

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.



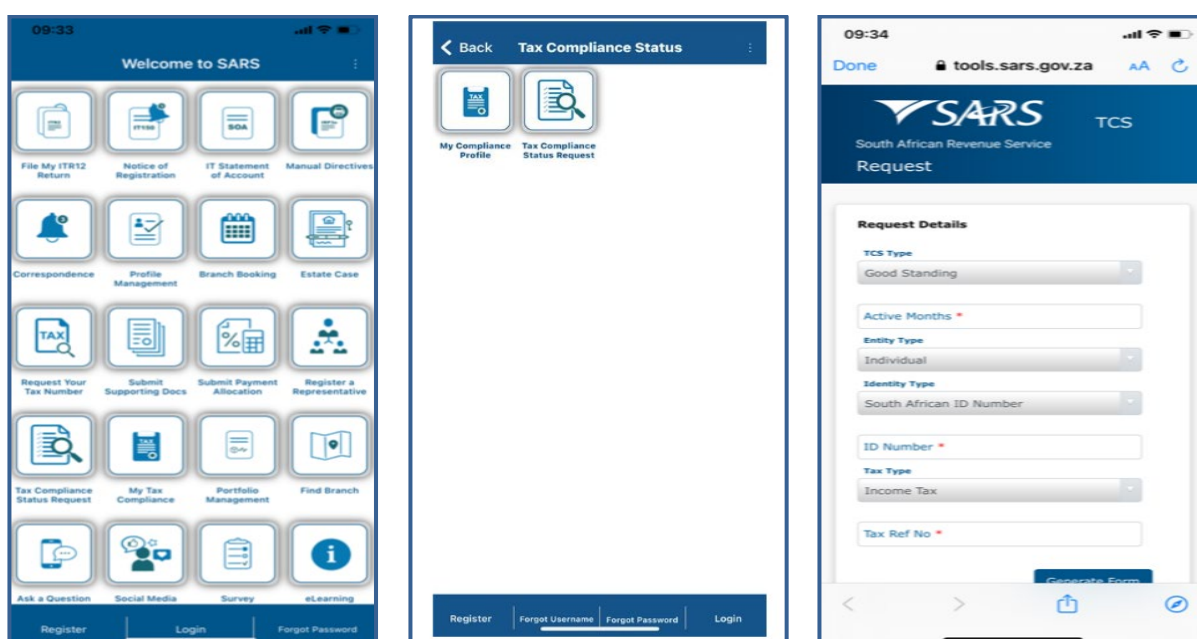
5 SERVICES OFFERED VIA THE SARS MOBIAPP

- 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 COMPLIANCE STATUS

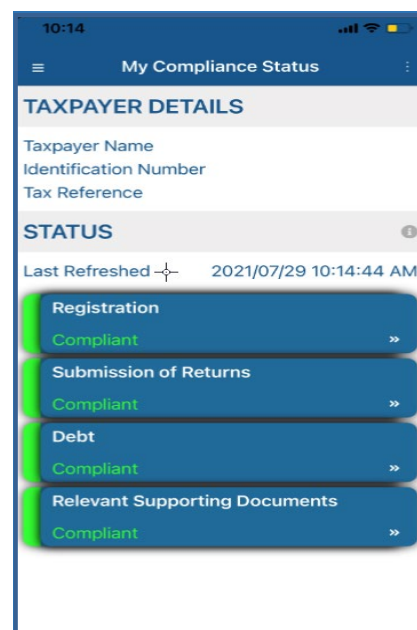
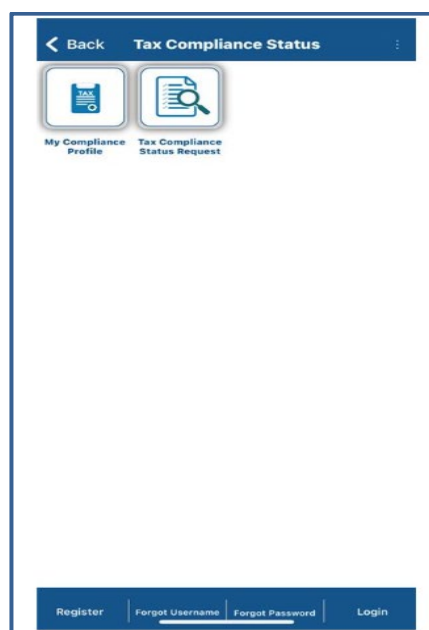
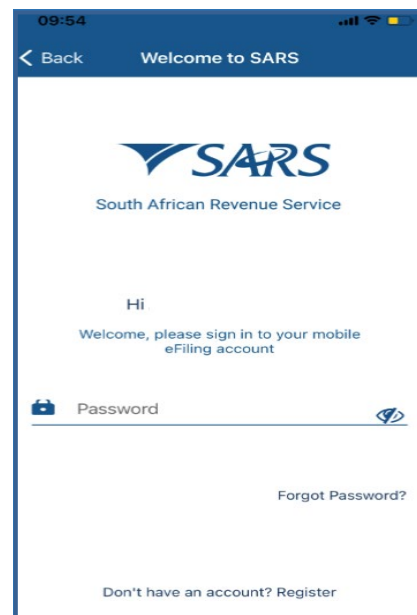
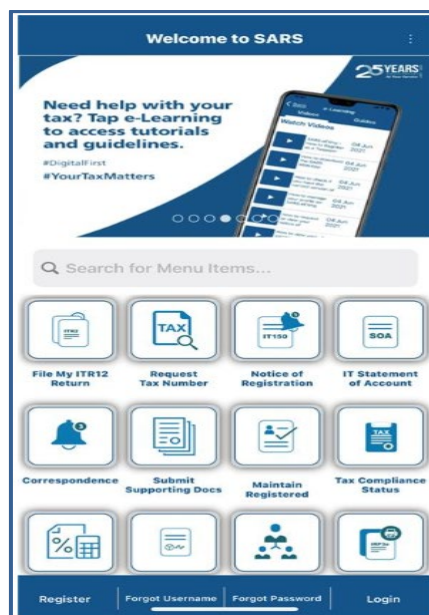
- The Tax Compliance Status (TSC) can be requested on the pre-login page (**Home Page**) by tapping on the **Tax Compliance Status** icon.
- You will be routed to the **Tax Compliance Status Page** which consists of the following request services
 - **My Compliance Profile** – Allows the user to view 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**



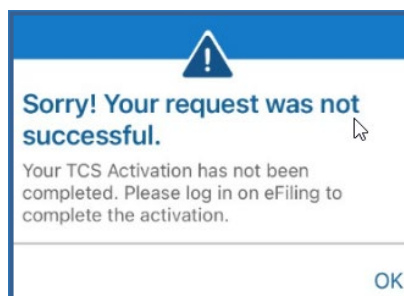
- Note that the form cannot be generated if the mandatory fields are not completed.
- Once completed successfully and your tax affairs are in order, an SMS/email will be sent through detailing your PIN.

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



- Where you have not completed your TCS activation on eFiling, this service will not be available.
 - 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.

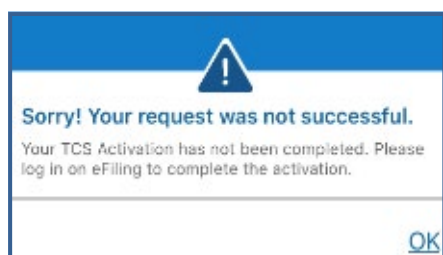
5.1.3 HOW TO VIEW YOUR TAX COMPLAINE STATUS

- 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**.



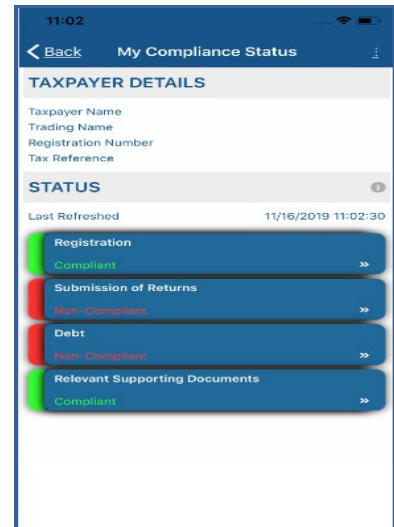
Note that to use this service, you must be activated for Tax Compliance Status (TCS) on eFiling.

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



- The following compliance status can be viewed on the SARS MobiApp.

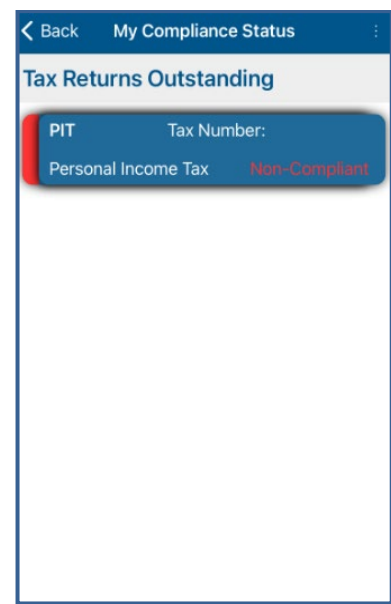
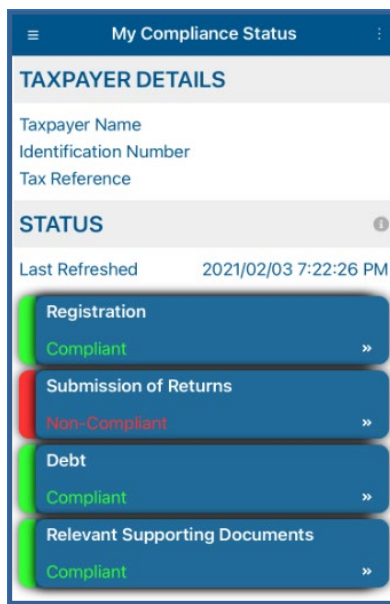
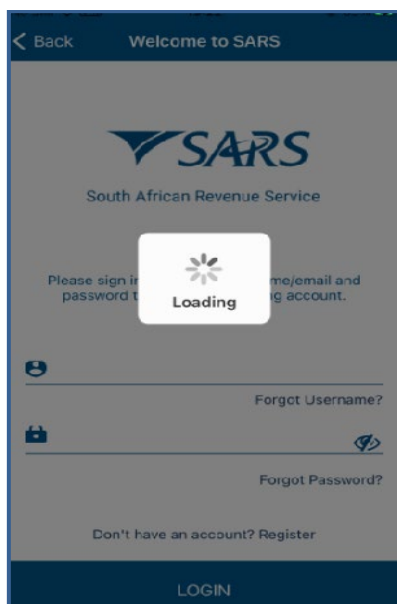
- Registration
- Submission of Returns
- Debt
- Relevant Supporting documents.



- 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.



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

Done AA

SARS Query
South African Revenue Service
System

Query Type:
Account Query

Category:
Payment Allocation

Title: *
Ms

Initials: *
LJ

Name: *

< > [Share] [Refresh]

SARS Query
South African Revenue Service
System

Name: *

Surname: *

Trading Name:

Email: *

Mobile: *

Telephone:

SARS Query
South African Revenue Service
System

Tax Type:
Income Tax

Tax No: *

Notes:
Testing bubble design preproduction

Submit Documents (0) Reset

Documents for Submission

Document
[Select]

Photo Library
Take Photo
Browse

2714222201

Notes:
Testing bubble design preproduction

Submit Documents (0) Reset

Documents for Submission

Document
[Select]

eNotice of Registration.pdf [Delete]

Close Upload Tips

2714222201

Notes:
Testing bubble design preproduction

Submit Documents (0) Reset

SARS Query
South African Revenue Service
System

Tax Type:
Income Tax

Tax No: *

Notes:
Testing

Submit Add Documents (1) Reset

Please capture the text shown in the image below

Captcha
EF5ZM
[Validate] [Listen] [Refresh] [Cancel]

Notes:
Testing bubble design preproduction

Submit Add Documents (1) Reset

Your Query is Being Processed

Please do not close your browser

Income Tax

Tax No: *

Notes:
Testing bubble design preproduction

Submit Add Documents (1) Reset

Done AA

Your Query is Being Processed

Please do not close your browser

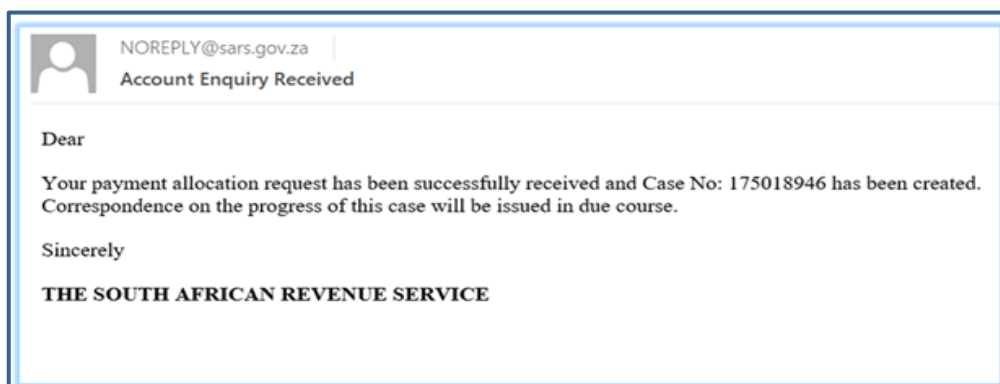
Thank you for your submission.
Correspondence will be issued shortly.
[Close]

Notes:
Testing bubble design preproduction


Submit Add Documents (1) Reset

< > [Share] [Refresh]

- A notification will be sent to the taxpayer via their preferred method of communication once successfully submitted.



5.2.5 HOW TO SUBMIT SUPPORTING DOCUMENTS

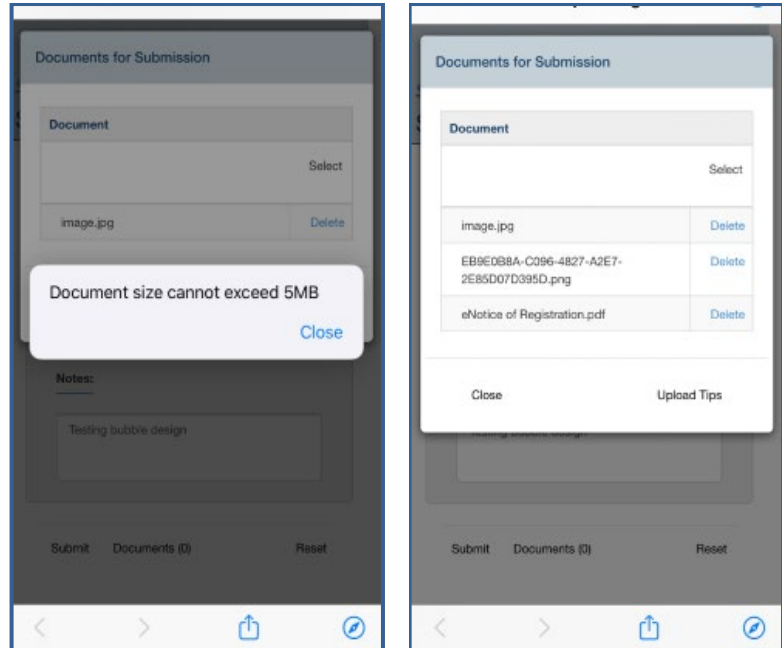
- SARS sends notifications to the taxpayer for their attention and action. Where the notification received requires the uploading of, proceed as follows.
- On the **Home** page
 - Tap on **Submit Supporting Documents**
- Alternatively, if on the post login, select the **Hamburger menu**  and select **Submit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

The screenshot shows the SARS Query System form. At the top, it says 'SARS Query' and 'South African Revenue Service System'. Below this, there is a 'Query Type:' section with a dropdown menu set to 'Supporting Document Upload'. There is a 'Case No:' field with a red asterisk. Below that, there is a 'Title:' field with a dropdown menu set to 'Ms', an 'Initials:' field with a red asterisk, and a 'Name:' field with a red asterisk. At the bottom, there are navigation arrows and a 'Done' button.

The screenshot shows the SARS Query System form with ID details. It includes a 'Telephone:' field, an 'ID Type:' dropdown menu set to 'South African ID Number', and an 'ID No:' field with a red asterisk. Below these fields, there is a 'Done' button. At the bottom, there is a list of document types: 'South African ID Number', 'Passport Number', 'Company Registration Number', and 'Trust Number'.

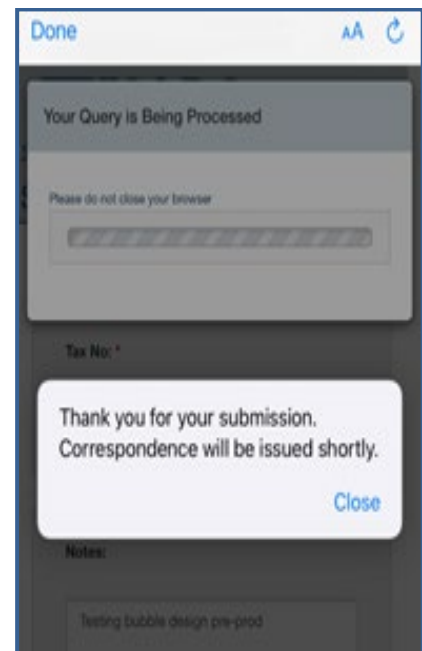
The screenshot shows the 'Documents for Submission' screen. It has a 'Document' section with a 'Select' button and a 'Delete' button. Below this, there is a 'Close' button and an 'Upload Tips' button. At the bottom, there is a 'Notes:' section with a text area containing 'Testing bubble design pre-prod'. At the very bottom, there are 'Submit', 'Documents (0)', and 'Reset' buttons.

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.




- 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.

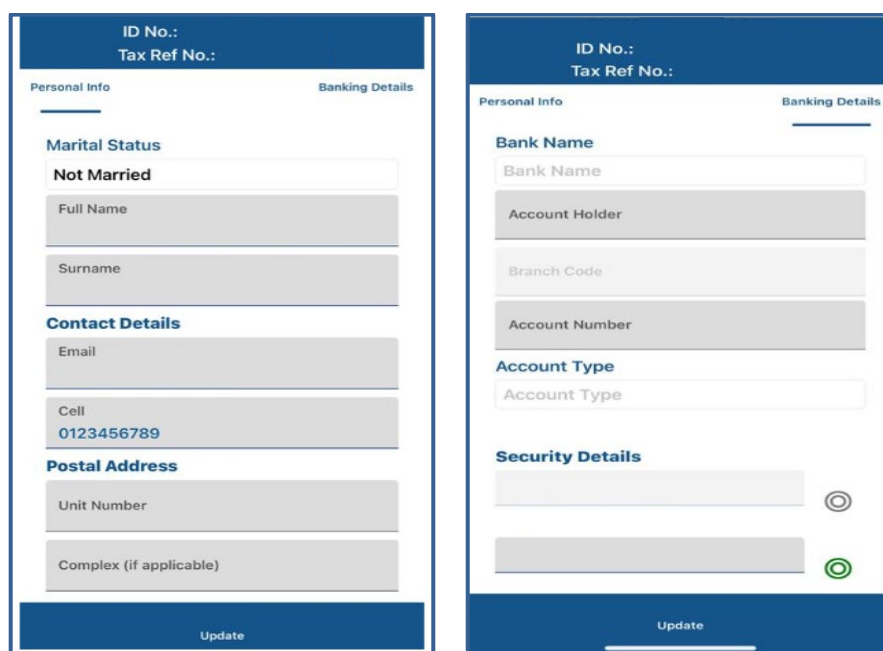
- Where the documents have been successfully attached, the following message will display on your device, indicating that the document was successfully submitted.



5.3 PROFILE MANAGEMENT SERVICE

5.3.1 HOW TO MANAGE YOUR PROFILE INFORMATION

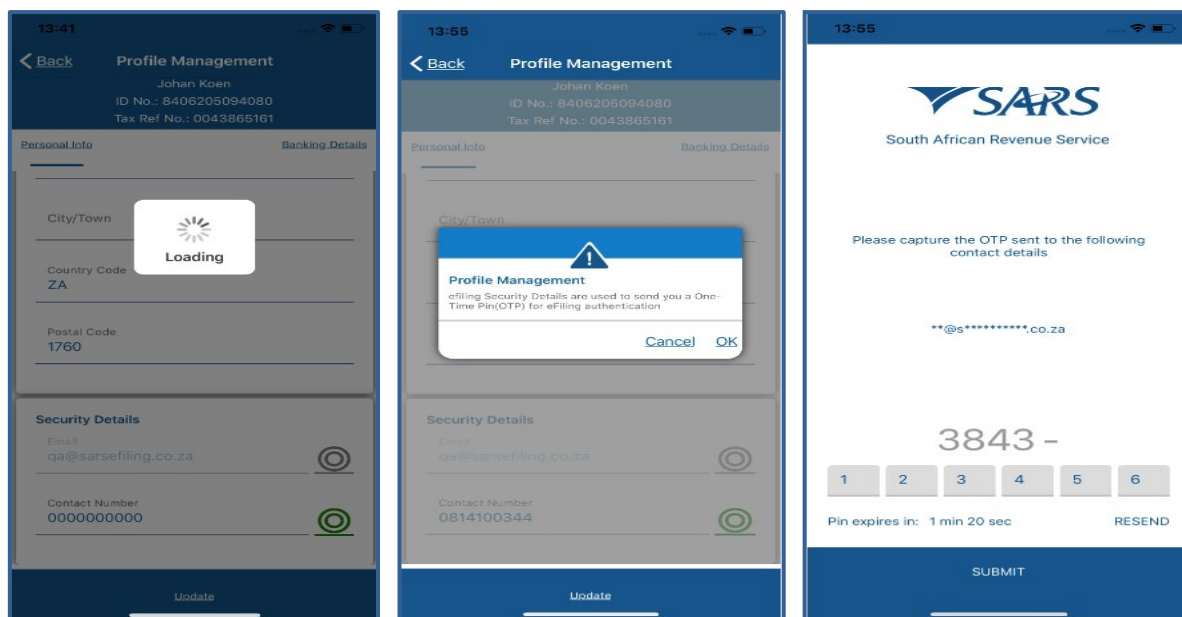
- Taxpayers and tax practitioners can update their profile information using the SARS MobiApp.
- The following profile information can either be viewed or updated:
 - Marital Status
 - Email address (if different from the security details)
 - Contact Number (if different from the security details)
 - Security details (cellphone and email)
 - Postal Address
 - Residential address
 - 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.



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

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

When updating your banking details or security details you will be prompted to complete the OTP for authentication purposes. Also note that the tax practitioner can update their clients profile information by accessing their client's profile as described in portfolio management service. Note however, they cannot update the security details of their clients.



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

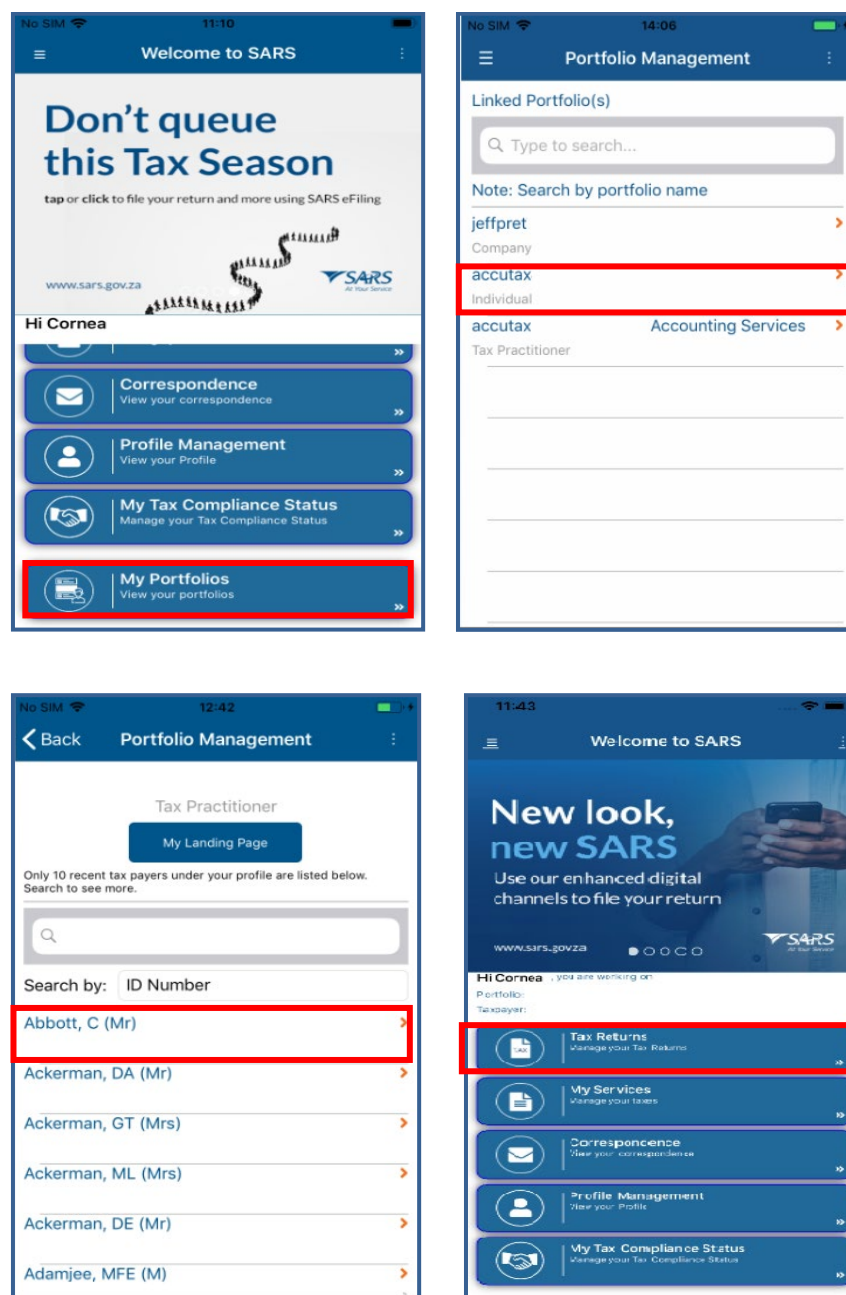
5.3.2 HOW TO ACCESS YOUR PORTFOLIOS

- 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.

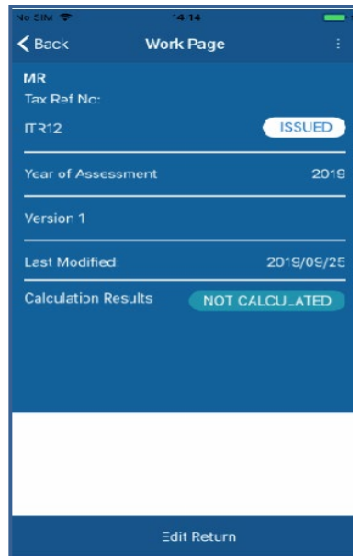
Note that the tax types that can be accessed via the SARS MobiApp are for Personal Income Tax (PIT) only.

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.

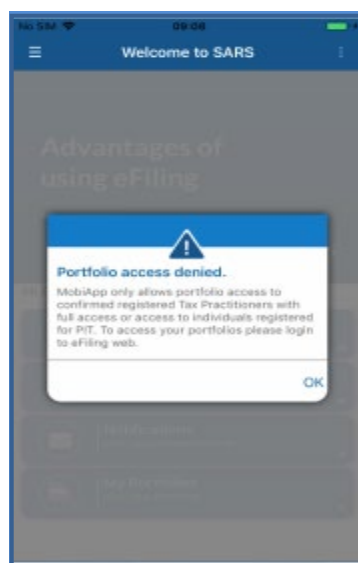
- Tap on the applicable taxpayer from your list of taxpayers grouped on your selected portfolio. This will display the **Landing** page of the applicable taxpayer.
- *Below is an example of how to access your PIT client via the MobiApp.*



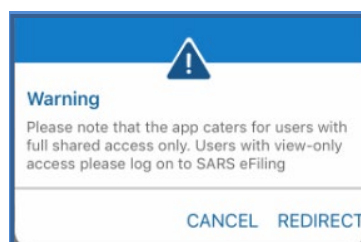
- Once you are on the **Landing** page of your PIT client, you can access their account and complete their Income Tax return accordingly.
 - Refer to the previous sections on the functionalities displayed on the **Work** page.



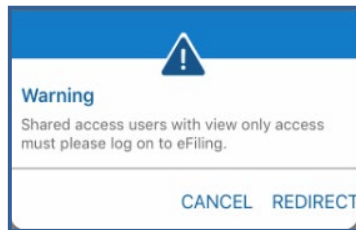
- Where you do not have access rights to complete the return of your client or you are not a registered tax practitioner, the following warning message will be displayed. Note the content on the message and tap on **Ok**.




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

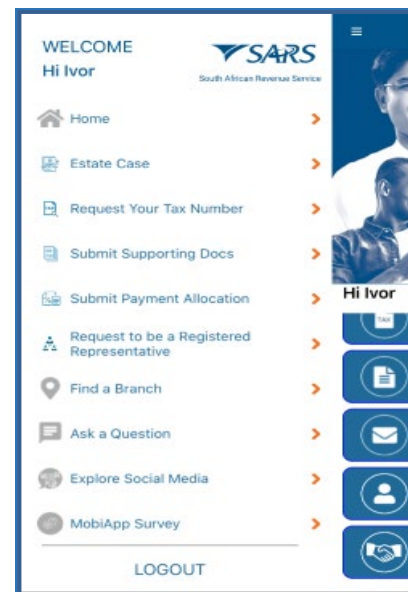


- Tax practitioners with shared access users, with view only access, will not be able to use the MobiApp to submit returns for their clients.**
- If a registered tax practitioner with view only attempts to open their client's profile, the following message will be displayed.





- 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 – will direct you to your Landing page
	Search Taxpayer – will direct you to the Portfolio Management page

5.3.3 HOW TO UPDATE YOUR REGISTERED TAX REPRESENTATIVE 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 mandatory fields.
 - Capture all the details for the entity and the registered representative

Done AA

SARS Query
South African Revenue Service
System

Query Type:
Request to be updated as the Registered Rep

Capacity:
Public Officer

Entity Details:
Name:
Leanne Graber
Type:
Individual

SARS Query
South African Revenue Service
System

Tax Type:
Income Tax

Tax No: *

ID Type:
South African ID Number

ID No: *

Representative Contact Details:

Title: *

SARS Query
South African Revenue Service
System

Representative Contact Details:

Title: *

Ms

Initials: *

PG

Name: *

Robyn

Surname: *

Eastes

EMail: *

Done AA

SARS Query
South African Revenue Service
System

ID Type:
South African ID Number

ID No: *

Tax Type:
Income Tax

Tax No: *

Submit Documents (0) Reset

Done AA

Documents for Submission

Document

Select

Photo Library

Take Photo

Browse

Tax Type:
Income Tax

Tax No: *

2809125146

Submit Documents (0) Reset

AA

Documents for Submission

Document

Select

F1F98465-4640-489F-A65A-AD705808668A.png

Delete

Close Document Requirements Upload Tip

Tax Type:
Income Tax

Tax No: *

2809125146

Submit Documents (0) Reset

Done AA

SARS Query
South African Revenue Service
System

South African ID Number

ID No: *

Tax Type:
Income Tax

Tax No: *

Submit Add Documents (1) Reset

Done AA

Your Query is Being Processed

Please do not close your browser

ID No: *

Tax Type:
Income Tax

Tax No: *

Submit Add Documents (1) Reset

Done AA

Your Query is Being Processed

Please do not close your browser

ID No: *

Thank you for your submission. Correspondence will be issued shortly.

Close

Tax No: *

Submit Add Documents (1) Reset

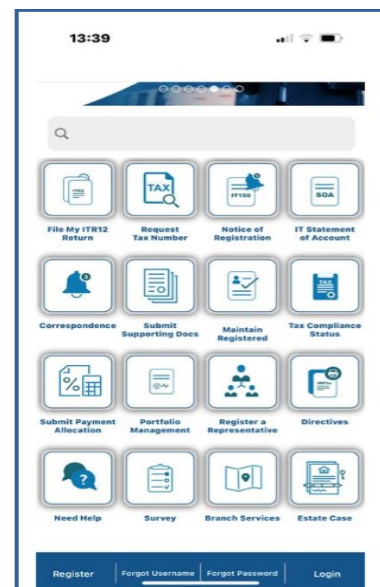
- Notification will be sent to taxpayer via their preferred method of communication:



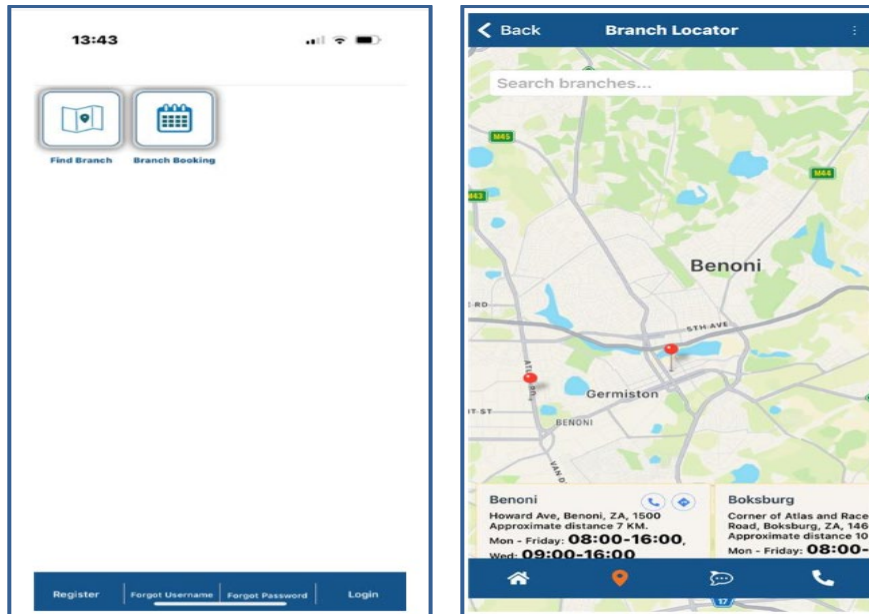
5.4 SARS BRANCH OFFICE LOCATION AND APPOINTMENT SERVICE

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**



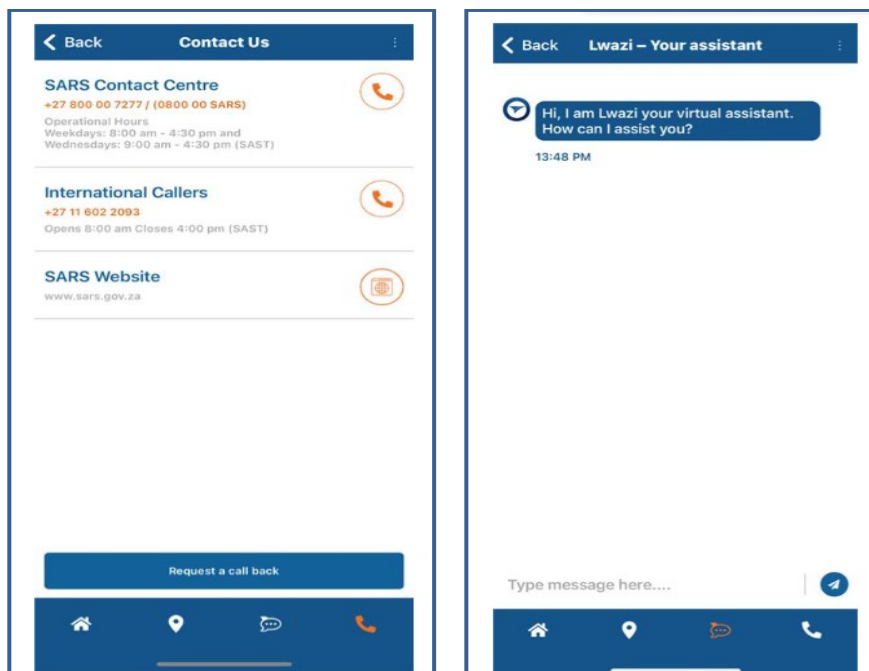
- This will direct you to two Service icons
 - **Find Branch** – This icon will direct you to the SARS Branch locator which will take you to your nearest Branch via google maps and list all the other SARS Branch closer to your location.
 - **Branch Booking** – This icon will open a form for you to complete for booking a virtual appointment with SARS.



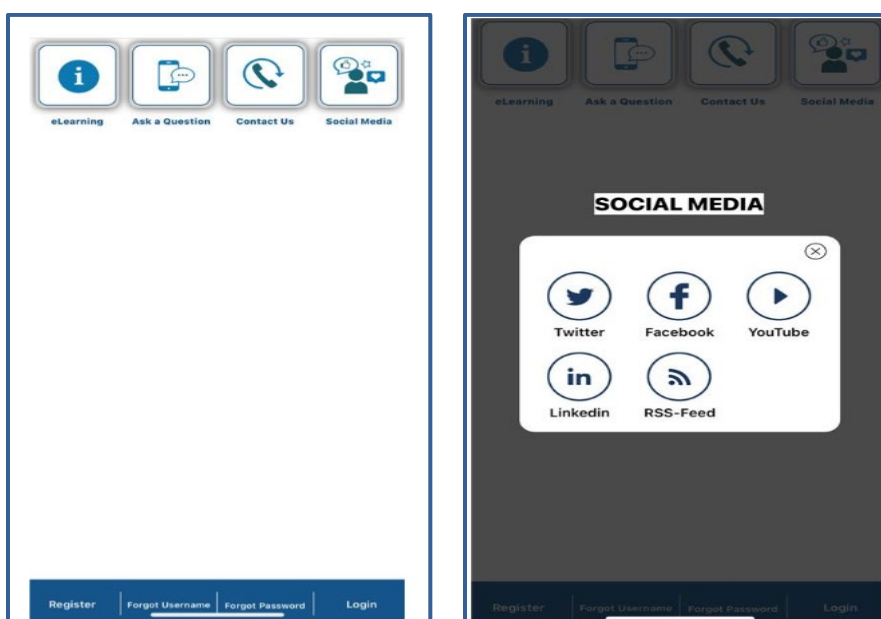
- Below is the service offered by the icons displayed below the Branch Locator Page

	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
	This will display the contact details of SARS

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

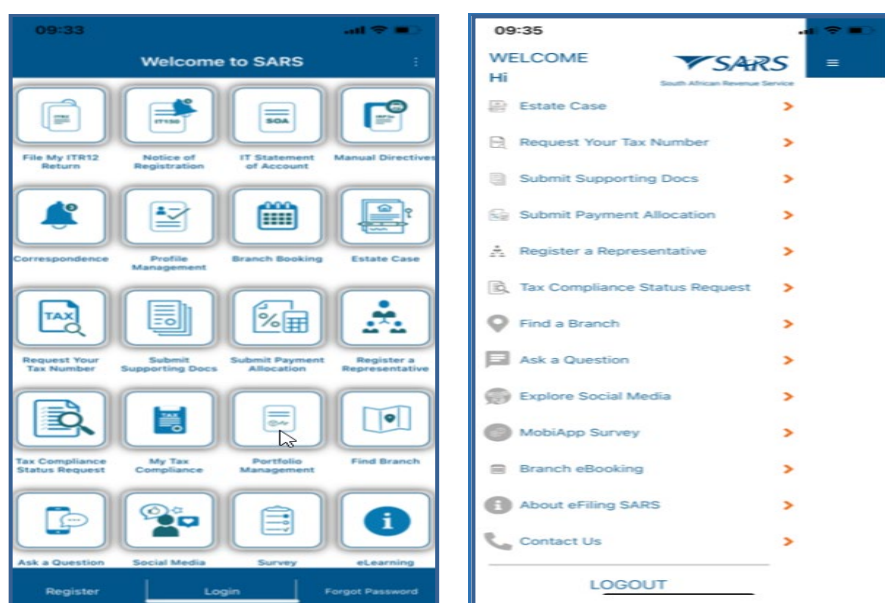



- On the **Home Page** note the following service icon and their use.
 - eLearning
 - This will display the SARS YouTube channel which contains all SARS related videos
 - This will also display all the relevant external
 - Ask a Question – This will direct you to the SARS Lwazi
 - Contact Us – This will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

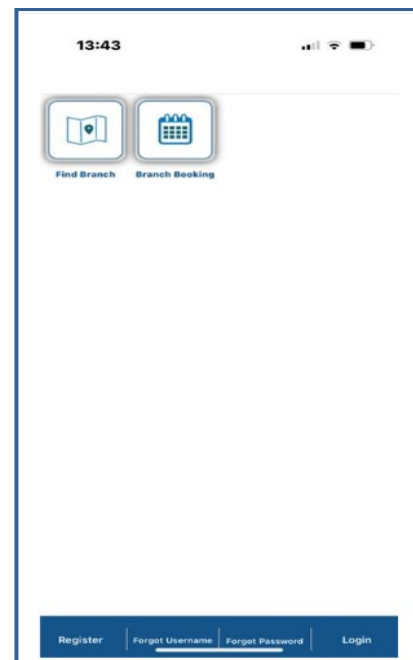


5.4.2 HOW TO BOOK A VIRTUAL OR BRANCH VISIT APPOINTMENT

- 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



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



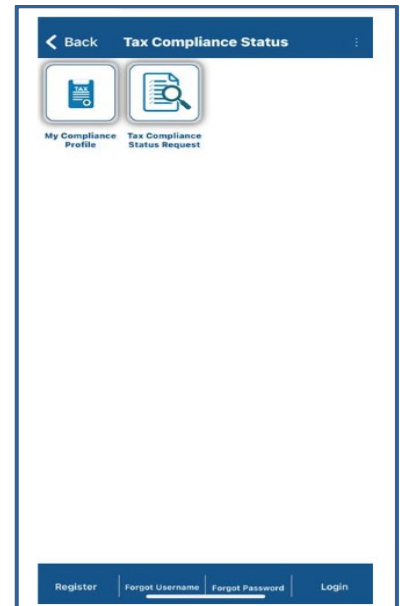
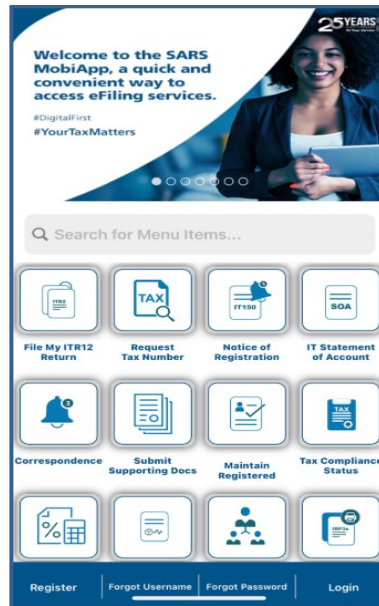
- Complete the form with the necessary details.
- For more information what is required on the form, refer to the following external guide:
 - GEN-BO-09-G01 – Book an appointment at a SARS branch – External Guide

- 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)

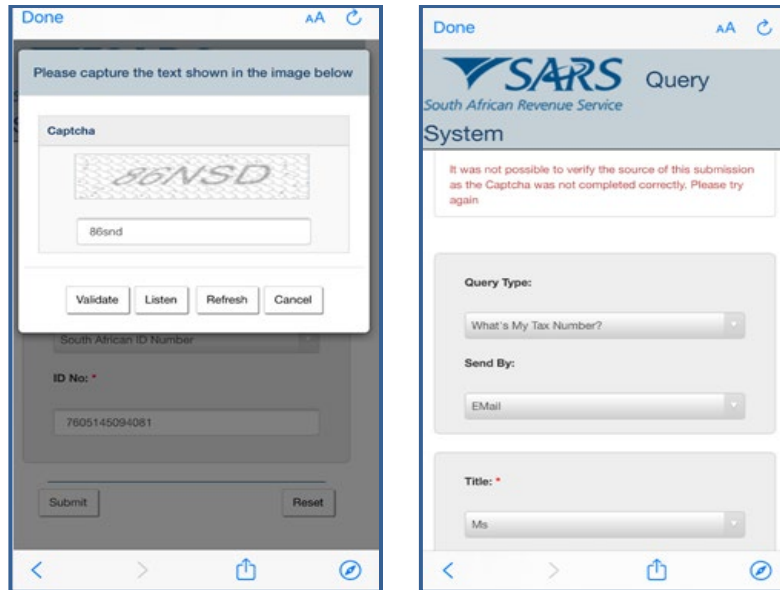
- On the **Home Page**



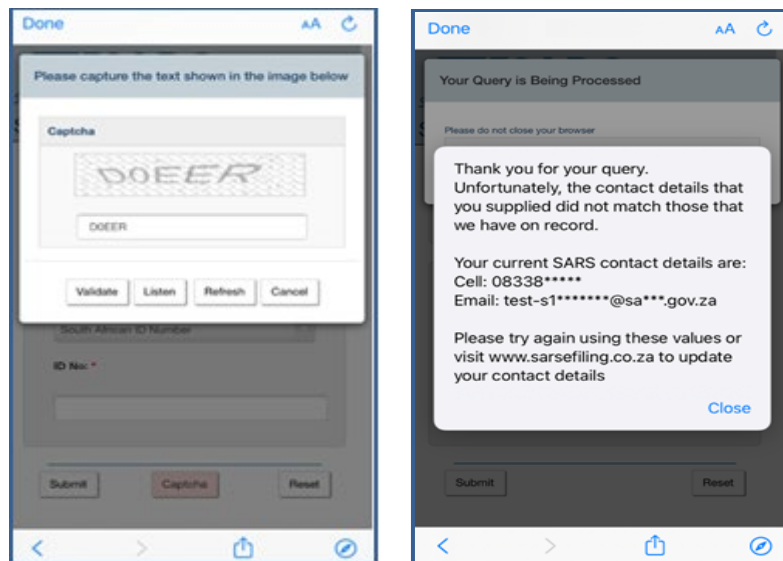
- The SOQS form will be displayed. Complete the form with the necessary mandatory fields.

A screenshot of the SARS Query System form. The title is 'SARS Query System'. The 'Query Type' dropdown is set to 'What's My Tax Number?'. The 'Send By' dropdown is set to 'Email'. There are fields for 'Title' (Ms), 'Initials' (N), and 'Name'.A screenshot of the SARS Query System form. The title is 'SARS Query System'. The 'ID Type' dropdown is set to 'South African ID Number'. Below this, there are checkboxes for 'South African ID Number', 'Passport Number', and 'Company Registration Number'. The 'Done' button is visible.A screenshot of the SARS Query System form. The title is 'SARS Query System'. The 'ID Type' dropdown is set to 'South African ID Number'. The 'ID No.' field is empty. There are 'Submit' and 'Reset' buttons at the bottom.

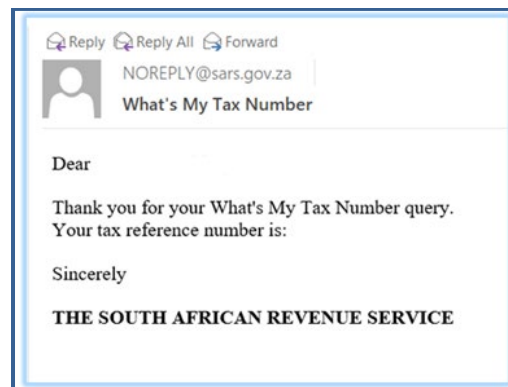
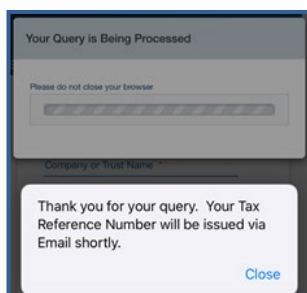
- The following error message will be displayed when the incorrect text is entered on the form:



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

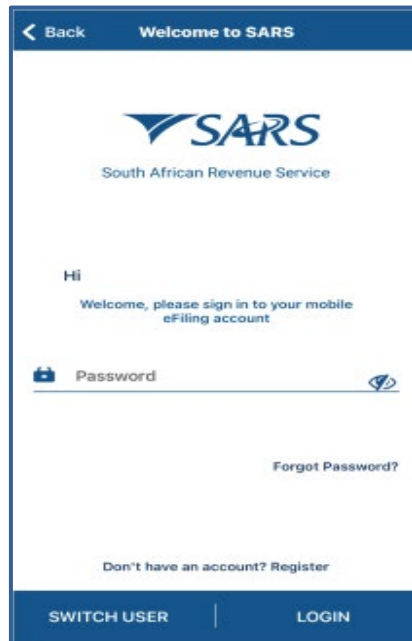
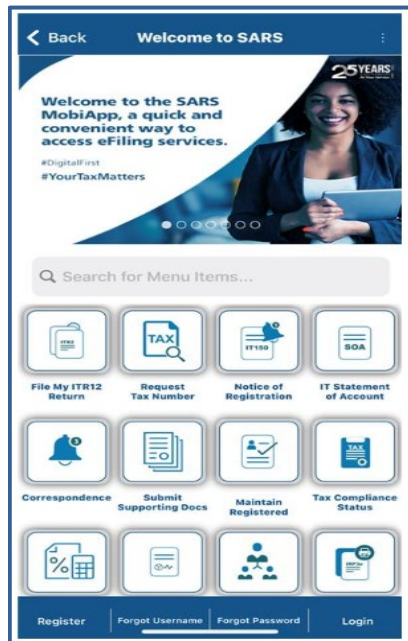


- The following message will be displayed when the data captured is correct and successfully validated.

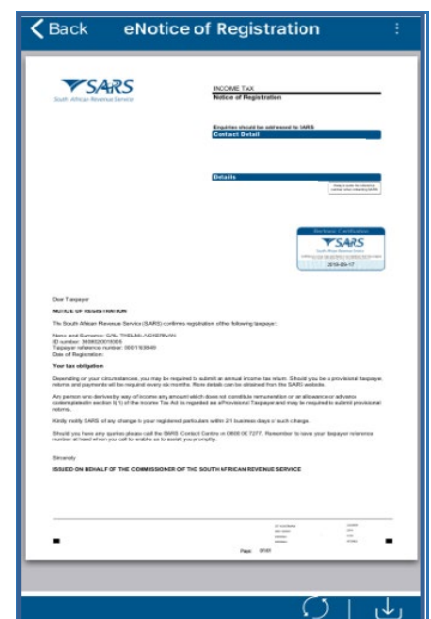
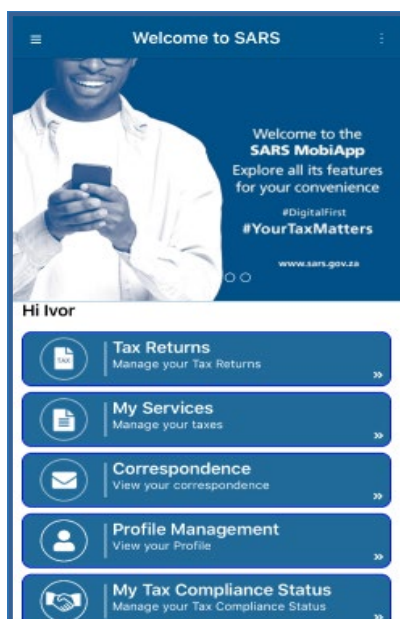


5.5.2 HOW TO REQUEST YOUR NOTICE OF REGISTRATION

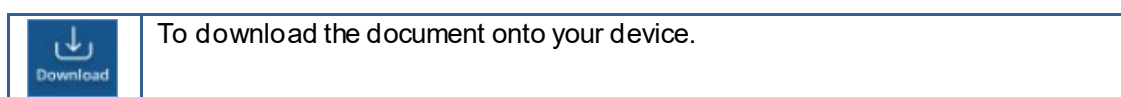
- If you have not logged in, on the **Home Page**
 - Tap on the **Notice of Registration** icon
 - This will display the **Login Page**.
 - Complete your password, then tap on **Login**



- 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.



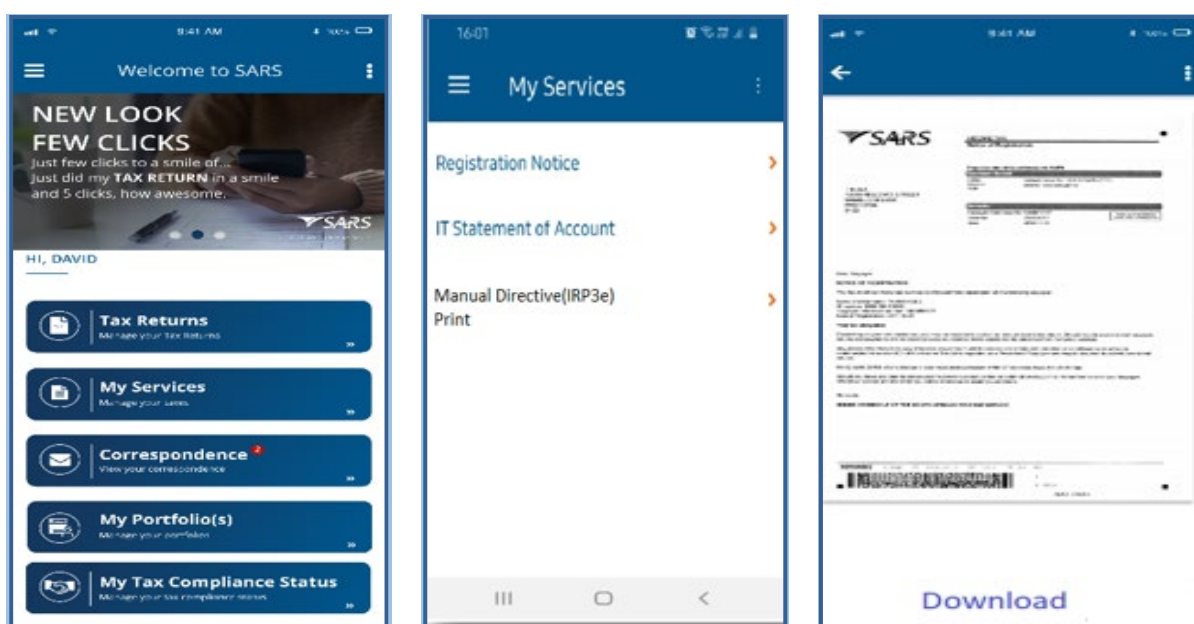
5.6 TAX DIRECTIVE SERVICE

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:
 - 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.

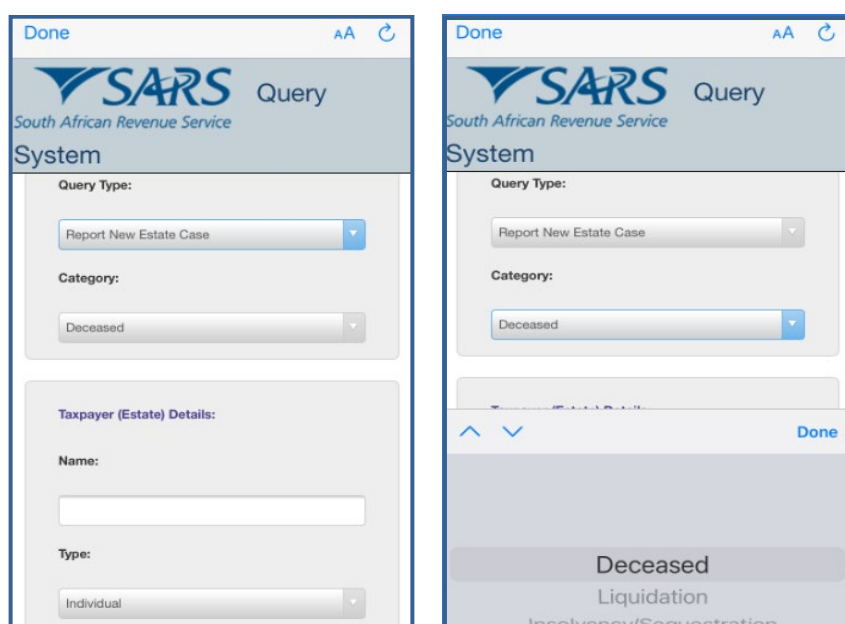
- If there is a Tax Directive stored on your eFiling profile, the Tax Directive will be displayed on your screen
- If there is no Tax directive stored on your eFiling profile, the following message will be displayed on your device: *“The Directive (IRP3e) request functionality is currently unavailable, 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 **Estate Case** icon displayed on the **Home Page**.
- To access the service via post login (**Landing Page**)
 - Tap on the hamburger menu option  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.



- 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

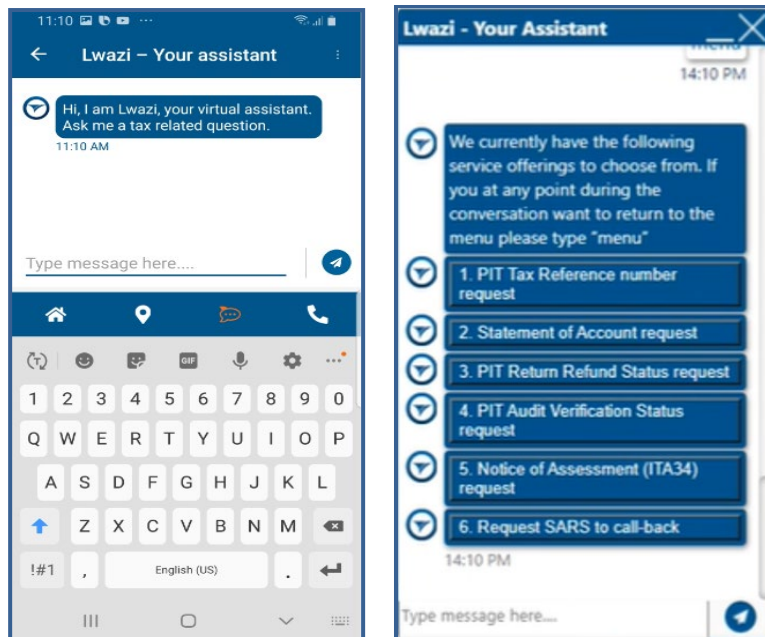
5.7.2 REQUIREMENTS TO ACCESS THE CHATBOT

- The user must have access to the internet on their smart phone.
- The chat must be initiated using the English 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

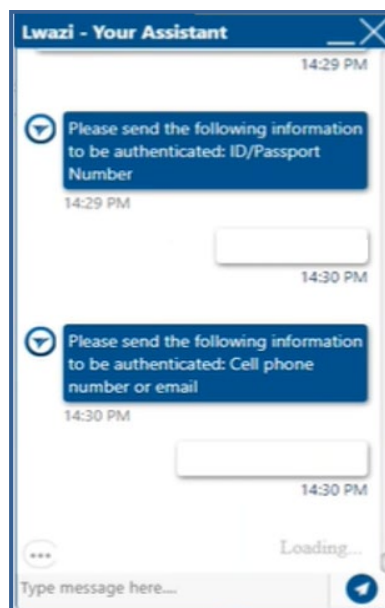
- **Note the following:**
 - The services offered on this platform only caters for Personal Income Tax (PIT) tax type and individuals.
 - To get quick response, upon greeting, steer the conversation directly to your tax related query. Do this by ensuring that your question is tax related.

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.



- 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 device. 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 your 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 – External Guide	All

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).