



SERVICES OFFERED VIA THE SARS MobiApp



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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**



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For a faster, simpler, and more convenient experience, explore our online service offerings on this pap or on eFiling.	My Complia		
Q Search for Menu Items)		
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Register Forget Descender Login	Register	r Forget Username Forget Password	Login

- 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



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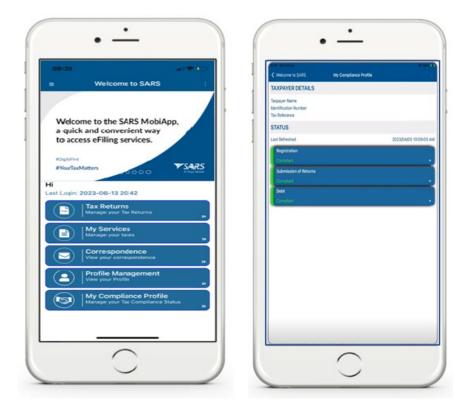
iv) Once you logged in successfully, the **My Compliance Profile** page will be displayed.



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.



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Welcome to SARS		< Back	Welcome to SARS	
For a faster, simpler, and more convenient experience, explor			<u>s</u>	
our online service offerings or this app or on eFiling.		My Compliance Profile	Tax Compliance Status Request	
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Register Forgot Username Forgot Password	Login	Register	Forgot Username Forgot Password	

b) The request form will be displayed on your mobile device. Complete the applicable fields to request your TCS.

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- 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.



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Welcome to SARS	South African	Revenue Service
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Welcome to the SARS MobiApp, a guick and convenient way	Estate Case	> a
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My Compliance Profile Manager your Tax Compliance Status »	MobiApp Survey	>
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e) The request form will be displayed on your mobile device. Proceed to complete the applicable fields to request your TCS.

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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 autoassessed 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.

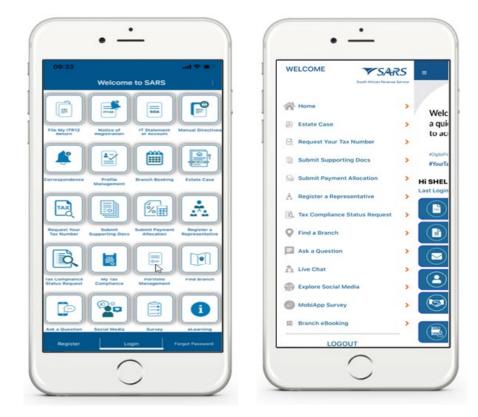


6.3 HOW TO MAKE PAYMENTS OF YOUR DEBT

- 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.



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Payment Alocation 0	Trading Name:	Tax No: *
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	income las	Page 14
Valdate Listen Reflech Ganos	Process Tax	Thank you for your submission. Correspondence will be issued shortly. Close
		Thank you for your submission. Correspondence will be issued shortly.
Validate Listen Refresh Gancer	Tar No. *	Thank you for your submission. Correspondence will be issued shortly. Close

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.

Done AA C	South African Revenue Service	Documents for Submission
outh African Revenue Service , System	System	Document
Query Type:	Telephone:	Select
Supporting Document Upload		Now to register for eFiling and manage your user profile, pdf
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d) The documents you can upload must not exceed 5MB. Where a document size is greater than 5MB, the following warning message is displayed:



Documents for Submission		Documents for Submission	
Document		Document	
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image.jpg	Delete	image.jpg	Dek
		EB9E0B8A-C096-48:27-A2E7- 2E85D07D395D.png	Dek
Document size canno	ot exceed 5MB Close	eNotice of Registration.pdf	Dek
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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.

Done	14 C
Your Query is Being	Processed
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Tax No: *	
	our submission.
Correspondenc	e will be issued shortly. Close
Notes:	
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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.

ID No.: Tax Ref No.:		ID No.: Tax Ref No.:	
Personal Info	Banking Details	Personal Info	Banking De
Marital Status		Bank Name	
Not Married		Bank Name	
Full Nane		Account Holder	
Surname		Branch Code	
Contact Details		Account Number	
Email		Account Type	
Cell 0123456789		Account Type	
Postal Address		Security Details	
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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.



12/41		•
C Back Profile Management	Back Profile Management	South African Revenue Service
City/Town	City Town Profile Management offing Security DataBased to send you a One- Time Profile Verifying subterfit security Cancel OK	Please capture the OTP sent to the following contact details
Security Details	Security Details	3843 - 1 2 3 4 5 6
		Pin expires in: 1 min 20 sec RESEND

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:

Profile Management Sorry this cell phone number is already in use	Profile Management Sorry this email address is already in use		Profile Management An eFiling account with this email address/cell phone number already exists.
ОК		ок	ок

- 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.

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	V SARS
South African Revenue Service	South African Revenue Service
	Please capture the OTP sent to the following contact details
Hi Welcome, please sign in to your mobile eFiling account	lv*****@s****.gov.za
ê 🛷	
Forgot Password?	2706 -
Don't have an account? Register	Pin expires in: 2 min 58 sec RESENI CANCE
SWITCH USER LOGIN	SUBMIT
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- 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 77.0 = # (2 IIII) 930	D 75. 0 = ± (2) (1) (0)
pdate Contact Details	Update Contact Details	
Last Login: 2025-06-02 09:20	Email	V SARS
rur Tax Reference Number rference Number: gistration ID Number	Email Status Unconfirmed CONTRACT	South African Revenue Service
Number:		
ecurity Contact Details	Cell Number 1234567890	Please capture the OTP sent to th following contact details
nabled preferred method of communication is Il Number	Cell Number	
referred method of communication	Status Pending	lv*****@s****.gov.za
atus Unconfirmed CONFIRM	Two-Factor Authentication	2706 -
Cell Number	Enabled Two-Factor method is One Time Pin	2708-
ll Number	Method of authentication One Time Pin	Pin expires in: 2 min 58 sec RES CAN
atus Unconfirmed	UPDATE & SAVE	
UPDATE PREFERED	CONTINUE TO EFILING	SUBMIT



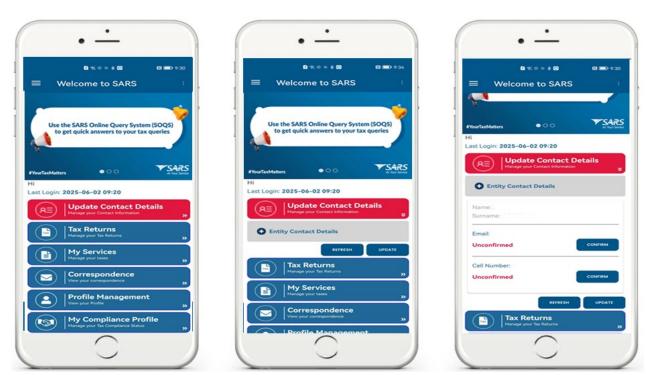
Note the following information regarding the statuses displayed:

- 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.
 - 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: <u>www.sars.gov.za</u>: 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)

- 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.
 - 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**.

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atus Confirmed		Status Confirmed
bell Number	·	4 Cell Number
atus Confirmed	Please capture the OTP sent to the following contact details	Status Confirmed
ecurity Contact Details		Security Contact Details
mail	lv*****@s***.gov.za	Email
tus Confirmed	IV@sgov.za	Status Confirmed
ell Number		Coll Hamber
tus Unconfirmed Confirm	2706 -	Status Pending
Security Method Preference		Security Method Preference
Inieuwoudt@sans.gov.za	Pin expires in: 2 min 58 sec RESEND CANCEL	Inieuwoudt@sans.gov.za
0721040220	SUBMIT	0721040220

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.

= Welcome to SAF	? ₩## RS i	17:41 = Welco	ne to SARS
Use the SARS Online Query to get quick answers to y			ne Query System (SOQS wers to your tax queries
PYourTaxMatten • • • •	TSARS	Nou/TaxMatters Hi Last Login: 2025-08-08 17:	•00 *
RE Manage your Contact Inform	Nation ¥	RE Update Co	ntact Details
Entity Contact Details		Tax Return Manager your Ta	s x Returns
Name: Surname:		My Service	
Email: Confirmed		Correspon View your corre	lence
Cell Number: Confirmed		Profile Man View your Profil	agement
		My Complia Manage your 7a	ance Profile « Compliance Status
Ré	efresh Update		

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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.

•	•	•
Welcome to SARS	E Portfolio Management :	09:33 art 🕈 1
	Linked Portfolio(s)	Welcome to SARS
For a faster, simpler, and more	Q Type to search	
convenient experience, explore our online service offerings on	Note: Search by portfolio name	Welcome to the SARS MobiApp,
this app or on eFiling.	ind >	a quick and convenient way to access eFiling services.
rOgtaFint ¥YourTaxMatters ▼SARS	Tau >	KDIQD/FHI
e G O O O at the levels	Individual >	#ViourTaxMatters
i Ist Login: 2023-06-14 10:44	Organisation pennyv0404 - Estates & Trust Services	Hi Last Login: 2023-06-13 20:42
Manage your Tax Returns	Tax Practitioner sheldonc - Business Soul Accounting cc	Tax Returns Manage your Tax Returns
My Services	Tax Practitioner	My Services Manage your taxes
• · · · ·		<u> </u>
Correspondence View your correspondence		View your correspondence
Profile Management		Profile Management View your Profile
My Compliance Profile Manage your Tax Compliance Status »		My Compliance Profile Manage your Tax Compliance Status
Wy Portfolios View your portfolios		
		\frown
\bigcirc		

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.

	14-14	
K Back	Work Page	
MR		
Tax Ref No:		
IT 212		ISSUED
Year of Asses	sment	2016
Versior 1		
Last Modified		2019/09/25
Calculation R	esults NOT C	

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.



I) The hamburger menu a will list various services, which include the search Taxpayer option that will direct you back to the portfolio management page.

WELCOME	₹S	=
A Home	>	Weld
Estate Case	>	a qui to ac
Request Your Tax Number	>	to at
Submit Supporting Docs	>	Rigids TuoYi
Submit Payment Allocation	>	HI SHEL
A Register a Representative	>	Last Logi
🗟 Tax Compliance Status Request	>	
Find a Branch	>	
Ask a Question	>	
n Live Chat	>	\sim
Explore Social Media	>	
MobiApp Survey	>	9
Branch eBooking	>	
LOGOUT	-	

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) ii)
- Tap on the hamburger menu option \blacksquare , and Select **Request to be a registered representative**.

Welcome to SARS	WELCOME	
	Home	•
ITR12 Notice of IT Statement Manual Directives of Account of Account	Estate Case	>
	Request Your Tax Number	>
	Submit Supporting Docs	>
e Profile Branch Booking Estate Case	Se Submit Payment Allocation	> ні
	A Register a Representative	>
	🖳 Tax Compliance Status Request	>
Submit Submit Payment Register a Supporting Docs Allocation Representative	Find a Branch	->-
	Ask a Question	>
My Tax Portfolio Find Branch	Live Chat	•
Compliance Management Find Branch	Decision Explore Social Media	>
🍄 🔒 🕕	MobiApp Survey	>
Social Media Survey eLearning	Branch eBooking	>
Login Forget Password	LOGOUT	

- The SOQS form will be displayed as below. d)
 - Complete the form with the necessary mandatory fields.A) Capture all the details for the entity and the registered representative. i)

one A C	South African Revenue Service Query	South African Revenue Service Query
	System	System
Query Type:	Тан Туре:	Representative Contact Details :
Pequest to be updated as the Registered Repr	Tax No: *	Title: *
Capacity:		Ma
Public Officier	ID Type:	initials."
		RG.
Ently Details:	South African D Number	Name: *
Name:	ID No: *	Pubyn
Learne Graber		Burname.*
Туре:		Castes
Individual	Representative Contact Details :	Diak *
	Title: *	
	Ma El	



Done 🗚 🖒	Done 🗚 C	Done AA
wh African Revenue Service	Your Query is Being Processed	Your Query is Being Processed
ystem	Please do not dose your brease	Please do not close your browner
South African ID Number		
ID No: *	ID Not *	Ditter *
Так Турн:	Text Type:	Thank you for your submission. Correspondence will be issued shortly
Income Tax	Income Tex	Close
Tax No: 1	Tax Nor*	Tao No. 1
Submit Add Documents (1) Reset	Submit Add Documents (1) Reset	Bitmit AbdDocuments (1) Resid
	< > ()	< > 0
\frown	\frown	\frown

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

ſ	
	9
Bra	nch 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.

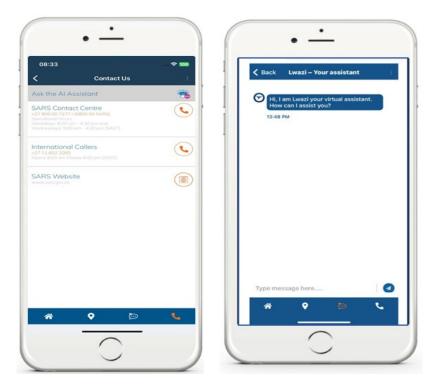




b) Below is the service offered by the icons displayed below the Branch Locator Page

*	This will direct you to the home page
•	This will direct your attention to google maps
$\mathbf{\tilde{c}}$	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.
 - . WELCOME **V**SARS to SARS P 17154 A Home = Welc Estate Case a qui to ac est Your Tax Ê P 1 #YourT HI SHEL ÷. % E. 0 Find a Branch Ask a Question 0 • -2 plore Social M (15) MobiApp Survey i ch eBc 1 LOGOUT
- 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

10:03 🗢 🗢 100	10:04 🗢 🕫
Back Branch Booking	< Back Branch Booking
V SARS	V SARS
Ith African Revenue Service	South African Revenue Service
eBooking	eBooking
	Capture Details
	X Hearing Impaired
Capture Details	Please mark this checkbox if the person that will be attending the session is hearing impaired.
	Requestor Details
🕺 Hearing Impaired	- Requestor Type*
Please mark this checkbox if the person	Loading *
 that will be attending the session is hearing impaired. 	Email Address*
Requestor Details	Mobile Number*
Requestor Type*	Alternative Number
Email Address*	
Mobile Number*	CLEAR
Alternative Nutrition	

- 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.

Done AA C	Done AA C	Done AA
outh African Revenue Service	South African Revenue Service	South African Revenue Service
Guery Type: What's My Tax Number?	Telephone:	Telephone:
EMail E	10 Type:	10 Type: South African ID Number
Title: *	South Alscan D Number Done	Bourn Altrean LU Number
Name:*	South African ID Number Passport Number Company Registration Number	Submit Reset

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b) The following error message will be displayed when the incorrect text is entered on the form:

Done AA	Done	AA C
Please capture the text shown in the image be	···· VSAR	S Query
Capicha	South African Revenue Ser System	vice
BENSD		the source of this submission mpleted conectly. Please try
86snd		
Validate Listen Refresh Cancel	Query Type:	
South African ID Number	What's My Tax Number Send By:	?
ID No: * 7805145094081	EMail	
75051450(940)81		
Submit Reset	Title: *	
	Ma	
< > ①	Ø	<u>d</u> @

c) When incorrect contact details are captured, the below correct message is displayed:

Done	AA C	Done	AA
Please capture the text shown in the ima	age below	Your Query is Being Proc	essed
Captcha		Please do not close your browser	(
DOEER		Thank you for your Unfortunately, the you supplied did no we have on record.	contact details that it match those that
Valdste Liston Refesh Ca	noel	Your current SARS Cel: 08338**** Email: test-s1****	
South Alexan ID Number		Please try again usi visit www.sarsefilin your contact details	g.co.za to update
			Close
Submit Capitria	Reset	Submit	Roset
< > 🖒	0	< >	<u>ڻ</u> (

d) The following message will be displayed when the data captured is correct and successfully validated.



our Query is Being Processed	NOREPLY@sars.gov.za What's My Tax Number
lease do not dose your browser	Dear
Company or Trust Name =	Thank you for your What's My Tax Number query. Your tax reference number is:
Thank you for your query. Your Tax Reference Number will be issued via Email shortly.	Sincerely THE SOUTH AFRICAN REVENUE SERVICE

9.2 HOW TO REQUEST YOUR NOTICE OF REGISTRATION

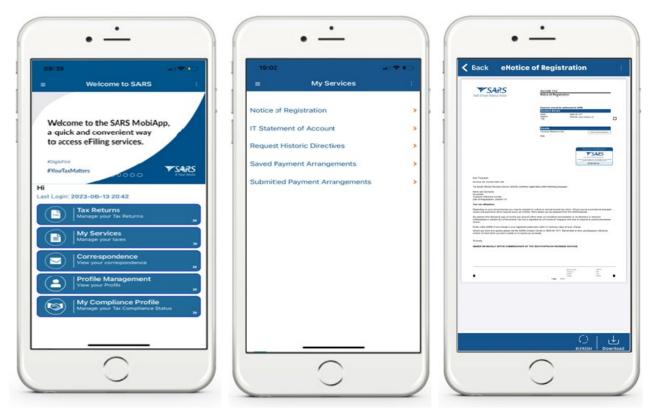
a) If you have not logged in, on the **Home Page**

i) Tap on the Notice of Registration icon.
 A) Complete your password on the Login Page, then tap on Login.

• • • • • • • • • • • • • • • • • • •	Back Welcome to SARS	Back eNotice of Registration
Velcome to SARS	South African Revenue Service	
Constantiation Constant	Hi Welcome, please sign in to your mobile eFiling account	Le transmission de la construcción de la construcci
File My (TR12 Refurn Correspondence Correspondence File My (TR12 Refurn Correspondence File Supporting Cacco Registered Octails Registered Octails Registered Octails Registered Octails	Forgot Password?	
Register Forget Literature Forget Pleasent Login	Don't have an account? Register SWITCH USER 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.

141 wnloa

To download the document onto your device.

10 TAX DIRECTIVE SERVICE

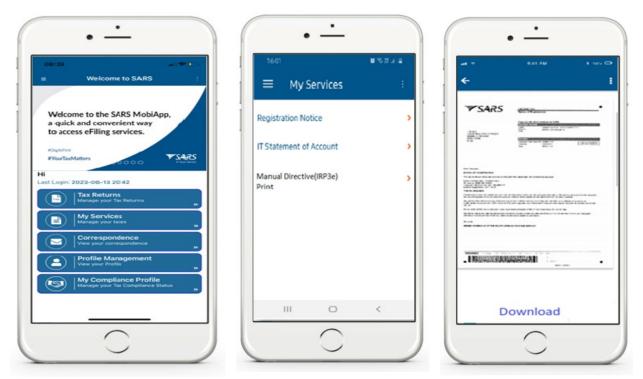
10.1 HOW TO REQUEST YOUR HISTORIC IRP3B AND IRP3C

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



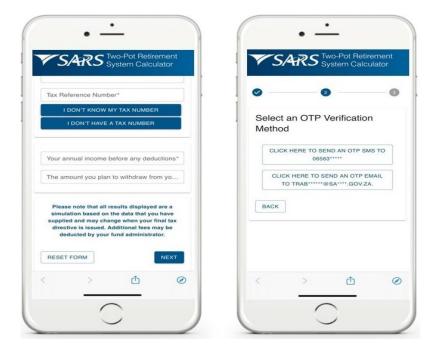
ii) This will route you to the Two-Pot Retirement Form for completion



- c) Once the Two-Pot Retirement form is displayed, simply follow the steps below:
 - i) **Step 1:** A) Co
 - Complete the requested details on the form
 - I) Name and Surname
 - I) 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

, <u>S</u> , III	S Two-Pot Retire System Calcu	Jiator	1 3/-	RS Two-Pot Ret System Calo	culator
0	0	•		0	
Please enter t	the OTP sent to 0656	3	Two-Pot	Calculation Res	ult
0 0 0	0-		Your Total A	nnual Income	
			Your Total C	Putstanding SARS Debt	
	(\mathbf{c})		The Amoun	You Plan To Withdraw	
	Time remaining	_	The Tax You	Will Pay	
BACK		SUBMIT	The Debt th	at SARS will Deduct	
			The Total Ar	mount To Be Deducted	
			The Final A	mount You Will Receiv	re
< >	đ	Ø		۰ ۱ <	(

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.

Don	е			AA Ĉ
South	African Reven		Query	
Syst	tem			
4	Query Type:			
	Report New Est	ate Case		•
	Category:			
	Deceased			
	Taxpayer (Estate) Details:		
1	Name:			
	Type.			
	Individual			

- 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
- 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 Al Assistant This will direct you to the Al Assistant.
 - ii) eLearning



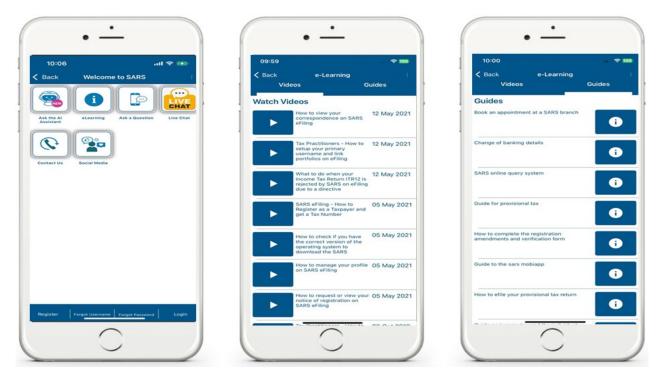
- A) This will display the SARS YouTube channel which contains all SARS related videos.
- B) This will also display all the relevant external guides.
- iii) Ask a Question This will direct you to the SARS Lwazi ChatBot.
- iv) **Contact Us** This will display the contact details of SARS.
- v) **Social 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



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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.



3∺45 ar ♥ ■ Back Lwazi – Your assistant :	13:45 ar ♥ ■.) 	13:47
13:44 PM	13:45 PM 2. Request Statement of Account 13:45 PM	13 Please send the following information to be authenticated:
We currently have the following Personal Income Tax service offerings to choose from. If you want to return to the menu, at any point during the conversation,	3. Request Return Refund Status 13:45 PM 14. Request Audit Status	Cell phone number
please type 'menu' 13:45 PM 1. Request Tax Reference number	13:45 PM 5. Request Notice of Assessment 13:45 PM	Please send the following information to be authenticated: Email
13:45 PM 2. Request Statement of Account	(1) 13:45 PM	13:46 PM
13:45 PM 3. Request Return Refund Status 13:45 PM	To receive correspondence for this selected service, an existing email address on SARS records is required.	Your Notice of registration (IT150) has been successfully generated and emailed to
4. Request Audit Status	13:45 PM Please send the following	13:47 PM
13:45 PM 5. Request Notice of Assessment	information to be authenticated: ID/ Passport Number	Is there anything else you need assistance with?
13:45 PM	13:45 PM	13:47 PM
e message here	Type message here	Type message here
* • •	* • •	* • > `

- 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.

08:35		🗢 100	08:33	* 10
Welc	ome to SARS		Contact U	•
			Ask the Al Assistant	9
S 0		CHAT	SARS Contact Centre	(
the Al Assistant eLearning	Ask a Question	Uve Chat	Operational Hours Weekdays: 800 cm - 4.30 pm and Wednesdays: 8.00 cm - 4.30 pm (SAST)	
	_			
()			International Callers +27 11 602 2003	(
			Opens 8:00 om Opses 4:00 pm (SAST)	
Contact Us Social Med	10		SARS Website	Ca
			www.sans.gov.zo	G
Q W E R	TYU	IOP		
A S D F	GHJ	KL		
► z x c	VBN	M		
123	space	search		
		Ŷ	* ?	ي ھ

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.

•		•	•		08:34	• -	
		1			Done	🔒 sars.gov.za	₹000 ^^ ×
Contact Us		Ask the Al Assistant	Contact Us			=	
SARS Contact Centre 427 Moto do 72771 (2000 do SANE) Contactual Harra Medinavday: 0.00 am - 4.20 pm and Medinavday: 0.00 am - 4.20 pm (SAST)		SARS Contact Centre 27 800 00 7277 / 4860 000 5 Weinsborne Hold Weinsborne Hold	e caresi	C.		0 × • •	
International Callers +27 11 602 2008 Opens 800 am Closes 400 pm (SAST)	C	International Callers. +27 11 602 2009 Opens II 00 am Choins 4 00 pm		C		African Revenue	
SARS Website		SARS Website			Individuals	Businesses	and Employers
					Tax Practition	ers Customs	and Excise
					Large Busin Internation	ness & onal	Trusts
					Deceased & I Estate	solvent G	overnment
					Small Busin	nesses Tax Exe	empt Institutions
Call +27 800007277		Call +27 (1	11) 602-2093		-		
Cancel			Cancel		<	Ask the ALAssistan	×
			$\overline{\bigcirc}$			0	

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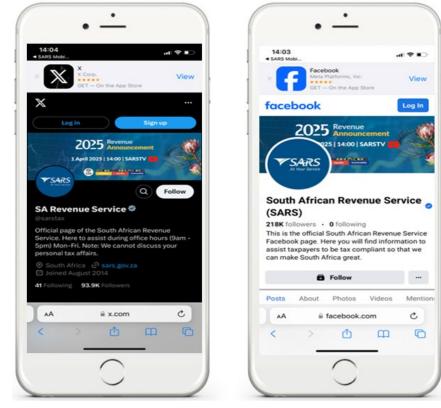
13.5 SOCIAL MEDIA

- 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.



IT-AE-48-G01 – Services offered via the SARS MobiApp – External Guide



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c) Navigate and make comments where applicable.

14 DEFINITIONS AND ACRONYMS

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