

EXTERNAL GUIDE

GUIDE TO SARS MOBILE  
TAX SERVICES

## REVISION HISTORY TABLE

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## 1 PURPOSE

- This document describes the tax services offered by SARS via your mobile device. These services can be accessed with or without data/airtime.
- 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

- Studies show that one third of the South African population utilize smart phones. Furthermore this figure is forecasted to increase over the coming years. In order to improve customer services and reduce human intervention, SARS has introduced added mobile tax services.
- Taxpayers can use their mobile devices to request tax services from SARS, either by using a smart phone or a standard mobile phone. Taxpayers who have smart phones and data can use the SARS MobiApp to access tax services or for compliance purposes such as submitting their Personal Income Tax (PIT) return. On the other hand, taxpayers who have standard mobile devices can use the SARS SMS tax services or engage with SARS telephonically.
- Additionally for the provision of effective and efficient online tax services, SARS has modernized their online system to include the latest technology which is available on the SARS MobiApp. Alternatively, those taxpayers with no internet connectivity or smart phones can now send an SMS to SARS to schedule an eBooking appointment with a SARS agent or to request specified tax services for free. The SARS toll free number (0800 00 7277) is also available for those taxpayers who prefer voice engagement in resolving their tax affairs.

## 3 MOBILE PROVISIONS TO ACCESS SARS TAX SERVICES

- Interaction with SARS to resolve your tax query can be initiated on your mobile device via the following mobile provisions -
  - Telephone
  - Online services
  - SMS
- Telephone conversations and the SMS provisions are featured in standard mobile devices. Smart devices on the other hand have additional features such as an ability to download applications which are accessible via the online store.
- The telephonic provision involves engaging with SARS by calling the SARS Contact Centre. The SARS Contact Centre has skilled agents who will assist you on your tax related queries. This service however is only available during working hours.
- The online application used to engage with SARS is the SARS MobiApp. The SARS MobiApp allows you to access tax related services 24 hours a day. It is a frontline application which you can access on the online stores and download to your mobile device. It can be used to access your eFiling profile and further request/resolve tax related queries.
- The SMS tax services is a new channel SARS has introduced to further engage with you. This channel involves you sending a SMS, which is text specific, to SARS for stipulated tax related queries. SARS will then engage with you to resolve your tax query by responding to your SMS request.

## 4 HOW TO REQUEST TAX SERVICES ON YOUR MOBILE DEVICE

### 4.1 SARS MOBIAPP

- The SARS MobiApp is a mobile application which taxpayers can install on their mobile devices and is compatible with numerous mobile devices. These devices include Android (version 5.0 or higher), iOS (version 10.0 or higher) operated devices or the Huawei app gallery.
- The SARS MobiApp caters for individual taxpayers and registered tax practitioners with full access for the submission of the Income Tax Return for Individuals, for the current year of assessment. Additionally the following other services are offered in this platform include:
  - Registration
  - Location of your nearest SARS Branch
  - Ask a Question
  - Request your TCS
  - SARS social media page links
  - View, edit, save or submit your Income Tax Return for Individuals
  - Update your IRP5 information
  - Calculate Tax Results
  - Upload supporting documents
  - Request your Notice of Registration
  - View your Statement of Account and other correspondence
  - Make a payment to SARS
  - SARS Online Query System
- The SARS MobiApp can also be used for compliance purposes which includes registration, submitting of Income Tax return (ITR12), making payments to your outstanding debt and tax services which include requesting your statement of account. Additionally auto assessment and estimates can also be accessed and finalized via this channel.
- For more information on this application and on how to resolve your tax related queries via this channel, please refer to the following external guide:
  - IT-AE-40-G02 - Guide to the SARS MobiApp - External Guide, which is available on the SARS Website [www.sars.gov.za](http://www.sars.gov.za)

### 4.2 SMS SERVICES

- SARS SMS channel involves sending an SMS to SARS requesting either an eBooking service which involves booking an appointment with a SARS agent, or requesting specified tax related services from SARS. SARS will respond to the received SMS by calling the taxpayer back (where an eBooking request was made) or respond by providing the taxpayer with the requested information of the tax service request.
- The SMS sent through to SARS must be worded and sent through in the following manner:
  - Complete the SMS text field with the applicable wording that is reserved for the specified service together with demographic information.
  - (**Note:** The specific wording is demonstrated below)
    - Example: If a taxpayer would like to receive the balance of his/her personal income tax account. The relevant SMS should be “BALANCE plus a “space” plus ID number/Passport number/Asylum Seeker number”
  - Send the completed text wording to the following number: **47277**
- Note: You will not be charged for the SMS
- The SMS self-help service request functionality is only be available to Individual Taxpayers for Personal Income Tax (PIT).

Things to note when using the SMS tax service option:

- For eBooking queries, the taxpayer/representative must be registered for Personal Income Tax (PIT)
  - Where the taxpayer/representative is not registered, kindly refer to the registration process on the SARS website [www.sars.gov.za](http://www.sars.gov.za)
- Where there are concerns regarding your registration status such as the duplication of your personal information ( e.g. tax reference or ID number), kindly follow the prompts on the SARS SMS response or alternatively call the SARS Contact Centre.
  - **Note:** This service will not be available until your registration matters are rectified.
- This service is not available for tax practitioners.
- Ensure that the SMS you send contains the relevant amount of detail (i.e. mandatory ID/passport/Asylum number). If the SMS contains missing or incorrect details your tax service request will not be resolved.

#### 4.2.1 TAX SERVICES OFFERED VIA SMS

- The tax services offered to taxpayers via SMS includes:
  - Confirmation whether you should submit a Personal Income Tax (PIT) return
    - **<File>** Space **<ID number/Passport number/Asylum Seeker number>**
  - Request the issuing of your Notice of Registration (IT150)
    - **<TRN>** Space **<ID number/Passport number/Asylum Seeker number>**
  - Request account related queries (balance statements) and your Statement of Account (SOA)
    - **<Balance>** Space **<ID number/Passport number/Asylum Seeker number>**
  - Request an eBooking appointment
    - **<Booking>** Space **<ID number/Passport number/Asylum Seeker number>**
- Note that in response authentication will be performed and SARS will respond with the requested information in the most appropriate channel(s), which includes SMS and/ or email.

#### 4.2.2 STEPS TO REQUEST SMS TAX SERVICES

- Submit an SMS to SARS on the specific service you require.

Note that the SMS must contain a word that is reserved for each service as well as demographic information required

Example is if you would like to receive your balance account, then SMS "BALANCE plus a "space" plus ID number/Passport number/ Asylum Seeker number"

- Confirmation whether you should submit your Personal Income tax (PIT) tax return
  - **<File>** Space **<ID number/Passport number/Asylum Seeker number>**
- Request the issuing of your IT150 (Tax Reference Number)
  - **<TRN>** Space **<ID number/Passport number/Asylum Seeker number>**
- Request Account related queries (balance statements) and your Statement of the Account (SOA)
  - **<Balance>** Space **<ID number/Passport number/Asylum Seeker number>**
- Request an eBooking appointment
  - **<Booking>** Space **<ID number/Passport number/Asylum Seeker number>**

#### 4.2.3 STEPS TO REQUEST AN eBOOKING APPOINTMENT VIA SMS

- The taxpayer can send an SMS to SARS requesting an eBooking appointment. SARS will respond by calling the taxpayer back to book an appointment on their behalf.
- Below are the steps to follow when requesting this service.
  - Send an SMS to SARS by texting the following message:
    - **<Booking>** Space **<ID number/Passport number/ Asylum number>**
    - e.g. Booking 8301011234080 or Booking A029666601
  - Send the SMS to **47277**
- If the information sent through is correct
  - A response SMS will be sent confirming receipt of SMS
  - A SARS agent will call back and book an appointment for you

Note that for more information on what will be required when booking an appointment refer to the following external guide: GEN-BO-09-G01 - Book an Appointment at a SARS Branch - External Guide available on the SARS website [www.sars.gov.za](http://www.sars.gov.za)

#### 4.2.4 SMS KEYWORD TO USE WHEN REQUESTING A TAX SERVICE

- As mentioned above, when requesting a tax service, it is essential to note the keyword. The keyword allows SARS to respond to your specific tax query requirement. This section list keywords that should use to generate a response from SARS.
- To request your Tax Reference Number – TRN, the following keyword should be used:
  - TRN

Example:

- **<TRN>** Space **<ID number/Passport number/ Asylum Seeker number>**
  - e.g. TRN 8301011234080 or TRN A029666601

- To request a Return Confirmation – RCT (This implies confirmation whether you should submit your Income Tax return) , The following keyword should be used;
  - File

Example:

- **<File>** Space **<ID number/Passport number/ Asylum Seeker number>**
  - e.g. File 8301011234080 or File A029666601

- To request your Account Balance, (This implies to determine the balance of your personal income tax account), the following keyword should be used:
  - Balance

Example:

- **<Balance>** Space **<ID number/Passport number/ Asylum Seeker number>**
  - e.g. Balance 8301011234080 or Balance A029666601

- To request an eBooking appointment, the following keyword should be used:
  - Booking

Example:

- <Booking> Space <ID number/Passport number/ Asylum Seeker number>
  - e.g. Booking 8301011234080 or Booking A029666601

## 5 CROSS REFERENCES

DOCUMENT #	DOCUMENT TITLE	APPLICABILITY
IT-AE-40-G02	Guide to the SARS MobiApp - External	All
GEN-ELEC-18-G01	How to Register for eFiling and Manage Your User Profile - External	All
GEN-BO-09-G01	Book an Appointment at a SARS Branch - External Guide	All

## 6 ACRONYMS AND DEFINITIONS

AP	Admin Penalty(ies)
ID	South African Identity Number (issued by the Department of Home Affairs)
IT150	Notice of Registration
IT34/ ITA34	Notice of Assessment for Income Tax
PIT	Personal Income Tax
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](http://www.sars.gov.za)
- Visit your nearest SARS branch
- Contact your own tax advisor/tax practitioner
- If calling from within South Africa, contact the SARS Contact Centre on 0800 00 SARS (7277)
- If calling from outside South Africa, contact the SARS Contact Centre on +27 11 602 2093 (only between 8am and 4pm South African time).