

**Minutes of the Port Elizabeth Stakeholders meeting held on 04 February 2016 in the LBC Boardroom, SARS Sanlam Building from 10:00 – 11:43**

1. Welcome

The Chairperson Patience Ndende declared the meeting open and welcomed all present, she also introduced Siyanda Mvubu as the Branch Manager in UTH office.

2. Attendance

MEMBERS PRESENT			
Name	Name	Name	Name
As per register attached			

APOLOGIES	
As per register attached	

3. Matters arising from previous minutes

No	ITEM	Notes / Action Agreed Upon
3.1	Dispute Trust	<ul style="list-style-type: none"> <li>• It was noted that Brenda did speak to someone in her office and thus is the feedback: The following documents are compulsory at this stage for Trust verification audits:  Income &amp; Expenditure Statement / Financial Statements / Administration Accounts IRP5, IT3(a), IT3(b) and IT3(c) certificates</li> <li>• The beneficiaries' rights with regards to income and capital should be correctly completed on the ITR12T return. This should be in line with the Trust Deed. Currently the Compliance audit cases are not being stopped if the Trust Deed has not been uploaded to the case. However, it is suggested that the Trust Deed be uploaded if it's a first time audit to avoid unnecessary queries.</li> </ul>

		<ul style="list-style-type: none"> <li>Taxpayers to ensure that beneficiary schedules are correctly completed.</li> </ul>
3.2	Vat Visits	Duane stated that he did speak to BOE and discussed a way forward. It was also noted that Criminal Investigations was assisting with the backlog of these visits and addressed the skills issue.
3.3	TCC	It was noted that the example for the calls was given and it was all different issues re calls logged and feedback was given to Gerhard. It was noted that there are a few issues relating to modernisation of SDL registration.
3.4	Dividends withholding Tax registration	It was noted that eFiling has been updated and, if there is a skills issue, training can be provided.

#### 4. New Matters: Points of Discussions

No	ITEM	Notes / Action Agreed Upon
4.1	Tax Practitioners POA	<p>POA on External site has reverted back to state "To communicate to SARS any change of registered particulars, <b>excluding bank account details</b>". This is an error and has been escalated. HO is currently working on the fix. Work around: scratch the wording "excluding bank account details" and both client and practitioner need to sign next to alteration. The POA needs to accompany the Tax Practitioner at all times for authentication purposes.</p> <p>It was also noted that if any queries are being sent to SARS via emails the POA needs to be attached in order to get feedback.</p>
4.2	Foreign Investment TCC	New Sop was implemented from 25/01/2016. This has not been published externally and will be escalated. Practitioners need to be aware of the supporting documents required. It was noted that Denise will draft an email to the Prac Bodies re documents required.
4.3	TCC Capturing	New TCC system (phase 2) has been released on (23/01/2016) and is currently piloted in offices within Gauteng. Only when phase 3 is rolled out, probably during April, it will be rolled out nationally. Duane stated that thus far no problems was reported and will do an analysis which will be shared with the managers. System will be compliance status related. Patience mentioned if practitioners need another meeting in April it can be arranged.

4.4	VAT Amendments	VAT Legislative changes for voluntary registration less than R50 000 has been posted externally.
4.5	Outstanding Documents	All documents need to be prepared before visiting SARS office as the Prac unit cannot wait for documents to be emailed while dealing with practitioners on an appointment basis as it runs over into the next appointment time.
4.6	Prac Appointments Stats	<p>It was noted that for PE for the period of Nov 2015 to January 2016 a total of 585 appointments was made, of which 15 was cancelled and 11 no shows. Denise stated that the appointments got cancelled 10min prior to appointment times and she will communicate the names of the two culprits to their relevant Prac bodies. She indicated that she has informed them that they will be denied appointments for the next four weeks. In general staff conduct from the Prac bodies were exemplary.</p> <p>It was also noted for Uitenhage stats: 39 appointments were made from Nov to Dec 2015 and only 3 cancelled with 1 no confirmation.</p>

## 5. General

No	ITEM	Notes / Action Agreed Upon
5.1	Diesel Refunds	It was noted that a Diesel presentation will be done on 1 <sup>st</sup> March 2016 and Prac suggested that a split session be held re farming and export and import.
5.2	Updates on Registration	It was noted that there was a slow response re registration numbers on SARS system that has now been corrected.
5.3	PIT and VAT refunds	It was noted that there is a backlog and staff are working overtime to address the issue. It was also noted that practitioners should email the relevant manager concerned re burning cases relating to this.
5.4	VAT101	Denise stated that when online registration is being done the practitioners only visit the branch with the RAV01, but the VAT101 that was signed by the client is also needed.
5.5	LBC updates	It was noted that Duane will be relationship manager from 01 <sup>st</sup> April 2016 in LBC and that Mark Kingon will be the executive. Madeleine indicated that SARS is restructuring and new managers will be communicated.
5.6	IT Registrations at Branch	Eugene urged everyone to encourage employers to register their employees electronically instead of them queuing at branch offices. It was noted that some

		employers have a policy of not allowing registrations to be done on behalf of employees.
5.7	easyFile	It was noted that a session after meeting will be conducted re updates on easyFile. Eugene encouraged practitioners to utilize monthly training sessions. He also urged them to follow the process and immediately phone the Call Centre to get a reference number if a technical easyFil/eFiling issue is experienced. After 21 days these calls can be escalated by him.
5.8	Practitioners Comments	<p>It was noted that expenses are being disallowed yet all the relevant information has been submitted and is being ignored which leads to assessments being raised. Zane indicated that he is unsure if this is performance driven, but it mostly happens from Alberton office. Patience mentioned that practitioners should raise these issues with the Managers in PE in order to escalate to the relevant Manager in said offices.</p> <p>Zane asked if the Prac unit also assist other clients as he waited 30min for his appointment while the staff member was assisting another client. Patience stated that they do help with the walk-in queue and if a practitioner has got an appointment and experiencing same issue either herself or the Ops Manager needs to be informed immediately to address the issue.</p>

## 6. Closing

Patience thanked all for coming and practitioners thanked Patience for positive experience and wish her well on her endeavours. Patience closed the meeting.

## 7. Date of Next Meeting

Date of next meeting: 09 June 2016 @ 10am.