

## EXTERNAL GUIDE

# Guide to the Tax Directive functionality on the SARS MobiApp

## REVISION HISTORY TABLE

Date	Version	Description
03-12-2021	0	View current and historic tax directives via the SARS MobiApp

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## 1 PURPOSE

- 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.
- The purpose of this guide is to describe how to use the SARS MobiApp to view your tax directives.

## 2 INTRODUCTION

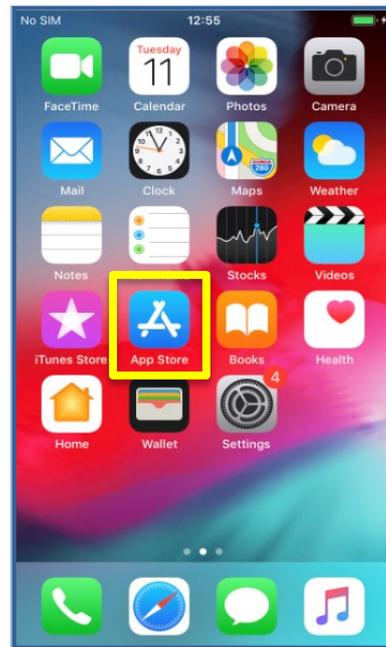
- The SARS Online Tax Directive supports the end-to-end tax directive application process. Applicants are able to access the front-end of this application via eFiling and complete the various processes of tax directives. One such support enhancement is the tax directive simulation. This front end functionality allows eFilers who are employers, fund administrators or long term insurers, to request and obtain simulated calculations on a tax directive before submitting the application for an actual tax directive.
- The SARS MobiApp is one of the SARS online front-end channels that a taxpayer/ tax practitioner can use to resolve their tax queries. The SARS MobiApp is a mobile application which can be installed on your mobile device 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 allows individual taxpayers and tax practitioners to request their tax directives. Additionally taxpayers and tax practitioners can request and generate previously issued tax directives. Tax Directives form part of the Income Tax that is governed by the Income Tax Act of 1962, thus play a vital role in the compliance of taxpayers. These digital enhancements are there to assist taxpayers/ tax practitioners on the ease of tax compliance in the comfort of their homes. This guide will describe how taxpayers /tax practitioners can use their smart devices to install the SARS MobiApp and use it to view their tax directives and where necessary download the PDF version of the related tax directive letters or forms.

## 3 SARS MOBIAPP

### 3.1 How to install the SARS MobiApp

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

- For an Apple device:
  - Apple users should navigate to the App Store
  - Search for “**SARS MobiApp**”
  - Install the application
- For an Android device:
  - Android users should navigate to the Google Play Store
  - Search for “**SARS MobiApp**”
  - Install the application
- For a Huawei device:
  - Huawei users should navigate to the Huawei app gallery
  - Search for “**SARS MobiApp**”
  - Install the application



Ensure that your downloaded SARS MobiApp is always up to date.

### 3.2 How to register for the use of the SARS MobiApp

- The SARS MobiApp is interrelated to eFiling. This implies that you can use your eFiling username and password to access the SARS MobiApp.

- If you are not registered,
  - Tap on to the “**Registration**” tab
  - Complete the questions to finalise the registration process
- Alternatively select “**Register**” displayed at the bottom of your screen device
  - Complete the questions to finalise the registration process



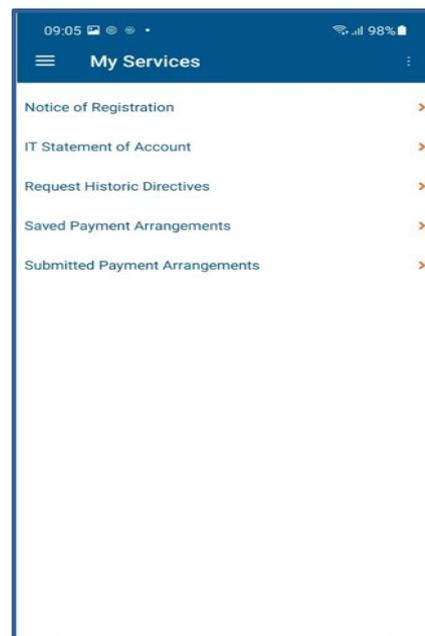
- For more information on this, please refer to the following external guide: IT-AE-40-G01 – Guide to the SARS MobiApp – External guide

### 3.3 How to access Tax Directives on the SARS MobiApp

- You can access historical tax directives in one of the following;
  - On the **“Welcome page”** and
    - Tap on the **“Directives”** tab
    - Complete your Username and Password.
    - Once completed, tap on **“Login”**

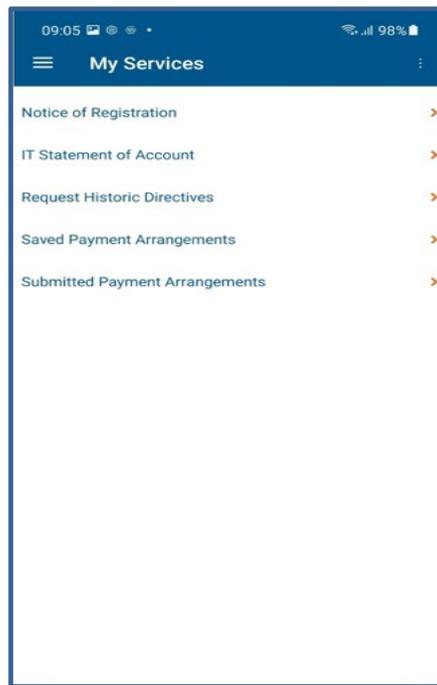


- On the **“Landing page”** (the page once logged in)
  - Select **“My Services”** option .
  - Tap on **“Request Historic Directives,”** displayed on the **“My Services”** page



### 3.4 How to request Historical Tax Directive

- Login to your profile
  - Upon logging on successfully, navigate to “**My Services**” menu.
- Tap on “**Request Historic Directives**,” displayed on the “**My Services**” menu

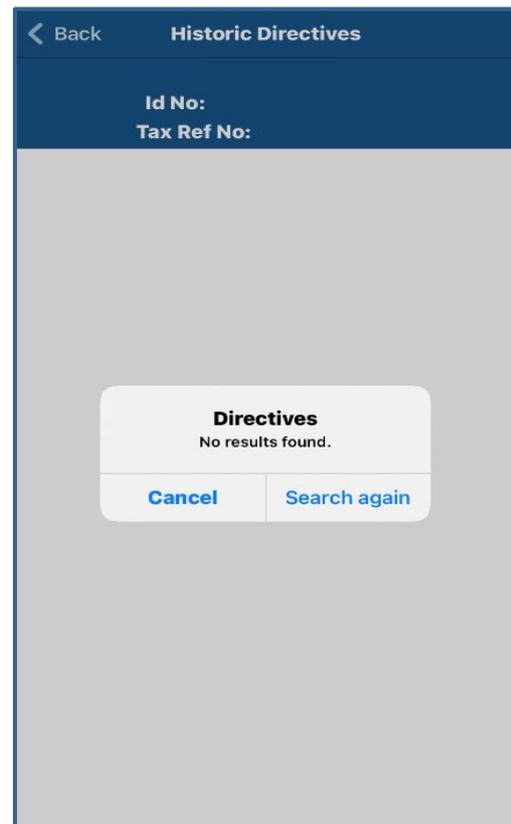


- When “**Request Historic Directives**” tab is tapped:
  - You will be presented with the Request Historic Directives screen containing the following fields:
    - **Tax Reference number** – This displays your tax reference number
    - **ID number** – This displays your ID number
    - **Tax Year From** – This displays the year which the directive request is made
    - **Tax Year To** – This displays the end year which the Directives request is made

Id No:	Tax Ref No:
2021/11/22 FORMAD	2022
2021/11/22 FORME	2022
2021/11/22 FORMAD	2022
2021/11/22 FORMB	2022

- Once the Directive list is displayed on your device, select the tax directive by tapping on the applicable Directives details
- Note the following:
  - Where the profile is for a Tax Practitioner, the Tax reference number and ID number that will be pre-populated is that of the selected Taxpayer captured.
  - Two years will be added to the Tax year captured on “Tax year from” field

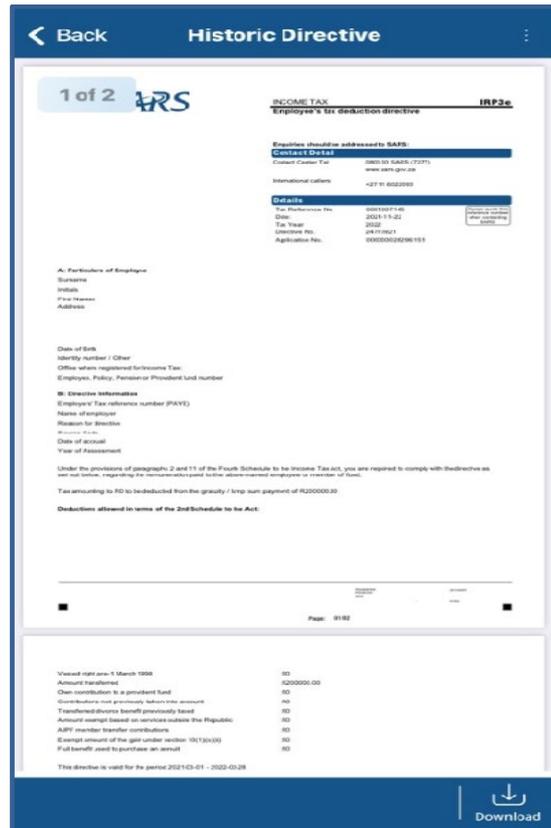
- If there is no tax directives list found for the selected period, an error message will be displayed



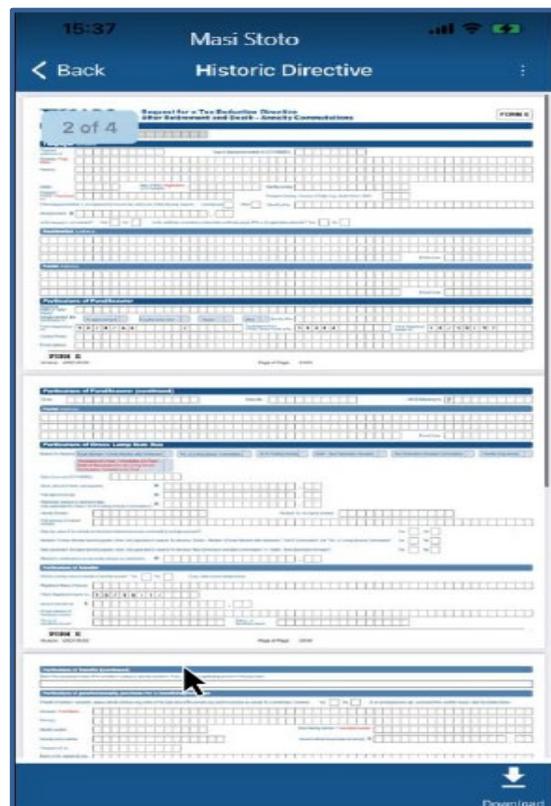
### 3.5 How to view and download the Tax Directives related letters and forms

**Note that your smart device must have capabilities to download and open pdf documents.**

- Once the tax directive list is displayed on your device, select the tax directive by tapping on the applicable directives details
  - Where a letter is selected the letter will be displayed on your device
  - To download, tap on **“Download”** and follow the prompts



- Once the tax directive list is displayed on your device, select the tax directive by tapping on the applicable directives details
  - Where a form was selected the form will be displayed on your device
  - To download, tap on **“Download”** and follow the prompts



## 4 CROSS REFERENCES

DOCUMENT TITLE	APPLICABILITY
Guide to Complete the Tax Directive Application Forms	All
Completion Guide for IRP3a and IRP3s Form	All
Guide to the Tax Directive functionality on eFiling	All
Tax Directive for Emigration, Cease to be resident and Expiry of visas	All

## 5 ACRONYMS AND DEFINITIONS

AP	Admin Penalty(ies)
IT150	Notice of Registration
ID	South African Identity Number (issued by the Department of Home Affairs)
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).