TAXPAYER
SERVICES

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 an easy way to resolve most tax queries.

b)   These are some of the services offered via the SARS MobiApp, but not limited to.

   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.
   vii) **Live Chat**
         A)   This service allows you to chat/text with a SARS service agent via our live chat Lwazi.

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. 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 the following external guide.
               I)   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 the following guide:
               I)   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.
   vi)   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.

Huawei   **Android**   **Apple**

4.1   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**
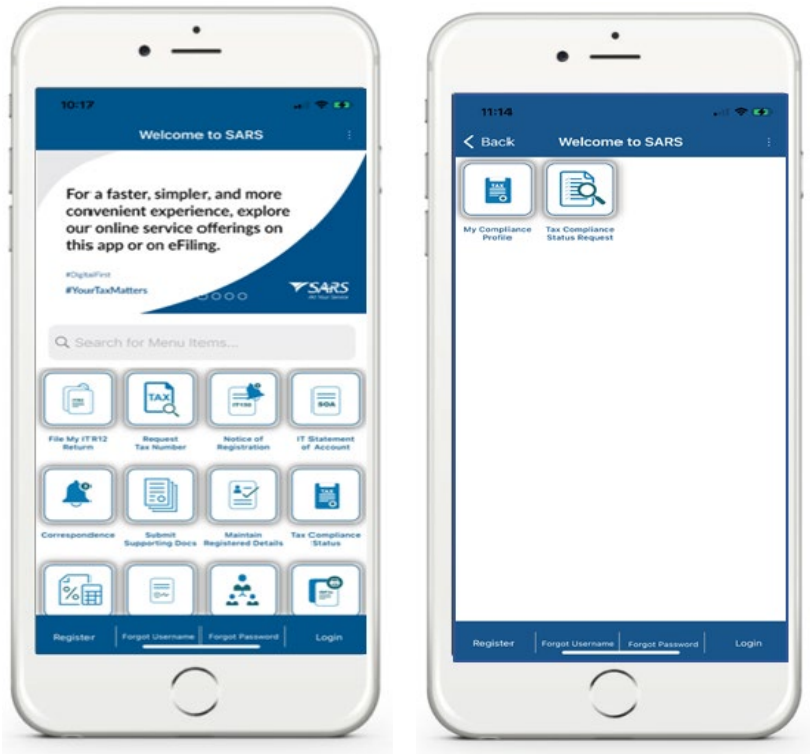
b)   The **Welcome Page**, offers you the following services:

    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.

4.1.1 HOW TO ACCESS MY COMPLIANCE PROFILE

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.**
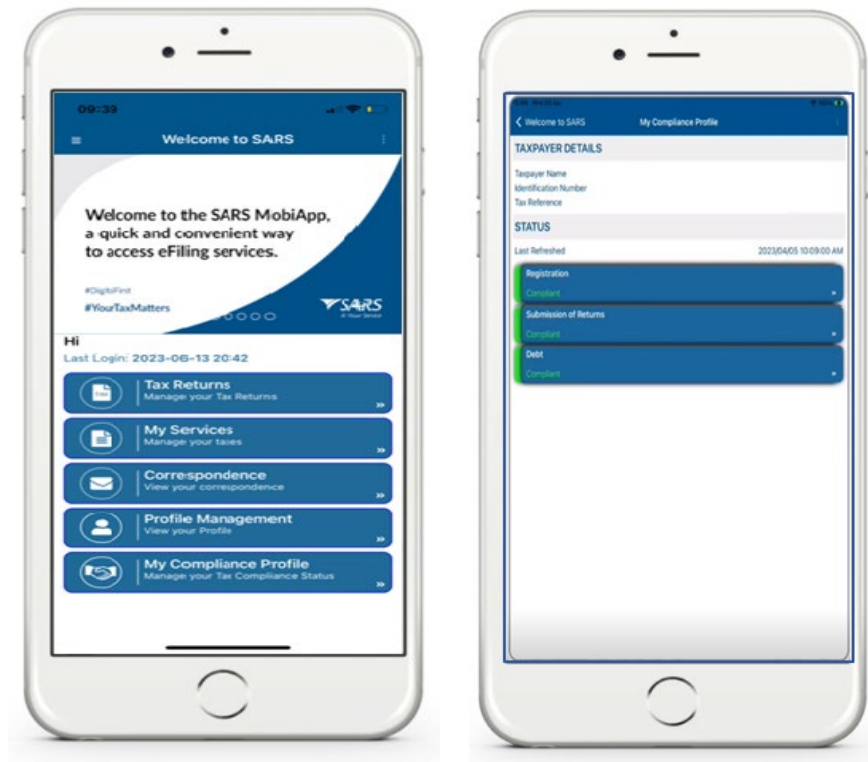   B)   Tap on **Login**
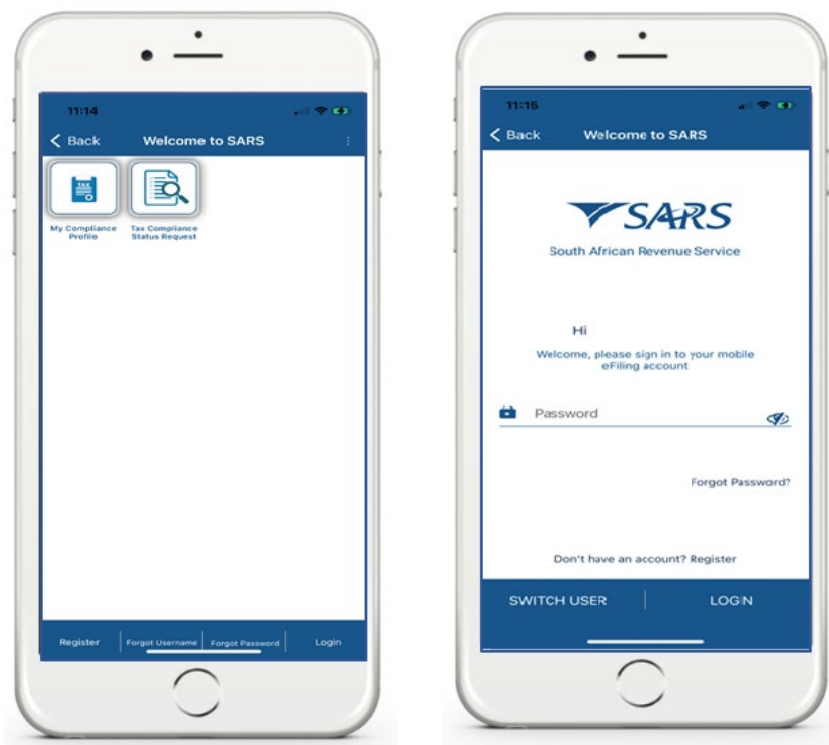
iv)   Once you logged in successfully, the **My Compliance Profile** page will be displayed.
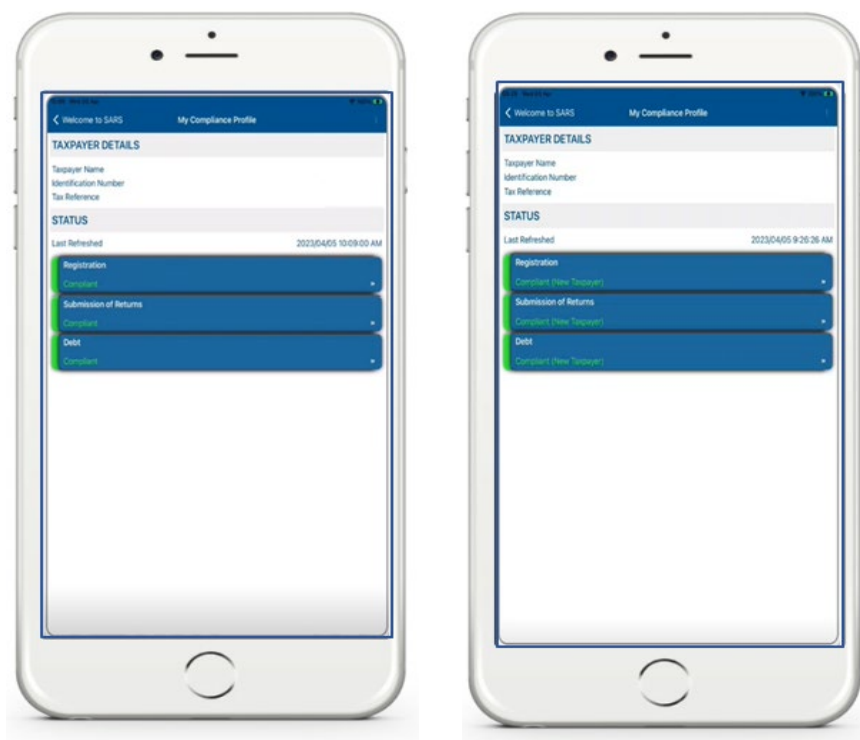
Note that where you are a new taxpayer, the **My Compliance Profile** Page will display that you are indeed a new taxpayer.

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

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

c) **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.

4.1.2 HOW TO REQUEST YOUR TAX COMPLIANCE STATUS

a) To request your Tax Compliance Status (TCS) for good standing, and acquire your TCS PIN, proceed as follows.

i) On the Pre-login page
A) Tap on **Tax Compliance Status** icon.
ii) On the **Welcome Page**,
A) Tap on **Tax Compliance Status Request**
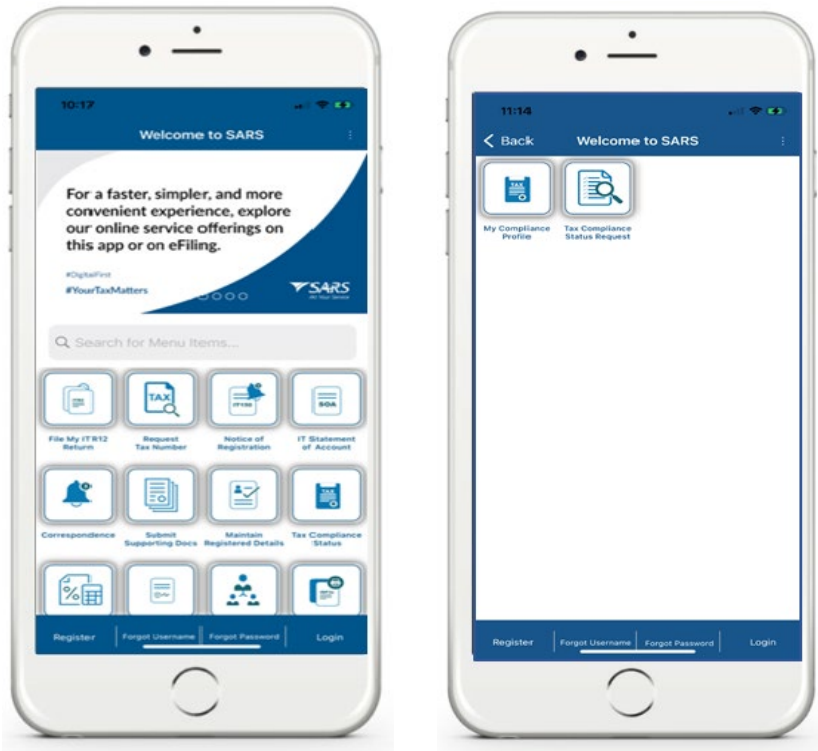
b) The request form will be displayed on your mobile device.

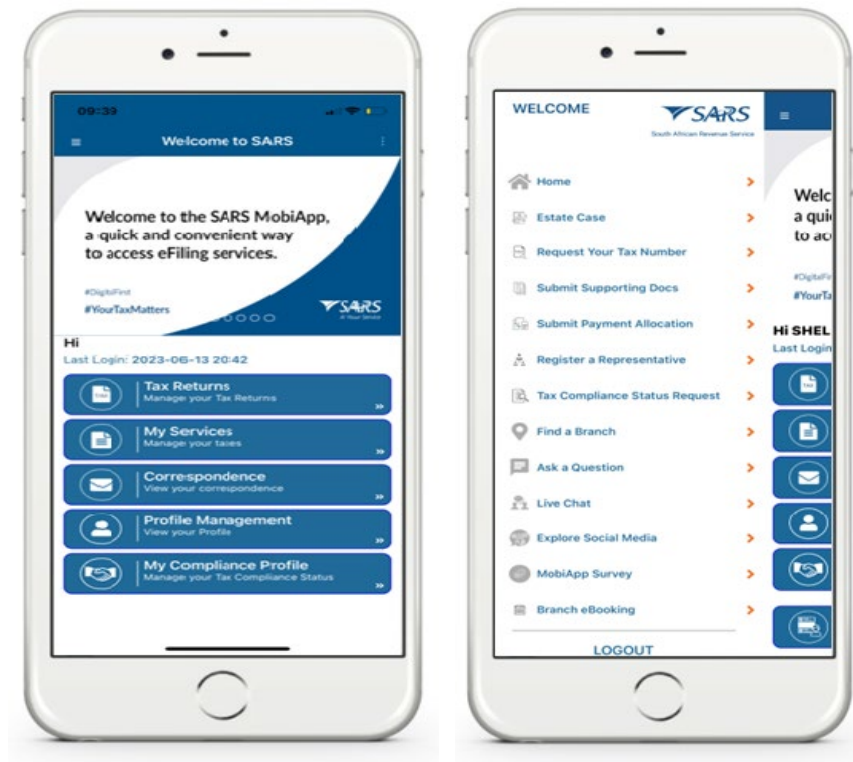c) Complete the applicable fields to request your TCS

d) Once all the fields on the form are completed,

   i) Tap on **Generate Form**
   ii) **Note** that the form cannot be generated if the mandatory fields are not completed.

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

b) 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.

f) The request form will be displayed on your mobile device.

g) Proceed to complete the applicable fields to request your TCS.
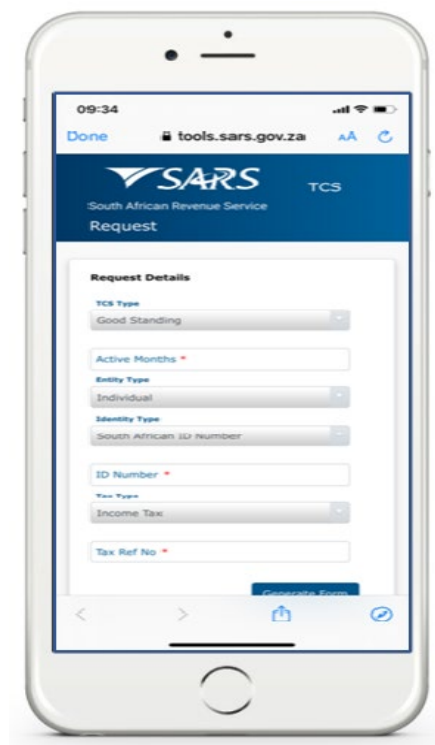
h) **Note the following TCS error messages and their meaning.**

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

i) Where the taxpayer is not activated for TCS the following error message will be displayed on your device.
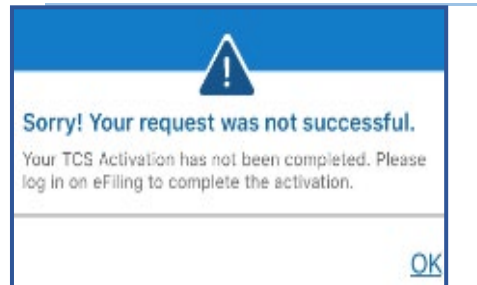
j) Where you have not completed your TCS activation on eFiling, this service will not be available.

    i) The following message will be displayed on your device for your attention.
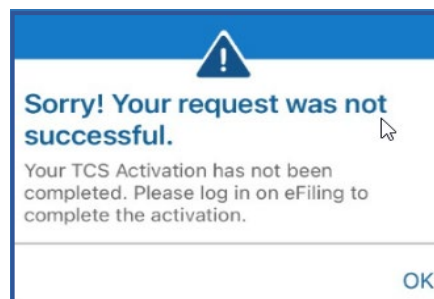
k) You can respond by logging into eFiling and select **TCS** on your profile. Additionally navigate on the left menu of your eFiling profile as follows:

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

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

4.2 SERVICES TO MANAGE YOUR TAX COMPLIANCE REQUIREMENTS

4.2.1 HOW TO REGISTER FOR PERSONAL INCOME TAX

a) The SARS MobiApp allows you to register for the use of the Application. Once you have downloaded the application, "you can register for Personal Income Tax" via the SARS MobiApp. For more on how to do this, refer to the following guide:

    i)   IT-AE-47-G01 - How to register for the use of the SARS MobiApp - External Guide

4.2.2 HOW TO SUBMIT YOUR INCOME TAX RETURN

a) The SARS MobiApp can also be used to file/ submit your income tax return. For more on how to do this, kindly refer to the following guide:

    i)   IT-AE-46-G01 - How to submit your Individual Income Tax return via the SARS MobiApp - External Guide

4.2.3 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

c) On how to arrange payments on your debt refer to the following guide:

   i) GEN-DC-20-G04 - Deferral of Payment Arrangements on SARS MobiApp - External Guide

### 4.2.4 HOW TO SUBMIT A PAYMENT ALLOCATION ACCOUNT QUERY

a) To submit a payment allocation pre login

   i) Tap on **Submit Payment Allocation** icon displayed on the **Home Page**

b) Alternatively, to access the service post login

   i) Tap on the hamburger menu option ☰ and select **Submit Payment Allocation**
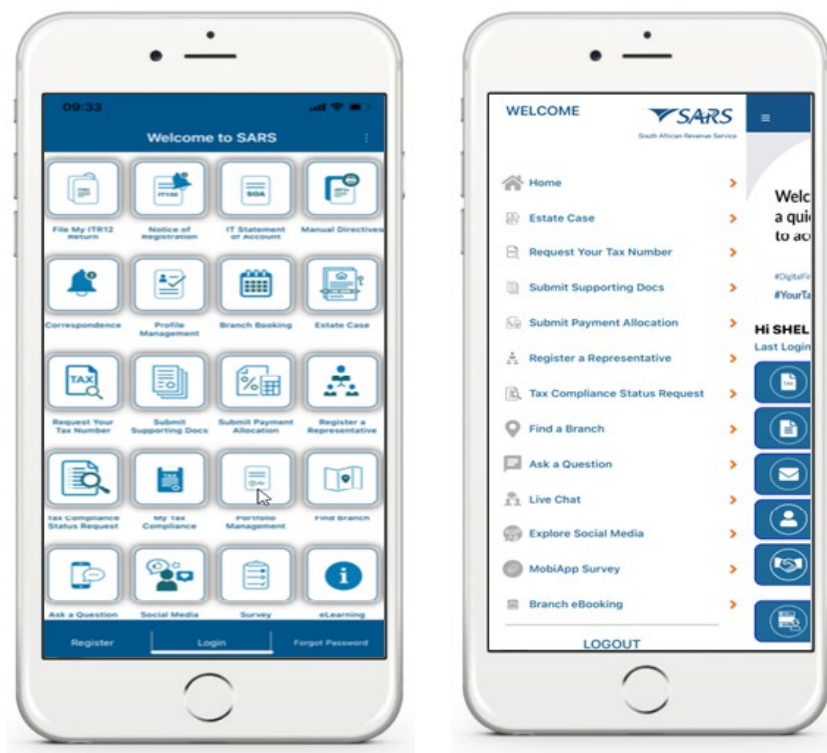
c) The SARS Online Query System form will be as displayed below.

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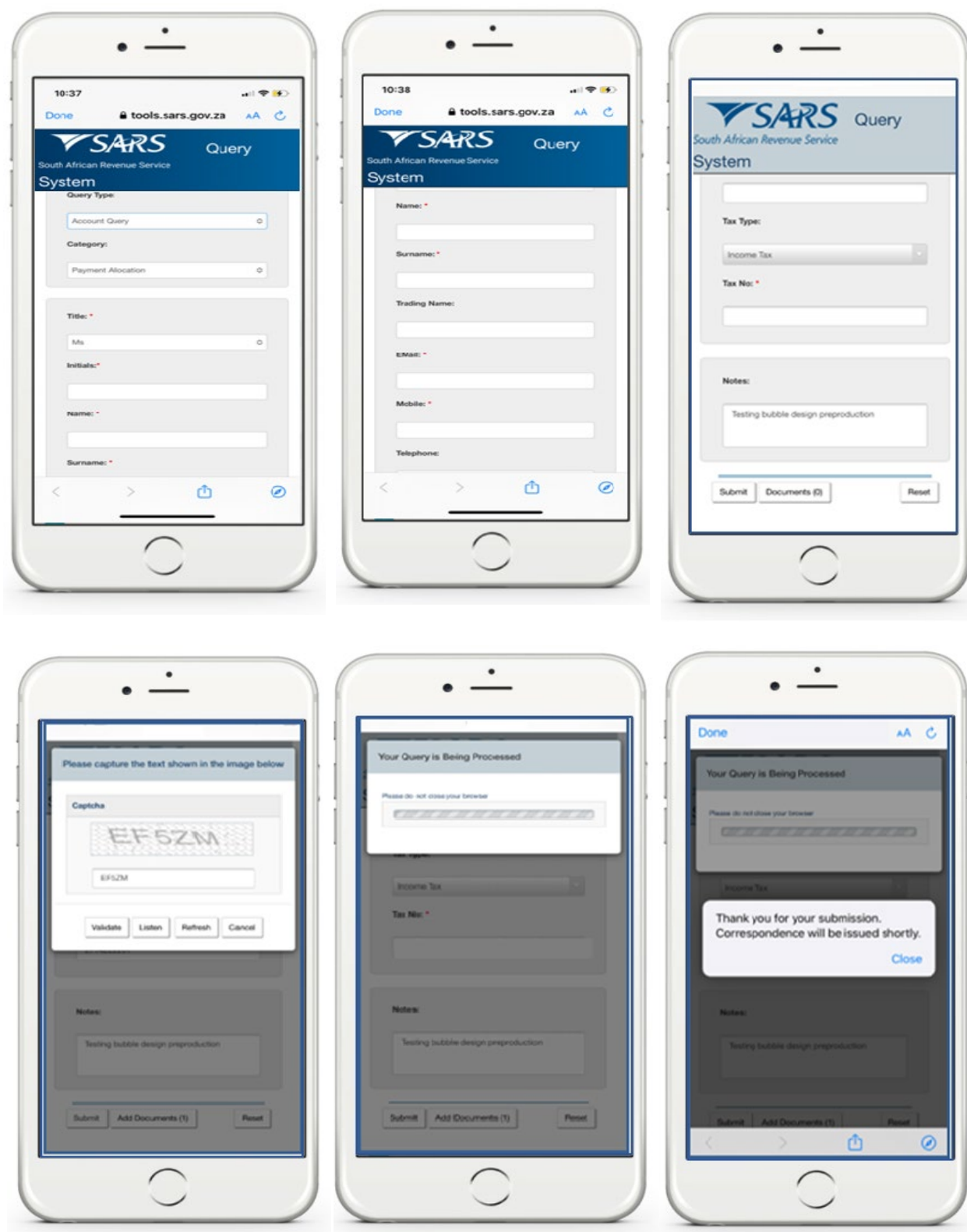
d) A notification will be sent to the taxpayer via their preferred method of communication once successfully submitted.
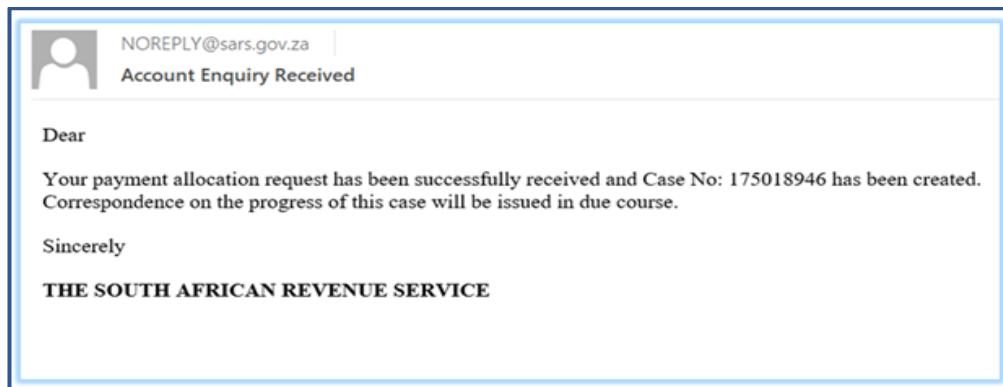
4.2.5 HOW TO SUBMIT SUPPORTING DOCUMENTS

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

    i)   Tap on **Submit Supporting Documents**

c)   Alternatively, if on the post login,

    i)   Select the **Hamburger menu** and select **Submit Supporting Documents**.

    ii)   This will display the SARS Online Query system (SOQS) form on your device.
   iii)   Complete the form.
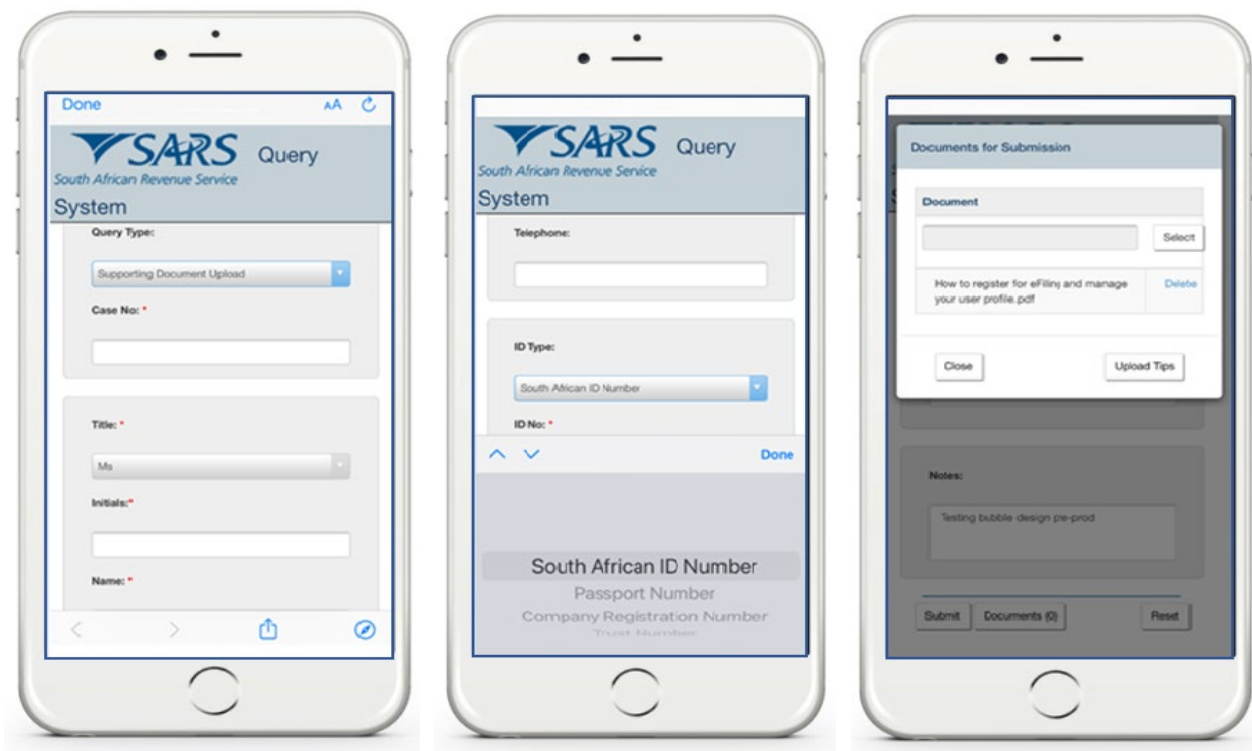
d) **Note** that the documents you can upload must not exceed 5MB. Where a document size is greater than 5MB, the following warning message is displayed.
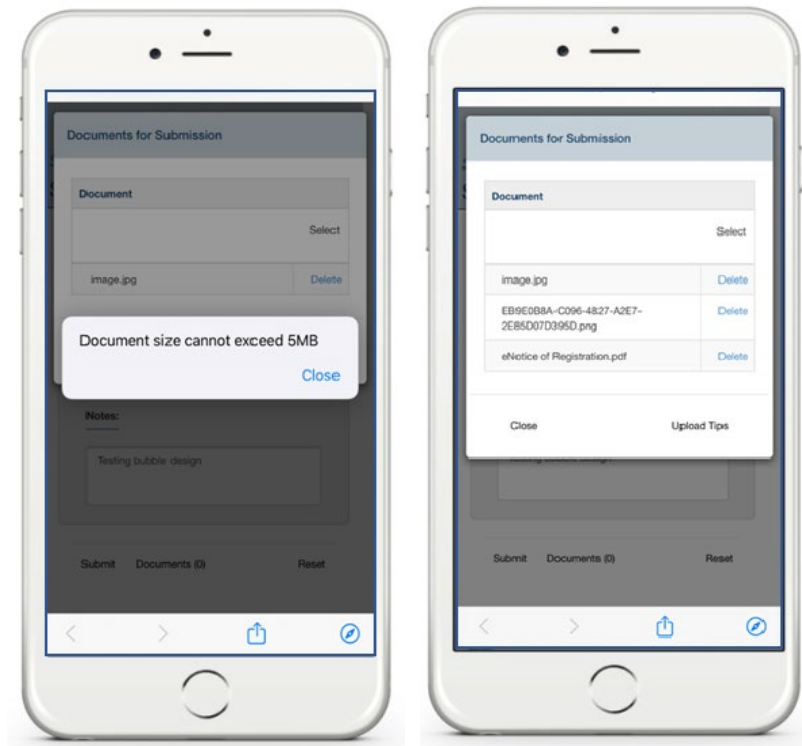
e) Note the following when uploading documents:

   i) Documents must be in one of the following formats: pdf, doc, docx, xls, xlsx, gif, jpg, jpeg, bmp and png.
   ii) Documents should not be blank, password protected or encrypted.
   iii) Documents may not be more than 5MB per upload and a maximum of 10 documents may accompany a single submission.
   iv) Document names should not include the characters 'or &.
   v) No more than 10 submissions are permitted against a given case number.

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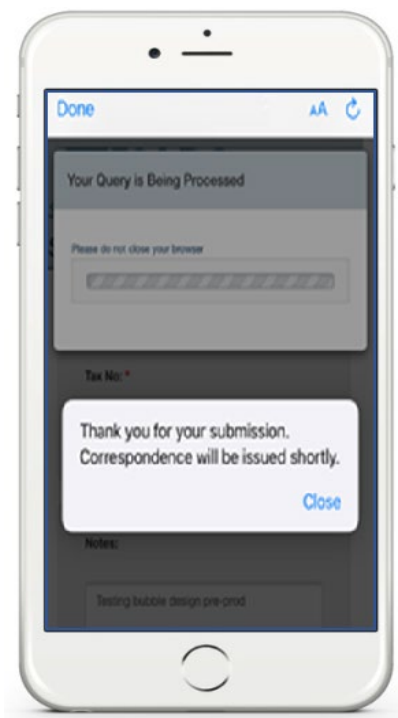
4.3 PROFILE MANAGEMENT SERVICE

4.3.1 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.
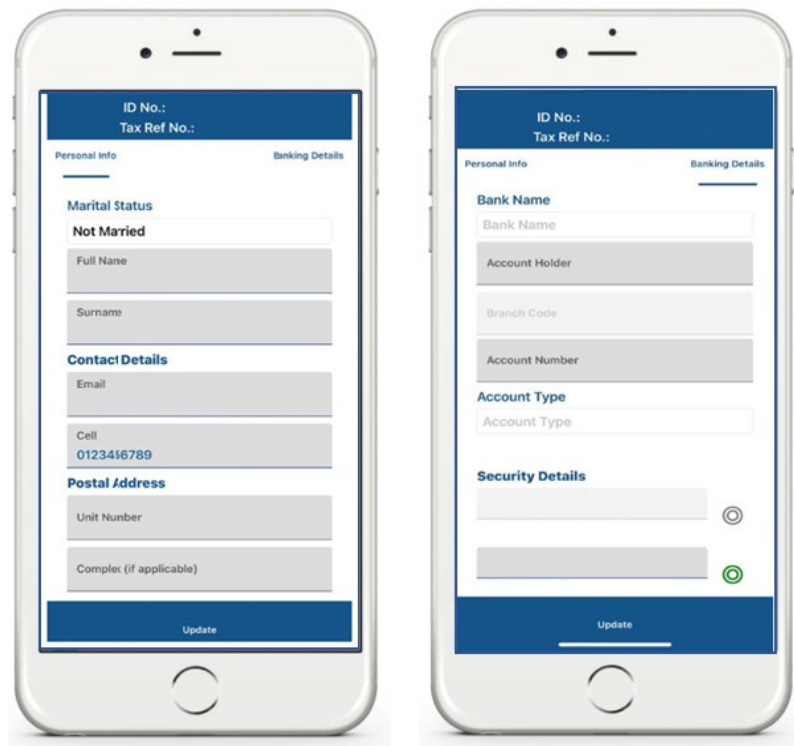
g)   If personal info is selected, the taxpayer's personal information as described above will be listed. Tap on the applicable personal information to update and tap on "Update."

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.
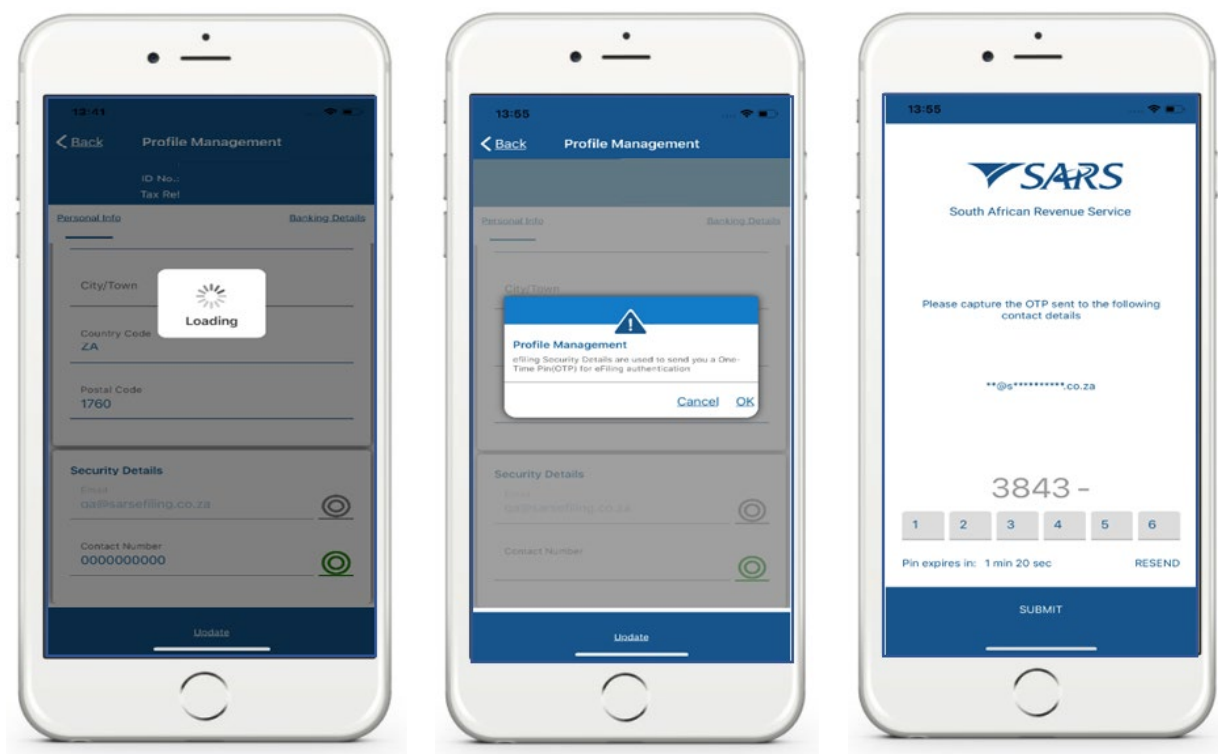
Note that in the event where both the security details must be updated, the taxpayer/tax practitioner is advised to kindly call the SARS Contact Centre or visit the SARS branch to update their security details.

### 4.3.2 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.
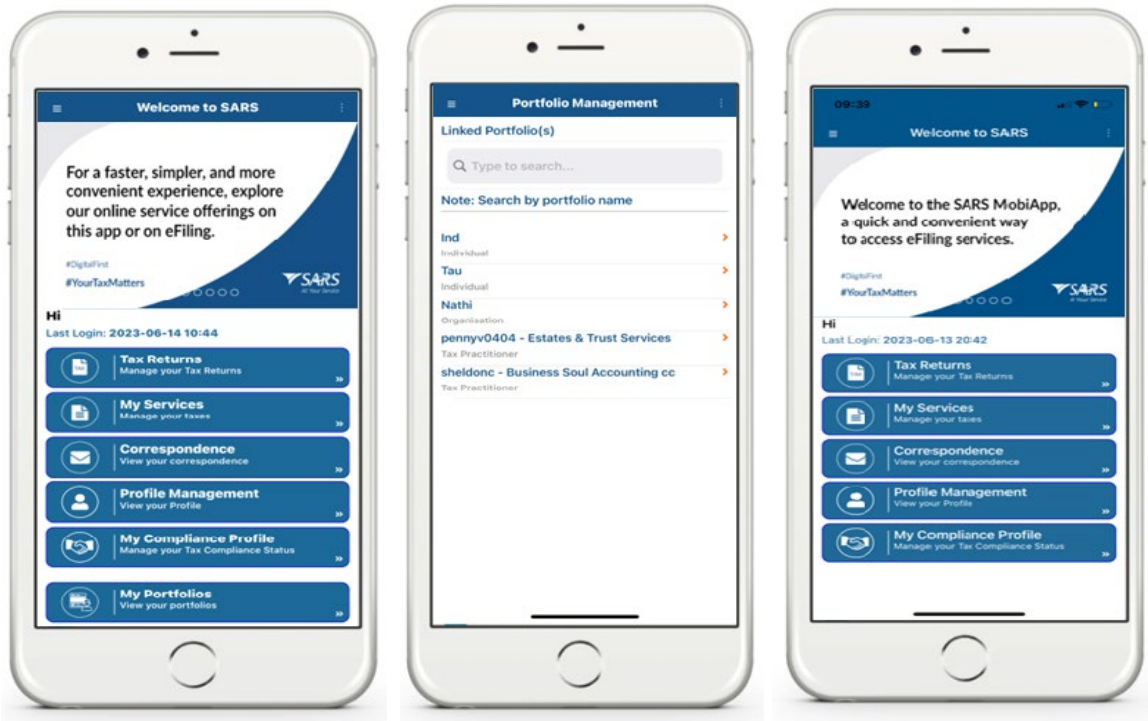
f) Once you are on the **Landing** page of your PIT client, you can access their account and complete their Income Tax return accordingly.

> 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.
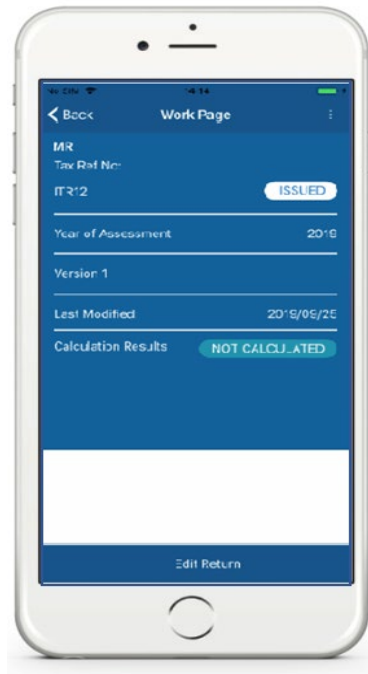
h) Where you do not have access rights to complete the return of your client or you are not a registered tax practitioner, the following warning message will be displayed. Note the content on the message and tap on **Ok**.
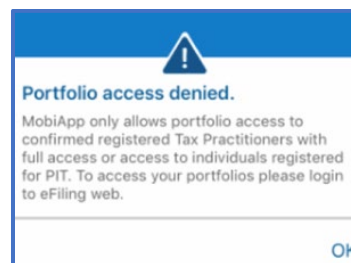
i) Where you are a registered tax practitioner with **view access** only for your PIT client, the following warning message will be displayed.
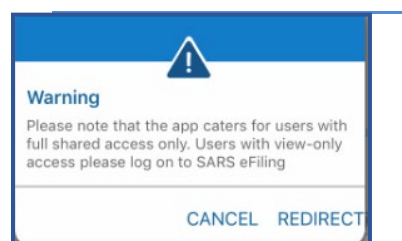

j) Tax **practitioners with shared access users, with view only access, will not be able to use the MobiApp to submit returns for their clients**.

k) If a registered tax practitioner with view only attempts to open their client's profile, the following message will be displayed.
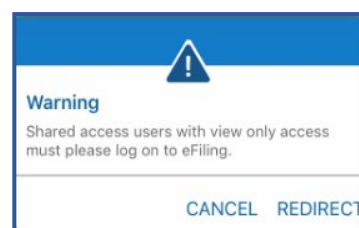
l)   Below are the following functions and their use:

m)   The hamburger menu ☰ will list various services, which include the search Taxpayer option that will direct you back to the portfolio management page.
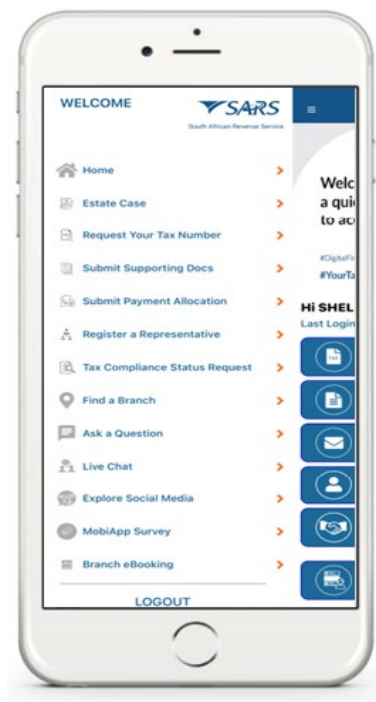
Please note that this functionality is limited to only Personal Income Tax (PIT) clients and the PIT product.
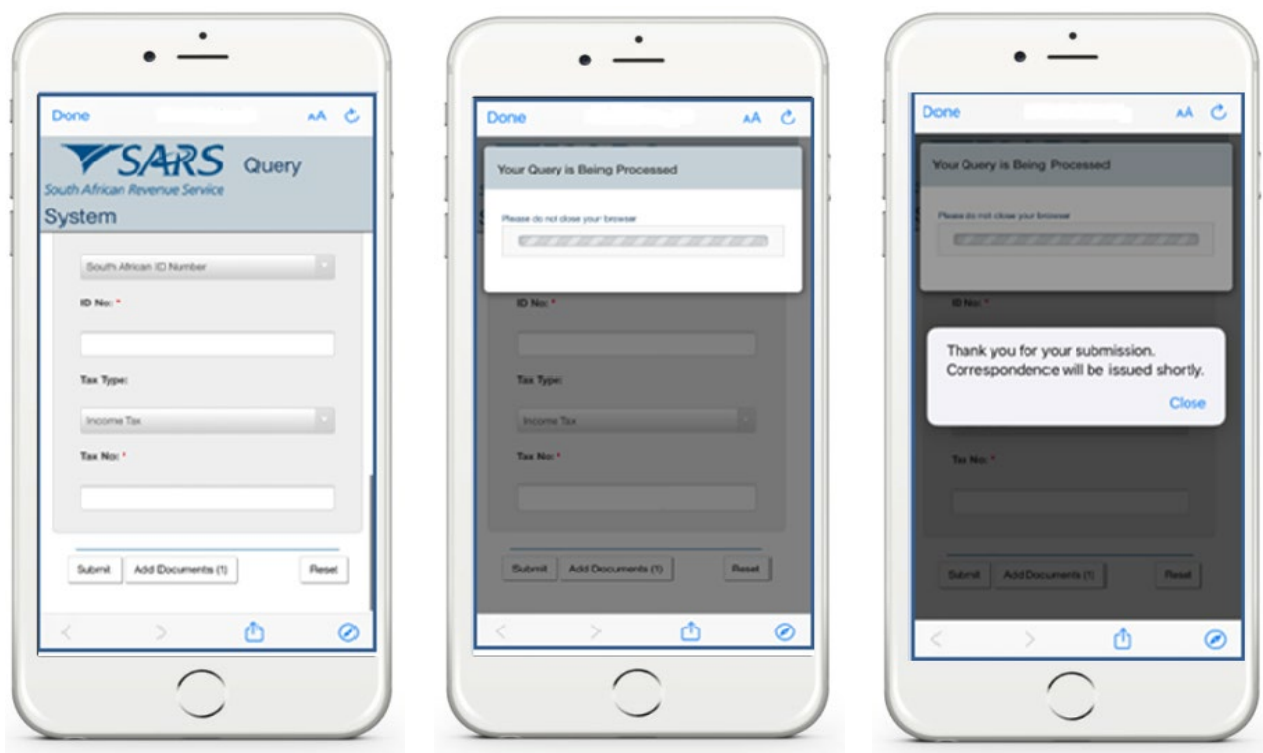
My Landing Page	**My Landing Page** – will direct you to your **Landing page.**
Search Tax Payer	**Search Taxpayer** – will direct you to the **Portfolio Management** page

4.3.3 HOW TO UPDATE YOUR REGISTERED TAX REPRESENTATIIVE 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 optio ☰   , 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

4.4   SARS BRANCH OFFICE LOCATION AND APPOINTMENT SERVICE

4.4.1 HOW TO LOCATE A BRANCH OFFICE NEAR YOU

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

b) On the **Home Page**

i) Tap on **Branch Services**
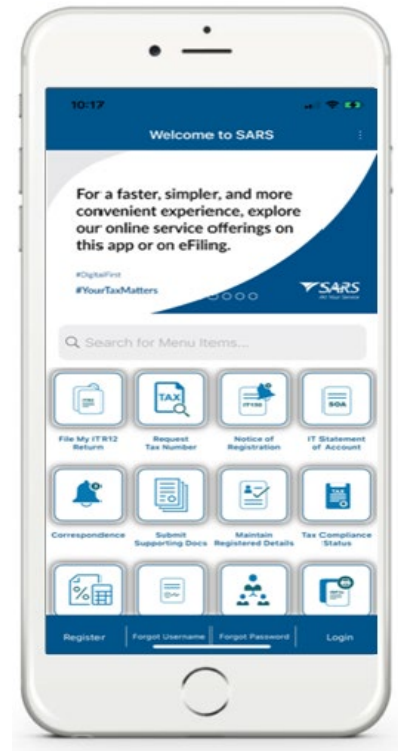
Branch Services

c) This will direct you to two Service icons.

i) **Find Branch** – This icon will direct you to the SARS Branch locator which will take you to your nearest Branch via google maps and list all the other SARS Branch closer to your location.

ii) **Branch Booking** – This icon will open a form for you to complete for booking a virtual appointment with SARS.
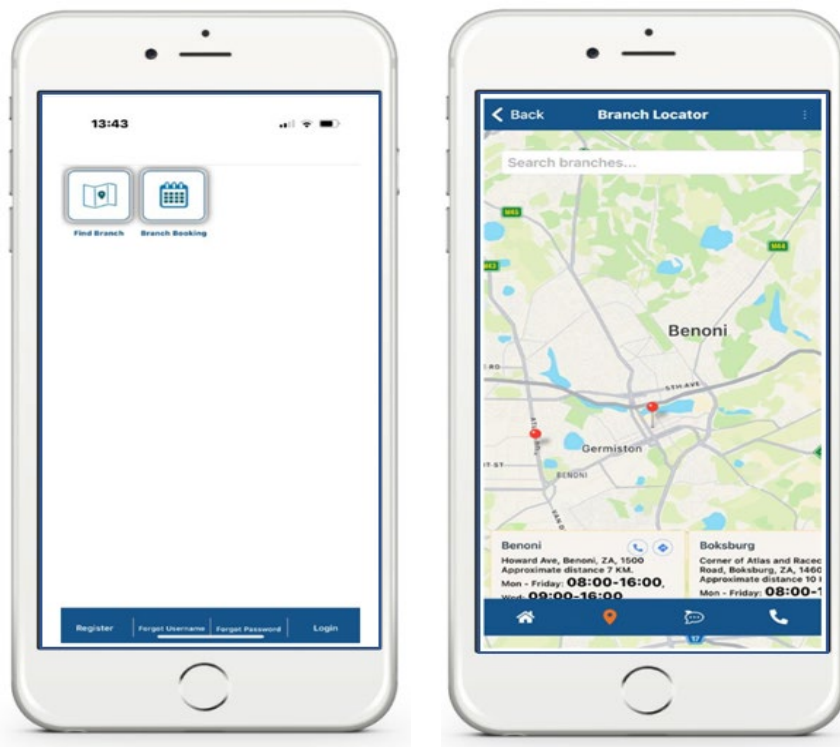
d) Below is the service offered by the icons displayed below the Branch Locator Page

	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

e)   The contact details and Lwazi live chat has been selected the following screens will be displayed.
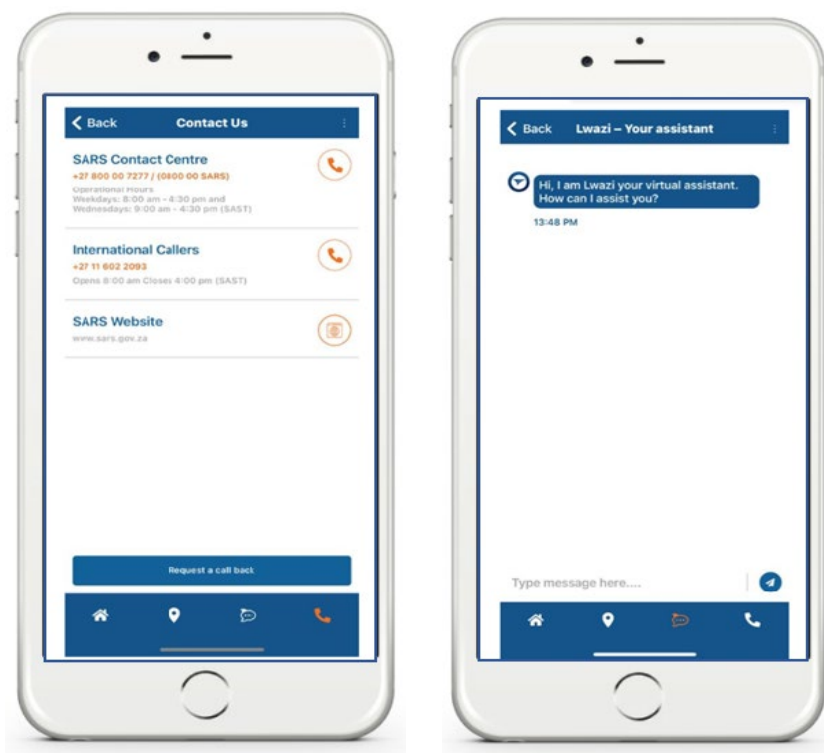

f)   On the **Home Page** note the following service icon and their use.

  i)   eLearning
         A)   This will display the SARS YouTube channel which contains all SARS related videos.
         B)   This will also display all the relevant external.

  ii)   Ask a Question – This will direct you to the SARS Lwazi
  iii)   Contact Us – This will display the contact details of SARS.
  iv)   Social Media – This will direct you to the SARS social media platforms.

4.4.2 HOW TO BOOK A VIRTUAL OR BRANCH VISIT 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, proceed as follows:

i)   Tap on **Branch Booking** on the pre-login.
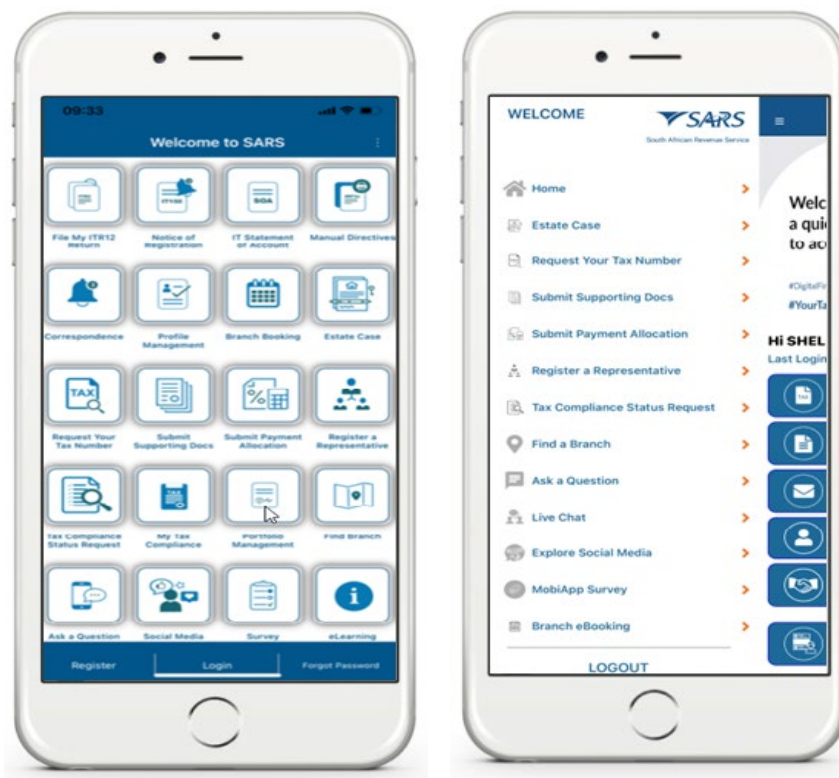
c) Where you are logged in, tap on the menu bar ☰ and select **Branch eBooking.**

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

e) Complete the form with the necessary details.

f) For more information what is required on the form, refer to the following external 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 also depending on your query you might be required to submit supporting documents prior to your appointment. For more information on this, refer to the external guide:

i) GEN-BO-09-G01 – Book an appointment at a SARS branch – External Guide

4.5 TAX REFERENCE NUMBER REQUEST SERVICE

### 4.5.1 HOW TO REQUEST YOUR TAX REFERENCE NUMBER (TRN)

a) On the **Home Page (Pre-Login)**
   i) Tap on **Request Tax Number** icon.

b) The SOQS form will be displayed.
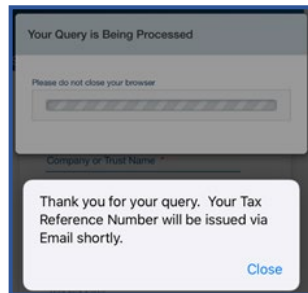   i) Complete the form with the necessary mandatory fields.

c) The following error message will be displayed when the incorrect text is entered on the form:
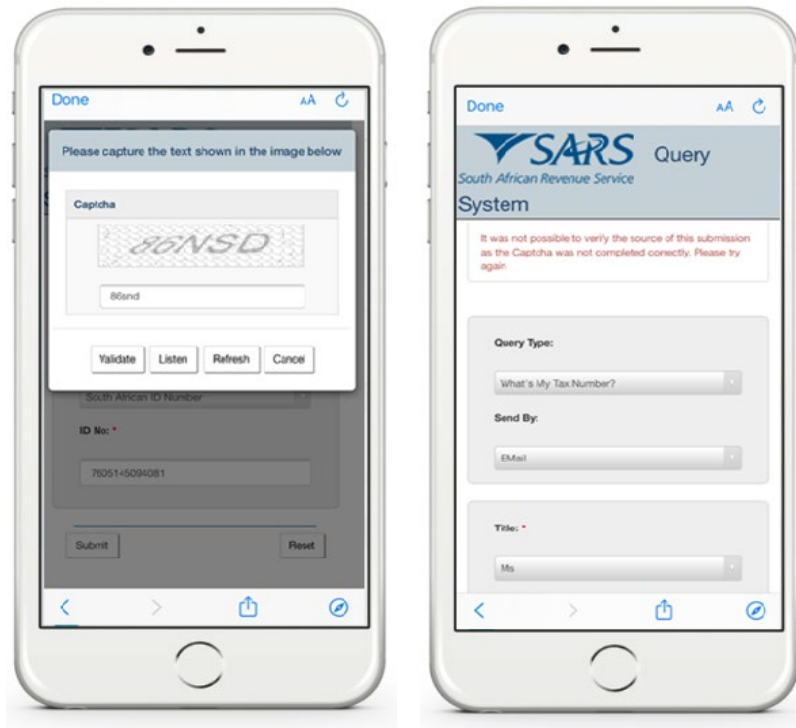
d) When incorrect contact details are captured, the below correct message is displayed:
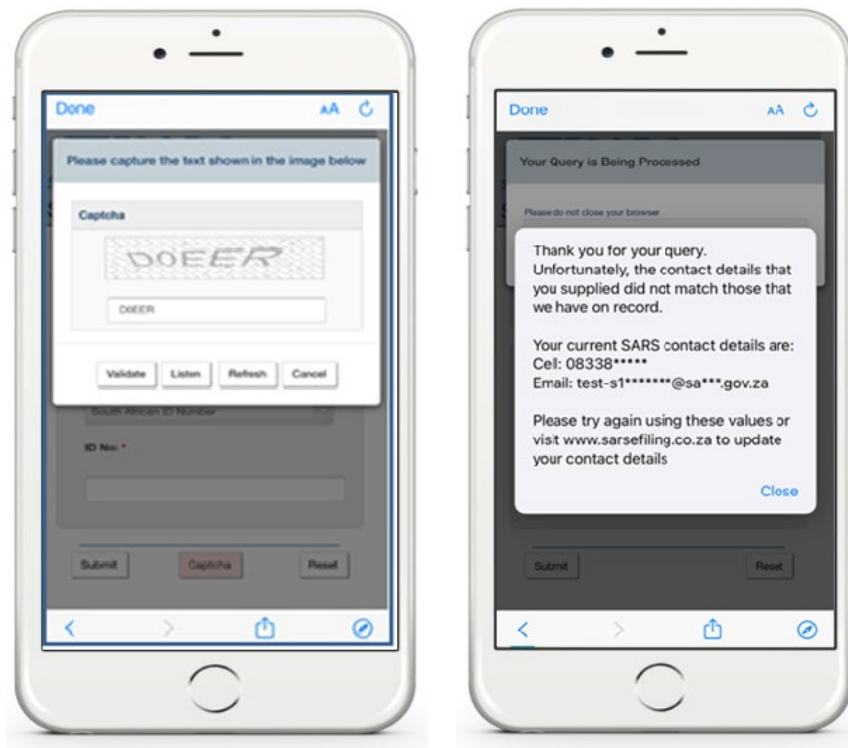
e) The following message will be displayed when the data captured is correct and successfully validated.
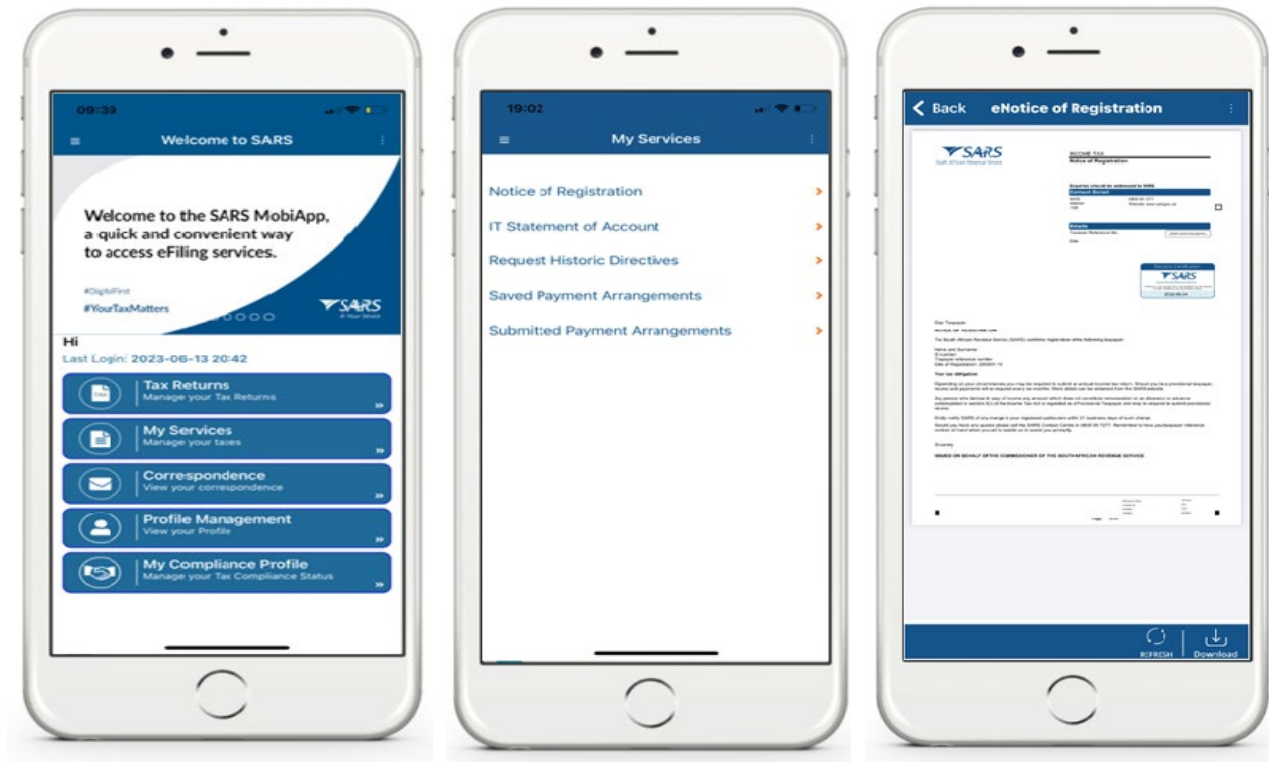
4.5.2 HOW TO REQUEST YOUR NOTICE OF REGISTRATION

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

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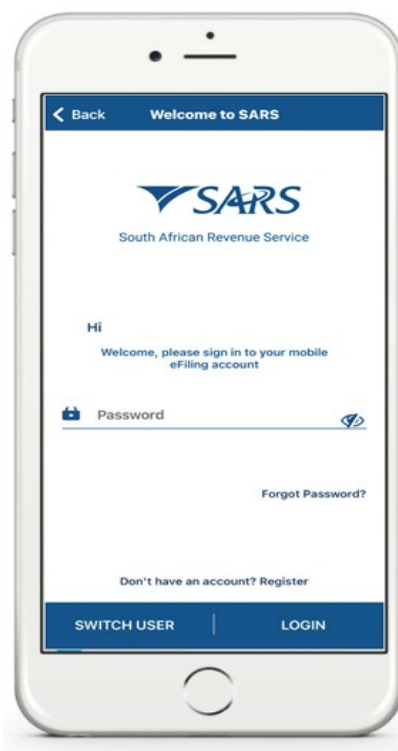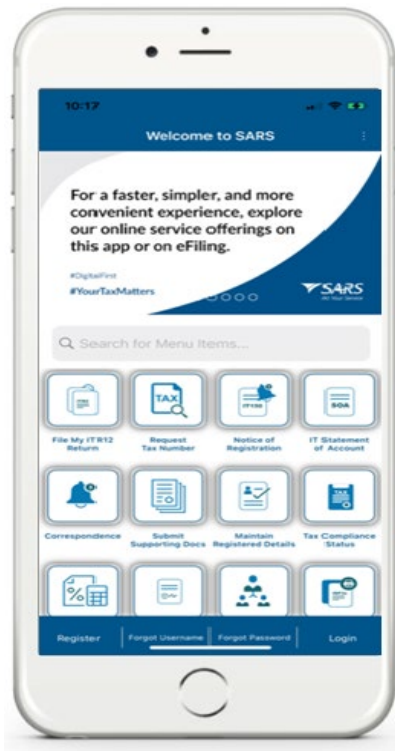
b) If you have logged in, on the **Landing Page**

   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.
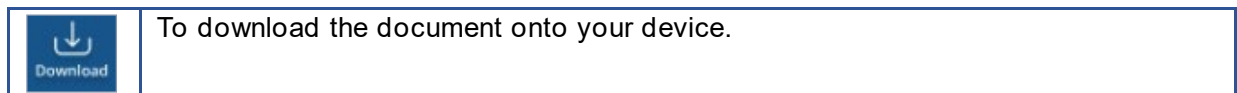
4.6 TAX DIRECTIVE SERVICE

4.6.1 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.

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b) Note the following assumptions that must be met to use this service:

    i) The user requesting the Tax Directive must be registered on eFiling and have an active profile.
    ii) To request the Tax Directive on MobiApp, the user must have installed the latest version of the SARS MobiApp.
    iii) The taxpayer's profile that the Tax Directive is being requested for must have an active Personal Income Tax.
    iv) Tax Practitioners must have been registered for eFiling and have an active account.

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

d) 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."*

e) Select the applicable Tax Directive to be displayed on your device by tapping on it. It will be displayed in a PDF format.
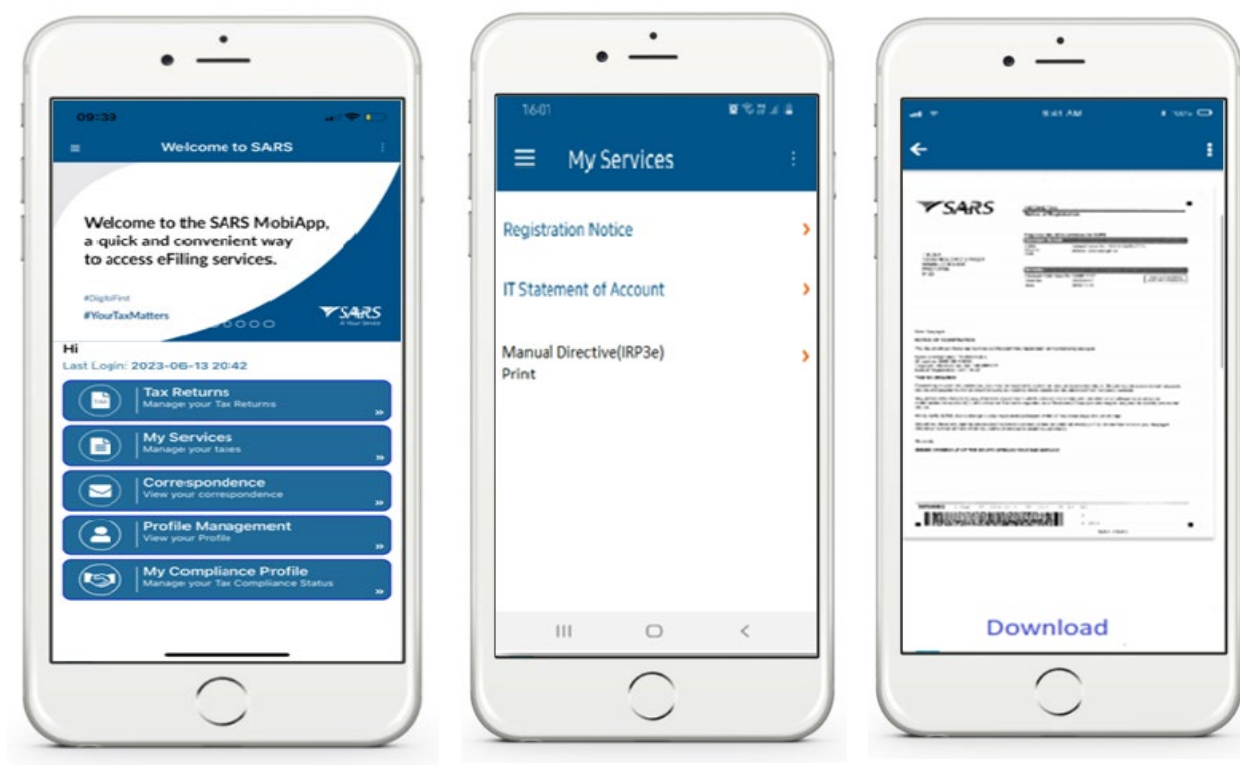
4.7 ESTATE CASE SERVICE

4.7.1 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.
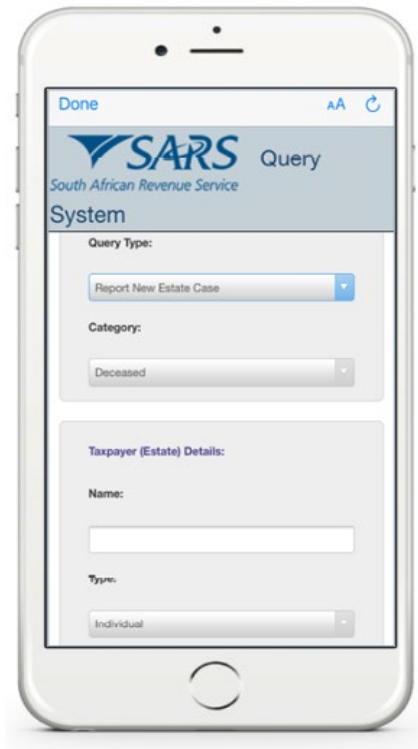
f) The SARS Lwazi your assistant is a chat platform available via eFiling or the MobiApp. This platform allows you to ask tax related questions and request tax services.

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
   iii) Request Refunds Status
   iv)   Request Audit Status
   v)   Request Notice of Assessment
   vi)   Request Call Back

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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


4.7.2 REQUIREMENTS TO ACCESS THE CHATBOT

a) The user must have access to the internet on their smart phone.

b) The chat must be initiated using the English 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.

c)   **Note the following**:

      i)   The services offered on this platform only caters for Personal Income Tax (PIT) tax type and individuals.

      ii)   To get quick response, upon greeting, steer the conversation directly to your tax related query. Do this by ensuring that your question is tax related.

4.7.3 HOW TO NAVIGATE THE SARS MOBIAPP TO ACCESS

a)   Lwazi your assistant can be accessed on the pre- and post-login menu options of your SARS MobiApp screen.

b)   Tap on "*Ask a Question*" on the pre login screen or post login screen of the SARS MobiApp.

      i)   This will direct you to the **Lwazi – Your Assistant** page.

c)   To ask a question, type your question, then pre

d)   Note the *Service Offerings* presented on your mobile device.
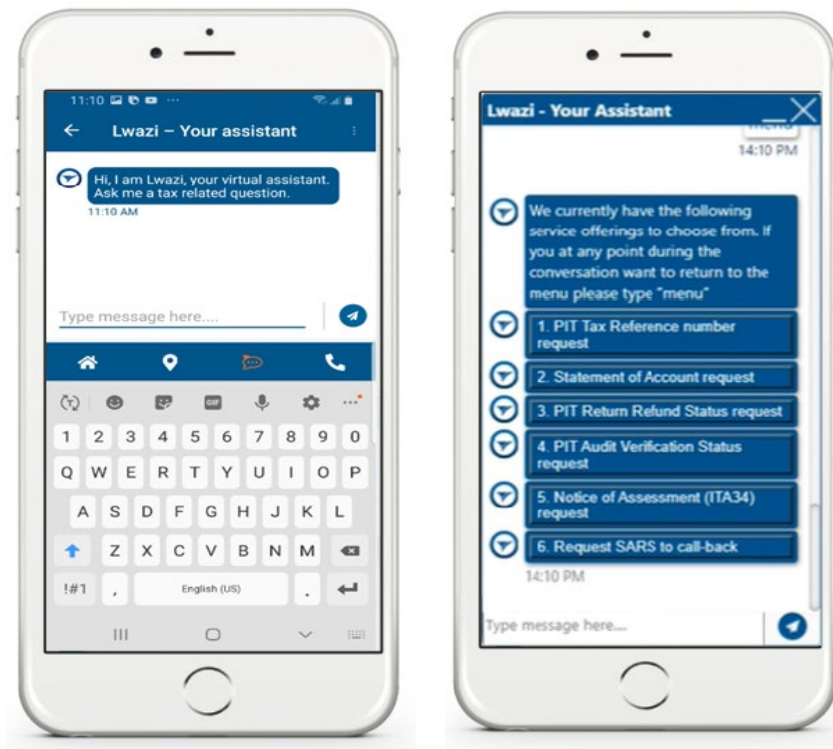
e)   Select by tapping on the applicable tax service on your mobile device. This will prompt you to complete security questions. Respond by completing the authentication related questions presented.
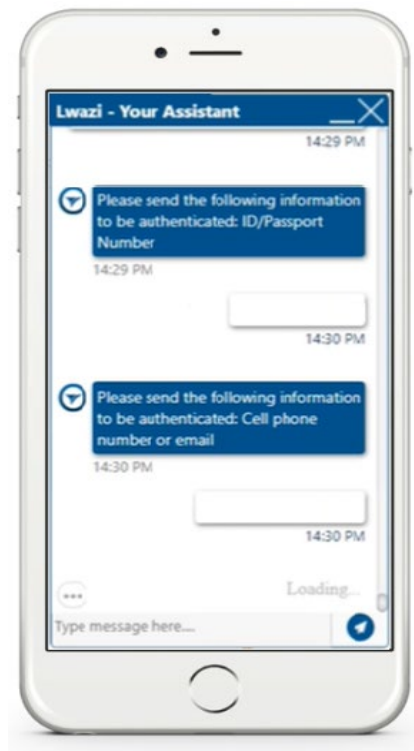
f) Note that if you respond incorrectly to any the questions, your tax service request will not be resolved.

g) Alternatively, you can ask Lwazi, your virtual assistant, any tax related question, by texting a tax product related query.

4.7.4 STEPS TO ACCESS THE CHATBOT

a) Navigate to the Lwazi your assistant page on your mobile device.

   i) The textbox will be displayed to enable the user to type in questions.

b) Tap on the applicable tax service you require service on from the menu options displayed, or alternatively tap on the textbox and type in your tax product related query.

   i) Where you have selected a tax service on the Lwazi your assistant page, authentication questions will be displayed on your device. Continue with the service request by responding accurately to the authentication questions displayed on your device.
   ii) Where you have been successfully authenticated, the requested service will be emailed to the users' primary emails address.
      A) Note that Lwazi your assistant will notify you that the requested service has been emailed to their email address.
      B) If your tax service request was for your Personal Income Tax Refund status, the status will be displayed on the Lwazi your assistant page.
   iii) On the other hand, where you have texted your tax product query, Lwazi your assistant will respond to your query with the texted solution displayed on your device.

5   DEFINITIONS AND ACRONYMS

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

6   DOCUMENT MANAGEMENT

Detail of Change	Guide updated with Tax Season 2023 amendments