



South African Revenue Service

SARS Tax Practitioner Readiness Programme

Module 5

Channels of Engagement

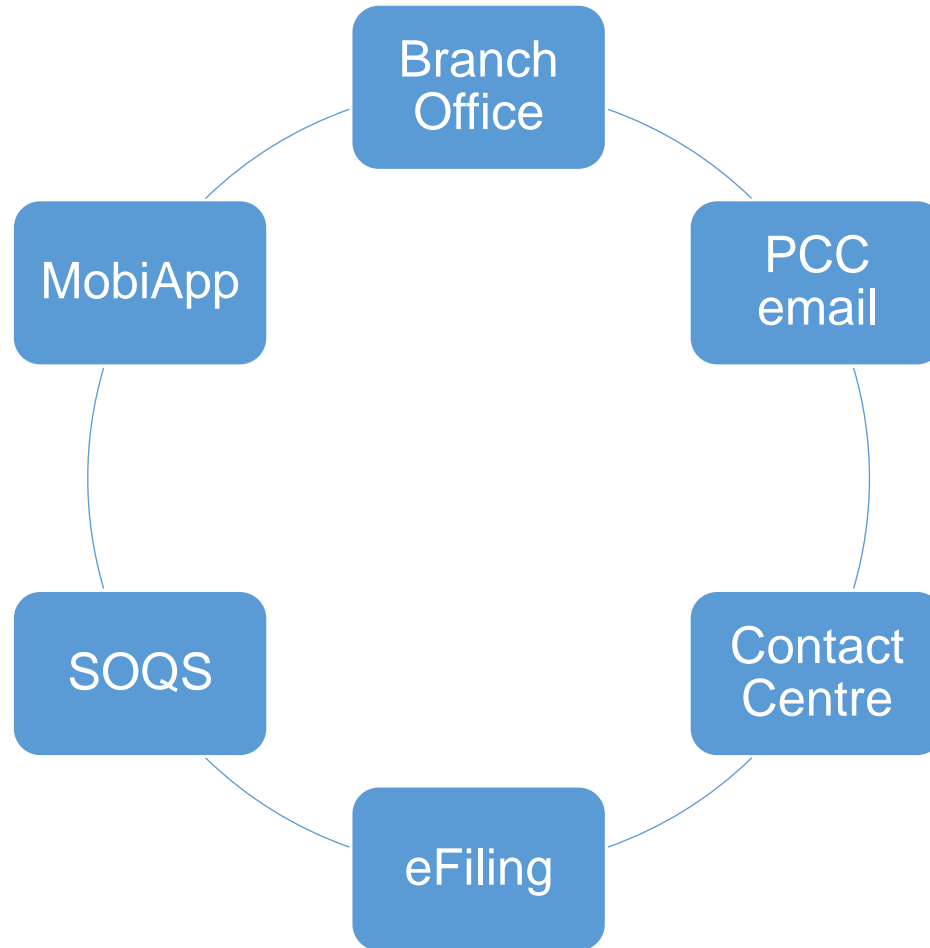
Learning Objective

At the end of this module, you are expected to

- Understand the role each channel of engagement plays in assisting tax practitioners.
- Understand the scope of each channel of engagement

Note: In this module the importance of the Power of Attorney will also be emphasised.

Channels of Engagement



Power of Attorney

SPPOA – Special Power of Attorney

To appoint any taxpayer or representative taxpayer, except a tax practitioner, to act on his/her behalf **the SPPOA must be accompanied by:**

- a copy of the taxpayer's identity document;
- a copy of representative taxpayer's identity document.

TPPOA – Special Power of Attorney for Tax Practitioners

- To be completed by a taxpayer or representative taxpayer to appoint a tax practitioner to act on his/her behalf

ASPOA – Authority on Special Power of Attorney by a Tax Practitioner

- To be completed by a tax practitioner to further delegate an employee to act on a client's behalf
(The TPPOA must be submitted simultaneously with this ASPOA to SARS offices)

NB: with the new system enhancement on eFiling, taxpayers are required to approve online POA's for tax type transfers

Check List when attempting to resolve an issue

Before contacting SARS, ask yourself the following questions:

- What is the nature of the query?
- Are there different work processes that need to work together to achieve resolution (e.g. returns outstanding and request for deferred arrangement). Do I need to therefore do something before I lodge a query, or do I need to lodge two separate queries?
- Is there a self-help option I can make use of to retrieve the necessary answer?
- Are there any FAQs that answer my question?
- Is the query within turnaround time?
- What is the most appropriate service channel to use?

By following the abovementioned steps you will be ensuring that your query is dealt with speedily and efficiently

SARS Online Self-Service

The screenshot shows the SARS.gov.za website with a navigation bar at the top containing the text "SARS Home | South African Revenue Service" and the URL "https://www.sars.gov.za". A banner below the navigation bar features a hand holding a smartphone displaying the SARS app, with the hashtag "#YourTaxMatters" and the SARS 25th Anniversary logo (1997-2022) and "SARS At Your Service".

The main content area is divided into several sections:

- What's my tax number?**: Represented by a magnifying glass icon.
- Tax Season**: Represented by a calendar icon.
- Tax Compliance Status Request**: Represented by a compass icon.
- Book an appointment**: Represented by a clock icon.
- Online Services**: Represented by a laptop icon. This section is highlighted with a red rectangle.
- Important Dates**: Represented by a calendar icon.

The **Latest News** section contains the following items:

- Customs Weekly List of Unentered Goods**: 21 June 2022 – Customs Weekly List of Unentered Goods
- eFiling downtime alert**: 21 June 2022 – Due to ongoing maintenance, eFiling may not be available on Friday, 24 June, from 18:00 – 23:00. Our apologies for the
- Tender**: 20 June 2022 – RFP52/2021: Appointment of a panel of service providers for the provision of forklifts for the period of five (5) years Questions
- Legal Counsel Publications – Find a Guide – Income Tax**: 17 June 2022 – Income Tax Act, 1962: Guide on the Determination of Medical Tax Credits (Issue 14)

On the right side of the page, there is a vertical list of links for various services:

- [How does Auto-Assessment work?](#)
- [See the latest on Filing Season](#)
- [How do I pay SARS?](#)
- [Find a Source Code](#)
- [Request a Tax Number](#)
- [Submit Supporting Documents](#)
- [Tax Compliance Status Request](#)
- [Tax Compliance Status Verification](#)
- [Online request for an eBooking appointment](#)
- [SMS request for an eBooking appointment](#)
- [How do I access my tax return on eFiling?](#)
- [Update the Registered Representative](#)
- [SMS us to know if you need to submit a tax return](#)
- [SMS us to request your balance or Statement of Account](#)
- [Update banking details](#)
- [SMS us to request your Notice of Tax Registration](#)

The Windows taskbar at the bottom shows the search bar with "Type here to search", several application icons, and the system tray with the date "11:10 2022/06/21" and language "ENG".

SARS Online Self-Service

Use our Digital Channels



Request your
Tax Number



Submit
Supporting
Documents



Submit a
Payment
Allocation



Report New
Estates
Case



Register a
Representative



Tax Compliance
Status Request



Tax Compliance
Status
Verification



Search for a VAT
Vendor



Trust
Registration

SARS Online Self-Service



South African Revenue Service

Supporting Document Upload

Query Type:	<input type="text" value="Supporting Document Upload"/>	Case No: *	<input type="text"/>
Title: *	<input type="text" value="Ms"/>	Initials: *	<input type="text"/>
Name: *	<input type="text"/>	Surname: *	<input type="text"/>
Trading Name:	<input type="text"/>		
EMail: *	<input type="text"/>		
Mobile: *	<input type="text"/>	Telephone:	<input type="text"/>
Tax Type:	<input type="text" value="Income Tax"/>	Tax No: *	<input type="text"/>
ID Type:	<input type="text" value="South African ID Number"/>	ID No: *	<input type="text"/>

SARS Online Self-Service



South African Revenue Service

Account Query

Query Type:

Account Query



Category:

Payment Allocation



Title: *

Ms



Initials: *

Name: *

Surname: *

Trading Name:

EMail: *

Mobile: *

Telephone:

Tax Type:

Income Tax



Tax No: *

ID Type:

South African ID Number



ID No: *

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The main content area is divided into several sections:

- Services Grid:** A grid of six service tiles. The "Book an appointment" tile is highlighted with a red border. Other tiles include "What's my tax number?", "Tax Season", "Tax Compliance Status Request", "Online Services", and "Important Dates".
- Latest News:** A section with a blue header containing three news items:
 - Customs Weekly List of Unentered Goods:** 21 June 2022 – Customs Weekly List of Unentered Goods
 - eFiling downtime alert:** 21 June 2022 – Due to ongoing maintenance, eFiling may not be available on Friday, 24 June, from 18:00 – 23:00. Our apologies for the
 - Tender:** 20 June 2022 – RFP52/2021: Appointment of a panel of service providers for the provision of forklifts for the period of five (5) years Questions
- Legal Counsel Publications – Find a Guide – Income Tax:** 17 June 2022 – Income Tax Act, 1962: Guide on the Determination of Medical Tax Credits (Issue 14)

On the right side of the page, there is a vertical list of links for various services and information, including "How does Auto-Assessment work?", "See the latest on Filing Season", "How do I pay SARS?", "Find a Source Code", "Request a Tax Number", "Submit Supporting Documents", "Tax Compliance Status Request", "Tax Compliance Status Verification", "Online request for an eBooking appointment", "SMS request for an eBooking appointment", "How do I access my tax return on eFiling?", "Update the Registered Representative", "SMS us to know if you need to submit a tax return", "SMS us to request your balance or Statement of Account", "Update banking details", and "SMS us to request your Notice of Tax Registration".


The Windows taskbar at the bottom shows the search bar with "Type here to search", several application icons, and the system tray with the date "11:10 2022/06/21" and language "ENG".

SARS Online Self-Service


SARS Branch eBooking System

* Mandatory Fields


Requester Information

Individual* 

Yes

Company / Trust / Entity Representative*



Yes

Tax Practitioner* 

Yes

SMME* 

Yes

Would you like to* 

Make a
new
appointment

Cancel an
appointment

Virtual Appointments

- Ensure that you honour your appointments
- If appointments cannot be honoured, inform SARS and cancel the appointment.
- Ensure that all documentation is uploaded before the appointment date.

By following the abovementioned steps, you will be ensuring that your query is dealt with speedily and efficiently

SARS Contact Centre

0800 00 SARS
(7277)

Select the correct option:

- 0 - eBooking
- 1 - Tax Practitioner
- 2 - If you have a case number
- 3 - Tax query
- 4 - Customs & Excise
- 5 - Help-you-eFile
- 6 - SMME
- 7 - Other query
 - (1) Income Tax
 - (2) PAYE
 - (3) VAT
 - (4) Customs & Excise

- Option 1 is for tax practitioners who need assistance with a service not available online or part of a self service channel.
- Once selected, you have to authenticate yourself. This helps SARS identify the tax practitioner, the type of queries and appropriate future actions (mitigation)

- Daily volumes for this queue can be reduced by between 35% calls if the service options are utilised. This will lead to improved answering times.
- Calling unnecessarily, increases queue wait times.
- Check status dashboards using eFiling to see if there has been progress in queries lodged

Services	Tax Practitioner Unit*	pcc@sars.gov.za	Contact Centre**	Branch (by appointment only)	Efiling	SARS Mobi App	SARS Online Query System
Software/Systems Related							
All eFiling Queries			✓	✓			
All e@syFile Queries			✓	✓			
Resetting of eFiling password					✓	✓	
Registration Maintenance							
1 st time registration (Personal Income Tax) *see exceptions below					✓	✓	
1 st time registration Trust/Body Corporates *see exceptions below	✓ Only if the trustee acting on behalf of the trust accompanies the tax practitioner			✓ Only if the trustee acting on behalf of the trust accompanies the tax practitioner			
1 st time registration VAT *see exceptions below					✓		
1 st time registration PAYE *see exceptions below					✓		
Update of ID Number/Company registration Number	✓			✓			
VAT Interview	✓			✓			

Services	Tax Practitioner Unit*	pcc@sars.gov.za	Contact Centre**	Branch (by appointment only)	Efiling	SARS Mobi App	SARS Online Query System
Registration Maintenance							
Update of Registered particulars					✓	✓	
Deregistration		✓					
Banking detail changes	✓			✓	✓	✓	
Banking detail verification	✓			✓			✓
Trustee/Director verification	✓			✓			✓
Merging of profiles for single registration					✓		
Reprint of registration confirmation					✓	✓	✓
Return Completion							
Personal Income Tax Returns (ITR12)			Advisory	Advisory	✓	✓	
Company Income Tax Returns (ITR14)			Advisory	Advisory	✓		
Trust Income Tax Returns (ITR12T)			Advisory	Advisory	✓		
VAT 201			Advisory	Advisory	✓		
EMP201/EMP501/EMP601			Advisory	Advisory	✓		

Services	Tax Practitioner Unit*	pcc@sars.gov.za	Contact Centre**	Branch (by appointment only)	EFiling	SARS Mobi App	SARS Online Query System
Return Completion							
IRP6			Advisory	Advisory	✓		
Tax Compliance Status (TCS application)			Advisory	Advisory	✓	✓	✓
Tax Directives			Advisory	Advisory	✓		
Application for Tax Directive Fixed % IRP3b			Advisory	Advisory	✓		
Emigration Clearances			Advisory	Advisory	✓	✓	✓
Foreign Investment			Advisory	Advisory	✓	✓	✓
Request for remission (PIT, CIT, VAT)			Advisory	Advisory	✓		
Notice of Objections (PIT, CIT, VAT, PAYE) *see exceptions below			Advisory	Advisory	✓		
Request for Correction			Advisory	Advisory	✓		
Notice of Appeal (PIT, CIT, VAT, PAYE)			Advisory	Advisory	✓		
ADR1 (Trusts and Donations)	✓		Advisory	✓			
ADR2 (Trusts and Donations)	✓		Advisory	✓			

Services	Tax Practitioner Unit*	pcc@sars.gov.za	Contact Centre**	Branch (by appointment only)	Efiling	SARS Mobi App	SARS Online Query System
Return Completion							
Request for Returns					✓	✓	
Voluntary Disclosure Programme					✓		
Accounts							
Requests for Statements	From 1999 to 2008 only	From 1999 to 2008 only	From 1999 to 2008 only	From 1999 to 2008 only	After 2008	After 2008 only	
Re allocations		✓			✓		✓
Requests for waiving of penalties and interest					✓		
Queries relating to refunds			✓				
Offset of credits		✓					✓
Debt Management							
Under R100000 debt arrangements	✓	✓	✓	✓	✓		
Request of suspension of obligation to pay			Advisory	✓	✓		
Over R100000 debt arrangements	✓		Advisory		✓		

Services	Tax Practitioner Unit*	pcc@sars.gov.za	Contact Centre**	Branch (by appointment only)	EFiling	SARS Mobi App	SARS Online Query System
Debt Management							
Request for debt equalization		✓					
Other							
VAT vendor search			Advisory		✓		✓
Tax Practitioner verification			Advisory		✓		
Supporting documentation upload			Advisory		✓	✓	✓
Reprint of notice of assessment			Advisory		✓	✓	
Payments	Advisory		Advisory		✓	✓	
Tax Practitioner registration and verification			Advisory		✓		
Transfer Duty Payments			Advisory		✓		
Advanced Tax Ruling					✓		
Audit							
Submitting documents for Audit					✓	✓	✓
Enquiry as to audit status					✓	✓	

SARS service channels

- Service channels requiring human intervention should be the last point of contact as opposed to first.
- The use of the self-service channel is the preferred option. This will enable SARS to make use of its resources more efficiently in dealing with queries that really matter to you

Thank you



www.sars.gov.za



SARS Contact Centre 0800 00 SARS (7277)



Visit your nearest SARS branch (to locate a branch visit www.sars.gov.za)



**Open: Monday, Tuesday, Thursday & Friday 08:00 to 16:00;
Wednesday 09:00 to 16:00**



Find us on Facebook

Thank you
Re a leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza