

## EXTERNAL GUIDE

# BOOK AN APPOINTMENT AT A SARS BRANCH

## REVISION HISTORY TABLE

Date	Version	Description
08-05-2020	0	Implementation of new service to book an online appointment at a SARS branch
06-06-2020	1	New fields added, booking using foreign passport number, allow additional tax types, error messages
21-08-2020	2	Booking schedule amended from 7 days to 60 days in advance
01-09-2020	3	Video and Voice appointments, ITR12 bookings via voice only, remove scanning option from list of reasons, allocate case number, upload supporting documents
21-09-2020	4	Changed Voice to Telephonic Engagement, Type of client amended, supporting documents
08-02-2021	5	Removed reference to toll-free number
12-03-2021	6	Authentication documents
1 July 2021	7	Updates/additions: Appointment Information, Cancel appointment, SMS, SMME
20 Aug 2021	8	Remove requirement for 'certified copies'; remove video appointment option for individuals; pop-up branches/MTU; reminders
16 Sep 2021	9	Remove 'affidavit' for authentication

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## 1 PURPOSE

The purpose of this document is to assist registered taxpayers, representatives and tax practitioners to book a virtual appointment with SARS using the online eBooking form.

This guide, in its design, development, implementation and review phases, is guided and underpinned by the SARS strategic objectives, the SARS Intent, and the SARS values, code of conduct and applicable legislation. Should any aspect of this guide be in conflict with the applicable legislation the legislation will take precedence.

## 2 INTRODUCTION

- The SARS Branch eBooking system enables you to request a video or telephonic engagement with SARS if you require our assistance. This is part of our drive to improve our service to you.
  - If you choose a **telephonic** engagement, a SARS official will call you on the date and time that you choose on the booking form.
  - If you choose a **video** engagement (applicable to trusts, companies, representatives and tax practitioners only), a SARS official will email a link to you to join a video meeting on the date and time that you choose on the booking form. Microsoft Teams is the preferred video conferencing tool used by SARS.
- Depending on demand, temporary pop-up branches and Mobile Tax Units (MTU's) will be created for specific dates and durations to service taxpayers at venues such as malls, shopping centres, etc. The temporary pop-up branches and MTU's will cater for scheduled walk-ins (i.e. ebooking appointments) and unscheduled walk-ins.
- Note: if you do not have access to the internet you can use one of the following options to arrange an appointment with SARS
  - Call the SARS Contact Centre on 0800 00 7277. A SARS official will book the appointment on your behalf.
  - Send an SMS to **47277** (iSARS) with the information and format described below:
    - **BOOKING (Space) Your ID number or Passport number or Asylum number**
    - E.g. Booking 1234567890123 OR Booking A029999998
    - A SARS official will call you back to book the appointment on your behalf
    - This SMS service is only available to taxpayers/registered representatives who are registered for Personal Income Tax (PIT). This service is not available to tax practitioners.

## 3 IMPORTANT INFORMATION TO NOTE WHEN USING THIS SERVICE

- The eBooking system excludes appointments to visit a branch office and engage with a SARS consultant in person. This is intended to support social distancing and to reduce the number of walk-ins at SARS branches
  - Branch visits will be allowed in exceptional circumstances.
  - Each request will be evaluated and the appointment for a branch visit will be booked internally at the discretion of a SARS official.
- You must have a valid tax reference number to make a booking.
  - The following will be accepted:
    - Personal income tax reference numbers
    - Company income tax reference number
    - PAYE reference number

- VAT reference number
  - If you do not have a personal income tax number, please [register as an eFiler](#) and SARS will automatically register you for personal income tax and allocate a tax reference number.
- Bookings using customs and excise client numbers are not accommodated at this stage.
- Please ensure that you capture all personal particulars exactly as registered with SARS. You will only be allowed to continue with the ebooking process once we have verified that you are:
  - A registered individual taxpayer; or
  - A registered and active tax practitioner; or
  - The registered representative of the company/trust
- Non-South African's will be allowed to make a booking using foreign passport numbers. South African citizens must use their identity numbers when making a booking.
- Appointments cannot be made for a date and time that:
  - Is more than 60 days in advance from the current date; or
  - Earlier than 48 hours from the current date; or
  - Falls on a public holiday; or
  - Falls on a weekend (unless otherwise stated by SARS).
- The online calendar will display available appointments for the next 60 days. You can only book one appointment per week. This is to ensure that all taxpayers get a fair chance to make an eBooking.
- There may be instances where the timeslot that is most convenient for you is not available. This will occur when that slot has already been fully booked by other taxpayers.
- There may be instances where **no** timeslots will display. This will occur when the SARS branch you have selected is fully booked for that day.
- The following appointment methods are available for you to interact with SARS:
  - Video – this option is only applicable to:
    - Tax practitioners
    - Company/trust/entity representatives
  - Telephonic Engagement - this option is applicable to:
    - Individuals
    - Tax practitioners (for ITR12 return submission only)
  - Walk-ins at temporary Pop-up Branches and Mobile Tax Units
- Note: If you book a video or telephonic engagement with us, **we will contact you**. You are not required to walk into a branch office.
- Assistance with submission of individual income tax returns (ITR12s) are limited to telephonic engagements only.
- For video appointments, you must have internet connectivity and a device with a camera (e.g. a smartphone with a camera or computer with a webcam) to engage with the SARS official.
- An 'eBooking case number' will be allocated for each appointment made.
- Prior to your confirmed appointment, please use the '[SARS Online Query System](#)' to upload all supporting documents related to the reason for your appointment

- To view the type of supporting documents applicable to the various appointment reasons:
  - Log on to the SARS website
  - Select 'Contact Us'
  - Select 'Make an Appointment'
  - Click on the link 'Please see the required supporting documents for your specific appointment here'
  - **Please note:** this list is not exhaustive. SARS may request additional information from you.
- To upload supporting documents:
  - Log on to the SARS website
  - Select 'Contact Us'
  - Select 'Submit Supporting Documents'
  - Complete the taxpayer information in the applicable fields
  - In the 'case number' field insert the eBooking case number that you received for your appointment.
- Note: You are also required to upload the following additional information for authentication. This is intended for your protection and will help us verify if we are transacting with the authorised person on the day of the virtual appointment:

Individuals	Tax Practitioners	Representatives
Copy of ID	<ul style="list-style-type: none"> <li>• Copy of the tax practitioner's ID</li> <li>• Copy of the taxpayer's ID</li> <li>• Power of attorney</li> </ul>	<ul style="list-style-type: none"> <li>• Copy of the representative's ID</li> <li>• Copy of the taxpayer's ID</li> <li>• Copy of power of attorney</li> </ul>

- The Requestor can cancel a booking prior to the appointment date and time and request a new appointment date and time.
- A day before your appointment we will send you an email/SMS just to remind you of the appointment you scheduled.
- On the day of your appointment:
  - Ensure that you have all the necessary documentation with you
  - If you booked an appointment for a telephonic engagement, ensure that you are available to answer the call from SARS at the time you selected
  - If you booked a video appointment, ensure that you join the video meeting at the time you selected
  - If you fail to honour the booking, you will forfeit your appointment and will have to make a new eBooking
  - You will be assisted by the next available SARS consultant. You will not be able to request assistance from a specific consultant.
- This service is compatible with the following browsers:
  - Chrome
  - Internet Explorer – IE11 or higher versions
  - FireFox
  - Edge
  - Safari

## 4 EASY STEPS TO BOOK AN APPOINTMENT

- You can also access eBooking form via:
  - eFiling
  - The SARS Mobi App
  - The SARS website ([www.sars.gov.za](http://www.sars.gov.za)). Select the following:
    - 'Contact Us'

- 'Make an Appointment'
  - Click on the link to open the booking form.
- Follow the steps described in the sections below to complete the form.

## 4.1 REQUESTER INFORMATION

- The eBooking form will be customised according to the options selected in this section.
  - **'Individual':**
    - Indicate if you are an individual making a booking for yourself
  - **'Company/Trust/Entity Representative':**
    - Indicate if you are the registered representative making a booking on behalf of a company or trust or individual
  - **'Tax Practitioner':**
    - Indicate if you are a registered tax practitioner making a booking on behalf of a company, trust or individual
  - **'SMME':**
    - This field will be activated if the requestor is a 'Tax Practitioner' or 'Company/Trust/Entity Representative'
    - Select 'Yes' for this field if the entity you represent is a Small, Medium, and Micro Enterprise (SMME)
  - The **'Would you like to'** field gives you the option to make a new appointment or cancel an existing appointment prior to your appointment date.
    - Please select an option to activate the ['Appointment Information'](#) section of the form.
- **Note:** To remove an option/answer that you selected in this section, please click on the field again and the system will clear it.

**SARS** SARS Branch eBooking System  
South African Revenue Service

**\* Mandatory Fields**

**Requester Information**

Individual* ⓘ	<input type="checkbox"/>	Yes
Company / Trust / Entity Representative* ⓘ	<input type="checkbox"/>	Yes
Tax Practitioner* ⓘ	<input type="checkbox"/>	Yes
SMME* ⓘ	<input type="checkbox"/>	Yes
Would you like to* ⓘ	<input type="checkbox"/> Make a new appointment <input type="checkbox"/> Cancel an appointment	

- Note: The way in which the fields are completed on the form will differ for individuals, registered representatives and tax practitioners (see steps below).

## 4.2 INDIVIDUALS

- If you are a **REGISTERED INDIVIDUAL** taxpayer, complete the following personal particulars:

- 'Taxpayer Name'
- 'Taxpayer Surname'
- 'Taxpayer Tax Reference Number'
- 'Taxpayer ID number'
  - If you are a South African insert your SA identity number in this field
- 'Taxpayer Passport Number'
  - If you are not a South African, insert your foreign passport number in this field
  - A permit number may also be inserted in this field
- 'Taxpayer Passport Date of Issue'
  - This field will be activated when a passport number/permit number is entered
  - Click on the dropdown arrow and select the passport date of issue/ permit date of issue from the online calendar
- 'Taxpayer Passport Country of Issue'
  - This field will be activated when a passport number/permit number is entered
  - Insert the country of issue
- 'Email Address'
  - If you complete this field a booking confirmation will be emailed to this address
  - Note: This field will become mandatory if a mobile number is not provided.
- 'Mobile number'
  - If you complete this field a booking confirmation will be sent via SMS to this number
  - Note: This field will become mandatory if an email address is not provided.
- 'Contact Number'

Taxpayer Information	
Taxpayer Name*	JOHN
Taxpayer Surname*	TAXPAYER
Taxpayer Tax Reference Number* ⓘ	0011224455
Taxpayer ID Number* ⓘ	
Taxpayer Passport Number*	JT123456
Taxpayer Passport Date of Issue*	2000/01/01
Taxpayer Passport Country of Issue* ⓘ	AUSTRALIA
Email Address* ⓘ	jtaxpayer@sars.gov.za
Mobile Number*	
Contact Number*	012 4224000

### 4.3 REPRESENTATIVES

- If you are the registered **COMPANY/TRUST/ENTITY REPRESENTATIVE**, complete the following particulars:

#### REPRESENTATIVE INFORMATION

- 'Represented Company / Trust / Entity Name'
  - Insert the name of the entity/person on behalf of whom you are acting (e.g. deceased estate, non-profit organisation)
- 'Representative Name'
  - Insert your name in this field



- 'Representative Surname'
  - Insert your surname in this field
- 'Representative ID number'
  - Insert your South African ID number in this field
- 'Representative Passport Number'
  - If you are not a South African, insert your foreign passport number in this field.
- 'Representative Passport Date of Issue'
  - This field will be activated when a passport number is entered
  - Click on the dropdown arrow and select the passport date of issue from the online calendar
- 'Representative Passport Country of Issue'
  - This field will be activated when a passport number is entered
  - Insert the country of issue

## **TAXPAYER INFORMATION**

- 'Taxpayer Name'
  - If you are representing an individual taxpayer, insert the taxpayer's name in this field.
  - If you are representing a company or trust, insert your name in this field
- 'Taxpayer Surname'
  - If you are representing an individual taxpayer, insert the taxpayer's surname in this field.
  - If you are representing a company or trust, insert your surname in this field
- 'Taxpayer Tax Reference Number'
  - Insert the tax reference number for which the appointment with SARS is required (i.e. Income Tax/VAT/PAYE number)
- 'Taxpayer ID number'
  - If you are representing an individual taxpayer, insert the South African ID number in this field.
  - If you are representing a company or trust, insert your South African ID number in this field
- 'Taxpayer Passport Number'
  - If you or the individual taxpayer are not a South African, insert the foreign passport number in this field
  - A permit number may also be inserted in this field
- 'Taxpayer Passport Date of Issue'
  - This field will be activated when a passport number/permit number is entered
  - Click on the dropdown arrow and select the passport date of issue/ permit date of issue from the online calendar
- 'Taxpayer Passport Country of Issue'
  - This field will be activated when a passport number/permit number is entered
  - Insert the country of issue
- 'Email Address'
  - If you complete this field a booking confirmation will be emailed to this address
  - Note: This field will become mandatory if a mobile number is not provided.
- 'Mobile number'
  - If you complete this field a booking confirmation will be sent via SMS to this number
  - Note: This field will become mandatory if an email address is not provided.
- 'Contact Number'

Representative Information	
Represented Company / Trust / Entity name*	THE TAX COMPANY
Representative Name*	JOHN
Representative Surname*	TAXPAYER
Representative ID Number* ⓘ	
Representative Passport Number*	JT123456
Representative Passport Date of Issue*	2000/01/01
Representative Passport Country of Issue* ⓘ	AUSTRALIA

Taxpayer Information	
Taxpayer Name*	JOHN
Taxpayer Surname*	TAXPAYER
Taxpayer Tax Reference Number* ⓘ	9900112233
Taxpayer ID Number* ⓘ	
Taxpayer Passport Number*	JT123456
Taxpayer Passport Date of Issue*	2000/01/01
Taxpayer Passport Country of Issue* ⓘ	AUSTRALIA
Email Address* ⓘ	jtaxpayer@sars.gov.za
Mobile Number*	
Contact Number*	012 4224000

#### 4.4 TAX PRACTITIONERS

- If you are a registered **TAX PRACTITIONER**, complete the following particulars:




##### REPRESENTATIVE INFORMATION

- 'Practitioner Registration Number'
  - Insert your active practitioner number
- Complete your details in the following fields or the details of the person who will interact with SARS for this appointment
  - 'Representative Name'
  - 'Representative Surname'
  - 'Representative ID Number'
  - 'Representative Passport Number'
    - Insert the foreign passport number if the person is not South African
  - 'Representative Passport Date of Issue'
    - This field will be activated when a passport number is entered
    - Click on the dropdown arrow and select the passport date of issue from the online calendar
  - 'Representative Passport Country of Issue'





- This field will be activated when a passport number is entered
- Insert the country of issue

## TAXPAYER INFORMATION

- 'Taxpayer Name'
  - Insert the name of the individual or registered representative on behalf of whom you are acting
- 'Taxpayer Surname'
  - Insert the surname of the individual or registered representative on behalf of whom you are acting
- 'Taxpayer Tax Reference Number'
  - Insert the tax reference number for which the appointment with SARS is required
- 'Taxpayer ID number'
  - Insert the South African identity number of the individual or registered representative linked to the tax number above
- 'Taxpayer Passport Number'
  - If the individual or registered representative linked to the tax number above is not a South African, insert his/her foreign passport number
  - A permit number may also be inserted in this field
- 'Taxpayer Passport Date of Issue'
  - This field will be activated when a passport number/permit number is entered
  - Click on the dropdown arrow and select the passport date of issue/ permit date of issue from the online calendar
- 'Taxpayer Passport Country of Issue'
  - This field will be activated when a passport number/permit number is entered
  - Insert the country of issue
- 'Email Address'
  - If you complete this field the booking confirmation will be emailed to this address
  - Note: This field will become mandatory if a mobile number is not provided.
- 'Mobile number'
  - If you complete this field the booking confirmation will be sent via SMS to this number
  - Note: This field will become mandatory if an email address not provided.
- 'Contact Number'
- **Please Note:**
  - The eBooking system must only be used to make appointments for taxpayers already registered with SARS. The only exception to this rule is when a tax practitioner needs to register a body corporate, trust or estate for tax. In this instance, the tax practitioner's details must be completed in the '*taxpayer name*', '*taxpayer surname*', '*tax reference number*' and '*taxpayer ID*' fields on the booking form.
  - If you are a tax practitioner and you want to make an eBooking with SARS to discuss your own personal tax affairs, please follow the steps described for 'registered individuals' above.

Representative Information	
Practitioner Registration Number* 	PR- 1234567
Representative Name*	JOHN
Representative Surname*	TAXPAYER
Representative ID Number* 	
Representative Passport Number*	JT123456
Representative Passport Date of Issue*	2000/01/01
Representative Passport Country of Issue* 	AUSTRALIA

Taxpayer Information	
Taxpayer Name*	JANE
Taxpayer Surname*	DOE
Taxpayer Tax Reference Number* 	0011223344
Taxpayer ID Number* 	
Taxpayer Passport Number*	JD654321
Taxpayer Passport Date of Issue*	2010/01/01
Taxpayer Passport Country of Issue* 	MOZAMBIQUE
Email Address* 	jtaxpayer@sars.gov.za
Mobile Number*	
Contact Number*	012 4224000

#### 4.5 APPOINTMENT INFORMATION (FOR NEW APPOINTMENT)

- This part of the form will display if you selected 'Make a new appointment' in the ['Requestor Information'](#) section.
- Choose the applicable **'Appointment Channel'** from the dropdown list:
  - Mobile Tax Unit
  - Pop-Up Branch
  - Telephonic Engagement
  - Video
- Select the **'Reason Category'** from the dropdown list.
- Select the **'Reason for Appointment'** from the dropdown list.
- Select the **'Preferred Province'** from the dropdown list.
- Select the **'Preferred Branch'** from the dropdown list.

- Note: The system will display a list of all the relevant branches (within that province) that are able to provide the service you require.
- Select the **'Sub-Branch'** from the dropdown list.
  - Note: This list will only display if you have selected 'Mobile Tax Unit' or 'Pop-up Branch' as an 'Appointment Channel' above
- Click on the **'Check for Appointment'** button (this button will be activated when all mandatory fields have been completed).

### Appointment Information

Appointment Channel\*

Mobile Tax Unit

Reason Category\*

Other

Reason For Appointment\*

eFiling Queries

Preferred Branch\*

Province

Gauteng

Branch

PRETORIA

Sub-Branch

Menlyn

Check for Appointment

Select

Mobile Tax Unit

Pop-Up Branch

Telephonic Engagement

Video

## 4.6 APPOINTMENT DATE AND TIME

- Select a date from the online calendar
- The available time-slots for that day will display. Select the slot that is most convenient for you.

### Appointment Date & Time

Select a date

September 2020

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Select a Time

Available Time

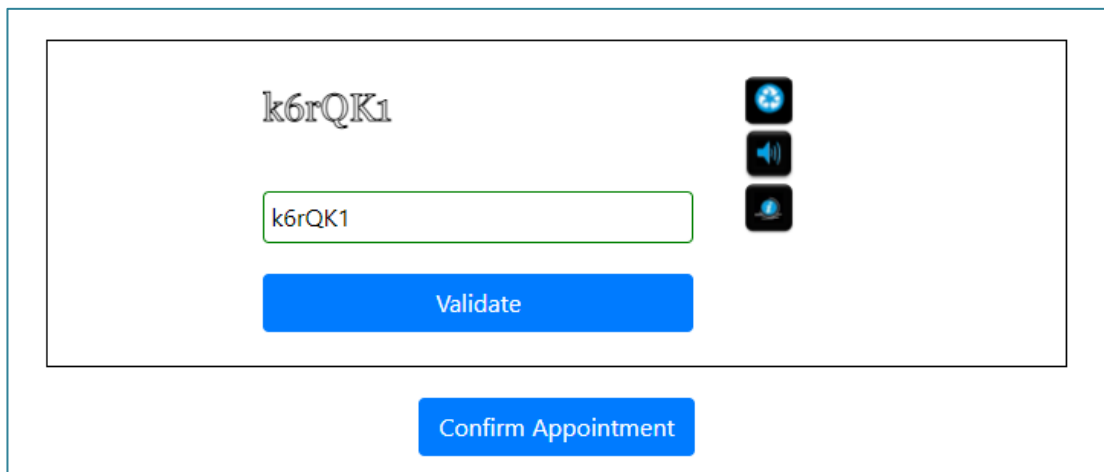
16:00




Select

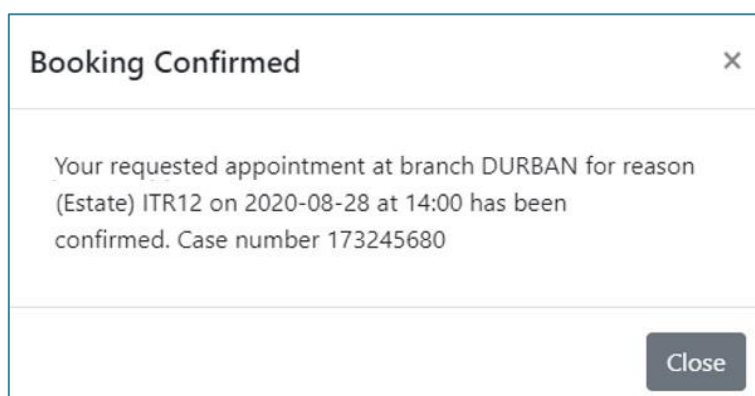
Your requested appointment at branch BELLVILLE for reason ' Submit Personal Income Tax Return (ITR12)' is on 2020-09-16 at 16:00

## 4.7 CONFIRM APPOINTMENT

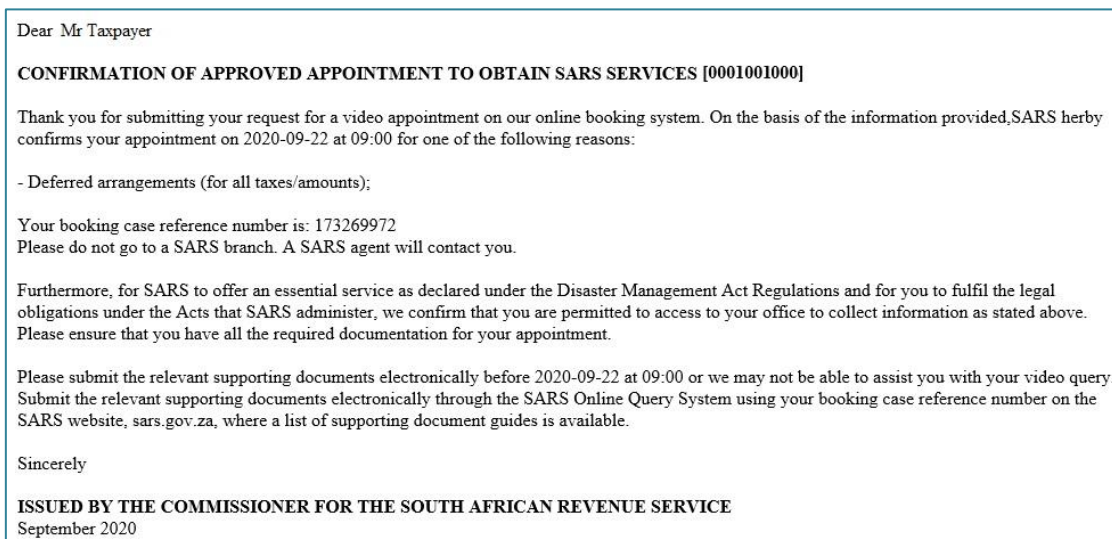
- To ensure that the booking is initiated by a human and not a machine/computer, you are required to insert a security code (also known as a CAPTCHA code) before you can finalise the booking.
  - Type in the letters that appear on your screen and click on the **'Validate'** button.

A screenshot of a CAPTCHA validation interface. At the top, the text 'k6rQK1' is displayed. Below it is a text input field containing 'k6rQK1'. To the right of the input field are three icons: a refresh button (circular arrow), an audio button (speaker), and a help button (lightbulb). Below the input field is a blue 'Validate' button. At the bottom of the entire interface is a blue 'Confirm Appointment' button.

- Please use the applicable icon should you require assistance with the CAPTCHA code:
  -  If you cannot see the letters clearly, click on the refresh button to get a new image
  -  If your device enables sound to be played, click on the audio icon, wait for the sound to play and type in the letters that you hear
  -  Click on the help icon if you require assistance with the CAPTCHA code.
- If you are satisfied with the Reason, Date and Time that you have selected, click on the **'Confirm Appointment'** button. The system will verify if the timeslot is still available at that branch.
  - If the timeslot is no longer available, you will have the option to amend the appointment
  - If the timeslot is still available, the booking will be finalised and a booking reference number will be allocated to you.

A screenshot of a 'Booking Confirmed' dialog box. The title bar says 'Booking Confirmed' with a close button (X) on the right. The main text reads: 'Your requested appointment at branch DURBAN for reason (Estate) ITR12 on 2020-08-28 at 14:00 has been confirmed. Case number 173245680'. At the bottom right is a 'Close' button.

- A confirmation message will also be sent to you via email. Example:



## 5 CANCEL AN APPOINTMENT

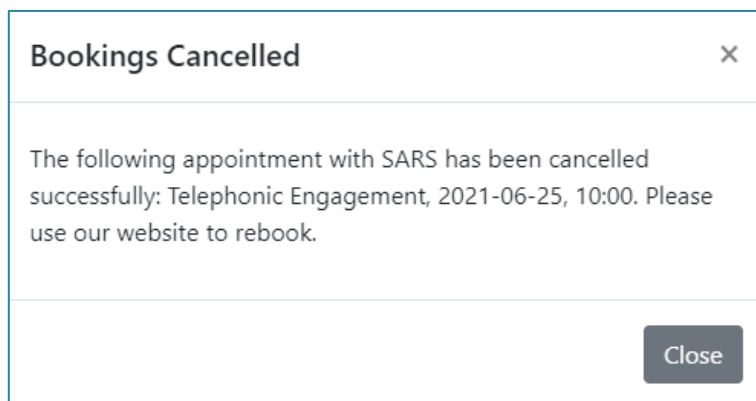
- To cancel an existing appointment:
  - Complete the '[Requestor Information](#)' section and select the option 'Cancel an appointment'.
  - Complete the following sections of the form (where applicable):
    - [Taxpayer information](#)
    - [Representative information](#)
    - [Tax practitioner information](#).
- Once the mandatory information above has been completed, the buttons in the 'Appointment Information' section will be activated.
  - Click on the '**Get Appointments**' button. A list of all existing appointments will display
  - Select the appointment(s) you want to cancel
  - Complete the [CAPTCHA](#) code and click on '**Validate**'
  - Click on the '**Confirm Cancellations**' button.

**Appointment Information** Get Appointments

Date	Time	Branch	Tax Ref Nr	Taxpayer Name	Taxpayer ID	Reason for Appointment	Cancel
2021-06-25	10:00	DORINGKLOOF	451723142	John Taxpayer	2085085022085	Submit my tax return (ITR12 / IRP6)	<input type="button" value="X"/>

WVvSIe

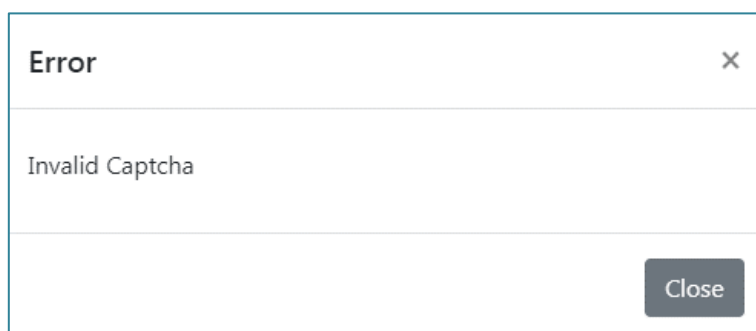
- The following message will display to confirm the appointment cancellation:



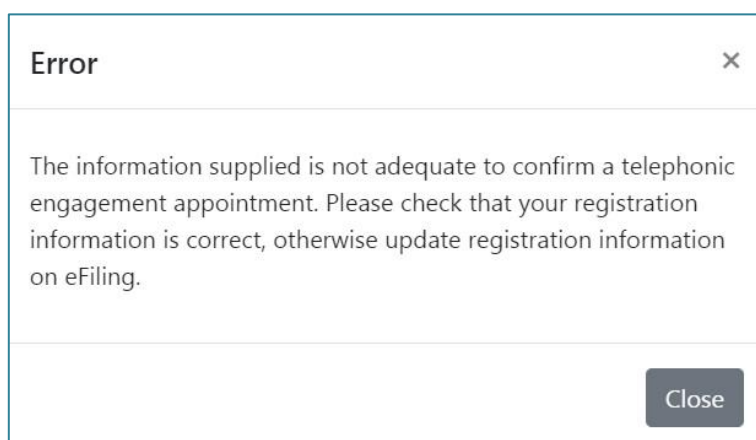
## 6 ERROR MESSAGES

This section describes some of the common errors you may encounter during the ebooking process:

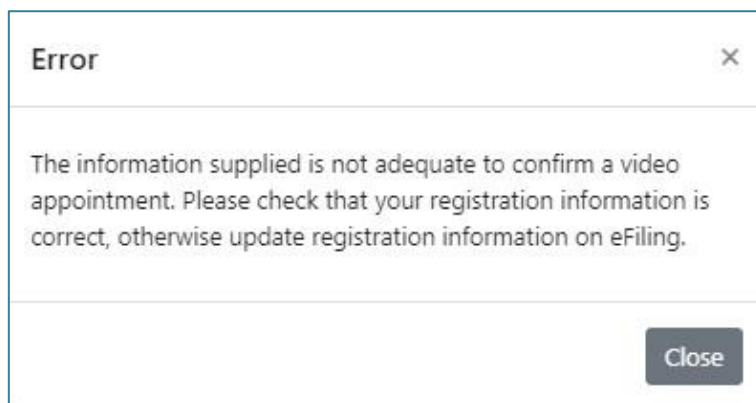
- The CAPTCHA code inserted does not correspond with the code displayed on the webscreen or the time limit to insert and validate the CAPTCHA code has expired.



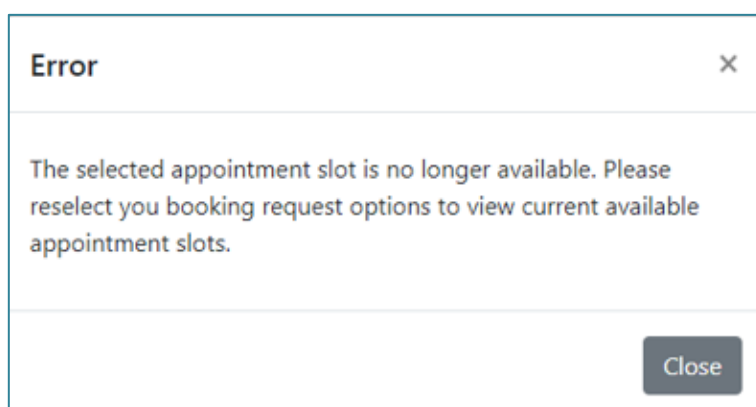
- The data you have entered has failed validation. Example:
  - The passport or ID number entered does not match the details that we have on record for the individual tax reference number
  - The representative's passport or ID number entered does not match the details that we have on record for the Company/Trust reference number
  - The passport/permit number does not exist.



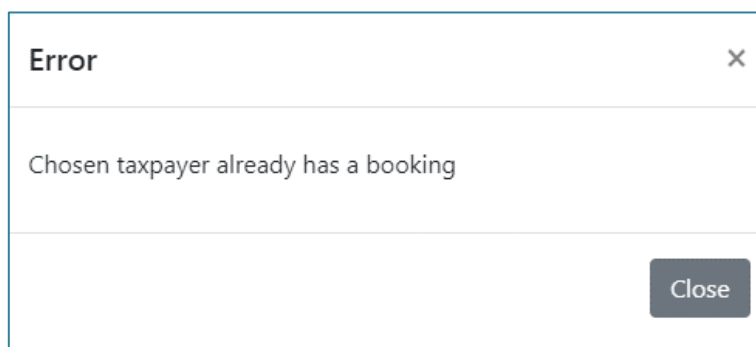




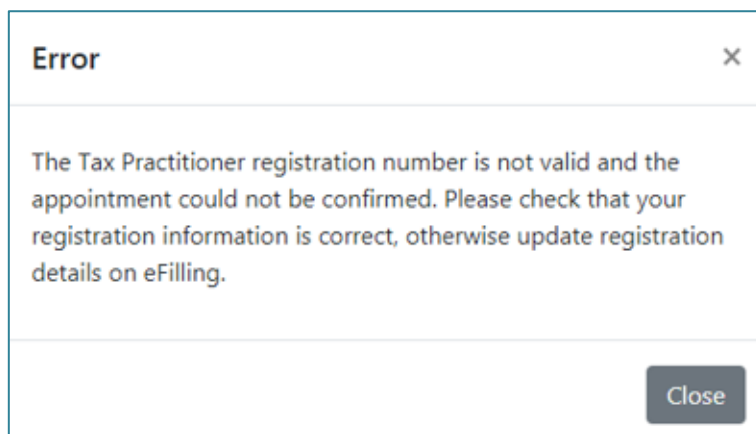
- The time slot you selected is no longer available. Please amend the appointment selection or exit the web page and try again



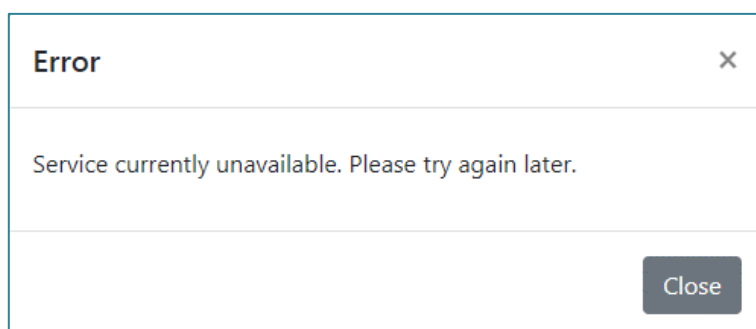
- A booking has already been submitted for the tax reference number entered. You will not be allowed to make multiple bookings.



- The Tax Practitioner registration number is not registered or is inactive according to our records



- Your internet connectivity is insufficient to process the request, or the system processing has timed out.



## 7 CONCLUSION

Please contact SARS should you require further information which might not be addressed in this guide.

### 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)
- 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).