**EXTERNAL GUIDE** 

# SERVICES OFFERED BY SARS VIA THE SARS MOBIAPP



#### **REVISION HISTORY TABLE**

| Date       | Version | Description      |  |  |
|------------|---------|------------------|--|--|
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## 1 PURPOSE

- The purpose of this guide is to describe how to use the services offered to you via 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

- Tax compliance forms part of a South African residents' responsibility under the Income Tax Act No. 58 of 1962. A South African resident is taxed of income and profit received (which could include individuals, companies, and trusts).
- Taxpayers can respond to SARS via our various service channels. These service platforms amongst other duties, ensure that the taxpayer is serviced efficiently and the information pertaining to their tax affairs is up to date, accurate and credible. The SARS MobiApp is one such service platform within the digital domain. The SARS MobiApp mainly caters for individual taxpayers and registered tax practitioners with full access for the submission of the Income Tax Return for Individuals.
- This guide will demonstrate various services which you can use for tax compliance, how to view progress with regards to query and view your tax compliance status with the ease of your smart device.

## 3 PREREQUISITES FOR USING THE SARS MOBIAPP

- Note the following for effective use of the SARS mobile application:
  - You must be a registered SARS income taxpayer who is liable for the submission of an Income Tax (ITR12) return
    - For more information on how to register for personal income tax, refer to the following external guide.
      - IT-AE-46-G01 How to submit your Individual Income Tax return via the SARS MobiApp - External Guide
  - You must be registered for the use of eFiling or the SARS MobiApp.
    - For more information refer to the following guide:
      - IT-AE-46-G01 How to submit your Individual Income Tax return via the SARS MobiApp External Guide
  - You must have downloaded the SARS MobiApp on your smart device.
    - Ensure that your downloaded SARS MobiApp is always up to date.
    - Ensure your device has the latest Operating System Software.
  - When using the application, your device must have data or connected to a functioning Wi-Fi system.
  - You must have the correct username and password to be able to transact on the SARS Mobile Application.

## 4 DOWNLOADING THE SARS MOBIAPP

• You can easily install the SARS MobiApp from the App Store, Google Play Store, or the Huawei App Gallery.

- The following are the operating systems versions required for your smart phone/device to enable the downloading of the SARS MobiApp:
  - Android Version 5.0 or Higher
  - iOS Version 10 or Higher



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



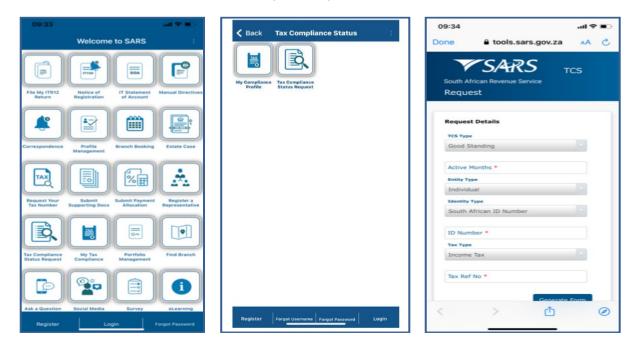
## 5 SERVICES OFFERED VIA THE SARS MOBIAPP

- The following tax services are offered via the SARS MobiApp:
  - Tax Compliance Status Service This service allows you to view your tax compliance status and request your tax compliance status (TCS) PIN
  - Profile Management Services This service allows you to view and manage your profile information with SARS
  - Tax Directive Service This service allows you to request a historical IRP3b or request historical IRP3b's and IRP3C's
  - Tax Reference Number Request Service This service allows you to request your tax reference number from SARS
  - Branch Office location and appointment services This service allows you to locate the nearest branch office to your location and or to book a virtual appointment with SARS.
  - Estate Case Service This service allows you to report a new estate case to SARS
  - Live Chat This service allows you to chat/text with SARS via our live chat Lwazi

#### 5.1 TAX COMPLIANCE SERVICE

#### 5.1.1 HOW TO REQUEST YOUR TAX COMPLAINCE STATUS

- The Tax Compliance Status (TSC) can be requested on the pre-login page (Home Page) by tapping on the Tax Compliance Status icon.
- You will be routed to the **Tax Compliance Status Page** which consists of the following request services
  - **My Compliance Profile –** Allows the user to view their TCS status
  - Tax Compliance Status Allows the user to get a pin for their TCS
- Where **My Compliance Profile** is selected, the TCS request form will be displayed.
  - Complete the applicable fields to request your TCS
- Once all the fields on the form are completed, tap on Generate Form



- Note that the form cannot be generated if the mandatory fields are not completed.
- Once completed successfully and your tax affairs are in order, an SMS/email will be sent through detailing your PIN.

#### 5.1.2 HOW TO ACCESS YOUR TAX COMPLIANCE STATUS

- To access your tax compliance status
  - Tap on **My Tax Compliance** on the pre-login page
- This will display the login page.
  - Complete your username and password and tap on Login.
- This will display your Compliance Status

| Welcome to SARS :  | 09:54II 중 ■><br>✓ Back Welcome to SARS  |
|--|---|
| Need help with your<br>tax? Tap e-Learning<br>to access tutorials<br>auguidelines.<br>Pograffint<br>BrourTaxMatters  | South African Revenue Service   |
| Q Search for Menu Items  | Hi<br>Welcome, please sign in to your mobile<br>eFiling account   |
| Correspondence<br>Submit<br>Supporting Docs<br>Begistered<br>Tax Compliance<br>Maintain<br>Registered<br>Tax Compliance<br>Tax Compliance<br>Status<br>Tax Compliance<br>Status<br>Login | Password 🕢 Forgot Password?   |
| Back Tax Compliance Status :   | 10:14     III ♥ ■       ■     My Compliance Status       TAXPAYER DETAILS       Taxpayer Name       Identification Number |
|  | Tax Reference STATUS Last Refreshed   |
| Register Forgot Username Forgot Password Login   | Compliant *   |

- Where you have not completed your TCS activation on eFiling, this service will not be available.
  - <sup>n</sup> The following message will be displayed on your device for your attention.



- 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:
  - <Tax Compliance Status>
  - Activation>
- Follow the prompts displayed on your screen to finalise your activation.

#### 5.1.3 HOW TO VIEW YOUR TAX COMPLAINCE STATUS

- Taxpayers and tax practitioners can view their tax compliance status via the SARS MobiApp.
- To do this proceed by:
  - Tapping on the My Tax Compliance Status tab displayed on your Landing Page.
- Alternatively, the user can select **My Tax Compliance** icon displayed on the **Home Page**.
- This will open the **My Compliance Page**.

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

 Where the taxpayer is not activated for TCS the following error message will be displayed on your device.



My Tax Compliance Status

5

- The following compliance status can be viewed on the SARS MobiApp.
  - Registration
  - Submission of Returns
  - Debt
  - Relevant Supporting documents.

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- Note that 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:
  - Green This indicates that the taxpayer is
  - Red This indicates that the taxpayer is non
- Tap on the applicable button to view your tax compliance.

Note that this 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.

- You can also use the Home Page to access your tax compliance
- To access TCS via the Home Page proceed as follows.
  - Tap on **My Tax Compliance** icon.
  - You will be directed to the **Login** Page for authentication purposes. Once logged in, you will be able to access your compliance status.

| K Back Welcome to SARS           | ■ My Compliance Status :                                | K Back My Compliance Status                          |
|----------------------------------|---|--|
|                                  | TAXPAYER DETAILS  | Tax Returns Outstanding                              |
| South African Revenue Service    | Taxpayer Name<br>Identification Number<br>Tax Reference | PIT Tax Number:<br>Personal Income Tax Non-Compliant |
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| Please sign in the mojornail and | Last Refreshed 2021/02/03 7:22:26 PM                    |  |
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| 8                                | Compliant »   |  |
| Forgot Username?                 | Submission of Returns                                   |  |
| <b>B</b>                         | Non-Compliant »   |  |
|                                  | Debt  |  |
| Forgot Password?                 | Compliant »   |  |
| Don't have an account? Register  | Relevant Supporting Documents                           |  |
| LOGIN                            | Compliant »   |  |

## 5.2 SERVICES TO MANAGE YOUR TAX COMPLIANCE REQUIREMENTS

#### 5.2.1 HOW TO REGISTER FOR PERSONAL INCOME TAX

- The SARS MobiApp allows you not only to register for the use of the Application. Once you 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:
  - IT-AE-47-G01 How to register for the use of the SARS MobiApp External Guide

#### 5.2.2 HOW TO SUBMIT YOUR INCOME TAX RETURN

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

#### 5.2.3 HOW TO MAKE PAYMENTS OF YOUR DEBT

- 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.
- On how to make payments via the MobiApp please refer to the following guide:
  - IT-AE-48-G01 How to make payments to SARS via the SARS MobiApp External
- On how to arrange payments on your debt refer to the following guide:
  - GEN-DC-20-G04 Deferral of Payment Arrangements on SARS MobiApp External Guide

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

- To submit a payment allocation pre login
  - Tap on **Submit Payment Allocation** icon displayed on the **Home Page**
- Alternatively, to access the service post login
  - Tap on the hamburger menu option and select **Submit Payment Allocation**
- The SARS Online Query System form will be as displayed below
  - Complete the form with the necessary mandatory fields and upload the supporting document required.
  - Ensure that your documents are within the limits prescribed by SARS

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|--|--|---|
| SARS Query   | VSARS Query  | SARS Query  |
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 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<br>Your payment allocation request has been successfully received and Case No: 175018946 has been created.<br>Correspondence on the progress of this case will be issued in due course.<br>Sincerely<br><b>THE SOUTH AFRICAN REVENUE SERVICE</b> |
|   |

#### 5.2.5 HOW TO SUBMIT SUPPORTING DOCUMENTS

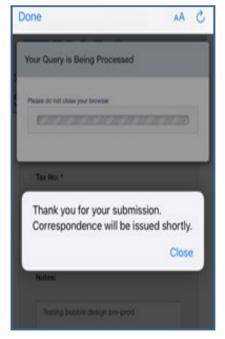
- SARS sends notifications to the taxpayer for their attention and action. Where the notification received requires the uploading of, proceed as follows.
- On the **Home** page
  - Tap on Submit Supporting Documents
- Alternatively, if on the post login, select the **Hamburger menu** and select **Submit Supporting Documents**.
  - This will display the SARS Online Query system (SOQS) form on your device.
  - Complete the form

| Done AA C                     | SARS Query                                     | Documents for Submission                                     |
|-------------------------------|--|--|
| South African Revenue Service | South African Revenue Service System           | Document   |
| Query Type:                   | Telephone:                                     | Select   |
| Supporting Document Upload    |  | How to register for eFiling and manage your user profile.pdf |
|                               | ID Type:<br>South African ID Number            | Close Upload Tips  |
| Title: *                      | ID No: *                                       |  |
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| Initials:*                    |  | Testing bubble design pre-prod                               |
| Name: *                       | South African ID Number                        |  |
| vame:<br>< > ₫ @              | Passport Number<br>Company Registration Number | Submit Documents (0) Reset                                   |

**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.

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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.
- Where the documents have been successfully attached, the following message will display on your device, indicating that the document was successfully submitted.



#### 5.3 PROFILE MANAGEMENT SERVICE

### 5.3.1 HOW TO MANAGE YOUR PROFILE INFORMATION

- Taxpayers and tax practitioners can update their profile information using the SARS MobiApp.
- The following profile information can either be viewed or updated:
  - Marital Status
  - Email address (if different from the security details)
  - Contact Number (if different from the security details)
  - Security details (cellphone and email)
  - Postal Address
  - Residential address п
    - Bank details
      - Account holder
      - Account number
      - Branch code .
      - Account type .
- To view or update your profile using the MobiApp, proceed as follows:
- Tap on the Profile Management service
- Once selected the user will be presented with personal information details.
- To update profile information, select the applicable one by tapping on it on your device.

| ID No.:<br>Tax Ref No.:       | ID No.:<br>Tax Ref No.:       |
|-------------------------------|-------------------------------|
| Personal Info Banking Details | Personal Info Banking Details |
| Marital Status                | Bank Name                     |
| Not Married                   | Bank Name                     |
| Full Name                     | Account Holder                |
| Surname                       | Branch Code                   |
| Contact Details               | Account Number                |
| Email                         | Account Type                  |
| Cell                          | Account Type                  |
| 0123456789                    |                               |
| Postal Address                | Security Details              |
| Unit Number                   | ©                             |
| Complex (if applicable)       | ©                             |
| Update                        | Update                        |

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.

| 13:41                         |                            |                 | 13:55               |   | 🗢 💶             | 13:55           | 🕈 🔳                                   |
|-------------------------------|----------------------------|-----------------|---------------------|---|-----------------|-----------------|---------------------------------------|
| < Back                        |                            |                 | < Back              | Profile Management<br>Johan Koen<br>ID No.: 8406205094080<br>Tax Ref No.: 0043865161  |                 | 75              | ARS                                   |
| City/Tow                      |                            | Banking Details | Personal.Info       |   | Banking Details | South African I | Revenue Service                       |
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| Postal Co<br>1760             | ode                        |                 |                     | Can   | cel OK          | **@s*****       | ******.co.za                          |
| Security I<br>Email<br>ga@sar | Details<br>rsefiling.co.za | 0               | Security D          | etails<br>sefiling.co.za  | 0               | 384             | 43 -                                  |
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|                               | Update                     |                 |                     | Update  |                 | sur             | вміт                                  |

**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.

#### 5.3.2 HOW TO ACCESS YOUR PORTFOLIOS

- Where you are a registered tax practitioner, "My portfolios" service will be displayed on your device.
- Select '**My Portfolios'** on the **Landing** page.
  - This will direct you to the **Portfolio Management**' page.
  - Your portfolios will be listed on your device, and you can search by portfolio name.
- Select the applicable portfolio by tapping on the valid portfolio.
  - This will list all the taxpayers under your selected portfolio. You can also search for a taxpayer by Surname, ID, or tax reference number.

**Note** that the tax types that can be accessed via the SARS MobiApp are for Personal Income Tax (PIT) only.

The portfolios listed are the same as those created and listed on your eFiling profile. To create a portfolio on eFiling, refer to the registration external guide available on the SARS website.

- Tap on the applicable taxpayer from your list of taxpayers grouped on your selected portfolio. This will display the **Landing** page of the applicable taxpayer.
  - Welcome to SARS Portfolio Management Linked Portfolio(s) Don't queue Q Type to search. this Tax Season Note: Search by portfolio name using SARS eFiling ATTERNAL VILLE jeffpret accutax SARS Hi Cornea accutax Accounting Services Tax Practitioner Correspondence Profile Management -My Tax Compliance Status My Portfolios < Back Portfolio Management Welcome to SARS Tax Practitioner New look. My Landing Page new SARS Only 10 recent tax payers under your profile are listed belo Use our enhanced digital channels to file your return V SARS irs.zovza Search by: ID Number Abbott, C (Mr) Tax Returns ( 📑 Ackerman, DA (Mr) Ackerman, GT (Mrs) Ackerman, ML (Mrs) -Ackerman, DE (Mr) My Tax Compliance Statu (5) Adamjee, MFE (M)
- Below is an example of how to access your PIT client via the MobiApp.

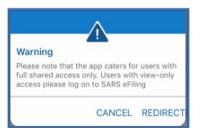
- Once you are on the **Landing** page of your PIT client, you can access their account and complete their Income Tax return accordingly.
  - Refer to the previous sections on the functionalities displayed on the **Work** page.

| No SIM 🗢        | ·4 14       |            |
|-----------------|-------------|------------|
| K Back          | Work Page   |            |
| MR              |             |            |
| Tax Ref No:     |             |            |
| IT R12          |             | ISSUED     |
| Year of Assess  | ment        | 2019       |
| Version 1       |             |            |
| Lest Modified   |             | 2019/09/25 |
| Calculation Res | sults NOT C | ALCU_ATED  |
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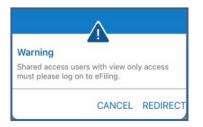
Where you do not have access rights to complete the return of your client or you are not a
registered tax practitioner, the following warning message will be displayed. Note the content on
the message and tap on **Ok**.



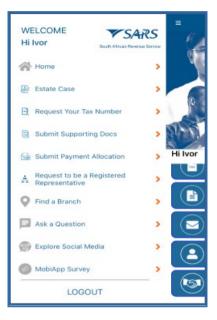
• Where you are a registered tax practitioner with **view access** only for your PIT client, the following warning message will be displayed.



- Tax practitioners with shared access users, with view only access, will not be able to use the MobiApp to submit returns for their clients.
- If a registered tax practitioner with view only attempts to open their client's profile, the following message will be displayed.



- Below are the following functions and their use:
- 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 |

#### 5.3.3 HOW TO UPDATE YOUR REGISTERED TAX REPRESENTATIIVE ON YOUR PROFILE

- To update the registered representative of the taxpayer
  - Tap on **Request to be a registered representative** icon displayed on the **Home Page**.
- To access the service via post login,
  - Tap on the hamburger menu option and select **Request to be a registered representative**.
- The SOQS form will be displayed as below. Complete the form with the necessary mand atory fields.
  - Capture all the details for the entity and the registered representative

| outh Africa | SARS             |                   |      | South Africa<br>System |
|-------------|------------------|-------------------|------|------------------------|
| system      |                  |                   |      | Tax Ty                 |
| Guery       | Type:            | the Registered Re | -    | Incor                  |
| Capac       |                  |                   |      | Tax N                  |
| Public      | Officer          |                   |      | ID Typ                 |
| Entity      | Delaite:         |                   |      | Sout                   |
| Name        |                  |                   |      | ID No.                 |
| Loor        | ne Graber        |                   |      |                        |
| ander       | dual             |                   |      | Repre                  |
| <           | >                | ₫                 | ø    | Tabe: 1                |
| Done        |                  |                   | AA C | Done                   |
| Y           |                  | Query             | /    | Docume                 |
| System      | an Revenue Servi | 0e                |      | Docum                  |

| Income Tax              |  |
|-------------------------|--|
| Tax No: *               |  |
|                         |  |
| Ю Турн:                 |  |
| South Atrican ID Number |  |
| ID No: *                |  |
|                         |  |

| tem         |                |          |  |
|-------------|----------------|----------|--|
| Representat | tive Contact D | etails : |  |
| Title: *    |                |          |  |
| Ma          |                |          |  |
| Initials."  |                |          |  |
| PG.         |                |          |  |
| Name:*      |                |          |  |
| Robyn       |                |          |  |
| Surname: *  |                |          |  |
| Eastes      |                |          |  |

| Done 🗚 🖒                             | Done 🗚 🖒                        | 5 AA   |
|--------------------------------------|---------------------------------|--|
| outh African Revenue Service         | Documents for Submission        | Documents for Submission                           |
| System                               | Document                        | Document   |
| ID Type:                             | Select ]                        | Select   |
| South African ID Number              | Take Photo 0                    | F1F98465-4640-489F-A65A- Dolete<br>AD70580668A.png |
| ID No: *                             | Close Browse ····               | ADVIDEDBIDER, proj                                 |
|                                      | Tax 7pm                         | Close Document Requirements Uploed Tips            |
| Tax Type:                            | Vectored Tax                    | Income Tax   |
| Income Tax                           | Tase No: *                      | Tax No: *  |
| Tax No: *                            | 2899125146                      | 2809125146   |
|                                      |                                 |  |
|                                      | Submit Documents (0) Reset      | Submit Documents (0) Result                        |
| Submit Documents (0) Reset           |                                 |  |
|                                      | $\langle \rangle $ $\bigcirc$   |  |
| S As enot                            | Done 🗚 Č                        | Done 🗚   |
| SARS Query                           | Your Query is Being Processed   | Your Query is Being Processed                      |
| uth African Revenue Service<br>ystem | Please do not done your browser | Phases do red close pior between                   |
| South African D Number               | CHRRRRRRRRRR                    | CHRERENER  |
| ID No: *                             | ID No: *                        | ID No. 1   |
|                                      |                                 | Thank you for your submission.                     |
| Тах Туре:                            | Tax Type:                       | Correspondence will be issued shortly.             |
| Income Tax                           | income Tax                      | close  |
| Tax No: *                            | Tax No. *                       | Tax No. 1  |
|                                      |                                 |  |
|                                      |                                 | Bubenit   Add Documents (1)   Reset                |
| Submit Add Documents (1) Reset       | Submit Add Documents (1) Reset  |  |
| < > A Ø                              |                                 | < > 🛆 🤇  |

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



#### 5.4 SARS BRANCH OFFICE LOCATION AND APPOINTMENT SERVICE

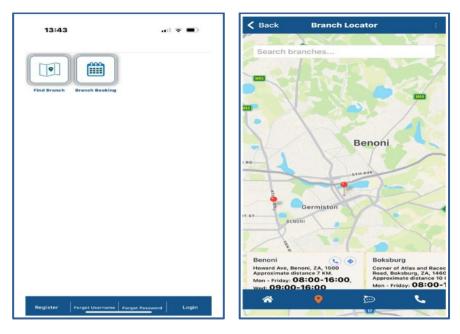
#### 5.4.1 HOW TO LOCATE A BRANCH OFFICE NEAR YOU

- To locate a Branch Office near you proceed as follows:
- On the **Home Page** 
  - Tap on Branch Services





- This will direct you to two Service icons
  - 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.
  - Branch Booking This icon will open a form for you to complete for booking a virtual appointment with SARS.



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 |
| ۹., | This will display the contact details of SARS    |

the contact details and Lwazi live chat has been selected the following screens will be displayed

| SARS Contact Centre<br>+27 800 00 7277 / (0800 00 SARS)<br>Operational Hours<br>Weekdays: 800 am - 4:30 pm and<br>Wednesdays: 9:00 am - 4:30 pm (SAST) | <b>C</b> | Hi, I a<br>How of<br>13:48 P | m Lwazi your v<br>can I assist you<br>M | irtual assistan<br>? | t. |
|--|----------|------------------------------|---|----------------------|----|
| International Callers<br>+27 11 602 2093<br>Opens 8:00 am Closes 4:00 pm (SAST)  |          |                              |   |                      |    |
| SARS Website<br>www.sars.gov.za  |          |                              |   |                      |    |
|  |          |                              |   |                      |    |
|  |          |                              |   |                      |    |
|  |          |                              |   |                      |    |
|  |          |                              |   |                      |    |
| Request a call back  |          | Type mes                     | sage here                               |                      |    |

**REVISION: 0** 

- On the **Home Page** note the following service icon and their use.
  - eLearning
    - This will display the SARS YouTube channel which contains all SARS related videos This will also display all the relevant external
  - Ask a Question This will direct you to the SARS Lwazi
  - Contact Us This will display the contact details of SARS
  - Social Media This will direct you to the SARS Social media platforms



#### 5.4.2 HOW TO BOOK A VIRTUAL OR BRANCH VISIT APPOINTMENT

- Taxpayers/tax representative can now book an eBooking appointment to resolve their tax queries with SARS via the SARS MobiApp.
- To make an eBooking appointment, proceed as follows:
  - Tap on **Branch Booking** on the pre-login

| 09:33 <b></b> 1 ♥ ■)  | 09:35 🗢 🔳                          |
|---|------------------------------------|
| Welcome to SARS :   | WELCOME ▼SARS ■                    |
|   | Estate Case                        |
| File My ITR12 Notice of IT Statement Manual Directives  | Request Your Tax Number            |
| Refurn Registration of Account  | Submit Supporting Docs >           |
| 🗳 🔛 🏛 🚉   | Submit Payment Allocation          |
| Correspondence Profile Branch Booking Estate Case   | A Register a Representative        |
|   | Tax Compliance Status Request      |
|   | Find a Branch                      |
| Request Your Submit Submit Payment Register a<br>Tax Number Supporting Docs Allocation Representative | Ask a Question                     |
|   | December 2015 Explore Social Media |
|   | MobiApp Survey                     |
| Tax Compliance My Tax Portfolio Find Branch<br>Status Request Compliance Management                   | Branch eBooking                    |
|   | About eFiling SARS                 |
| Ask a Question Social Media Survey eLearning  | 📞 Contact Us 🔹 🗲                   |
| Register         Login         Forgot Password  | LOGOUT                             |

- Where you are logged in, tap on the menu bar and select Branch eBooking
- Once selected, the Branch eBooking form will be displayed.



- Complete the form with the necessary details.
- For more information what is required on the form, refer to the following external guide:
  - GEN-BO-09-G01 Book an appointment at a SARS branch External Guide

| 14:07              |  | al ≑ ∎        | 13:45         | al 🗢 🛙              |
|--------------------|--|---------------|---------------|---------------------|
| Back               | Branch Booking   |               | K Back I      | Branch Booking      |
|                    | African Revenue Service<br>nch eBooking Sy<br>rry Fields | SARS<br>/stem | Appointm      | nent Information    |
| Reque              |  |               | Select        | <                   |
| Individual         |  |               | Reason Cate   | jory*               |
|                    | Yes  |               | Select        | <                   |
| Company            | / Trust /  |               | Reason For A  | ppointment*         |
| Entity<br>Represen | tative* (i)  |               | Select        | <                   |
|                    | Yes  |               | Preferred Bra | nch*                |
| Tax Pract          | itioner* (i)   |               | Select        |                     |
|                    | Yes  |               | Branch        |                     |
| SMME* (            | D  |               | Select        | ¢                   |
|                    | Yes  |               | Ch            | eck for Appointment |
| Would yo           | u like to <b>* (i)</b>                                   |               |               |                     |

- 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:
  - GEN-BO-09-G01 Book an appointment at a SARS branch External Guide

#### 5.5 TAX REFERENCE NUMBER REQUEST SERVICE

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

• On the **Home Page** 



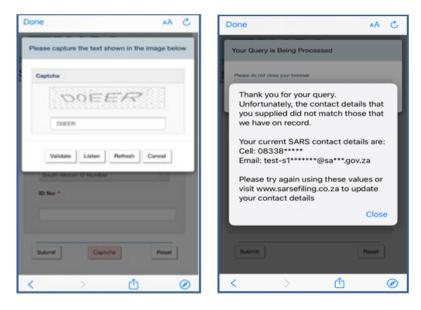
• The SOQS form will be displayed. Complete the form with the necessary mandatory fields.

| Done                                 | AA C  | Done                                  | AA C                          | Done                    | AA C       |
|--------------------------------------|-------|---------------------------------------|-------------------------------|-------------------------|------------|
| South African Revenue Service        | Query | South African Revenue Serve<br>System |                               | South African Revenue S |            |
| Query Type:<br>What's My Tax Number? |       | Telephone:                            |                               | Telephone:              |            |
| Send By:<br>EMail                    |       | ID Type:                              |                               | ID Type:                |            |
| Title: *                             |       | South African ID Number               | Done                          | South African ID Num    | ber        |
| Initials:*                           |       |                                       | an ID Number                  | Submit                  | Reset      |
| Name:*                               | Ů Ø   | Company Regi                          | rt Number<br>istration Number | < >                     | <u>ů</u> Ø |

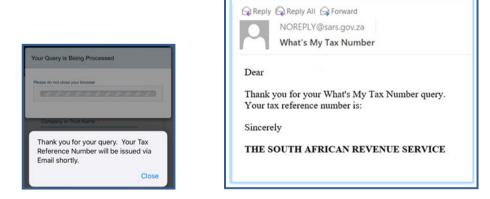
The following error message will be displayed when the incorrect text is entered on the form:

| lease capture the text shown in the image below | South African Revenue Service  |
|---|--|
| Captcha   | System   |
| BENSD   | It was not possible to verify the source of this submission<br>as the Captcha was not completed correctly. Please try<br>again |
| Validate Listen Refresh Cancel                  | Query Type:  |
| South African ID Number                         | What's My Tax Number?  |
| ID No: *  | Send By:   |
| 7605145094081                                   | EMail  |
|   | Title: •   |
| Submit Reset                                    | Ma   |

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



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

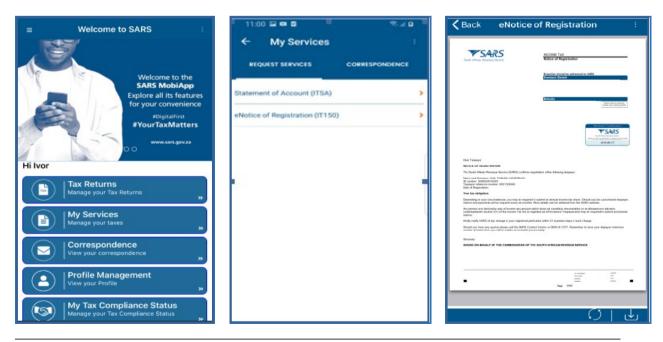


#### 5.5.2 HOW TO REQUEST YOUR NOTICE OF REGISTRATION

- If you have not logged in, on the Home Page •
  - Tap on the **Notice of Registration** icon
    - This will display the Login Page.
      - Complete your password, then tap on Login

| Sack Welcome to SARS  | K Back Welcome to SARS  | Back eNotice of Registration   |
|---|---|--|
| Welcome to the SARS<br>MobiApp, a quick and<br>corvenient way to<br>access efiling services.<br>ADgraffart<br>#YourfaxMatters | South African Revenue Service   |  |
| Q Search for Menu Items   | ні  | New Transport<br>MORES of Reconstructions<br>The data draws framework preserve provide publicly confirms region data of the following range party  |
| File My ITR12<br>Return Tax Number Notice of cAccount   | Welcome, please sign in to your mobile<br>eFiling account<br>Password | Use and before the second seco |
| Correspondence Submit Supporting Docs Maintain Status   | Forgot Password?  |  |
|   | Don't have an account? Register                                       |  |
| Register Forgot Username Forgot Password Login  | SWITCH USER LOGIN   |  |

- If you have logged in, on the Landing Page
  - Tap on My Services.
  - This will display the My Services Page.
- Tap on the Notice of Registration (IT150) option.
- On the Notice of Registration, you will also be able to view your Tax Reference Number (TRN).



Below the Notice of Registration Page, the following icon is displayed.

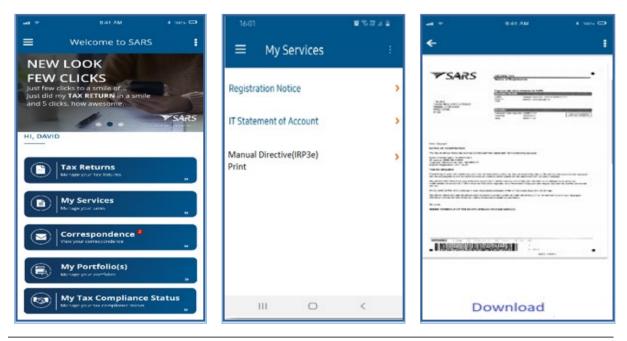


To download the document onto your device.

#### 5.6 TAX DIRECTIVE SERVICE

#### 5.6.1 HOW TO REQUEST YOUR HISTORIC IRP3B AND IRP3C

- 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:
  - <sup>D</sup> The user requesting the Tax Directive must be registered on eFiling and have an active profile.
  - <sup>a</sup> 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.
  - <sup>a</sup> Tax Practitioners must have been registered for eFiling and have an active account.
- If there is a Tax Directive stored on your eFiling profile, the Tax Directive will be displayed on your screen
- 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."
- Select the applicable Tax Directive to be displayed on your device by tapping on it. It will be displayed in a PDF format.



#### 5.7 ESTATE CASE SERVICE

#### 5.7.1 HOW TO REPORT A NEW ESTATE CASE

- To report a new estate case, select **Estates Case** icon displayed on the **Home Page**.
- To access the service via post login (Landing Page)
  - Tap on the hamburger menu option  $\equiv$  and select **Estate Case**.
  - The SARS Online Query System (SOQS) form will be displayed.
- 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.
- Once the supporting documents are at hand. Navigate as described and complete the SOQS form mandatory fields, upload, and submit the required supporting documentation.
- The mandatory fields include the Taxpayer (Estate) Details, the Requestor Details and the Requestor Additional Details.

| Done                                | AA Ĉ | Done                          | S AA  |
|-------------------------------------|------|-------------------------------|-------|
| South African Revenue Service       | ſY   | South African Revenue Service | Query |
| Query Type:                         |      | Query Type:                   |       |
| Report New Estate Case              | •    | Report New Estate Case        |       |
| Category:                           |      | Category:                     |       |
| Deceased                            |      | Deceased                      | ×     |
| Taxpayer (Estate) Details:<br>Name: |      | ∧ ∨                           | Done  |
|                                     |      |                               |       |
| Туре:                               |      | Deceased                      | ł     |
| Individual                          |      | Liquidation                   |       |

- 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.
- 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.
- The following services are offered via Lwazi your assistant (Ask a Question)
  - Request Tax Reference Number
  - Request Statement of Account
  - Request Refunds Status
  - Request Audit Status
  - Request Notice of Assessment
  - Request Call Back

- Note that authentication will be required when requesting certain services from SARS.
- Listed below is the required information for authentication purposes when using this service:
  - ID/ Passport number
  - Tax Reference Number (not applicable for a request for tax reference number)
  - Email address
  - Cell number

#### 5.7.2 REQUIREMENTS TO ACCESS THE CHATBOT

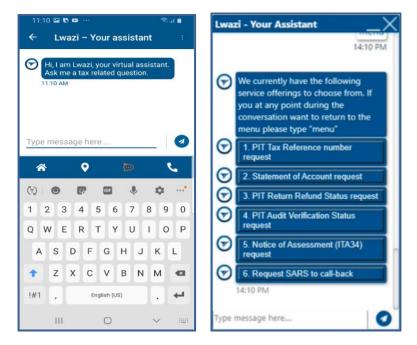
- The user must have access to the internet on their smart phone.
- The chat must be initiated using the <u>English</u> native language and must be related to the tax products offered by SARS.
  - Example: "What is my tax number"
  - Initiate the chat by typing and submitting a question

#### • Note the following:

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

#### 5.7.3 HOW TO NAVIGATE THE SARS MOBIAPP TO ACCESS

- Lwazi your assistant can be accessed on the pre- and post-login menu options of your SARS MobiApp screen.
- Tap on "Ask a Question" on the pre login screen or post login screen of the SARS MobiApp.
  - This will direct you to the Lwazi Your Assistant page
- To ask a question, type your question, then press
- Note the Service Offerings presented on your mobile device.



 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.

| Lwazi - Your Assistant   | _×       |
|--|----------|
|  | 14:29 PM |
| Please send the folio<br>to be authenticated:<br>Number          | -        |
| 14:29 PM   |          |
|  | 14:30 PM |
| Please send the follo<br>to be authenticated:<br>number or email |          |
| 14:30 PM   |          |
|  | 14:30 PM |
|  | Loading  |
| Type message here  | 0        |

- Note that if you respond incorrectly to any the questions, your tax service request will not be resolved.
- Alternatively, you can ask Lwazi, your virtual assistant, any tax related question, by texting a tax product related query.

#### 5.7.4 STEPS TO ACCESS THE CHATBOT

- Navigate to the Lwazi your assistant page on your mobile device.
  - The textbox will be displayed to enable the user to type in questions.

- 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.
  - Where you have selected a tax service on the Lwazi your assistant page, authentication questions will be displayed on your devise. Continue with the service request by responding accurately to the authentication questions displayed on your device.
  - Where you have been successfully authenticated, the requested service will be emailed to the user primary emails address
    - Note that Lwazi your assistant will notify you that the requested service has been emailed to their email address.
    - If you tax service request was for your Personal Income Tax Refund status, the status will be displayed on the Lwazi your assistant page.
  - 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.

## 6 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 -    | All           |
| External Guide  |               |

## 7 ACRONYMS AND DEFINITIONS

| AP          | Admin Penalty(ies)  |
|-------------|---|
| HYEF        | Help-you-eFile  |
| IT          | Income Tax  |
| ITR12       | Personal Income Tax Return (for Individuals)                    |
| IT34/ ITA34 | Notice of Assessment for Income Tax                             |
| IT150       | Notice of Registration  |
| ID          | South African Identity Number (issued by the Department of Home |
|             | Affairs)  |
| MOBIAPP     | SARS Mobile Application   |
| PIT         | Personal Income Tax   |
| RFC         | Request for Correction  |
| SARS        | South African Revenue Service                                   |
| SMS         | Short Message Service   |
| SOA         | Statement of Account  |
| SOQS        | SARS Online Query System (available on the SARS website)        |
| TCS         | Tax Compliance Status   |
| TRN         | Tax Reference Number  |

#### 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
- Visit your nearest SARS branch by making an appointment on the SARS website
- 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).