

NEW DEVELOPMENTS IN NEXT PHASE OF INDIVIDUAL FILING SEASON

Pretoria, 27 August 2020 – The South African Revenue Service (SARS) is continuing on its journey to make this year’s filing season a seamless and easy process to help taxpayers fulfil their legal obligations. We have also enhanced our capability to detect and make it costly for non-compliant taxpayers. In this respect, SARS will be introducing a number of new service offerings to assist taxpayers in this next phase of individual filing season.

We wish to emphasize that as far as possible, taxpayers are discouraged to come to our offices, but should continue to use our online electronic filing platform. Those needing assistance may also book with one of our agents via a virtual appointment for a guided filing experience to complete their submission. While we are determined to minimise the numbers of walk-in taxpayers at our branches, we are also prepared, as an absolute exception, to address the concerns of taxpayers who don’t have access to any technology, or who struggle with data issues.

From 1 September to 22 October 2020, taxpayers can visit our SARS branches for assistance with completing and submitting their tax returns. However, **they can only do so by making an appointment**, due to social distancing requirements under lockdown regulations. To help, we are introducing the following:

- **A toll-free number** for taxpayers to call and make branch appointments. The number to call is 0800 11 7277. Operating hours are Mon, Tues, Thurs, Fri : 08:00 – 16:00 and Wed: 09:00 – 16:00
- **Enhancements to the current eBooking system** on the SARS website. From 1 September, the eBooking system will give the taxpayer confirmation in real-time of their booking slot with their case number and also advise them of supporting documents that they may need to take along with them for their appointment. Since 24 July 2020, there have already been 14 201 eBookings made via the SARS website.
- With both the toll-free number and the online eBooking system, taxpayers will have the option of booking a virtual session with a SARS agent – via video or voice call. This would especially be helpful for the elderly, disabled or those who live far from a tax office. If they choose the video option, taxpayers will be sent a link to the video call which they can access on the day of the appointment. For video calls, taxpayers will need to have either a smartphone with a camera or a Personal Computer (PC) with a camera to start and conclude a video appointment. No special software is needed for this virtual engagement. This “virtual agent” project was recently piloted at our Mitchell’s Plain office in the Western Cape to great success. During the pilot, a taxpayer who now lives in New Zealand was assisted. The interaction was via video and took 15 minutes. The taxpayer was thrilled with our service as they said that their past experience of trying to get help from SARS from New Zealand was very challenging. The taxpayer commented that even though he now lives in New Zealand, he is proud to be South African, given the ground-breaking initiatives we have implemented.

- SARS will be calling certain taxpayers who have been sent auto-assessment SMSes and have not responded. The call will be to ascertain why they have not accepted their auto assessments and to help them either to accept or edit their return and submit it on their behalf. These taxpayers:
 - Have all been auto-assessed
 - Have a refund due to them
 - Submitted their returns at a branch last year
 - Have not responded to an auto-assessment SMS

Progress so far: Since the first phase of individual filing season was introduced on 1 August 2020, SARS has been actively encouraging taxpayers to use our newly-revamped digital channels to file their returns. Over the past month we have focused on auto-assessments, in which we pre-populated taxpayers' returns by using third party data, artificial intelligence and a taxpayer's prior compliance history. This was implemented to make it easier for taxpayers to submit their returns electronically – particularly those with standard tax returns – as they simply had to log into eFiling and accept the assessment if all their details were correct. By 31 July 2020, **we had sent over 3 million auto-assessment SMS's** to taxpayers. As of 27 August, **500 322 taxpayers** had accepted the **auto-assessment** outcome thus far. This means that 51% of those who had been selected for auto-assessment, and have already filed, accepted the outcome, while 49% elected to edit and submit their return. SARS will continue to make follow-up calls to encourage uptake, and prevent people from having to come into our offices to file.

Over the past month, we have also been encouraged **to see that of the just over 1.16 million taxpayers who have already filed their returns electronically, 281 160 were taxpayers who used to submit at branches in the past and are now using one of our digital channels (eFiling and/or MobiApp).**

We are encouraged by the large number of people being converted from filing at our branches into our digital channels. We also targeted Government employees (national, provincial and local government) to educate and enable them to file their returns using our enhanced MobiApp and eFiling. SARS' digital offering is definitely limiting the need for taxpayers to visit a branch.

As part of our commitment to make things as easy as possible for compliant taxpayers, we have been monitoring our social media channels and have noticed the following:

- We are aware that some taxpayers have complained about the lengthy waiting times when they call our Contact Centre, which is often the case during this early phase of filing season. However, taxpayers can use other query channels instead of calling the Contact Centre, namely: go to the SARS website (www.sars.gov.za), click on Contact Us > Contact SARS by email/fax or post
- Refund timeframes: Taxpayers are reminded that if their assessment was not selected for audit or verification, they can expect a refund (if it is due) within three business days. If selected for audit or verification, the process should be concluded within 21 business days from the date all required supporting documents are received. Once they have received a completion notification from SARS, they can expect the refund within three business days.
- We are getting a lot of queries about people being rejected for SASSA grants as it states they are registered with SARS for PAYE or are receiving an income. According to SASSA, to qualify for the grant, you need to be unemployed (not having any

source of income) and not receive any other grants. Should this not be correct, those affected should email SASSA on srd@sassa.gov.za.

We trust that some of the service offerings and campaigns mentioned above will assist you in this next phase of individual filing season. For those who are still experiencing challenges, please bear with us as we seek to balance the fulfilment of the SARS mandate and your tax obligations with the need to manage health risks and limit the risk of transmission of the coronavirus.

Please try to file from the comfort of your home - if you need help, kindly visit our website www.sars.gov.za, call our contact centre on 0800 00 7277 or the new toll-free number 0800 11 7277 to make branch bookings.

Keep your social distance.

Stay safe.

And comply with your tax obligations, so we can build South Africa together.

#YourTaxMatters.

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