

## 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

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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.

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 the 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, 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.  
Please Note: Microsoft Teams is the preferred video conferencing tool used by SARS.
- If you are unable to use the eBooking system to make an appointment, please call us on our toll free number 0800 117 277 and a SARS official will book an appointment on your behalf.
- 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.

## 3 IMPORTANT INFORMATION TO NOTE WHEN USING THIS SERVICE

- 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 applicable to:
    - Individuals
    - Tax practitioners
    - Company/trust/entity representatives
  - Telephonic Engagement - this option is applicable to:
    - Individuals
    - Tax practitioners (for ITR12 return submission only).
- 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) in order 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 eBooking'
    - Click on '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'
    - Under 'Online Tools' 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. 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:
      - Proof of identity
      - If you are a tax practitioner or registered representative, you are also required to upload a certified copy of your client's identity document and the power of attorney to enable us to authenticate you.
- 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

- Visit the SARS website [www.sars.gov.za](http://www.sars.gov.za) and select the following:
  - 'Contact Us'
  - 'Make an Appointment'
  - Click on the link to open the booking form.

### 4.1 REQUEST INFORMATION

- On the eBooking Form, complete the following fields:
  - **'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

SARS South African Revenue Service SARS Branch eBooking System

\* Mandatory Fields

**Requester Information**

Individual* ⓘ	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Company / Trust / Entity Representative* ⓘ	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Tax Practitioner* ⓘ	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

- Note: The manner 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
  - 'Taxpayer Passport Date of Issue'
    - This field will be activated when a passport number is entered
    - Click on the drop down arrow and select the passport date of issue from the online calendar
  - 'Taxpayer Passport Country of Issue'
    - This field will be activated when a passport number is entered
    - Insert the country of issue
  - 'Email Address'
    - If you complete this field a booking confirmation will be emailed to this address
  - 'Mobile number'
    - If you complete this field a booking confirmation will be sent via SMS to this number
  - 'Contact Number'

Taxpayer Information	
Taxpayer Name*	JOHN
Taxpayer Surname*	TAXPAYER
Taxpayer Tax Reference Number* <span>(i)</span>	0011224455
Taxpayer ID Number* <span>(i)</span>	
Taxpayer Passport Number*	JT123456
Taxpayer Passport Date of Issue*	2000/01/01
Taxpayer Passport Country of Issue* <span>(i)</span>	AUSTRALIA
Email Address* <span>(i)</span>	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 drop down 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.
- 'Taxpayer Passport Date of Issue'
  - This field will be activated when a passport number is entered
  - Click on the drop down arrow and select the passport date of issue from the online calendar
- 'Taxpayer Passport Country of Issue'
  - This field will be activated when a passport number is entered
  - Insert the country of issue
- 'Email Address'
  - If you complete this field a booking confirmation will be emailed to this address
- 'Mobile number'
  - If you complete this field a booking confirmation will be sent via SMS to this number
- 'Contact Number'

Representative Information	
Represented Company / Trust / Entity name*	<input type="text" value="THE TAX COMPANY"/>
Representative Name*	<input type="text" value="JOHN"/>
Representative Surname*	<input type="text" value="TAXPAYER"/>
Representative ID Number* ⓘ	<input type="text"/>
Representative Passport Number*	<input type="text" value="JT123456"/>
Representative Passport Date of Issue*	<input type="text" value="2000/01/01"/>
Representative Passport Country of Issue* ⓘ	<input type="text" value="AUSTRALIA"/>

Taxpayer Information	
Taxpayer Name*	<input type="text" value="JOHN"/>
Taxpayer Surname*	<input type="text" value="TAXPAYER"/>
Taxpayer Tax Reference Number* ⓘ	<input type="text" value="9900112233"/>
Taxpayer ID Number* ⓘ	<input type="text"/>
Taxpayer Passport Number*	<input type="text" value="JT123456"/>
Taxpayer Passport Date of Issue*	<input type="text" value="2000/01/01"/>
Taxpayer Passport Country of Issue* ⓘ	<input type="text" value="AUSTRALIA"/>
Email Address* ⓘ	<input type="text" value="jtaxpayer@sars.gov.za"/>
Mobile Number*	<input type="text"/>
Contact Number*	<input type="text" value="012"/> <input type="text" value="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
- 'Represented Company / Trust / Entity Name'
  - Insert your client's name in this field
- Complete the following 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 drop down 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.
- 'Taxpayer Passport Date of Issue'
  - This field will be activated when a passport number is entered
  - Click on the drop down arrow and select the passport date of issue from the online calendar
- 'Taxpayer Passport Country of Issue'
  - This field will be activated when a passport number is entered
  - Insert the country of issue
- 'Email Address'
  - If you complete this field the booking confirmation will be emailed to this address
- 'Mobile number'
  - If you complete this field the booking confirmation will be sent via SMS to this number
- '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

- Select the applicable '**appointment method**' from the dropdown list:
  - Telephonic Engagement
  - Video
- Select the '**reason for appointment**' from the dropdown list.
  - Note: reasons prefixed with '(Tax Practitioner)' are only applicable to bookings made by tax practitioners.
- Select the '**preferred province**' from the dropdown list.
- Select the '**preferred branch**' from list of SARS branches in that province.
- Click on '**Check for Appointment**'.

### Appointment Information

Appointment Method\*

Reason For Appointment\*

Preferred Branch\* **Province**

**Branch**

#### 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			

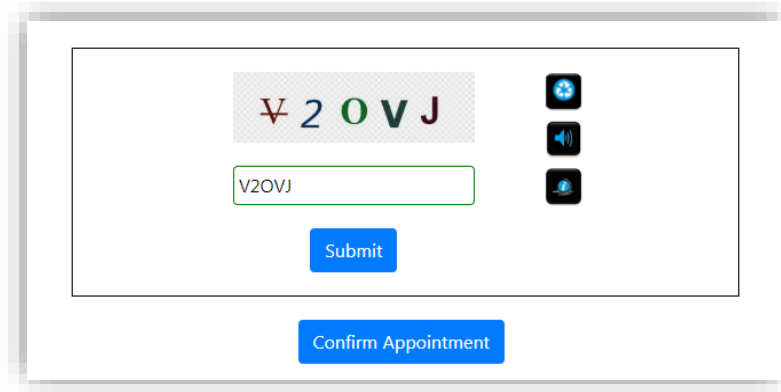
Select a Time

Available Time	Select
16:00	<input type="button" value="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

- In order 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 **<Submit>**.



- 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

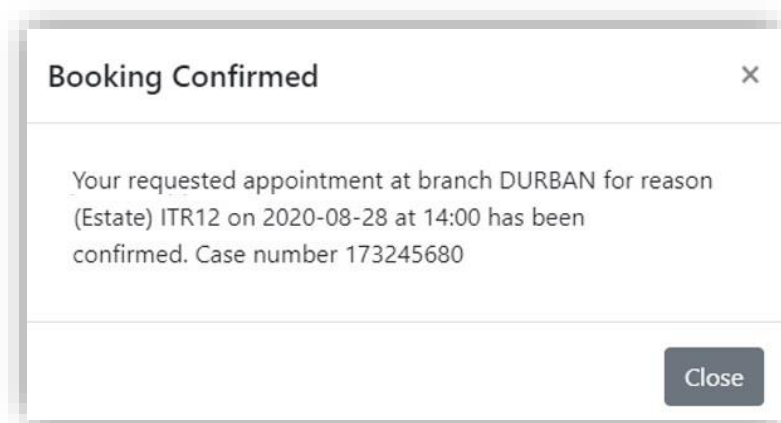


If your device enables sound to be played, click on the audio icon, wait for the sound to play and type in the letters that you hear

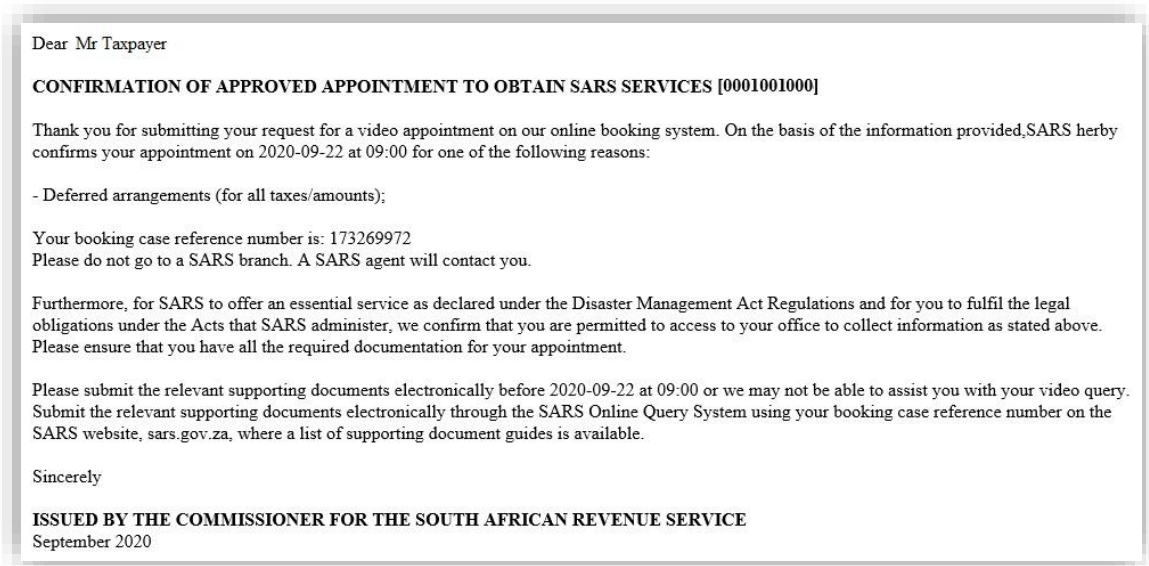


Click on the help icon if you require assistance with the CAPTCHA code.

- If you are satisfied with the Reason, Date and Time that you have selected, click on **'Confirm Appointment'**. 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.



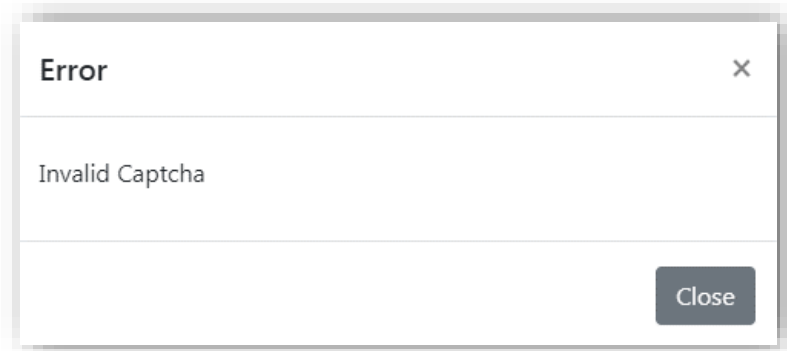
- A confirmation message will also be sent to you via email:



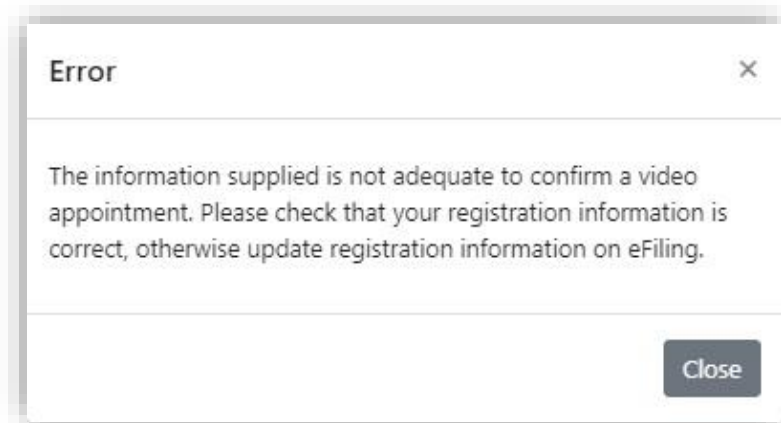
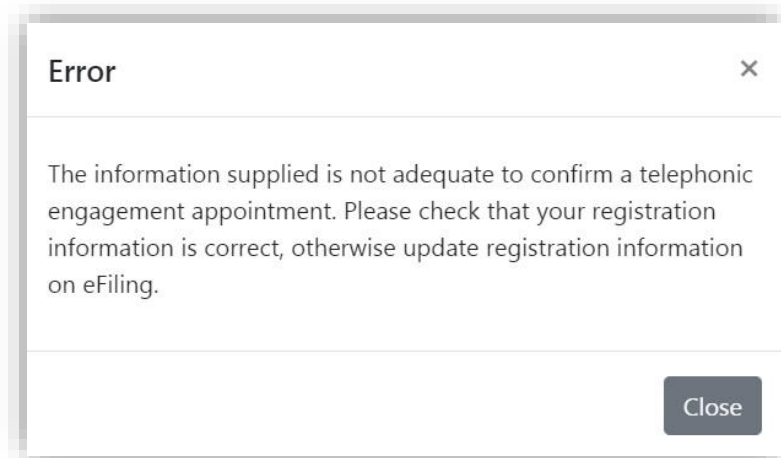
## 5 ERROR MESSAGES

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

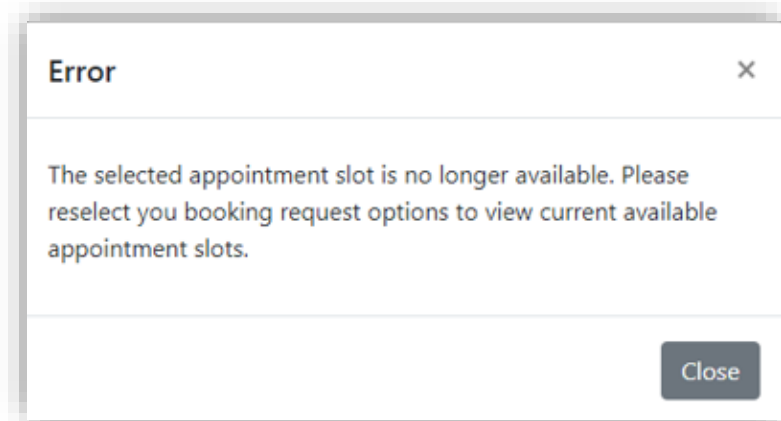
- The CAPTCHA code inserted does not correspond with the code displayed on the webscreen or the time limit to insert and validate the CAPTCHA code has expired.



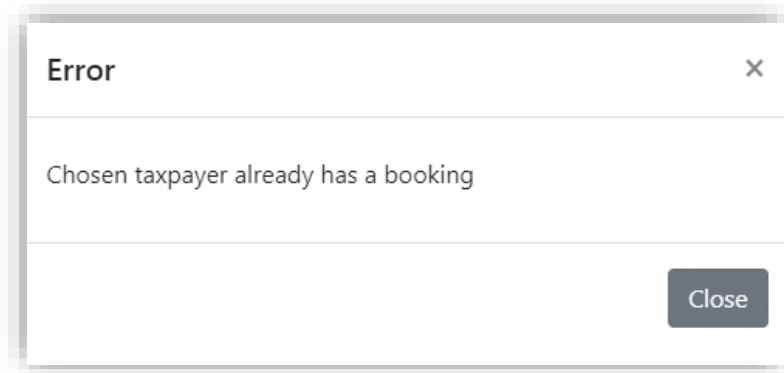
- The data you have entered has failed validation. Example:
  - The passport or ID number entered does not match the details that we have on record for the individual tax reference number
  - The representative's passport or ID number entered does not match the details that we have on record for the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



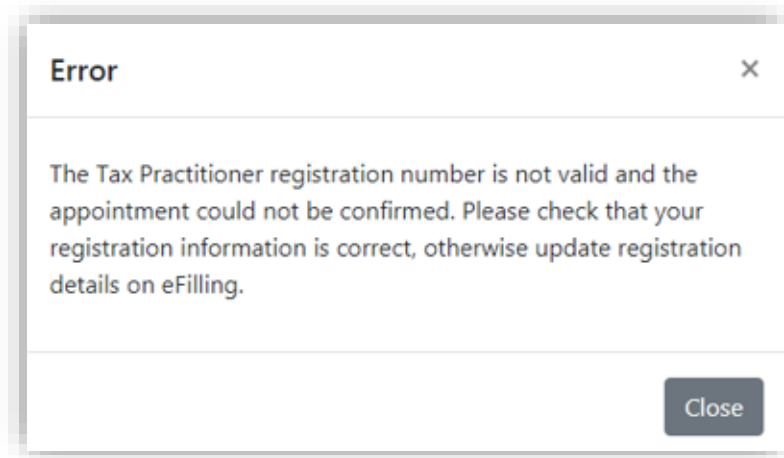
- The time slot you selected is no longer available. Please amend the appointment selection or exit the web page and try again



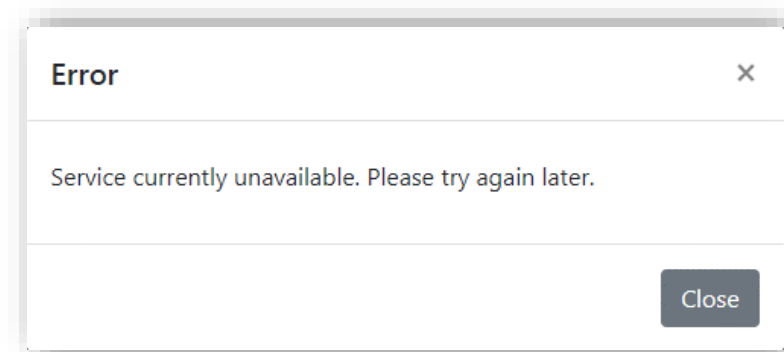
- A booking has already been submitted for the tax reference number entered. You will not be allowed to make multiple bookings.



- 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.



## 6 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).