



## REGIONAL OR BRANCH OPERATIONAL STAKEHOLDER FORUM

### MINUTES OF THE SARS REGIONAL OR BRANCH OPERATIONAL STAKEHOLDER FORUM HELD

ON 29 October 2015 at 10:00 to 12h00 at SARS Klerksdorp

### MINUTES

RCB REPRESENTATIVES	SARS REPRESENTATIVES	APOLOGIES
1. Div Lamprecht	1. Daniel Letanke	P. Van Der Swan
2. Pieter Burger	2. Sugar Ntwampe	N.Ridge
3. Carel VanZyl	3. Emmie Hayward	G.Mire
4.	4. Diederick Esterhuizin	M. Mothoa
5.	5. Traety Tloane	M. Hlongwane
6.	6. Deepa Moodley	
7.	7. Alida Aspeling	
8.	8. Deidre Collins	
9.	9. Patricia Khoncha	
10.	10. Karen Pretorius	
11.	11. Thandi Felicity Kunene	
12.	12. Johanna Mahape (Telecom)	
13.	13. Liezl Pottier (Telecom)	

ITEM	DETAILS		RESPONSIBLE
1.	<b>WELCOME AND APOLOGIES</b>		Daniel Letanke
2.	<b>CONFIRMATION OF AGENDA</b>		Daniel Letanke
3.	<b>CONFIRMATION OF PREVIOUS MINUTES</b>		Daniel Leanke
	3.1	Minutes of previous meeting – was read and Accepted by all.	
4.	<b>NEW AGENDA ITEMS</b>		
	4.1	<p data-bbox="418 609 753 640"><b><u>Old System vs New System</u></b></p> <ul data-bbox="469 680 1324 896" style="list-style-type: none"> <li>• SARS has introduced the Taxpractioner WEB page whereby Taxpractioners will be able to make appointments and will also find the the latest information and updates to assist them in servicing clients and broadening the the culture of Tax Compliance.</li> <li>• New system is quiker than the Old system on appointments.</li> <li>• Taxpractioners indicated that are happy with the the new system.</li> </ul>	Daniel Letanke
	4.2.	<p data-bbox="418 927 871 958"><b><u>Time Allocated per appointment</u></b></p> <ul data-bbox="469 999 1343 1572" style="list-style-type: none"> <li>• Time allocated is 30 min per appointment but the Branch manager can still allow them 45 Minutes based on the time that the query should take.</li> <li>• If the Taxpractioner has exhausted the appointment and the query is not yet resolved the Branch Manager can give it to the Consultant to finalise it.</li> <li>• The Taxparctitioner should be specific when making appointment (state the type of quiries for the appointment) so that time can be allocated arccodingly.</li> <li>• They should be prepared when coming for appointment (not start looking for some documents when in the office).</li> <li>• Klersdorp has increaded the number of Consultants assisting Taxpractioners to 2.This will be business as usual whether its during tax season or not.</li> </ul>	
	4.3	<p data-bbox="418 1715 743 1747"><b><u>VAT Diesel Allocations</u></b></p> <ul data-bbox="469 1787 1331 2002" style="list-style-type: none"> <li>• The system disallows the Tax Practitioners to to do the ADR1 for Penalties and Interests unless the capital shows nil.</li> <li>• Penalties and Interest dont get reversed automatically and have to do ADR.</li> <li>• The Diesl allocation are taking long and they prevent the Taxpayers to get the tax clearance or the bank overdrafts.</li> </ul>	<p data-bbox="1366 1729 1535 1760">Pieter Burger</p> <p data-bbox="1366 1966 1461 1998">Felicity</p>

	<p>4.4</p>	<ul style="list-style-type: none"> <li>• Felicity will escalate this to our business to check the system. Examples can be sent to Felicity so that she can escalate to Account Maintenance.</li> <li>• There is a lot of risk on the Audit Space, Some of the farmers are using diesel for attending funerals and some are not keeping log books as required.</li> <li>• The Tax Practitioners are welcomed to have a forum and invite SARS to explain the Diesel Refunds.</li> <li>• Felicity is prepared to assist with the Diesel refunds and they can forward their queries to her.</li> <li>• Her email Address is <a href="mailto:fkunene@sars.gov.za">fkunene@sars.gov.za</a>.</li> </ul> <p><b><u>VAT 217 or letter sent to the Taxpayer</u></b></p> <ul style="list-style-type: none"> <li>• No VAT 217 or letter was sent, although the tax payer was sent an SMS about outstanding tax (e.g. 4250267426)</li> <li>• Tax Practitioners should be informed first and not an SMS to the Taxpayer.</li> <li>• A letter was sent to the Taxpayer's Postal address, It can either be that the Taxpayer has changed the address or there is problem with the address (Emmie has proof and will share this with Pieter Burger after the meeting).</li> <li>• Tax payers may change their details without informing the Practitioners and the last known address will be overruled by the System.</li> </ul>	<p>Pieter Burger</p> <p>Emmie</p>
	<p>4.5</p>	<p><b><u>Services available from SARS Mobile Units</u></b></p> <ul style="list-style-type: none"> <li>• Tax Practitioners cannot do VAT Registrations and bank verifications at the Mobile Units, they have to travel from far to the nearest office.</li> <li>• BOE has all other queues for assisting with queries except the Practitioners Queue and they are open to all other queries except VAT Registrations which can be done at the Branch.</li> <li>• <b>Visit the SARS Website</b></li> <li>• <b>Go to search</b></li> <li>• <b>Type in Mobile Tax Unit Schedule</b></li> <li>• <b>Click search.</b></li> </ul> <p>Rustenburg &amp; Klerksdorp Office contacts for MTU Schedules.  <b>Liezl Pottier</b>  <b>014-5946077/6140</b>  <b>BOEGautengNorth/NorthWest</b>  <b>@sars.gov.za</b></p>	<p>Liezl Pottier</p>

	<p>4.6</p> <p>4.7</p> <p>4.8</p> <p>4.9</p>	<p>Mmabatho Office Contacts for MTU Services.  <b>Yola Swartz</b>  <b>072 190 0319</b>  <b>BOEGautengNorth/NorthWest</b>  <b>@sars.gov.za</b></p> <ul style="list-style-type: none"> <li>The SARS Service Channel Document was shared with all</li> </ul> <p><b><u>Audit Risk Engine Massive increase in Audit Selection of Clients.</u></b></p> <ul style="list-style-type: none"> <li>This is driven by the fraud and system hijackings happening and as a result the number of cases will still go up.</li> </ul> <p><b><u>Information Required by SARS during Audit Verification</u></b></p> <ul style="list-style-type: none"> <li>VAT Audit Verification requests are not specific and the the refund are taking too long to get paid.</li> <li>If Tax practitioners have such cases they can forward them to the contact person on the letter and Anelise will send to them but there is no back log at this moment. Sugar will share the name.</li> </ul> <p><b><u>SARS Escalation List</u></b></p> <ul style="list-style-type: none"> <li>Escalation list will not be circulated anymore. Complaints Management system will assist as cases will be referred to the relevant division through the system.</li> <li>If there are issues, Tax practitioners are encouraged to refer them to the OPS Managers/Branch Manager so that they can be addressed immediately.</li> </ul> <p><b><u>Complaints Management System</u></b></p> <ul style="list-style-type: none"> <li>The Complaints Management document was shared.</li> <li>SARS has introduced the the system that will improve the way in which te complaints will be lodged, tracked and resolved effective from the 11<sup>th</sup> September 2015.</li> <li>The system replaces the SARS Service Monitoring Office (SSMO).</li> <li>Complaints can be refeed to the Branch Managers and OPS Managers at the Branch .They can first try to resolve the matter, before lodging on the system.</li> </ul>	
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	4.10	<ul style="list-style-type: none"> <li>• Before lodging the complaint to the CMO the complaint should first be resolved by Calling SARS Contact Centre on 0800 00 7277.</li> <li>• Visiting SARS Branch,SARS eFiling</li> <li>• SARS E mail Channels.  <a href="mailto:Contact.north@sars.gov.za">Contact.north@sars.gov.za</a>  <a href="mailto:Contact.central@sars.gov.za">Contact.central@sars.gov.za</a>  <a href="mailto:Contact.east@sars.gov.za">Contact.east@sars.gov.za</a>  <a href="mailto:Contact.south@sars.gov.za">Contact.south@sars.gov.za</a> </li> <li>• Correct steps should be followed in escalating the matter prior to lodging the complaint.</li> <li>• Either call the Contact centre or visit SARS branch and note the reference number provided for further enquiries.</li> <li>• If all the above is done and the 21 Working days has lapsed,then you can proceed to lodge a complaint.</li> <li>• The dedicated staff in the branches will check the complaints on a daily basis.</li> <li>• For Audit queries, Karin Pretorius and Thabo Malaka will assist or tax practitioners can call the Auditor.</li> </ul> <p><b><u>Appointments Stats</u></b></p> <ul style="list-style-type: none"> <li>• The appointments were monitored for the period June-August the Appointments were monitored.</li> <li>• The stats will be released per branch summary on Monthly basis.</li> </ul> <table border="1" data-bbox="421 1227 1321 1348"> <thead> <tr> <th>OFFICE</th> <th>App booked</th> <th>App honoured</th> <th>App cancelled</th> <th>No show</th> </tr> </thead> <tbody> <tr> <td>Rustenburg</td> <td>784</td> <td>703</td> <td>81</td> <td>0</td> </tr> <tr> <td>Klerksdorp</td> <td>631</td> <td>462</td> <td>107</td> <td>0</td> </tr> <tr> <td>Mmabatho</td> <td>379</td> <td>366</td> <td>1</td> <td>12</td> </tr> </tbody> </table>	OFFICE	App booked	App honoured	App cancelled	No show	Rustenburg	784	703	81	0	Klerksdorp	631	462	107	0	Mmabatho	379	366	1	12	
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	4.11	<ul style="list-style-type: none"> <li>• Cancelled appointments is a challenge in Rustenburg and Klerksdorp Offices.</li> <li>• The committee decided that all Appointments need to be cancelled at least 24 hours in advance.</li> <li>• If no show for more than 2 times then the Practitioner will be blacklisted and escalated.</li> <li>• Each Branch manager will engage the Controlling Bodies of such cancellations and no - show.</li> </ul> <p><b><u>Channels for Query Resolution</u></b></p> <ul style="list-style-type: none"> <li>• <b>Required Information in respect of the query:</b></li> <li>• Tax Reference Number</li> <li>• PR Number (Tax Practitioner number)</li> <li>• If Follow up query,Please quote the original case number that was allocated in your mail or fax from SARS.</li> </ul>																					

	4.12	<ul style="list-style-type: none"> <li>• State your Email address so that response can be issued to your enquiry.</li> <li>• State what the enquiry is about.</li> <li>• Attachments if required</li> <li>• Limit of 5 queries per e-mail.</li> <li>• The turn around time for a query is <b>21 working days</b>.</li> </ul> <p><b><u>Practitioner Contact Centre (PCC) contact details:</u></b></p> <table border="1" data-bbox="421 667 1343 1211"> <thead> <tr> <th></th> <th>PCC Mailboxes</th> <th>Inbound Mail Boxes</th> </tr> </thead> <tbody> <tr> <td>North including Pretoria, Northwest, Limpopo, Mpumalanga &amp; West Rand</td> <td><a href="mailto:pcc.north@sars.gov.za">pcc.north@sars.gov.za</a> / 010 208 5003</td> <td><a href="tel:+271126706880">Contact. North @sars.gov.za /0126706880</a></td> </tr> <tr> <td>Central including East Rand, Soweto, Alberton, Vereeniging.</td> <td><a href="mailto:pcc.central@sars.gov.za">pcc.central@sars.gov.za</a> / 010 208 5004</td> <td><a href="tel:+27112085005">Contact. central @sars.gov.za /0102085005</a></td> </tr> <tr> <td>KwaZulu-Natal</td> <td><a href="mailto:pcc.east@sars.gov.za">pcc.east@sars.gov.za</a> /010 208 5005</td> <td><a href="tel:+27313286018">Contact. North @sars.gov.za /0313286018</a></td> </tr> <tr> <td>Western Cape</td> <td><a href="mailto:pcc.south@sars.gov.za">pcc.south@sars.gov.za</a> /010 208 5006</td> <td><a href="tel:+271214138905">Contact. North @sars.gov.za /01214138905</a></td> </tr> <tr> <td>Free State &amp; Northern Cape</td> <td><a href="mailto:pcc.fs@sars.gov.za">pcc.fs@sars.gov.za</a> /010 208 5007</td> <td></td> </tr> <tr> <td>East London</td> <td><a href="mailto:pcc.el@sars.gov.za">pcc.el@sars.gov.za</a> /010 208 5008</td> <td></td> </tr> <tr> <td>Port Elizabeth</td> <td><a href="mailto:pcc.pe@sars.gov.za">pcc.pe@sars.gov.za</a> /010 208 5009</td> <td></td> </tr> </tbody> </table> <p>Other channels may also be used as they are convenient and easy.</p> <ul style="list-style-type: none"> <li>• SARS Branch</li> <li>• Post or SARS Branch Office Drop Box</li> <li>• Electronically via e-Filing.</li> </ul> <p><b><u>Trust Returns-Modernisation</u></b></p> <p>Will be discussed in the next meeting (BOE).</p>		PCC Mailboxes	Inbound Mail Boxes	North including Pretoria, Northwest, Limpopo, Mpumalanga & West Rand	<a href="mailto:pcc.north@sars.gov.za">pcc.north@sars.gov.za</a> / 010 208 5003	<a href="tel:+271126706880">Contact. North @sars.gov.za /0126706880</a>	Central including East Rand, Soweto, Alberton, Vereeniging.	<a href="mailto:pcc.central@sars.gov.za">pcc.central@sars.gov.za</a> / 010 208 5004	<a href="tel:+27112085005">Contact. central @sars.gov.za /0102085005</a>	KwaZulu-Natal	<a href="mailto:pcc.east@sars.gov.za">pcc.east@sars.gov.za</a> /010 208 5005	<a href="tel:+27313286018">Contact. North @sars.gov.za /0313286018</a>	Western Cape	<a href="mailto:pcc.south@sars.gov.za">pcc.south@sars.gov.za</a> /010 208 5006	<a href="tel:+271214138905">Contact. North @sars.gov.za /01214138905</a>	Free State & Northern Cape	<a href="mailto:pcc.fs@sars.gov.za">pcc.fs@sars.gov.za</a> /010 208 5007		East London	<a href="mailto:pcc.el@sars.gov.za">pcc.el@sars.gov.za</a> /010 208 5008		Port Elizabeth	<a href="mailto:pcc.pe@sars.gov.za">pcc.pe@sars.gov.za</a> /010 208 5009		
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5.		<p><b><u>General</u></b></p> <ul style="list-style-type: none"> <li>• SAICA promised to try their level best in ensuring that the Taxpractitioners are informed of the discussed matters.</li> <li>• Branch Managers are encouraged to contact RCB if experiencing problems with Practitioners.</li> <li>• RCB should also share the issues of concern with the Branch Manager.</li> </ul>	Div Lamprecht																								

6.		<b><u>Next meeting</u></b> Third Week –January 2016 – Klerksdorp Office	
7.		<b><u>CLOSURE :</u></b> The chairperson thanked everyone for attending the meeting, and confirm that the next meeting will be held at Klerksdorp on the <b>21<sup>st</sup> of January 2016 in Klerksdorp</b>	Daniel Letanke