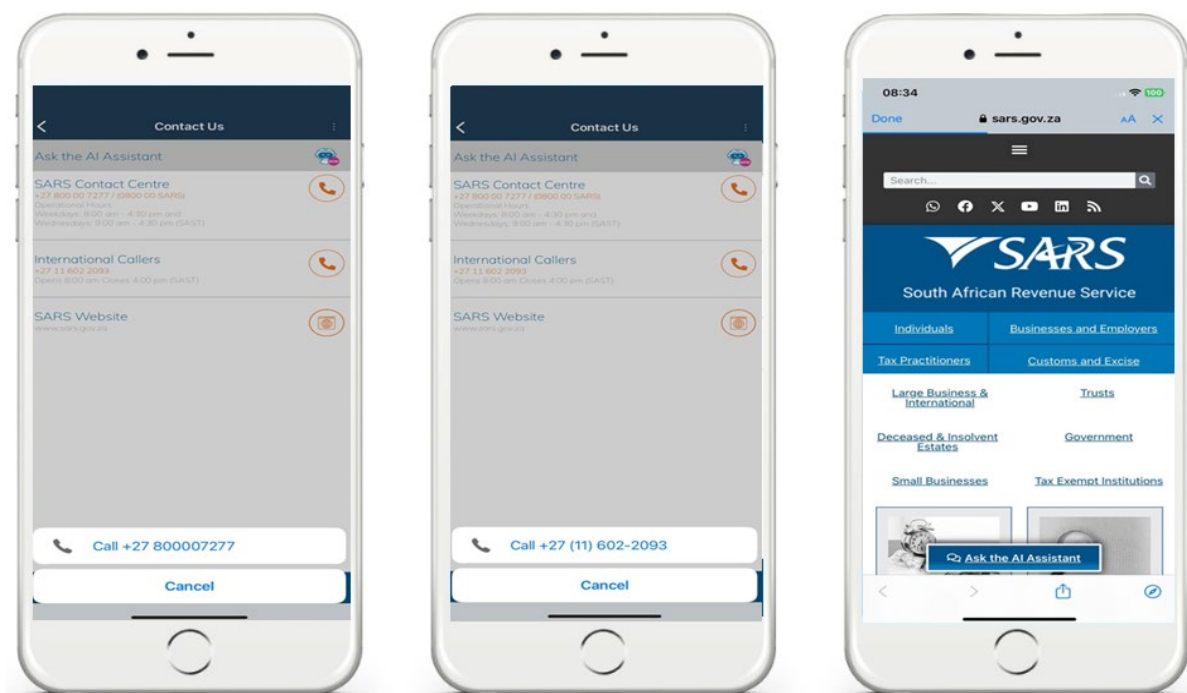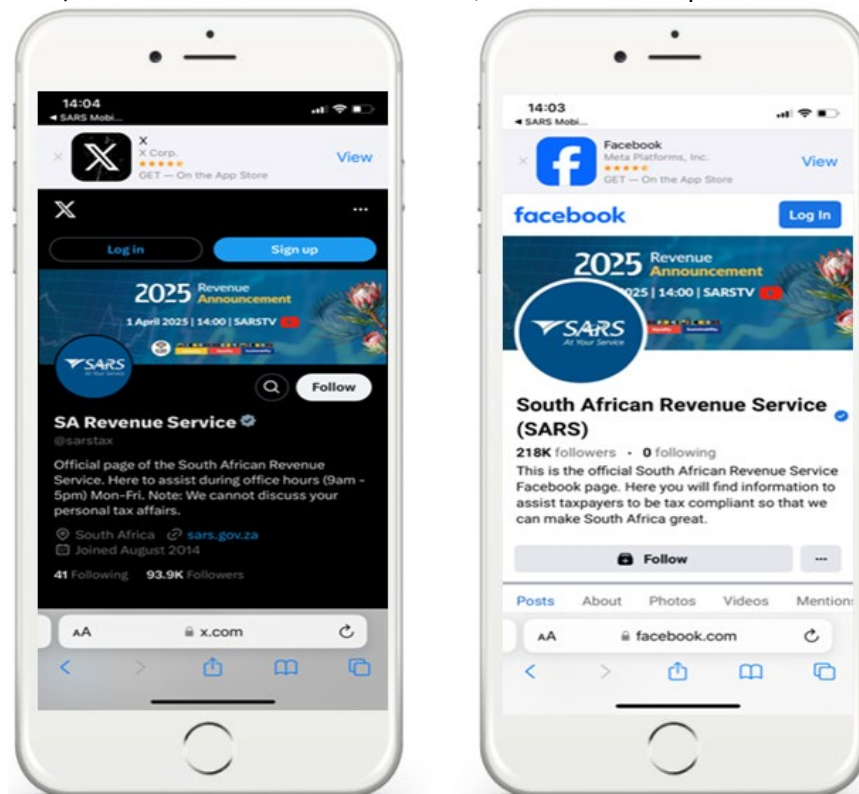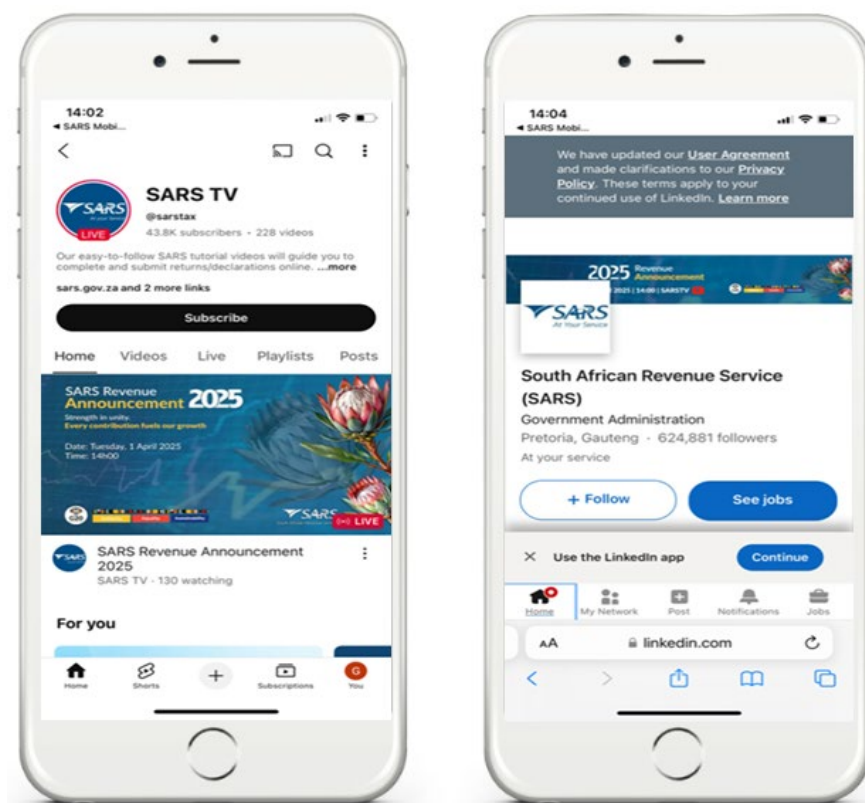
13.5 SOCIAL MEDIA

a)   To access SARS via social media, proceed as follows:

   i)   Tap on **Social Media** Icon
   ii)   Select the applicable social media platform.
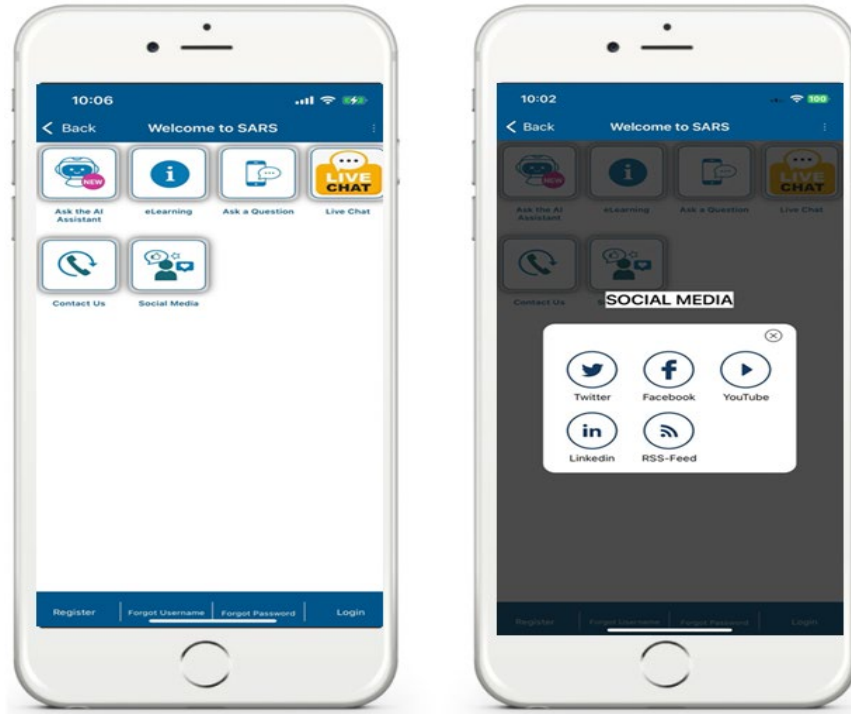
Do note that **Twitter** will route you to "**X**".

b)   Where **X**, **Facebook, YouTube** or **LinkedIn** is selected, the SARS social platforms will be displayed.

c)   Navigate and make comments where applicable.

14   DEFINITIONS AND ACRONYMS

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).