EXTERNAL GUIDE

HOW TO RESOLVE
TAX QUERIES VIA THE
SARS LIVE CHAT

SARS
At Your Service

REVISION HISTORY TABLE

Date	Version	Description
21-11-2022	0	Initial Draft

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1   PURPOSE

- The purpose of this guide is to assist taxpayers on how to chat in real time with a SARS service agent about their tax related queries via the SARS Live Chat service. This SARS Live Chat service is available via the following SARS digital platforms.

  ▫   eFiling; and
  ▫   The SARS MobiApp.

- This guide in its design, development, implementation, and review phases is guided and underpinned by the SARS Strategic Plan 2020/21 - 2024/25 and the applicable legislation. Should any aspect of this guide be in conflict with the applicable legislation the legislation will take precedence.

2   INTRODUCTION

- Live Chat is a software technology that allows taxpayers to communicate directly with SARS service agent in real-time. SARS clients can chat with SARS service agent via eFiling and SARS MobiApp, instead of having to resolve their tax issues by calling the SARS Contact Centre, visiting a Branch Office, or even sending an email. Live chat service on your eFling or MobiApp doesn't require you to login or download any software to start chatting.

- The Live Chat service allows SARS to give our clients an easier way to reach SARS service agent in that exact moment where they have a Personal Income Tax (PIT) query or tax related issues that requires resolution. This service will also reduce the time spent to access our SARS service agent via the SARS Contact Centre.

2.1   HOW DO I START A LIVE CHAT

- Live Chat can be accessed through one of the below options

  ▫   You can login to eFiling and access Live Chat using your browser.
  ▫   You can login to the SARS MobiApp and access Live Chat.
  ▫   You can also access Live Chat through the eFiling web or SARS MobiApp, without being logged in.

Note: Ensure that you have downloaded the latest SARS MobiApp so that you can have access to the chat service.

2.2   WHAT IS THE DIFFERENCE BETWEEN LIVE CHAT AND THE CHAT BOT

- Live chat offers human-to-human communication. Lwazi chatbot, on the other hand, provides an instant support experience and, automated answers to general queries.

- Live Chat and the Lwazi chatbot are SARS digital services to provide you with a high-quality support experience.

2.3   WHAT ARE THE BENEFITS IN LIVE CHAT COMMUNICATION

- Texting, chatting and online messaging can now not only be used for much more than simply communicating with friends, but it can now be used to resolve urgent personal income tax queries.

- This platform allows SARS service agents to share their knowledge and skills to ultimately build tax awareness.

3   THINGS TO NOTE WHEN USING THIS SERVICE

- SARS MobiApp users must ensure the following:

  ▫ Downloaded the latest application from the Android application from Google play or iOS application from Apple iStore or the Huawei App Gallery.

## 4   ACCESSIBILITY AND AVAILABILITY OF THE LIVE CHAT SERVICE

- The Live Chat service will be available to the taxpayer during the following times:

  ▫ 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."

- If logged in on your eFiling or MobiApp account, you will be able to immediately initiate a chat with a SARS Service Agent

- However, if you are not logged in, you will be prompted to enter your 13-digit ID number for verification purposes.

  ▫ Please do take note that once you start chatting with a SARS Service Agent, you can be requested to provide additional verification for authentication purposes, before the relevant information can be provided

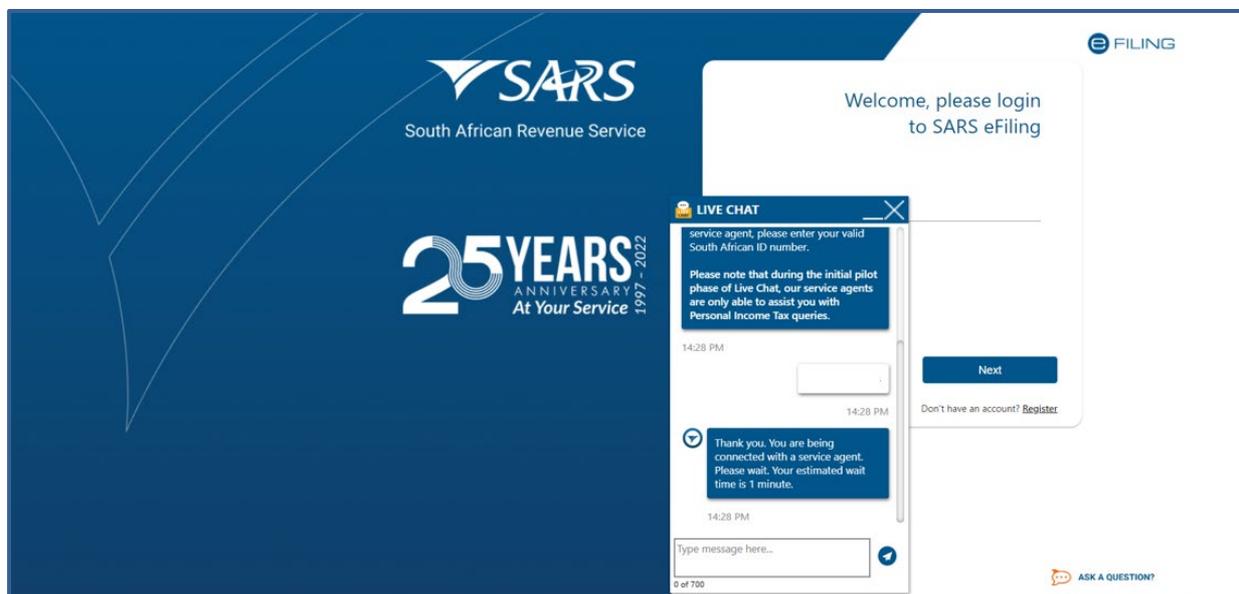## 5   ACCESS LIVE CHAT VIA THE SARS EFILING

- On the SARS eFiling website

- Note the **LIVE CHAT** icon displayed at the bottom of the screen.

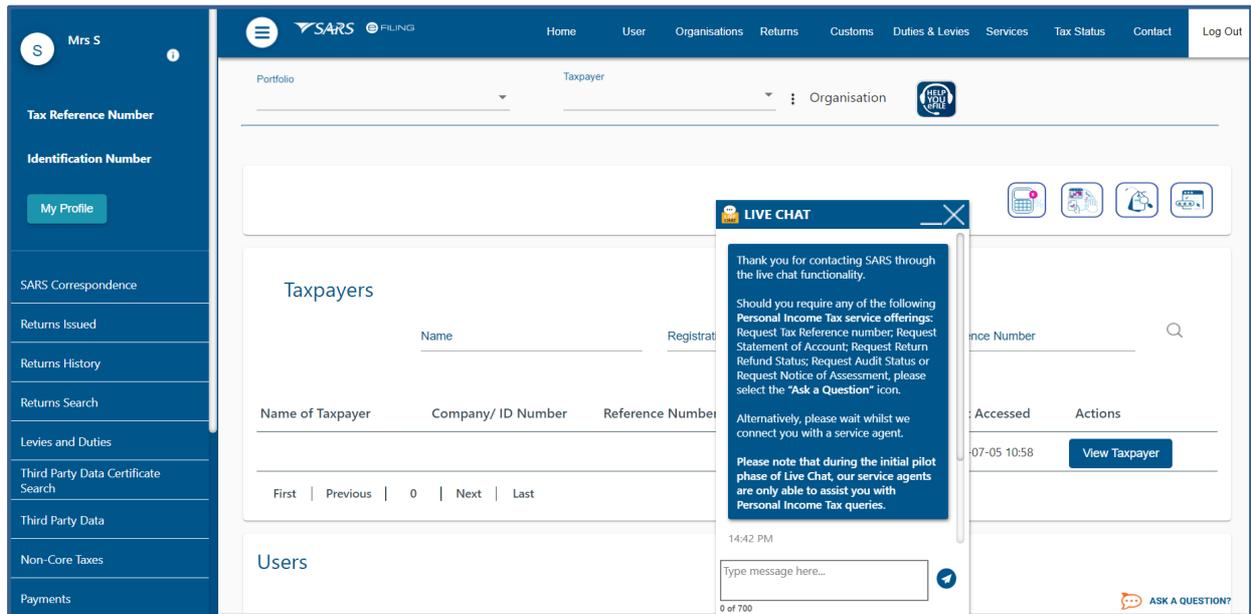- Click on the **LIVE CHAT** icon
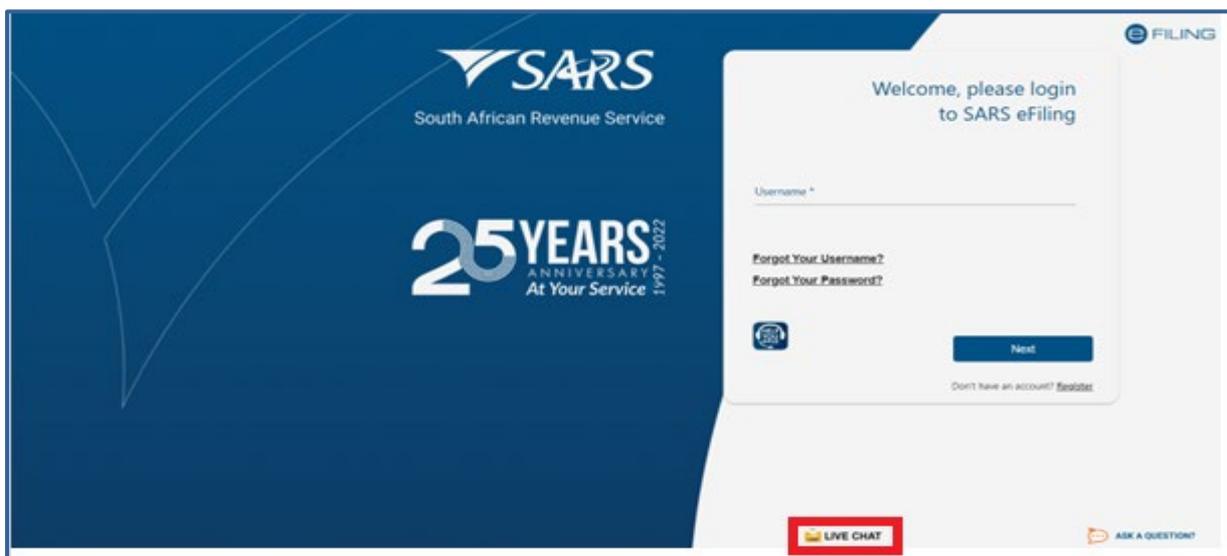
- There will be two instances where you can access Live Chat:

    ▫ The icon will be available when you have not logged in to eFiling
    ▫ Click on "LIVE CHAT"
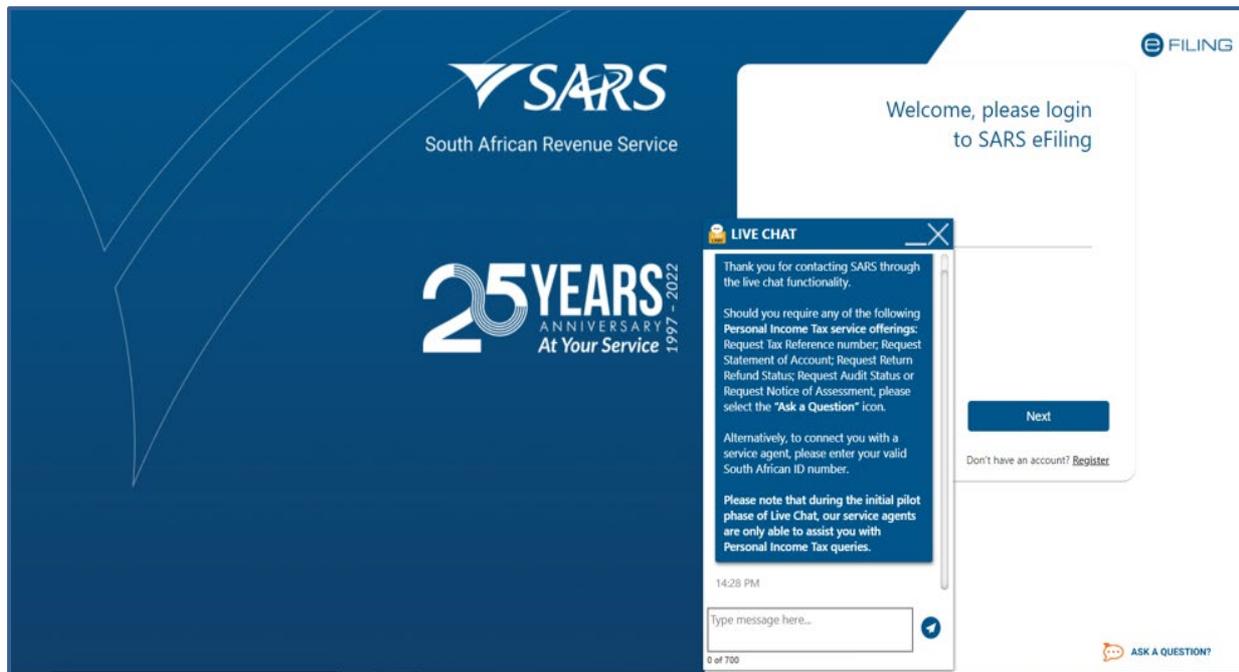
- Complete your 13-digit ID number and click on the send button

    ▫ Once you have entered your ID number, the SARS service agent will be in contact with you. **Note** the time mentioned in which the agent will be in contact with you.

- The Icon will also be present" when you are logged in. However, you will not be required to entre you ID number.

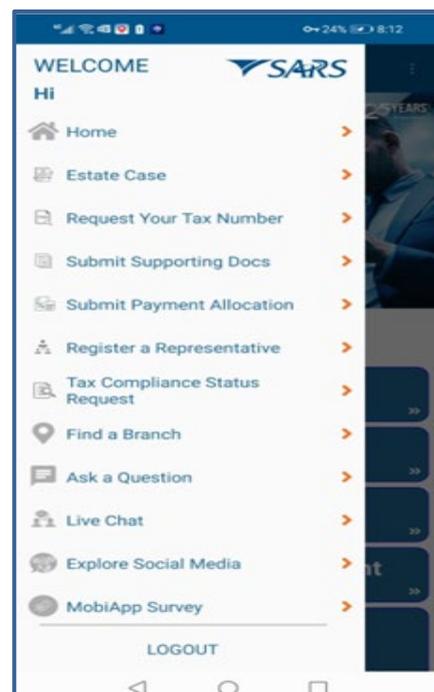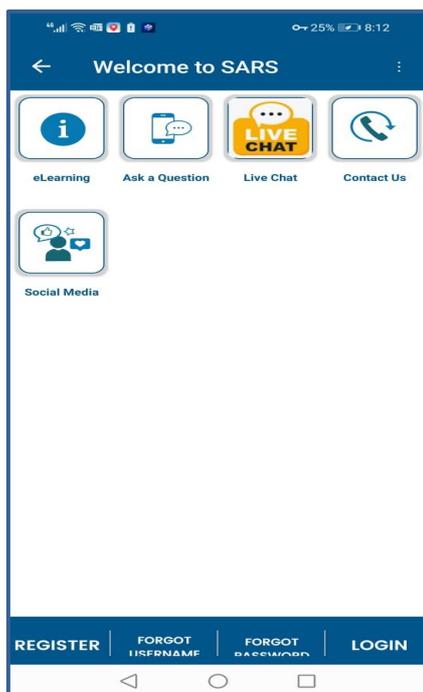   ▫ Once logged in
    ▫ Click on "LIVE CHAT"

6 ACCESS LIVE CHAT VIA THE SARS MOBIAPP

- On the SARS MobiApp, pre login screen, on the **home page** you can search by typing Live Chat

  ▫ **The LIVE CHAT** icon will be displayed

- Click on the **LIVE CHAT** icon

- Where you are already logged in, click on the ellipsis , and select **Live Chat** from the menu options displayed

- Note that the Live Chat icon can also be displayed on the '**Need Help**' page

## 7 PROCESS STEPS TO ENGAGE ON A PERSONAL INCOME TAX QUERY VIA LIVE CHAT

➢ **Step 1:** Initiate a Live Chat session with a SARS Service Agent to get assistance with your Personal Income tax query.

➢ **Step 2:** Where authentication is required, provide SARS Service Agent with the necessary requested details.

➢ **Step 3:** As soon as the SARS Service Agent engages with you, you will then be able to type your query in.

➢ **Step 4:** The SARS Service Agent will let you know whether he/she is able to resolve your query.

   ▫ Where our SARS Service Agent is unable to assist, he/she will escalate your case. This implies that a SARS Service Agent will call you back regarding your query. The SARS Service agent will also provide you with a case number.

➢ **Step 5:** Kindly stay on the chat whilst you are waiting for the SARS Service Agent to respond to your query.

➢ **Step 6:** The SARS Service Agent will either provide you with the information you require, a resolve your query or refer it to another SARS Service Agent via the chat

➢ **Step 7:** To end the chat, type goodbye or click on "X"

7.1 AUTHENTICATION

- Verification by means of your 13-digit ID number will be required in cases where you are not logged into eFiling.

- Kindly note that a SARS service agent will require you to answer some demographic questions. These will be displayed on your devise as soon as you start engaging with the agent on your query.

- Respond by providing 3 answers to the questions displayed in the chat

Note that you must ensure you provide accurate information as it will be verified.
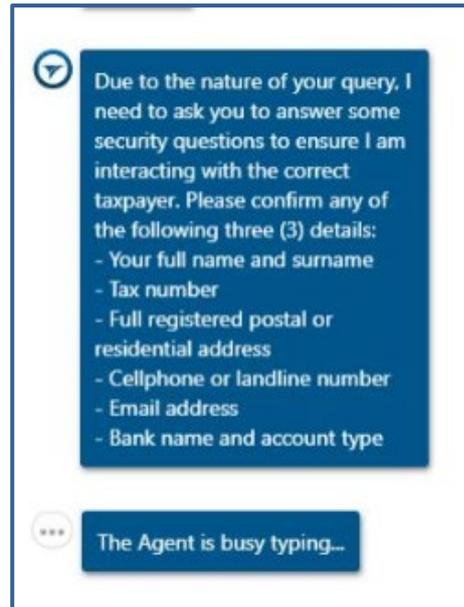

7.2 BEING ON HOLD

- In the event where you take long to respond to the chat, the SARS service agent might send you the following messages on the chat.

- Kindly respond by indicating that you are still online.

- Ensure you are always online with the SARS service agent during the chat
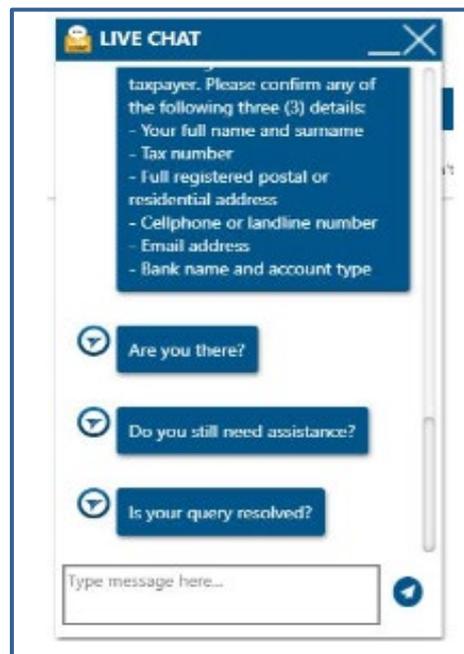
7.3 ENGAGING WITH A SARS SERVICE AGENT

- The SARS Service Agent will introduce him/herself before requesting authentication details. Authentication details are only required is query is profile related.

- The SARS service agent will introduce themselves to you and provide you a case number of the chat.
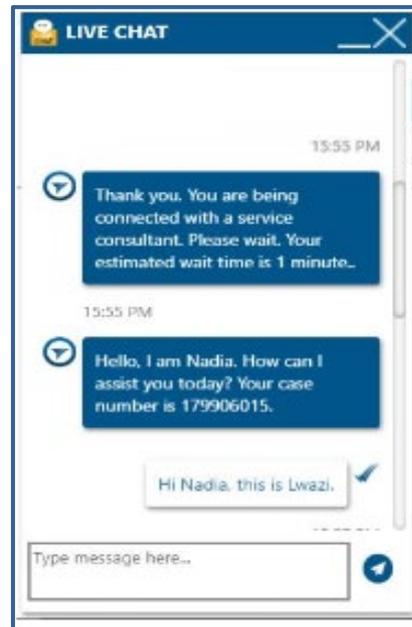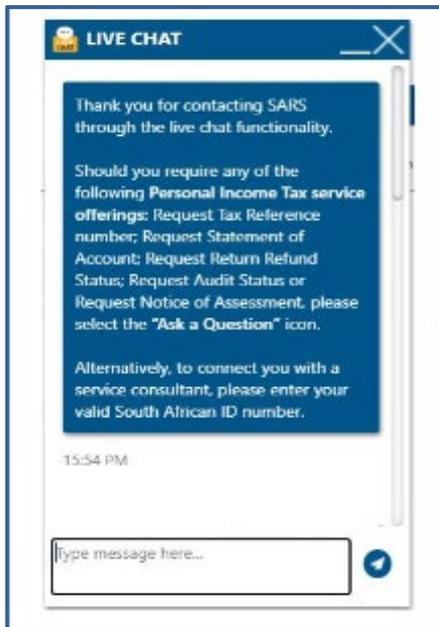
- Take note of the case number as you can use it to follow up on your case/query.

7.4 OPERATIONAL HOURS

- When you try to access the **LIVE CHAT** beyond working hours the following message will be displayed.

- Live Chat Operating hours are:

  - Monday to Fridays: 08:00 – 16:00 (Except Wednesdays: 09:00 –16:00).
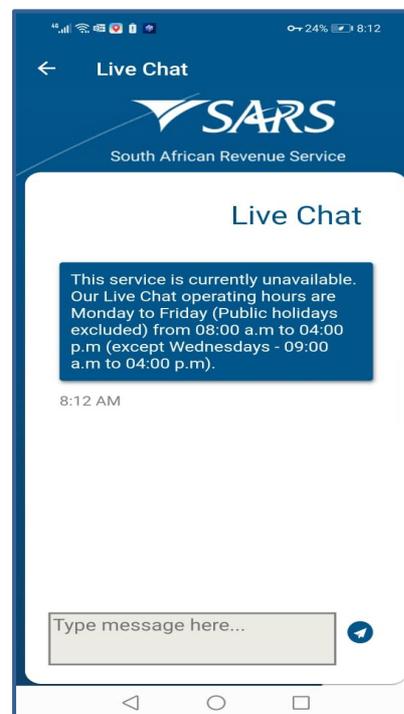
8   CROSS REFERENCES

DOCUMENT TITLE	APPLICABILITY
Comprehensive Guide to the ITR12 Return for Individuals – External Guide	All
How to eFile your Personal Income Tax Return – External Guide	All
How to Register for eFiling and Manage Your User Profile – External Guide	All
Book an appointment at a SARS Branch – External Guide	All
How to register for the use of the SARS MobiApp – External Guide	All
How to make payments to SARS via the SARS MobiApp – External Guide	All
How to submit your individual income tax return via the SARS MobiApp – External Guide	All
Comprehensive Guide to the ITR12 Return for Individuals – External Guide	All

9   DEFINITIONS AND ACRONYMS

Agent	SARS Service Agent
ID	Identification number
SARS	South African Revenue Service
SCC	SARS Contact Centre
SMS	Short Message Service