



# **GUIDE TO SARS MOBILE TAX SERVICES**

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## 1 SUMMARY

- a) SARS has been on an extensive journey to digitise its service offerings into the mobile platform as part of its strategic intent to make it easy for taxpayers to comply. As a result, extensive mobile online and self-help services are some of the means taxpayers can engage with SARS for faster, easier and customer friendly service. This guide lists the mobile phone tax services available for taxpayer's ease in resolving tax related queries and further unpacks what to look out for when using these services.

## 2 INTRODUCTION

- a) Studies show that one third of the South African population utilise smart phones and this figure is forecasted to increase over the coming years. Additionally, a study done by Pew Research, in 2018, found that although 51% of adults in South Africa own smartphones, an additional 40% of adults in South Africa, own a basic standard mobile phone.
- b) In view of the growing use of mobile phones in South Africa and to effect easier tax compliance and improved customer services, SARS has introduced additional mobile tax services for basic and smart mobile phone owners. Taxpayers can now use either their smart phone or their standard mobile phone to access tax services from SARS.
- c) Taxpayers who have smart phones and data can access a variety of tax services or communicate via text live with a SARS Agent by making use of the SARS Live Chat functionality available on the SARS MobiApp. Additionally, to cater for those taxpayers that are digitally savvy to experience effective and efficient online tax services, SARS has modernized their online system (SARS MobiApp) to include the latest technology.
- d) Alternatively, taxpayers with no internet connectivity or smart phones, can request specified tax services for free. Taxpayers who have basic standard mobile devices can send an SMS or a USSD request to SARS. The SMS or USSD SARS service channels will resolve selected tax related queries. Additionally, an eBooking option can be selected to request a call back from SARS. When the eBooking option is selected, a SARS Service Agent will call and engage with the taxpayer, to ultimately book a telephonic appointment for the resolution of any tax related query, on behalf of the taxpayer.
- e) Lastly, supplementary to the tax mobile services provided by SARS is the Contact Centre toll free number (0800 00 7277), which is available for those taxpayers who prefer voice engagement in resolving their tax affairs.

## 3 LEGISLATIVE REQUIREMENTS

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

## 4 SARS TAX SERVICE MOBILE PROVISIONS

- a) An interaction with SARS to resolve your tax query can be initiated on your mobile device via the following mobile provisions -
  - i) Telephone
  - ii) Online services
  - iii) SMS, and
  - iv) USSD
- b) Telephone conversations, SMS and USSD provisions are featured in most basic standard mobile devices. Smart mobile devices on the other hand have additional features such as an ability to download applications which are accessible via the online store.

- c) The telephonic provision involves engaging with SARS by calling the SARS Contact Centre. The SARS Contact Centre has skilled agents who will assist you on your tax related queries. Note however that this service is only available during working hours.
- d) Online services are initiated when using the SARS MobiApp. The SARS MobiApp is a frontline application which taxpayers can access and download onto their smart phone devices from the online stores. Once the SARS MobiApp is downloaded, on the smart mobile device, taxpayers will have access to resolve most tax related queries 24 hours a day. Additionally, this application has a functionality called the SARS Live Chat. The SARS Live Chat functionality offers taxpayers the opportunity to engage with a SARS Agent live during business hours to resolve tax related queries by texting.
- e) The SMS and USSD tax related services are channels SARS has further introduced to engage with taxpayers who might only have basic standard mobile phones. The SARS SMS channel involves sending a SMS, which is text specific, to SARS for stipulated tax related queries. SARS will then engage with the taxpayer to resolve his/her tax related query by responding to the SMS request. The SARS USSD channel on the other hand involves dialling a service code to SARS. As a response, SARS will present a menu option on the mobile device. Once a response of the menu option is made by the taxpayer, SARS will validate the taxpayer and ultimately present on their device the resolution of his/her tax related query.

## 5 SMART MOBILE DEVICE TAX SERVICES

### 5.1 SARS Mobile Application (SARS MobiApp)

- a) The SARS MobiApp is a mobile application which individuals can install on smart mobile devices and is compatible with numerous mobile devices. These devices include Android (version 5.0 or higher), iOS (version 10.0 or higher) operated devices or the Huawei app gallery. When using this service, the user must always ensure that they have downloaded the latest application from Google play, Apple iStore or the Huawei App Gallery.
- b) The SARS MobiApp caters for individual taxpayers and registered tax practitioners with full access for the submission of the Income Tax Return for Individuals. Moreover, the SARS MobiApp can be used for compliance purposes of the taxpayer such as registration, submitting of Income Tax return (ITR12), making payments to outstanding debt and resolving other tax related issues. Also, to note, is that auto assessment and estimates can be accessed and finalised via this channel.
- c) For more information on how to use this application in resolving tax related queries, please refer to the following external guides:
  - i) How to register for the use of the SARS MobiApp
    - A) IT-AE-47-G01 - How to register for the use of the SARS MobiApp - External Guide
  - ii) How to use the SARS MobiApp to submit your Income Tax Return
    - A) IT-AE-46-G01 - How to submit your individual Income Tax return via the SARS MobiApp - External Guide
  - iii) How to use the SARS MobiApp to make payments towards your SARS debt
    - A) IT-AE-48-G01 - How to make payments to SARS via the SARS MobiApp - External Guide
  - iv) How to resolve other tax related queries making use of the SARS MobiApp
    - A) IT-AE-49-G01 - Services offered by SARS via the SARS MobiApp - External Guide

### 5.2 SARS Live Chat

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

- b) The Live Chat service allows taxpayers to reach a SARS service agent in that exact moment when they have a Personal Income Tax (PIT) query or tax related issues that requires resolution. However, do note that the Live Chat service is only available during the following times:
  - i) Monday to Friday (Public holidays excluded) from 08:00 a.m. to 04:00 p.m., and on Wednesdays from 09:00 a.m. to 04:00 p.m.”
- c) Also, to note is, where the SARS MobiApp user is logged in on their profile, he/she can initiate a chat with a SARS Service Agent immediately. However, where the SARS MobiApp user has not logged in, he/she will be prompted to enter their 13-digit ID number for verification purposes.
- d) To access this Live Chat functionality, it will either be displayed as one of the pre-login menu options on the SARS MobiApp. However, where the user is already logged in, it will be displayed as part of menu options. Simply tap the SARS MobiApp and select the tax service by tapping on the **Need Help** icon displayed as part of the pre login services of the application. The user is then to tap on the **Live Chat** icon and follow the prompts displayed on the functionality. For further clarity on the use of this functionality, kindly refer to the following external guide:
  - i) IT-AE-50-G01 - How to resolve tax queries via the SARS Live Chat - External Guide

### 5.3 SARS Ask a Question

- a) The ‘SARS Ask a question’ functionality is available as part of the tax services offered on the SARS MobiApp. This functionality responds to users frequently asked tax related queries in real time. It utilises the latest high-quality support experience BOT technology to provide users with instant support on tax related queries. The Lwazi BOT technology generates automated answers to non-profile tax queries presented.
- b) To access this functionality, simply select the ‘Ask a “Question”’ icon on the SARS MobiApp and text any tax related questions. In response, the answer/s to your query will be populated/displayed onto your mobile device. Additionally, this service also offers users a menu options which incorporates a call back option in instances where the user wants to arrange a telephonic appointment with a SARS Service Agent. For further clarity on the use of this functionality, kindly refer to the following external guide:
  - i) IT-AE-49-G01 - Services offered by SARS via the SARS MobiApp - External Guide

## 6 STANDARD MOBILE DEVICE TAX SERVICES

### 6.1 SARS SMS Channel

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

### 6.1.1 Steps on how to request tax services via the SARS SMS Channel

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

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

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

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

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

b) **Unpacking Step 1:**

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

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

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

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

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

Tax Service: Confirmation if you should submit a Personal Income Tax (PIT) return  
SMS Syntax: **File <Space> ID number/Passport number/Asylum Seeker number**  

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

Tax Service: Request the issuing of your Notice of Registration (IT150)  
SMS Syntax: **TRN <Space> ID number/Passport number/Asylum Seeker number**  

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

Tax Service: Request account related queries (balance statements) and your Statement of Account (SOA)  
SMS Syntax: **Balance<Space> ID number/Passport number/Asylum Seeker number**  

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

Tax Service: Request an eBooking appointment  
SMS Syntax: **Booking <Space> ID number/Passport number/Asylum Seeker number**  

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

- c) **Unpacking Step 2:**
  - i) Send the SMS to **47277**
- d) In response to your SMS request, authentication will be performed, and SARS will respond with the requested information in the most appropriate channel(s), which includes SMS and/ or email.

### 6.1.2 Steps on how to request an eBooking appointment via the SARS SMS Channel

- a) The taxpayer can send an SMS to SARS requesting an eBooking appointment. SARS will respond by calling the taxpayer back to book an appointment on their behalf.
- b) Below are the steps to follow when requesting this service.
  - i) **Step 1:**
    - A) Send an SMS to SARS by texting the following message:
      - l) **<Booking> Space <ID number/Passport number/ Asylum number>**
        - e.g., Booking 8308245\*\*\* or Booking A0296\*\*\*
  - ii) **Step 2:**
    - A) Send the SMS to **47277**
- c) If the information sent through is correct
  - i) A response SMS will be sent confirming receipt of SMS request.
  - ii) A SARS agent will call back and book an appointment for you.
- d) Note that for more information on what will be required when booking an appointment refer to the following external guide: GEN-BO-09-G01 - Book an Appointment at a SARS Branch - External Guide which is available on the SARS website

### 6.1.3 Things to note when using the SARS SMS Channel

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

## 6.2 SARS USSD Channel

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

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

**\*134\*7277#**

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

- b) Kindly note the sequence flow when using this channel:
- i) Once the correct USSD string is dialled, the user's mobile device will display a list of SARS tax service menu options. The user will be prompted to select the applicable tax service for resolution.
  - ii) Once the user selects the applicable tax service resolution, a verification process will be done, where the user will be requested to provide their personal information (such as their ID number etc).
  - iii) Once the user has submitted their personal information, SARS will validate the user's personal information.
  - iv) Where the information is validated as correct by SARS, the user's mobile device will present the tax resolution and an email will be sent through to the user containing his/her tax resolution
  - v) Once the resolution is displayed on the mobile device, the user is presented with the option of either returning to the main menu to request further tax resolutions or exit the channel.
- c) The following services are available on this channel
- i) What's my Tax number?
    - A) This service should be used where the requestor wants to verify that he/she is registered for PIT. This service will display the requestors tax number on their mobile device.
  - ii) Account balance
    - A) This service should be used where the requestor who is registered for PIT wants to determine whether he/she has a debit or credit tax balance. This service will display the requestors tax balance which includes his/her PIT account and admin penalties.
  - iii) Do I need to file a tax return?
    - A) This service should be used where the requestor wants to verify whether he/she is registered for PIT and is liable to submit an Income Tax return. Note that this reply will display the answer of either a Yes or No.
  - iv) e-Booking
    - A) This service should be used where the requestor wants to request a call back from SARS to create an eBooking appointment on their behalf. SARS will then call the requestor back to ultimately create an eBooking for the requestor.

### 6.2.1 Steps on how to request tax services via the SARS USSD Channel

- a) **Step 1: Initiate USSD**
- i) Dial the following SARS USSD string characters  
**\*134\*7277#**
  - ii) Once the USSD characters are correctly typed and dialled, a menu option will be presented on your mobile device.
- b) **Step 2: Select Tax Resolution Request**
- i) Note the message displayed on your mobile device depicting how to make an applicable selection.
    - A) Select the applicable tax resolution request as per direction from the message.



c) **Step 3: SARS Verification**

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

d) **Step 4: Tax Resolution**

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

## 6.2.2 Things to note when using the SARS USSD Channel

- a) This service is not available for tax practitioners
- b) This service is free of charge and is only available to Individual Taxpayers for Personal Income Tax (PIT). Additionally, for eBooking related queries, the taxpayer must be registered for Personal Income Tax (PIT)
  - i) Where the taxpayer/ is not registered, kindly refer on how to register for PIT on the SARS website [www.sars.gov.za](http://www.sars.gov.za). Alternatively call the SARS Contact Centre and engage with a SARS agent.

## 7 CALL CENTRE SERVICES

- a) The SARS Contact Centre offers services on any tax related query. This includes requesting your tax reference number, request your statement of account, or following up on your previous tax queries etc. Although most of the services can be resolved via this channel, services such as updating your profile information or updating your banking details is associated with risk and thus cannot be resolved via this channel.
- b) To solve complex or risk related tax queries, taxpayers can request an eBooking from the Contact Centre agent. The agent will book an appointment request and advise on the documentation you should have in order to resolve your complex query during your appointment.

### 7.1 How to request tax services telephonically

- a) You can call the SARS Contact Centre on the toll-free number of **0800 00 7277**. A SARS agent will answer and resolve your tax related query. Note the menu options and select the applicable option related to your query.
- b) As mentioned above taxpayers can also use this platform to request an eBooking appointment with an agent to resolve complex or risk related queries. Refer to the eBooking external guide (GEN-BO-09-G01 - Book an Appointment at a SARS Branch - External Guide) on the information that will be required when requesting an eBooking appointment.

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

## 8 DEFINITIONS, ACRONYMS AND ABBREVIATIONS

<b>ID</b>	South African Identity Number (issued by the Department of Home Affairs)
<b>PIT</b>	Personal Income Tax
<b>SARS</b>	South African Revenue Service
<b>SMS</b>	Short Message Service
<b>SIM01</b>	Notice of Simulated Tax Assessment
<b>SOA</b>	Statement of Account
<b>SOQS</b>	SARS Online Query System (available on the SARS website)
<b>TRN</b>	Tax Reference Number
<b>USSD</b>	Unstructured Supplementary Service Data

### 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](http://www.sars.gov.za)
- Visit your 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)
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).