


2023/24 NATIONAL TREASURY REPORT INPUT: SIGN-OFF SHEET

Strategic Objective:	Strategic Objective 9: Build public trust and confidence in the tax administration system	Anchor:	S2025501 Johnstone Makhubu				
		Key Result Owner:	S1032748 Thomas Radzilani				
		ANNUAL TARGET	Q1 TARGET	Q2 TARGET	Q3 TARGET	Q4 TARGET	
KEY RESULT - SO 9.2 2023-24	SO 9.2: Adherence to Service Charter commitments	85.00%	85.00%	85.00%	n/a	85.00%	
KEY RESULT INDICATOR	% Service Charter performance score						

Quarter 3 (1 OCT 2024 - 31 DEC 2024)				
n/a	Actual Achievement	Variance	Target Met	Data Valid And Correct
	Service Charter Performance score for December 2023 (81.46%) and YTD score is 80.87%	n/a	No	Yes
REASON FOR VARIANCE	The Service Charter Index YTD performance is being compared to the annual performance target of 85% as per the 2023/24 Annual Performance Plan (APP). The YTD performance for 2023/24 quarter 3 is 80.87%, hence the variance of -4.13%. An incremental percentage of 2.62% was attained from Q2 to Q3, and an incremental percentage of 4.13% is required for quarter 4 to achieve the set annual target.			
MITIGATION FOR UNDERPERFORMANCE (Progress, actions and activities completed during the quarter)	To augment the action plans that were submitted in June 2023 which have not yielded positive results hence engagements should continue with Regional Directors and Heads of Segments to address underperforming transactions. Pre and Post Expiry proactive management of cases should be prioritized. Service channel improvement discussions should continue with BDE to effect short-term improvements on eBooking, IVR and Live-Chat.			
COMMENT ON PERFORMANCE (Progress, actions and activities completed during the quarter)	<p>The YTD Service Charter performance for 2023/24 Quarter 3 increased by 2.62% to 80.87% compared to the same period in 2022/23 of 78.25%. Monthly performance for December 2023 (81.46%) increased by 7.79% in comparison with same period last year (73.67%). The YTD performance improved by 1.1% from 79.76% in 2023/24 Q2 to 80.87% in Q3.</p> <p>Adherence to the Service Charter monthly performance for 2023 (October - 81.73%, November - 80.55%, December - 81.46%) increased in comparison to the same period in 2022 (October - 81.30%, November - 81.23%, December - 73.67%). However, the month-to-month performance has been above the expected minimum incremental 0.90% in Q2 only between November and December 2023.</p> <p>eBooking has been continuously negatively impacting the Engagement category in the value chain and other areas that are still underperforming</p>			

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	<p>are, Customs Complex Registrations, Returns (PIT), Verifications, Debt on Suspension of Payments, Tax Administration Act Disputes, Tax Clearance Status, Escalations to the Office of the Tax Ombud, Payment Errors.</p> <p>The resolution of complaints dropped by 0.17% from 85.56% (September 2023) to 85.39% (December 2023) and OTO resolution also dropped by 1.195 from 36.57% (September 2023) to 35.38% in (December 2023).</p> <p>Regional Performance for YTD (Q3), 4 out of 12 regions (Restricted: Prominent and Related, Eastern Cape, Free State and Northern-Cape and Kwazulu-Natal) performed at 85% and above, while 8 regions performed below 85% (Mpumalanga, North-West, Gauteng-South, Gauteng-North, Western-Cape, Limpopo, Large Business & International and High Wealth Individuals). This was a decline by one region from 2023/24 Q2, where 5 regions performed at 85% and above. In 2022/23 Q3 there was also 4 regions that performed at 82% and above the target then of 82%.</p> <p>The inventory ageing is still of great concern, the total inventory balance as of 31 December 2023 is 5.2 million cases, an increase of 600k cases at the end of Q2, which was 4.6 million cases. On 31 December 2023, 62.99% of cases were on ready status (a decrease of 4.33% from end of Q2), which was 67.32%, with an average age of 396 days on 31 December 2023, which reduced by 74 days from 467 days at the end of Q2.</p>		
Calculated according to the Technical Indicator Descriptions (APP, Part D)	Yes	If not Calculated according to the TID, please state reason why and the calculation used	n/a
DATA SOURCE	SARS Core Systems & Tax Ombud		
EVIDENCE (Provide a list)	Service Charter Index - October 2023 Service Charter Index - November 2023 Service Charter Index - December 2023 Service Charter YTD Score YTD Regional Performance		
<p>➤ Please ensure that information provided is complete, accurate and valid and has been reviewed prior to submission.</p> <p>➤ The information you provide is subject to audit by the Auditor-General and Internal Audit.</p> <p>➤ It must be emphasised that line managers remain responsible for establishing and running performance information systems within their sections, and for using performance information to make decisions.</p>			
COMPILER OF THIS REPORT: Carmen Fisher	SIGN:  DATE: 2024-01-10		
KEY RESULT OWNER : Thomas Radzilani	SIGN: DATE:		
ANCHOR :	SIGN:		

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<div>Johnstone Makhubu</div>	
	DATE: _____
TECHNICAL INDICATOR DESCRIPTION iro KEY RESULT (APP 2023/24 - PART D)	

9.2. Adherence to Service Charter commitments

Indicator Title	% Service Charter performance score
Definition / Purpose	This measure seeks to track how SARS is meeting its commitments in the 2022 Service Charter
Source/Collection of data	SARS core systems, Tax Ombud
Method of calculation	The score is derived from the categories in the 2022 Service Charter, and weighted to arrive at a composite score. Further detailed calculations are available in the service charter methodology and business rules documents.
Data limitations / assumptions	The migration from the old Service Charter to the 2022 Service Charter might compromise data quality due to some manual data processing. Continuous improvements will be implemented during the year.
Type of indicator	Output
Calculation type	Cumulative (year-to-date)
Reporting cycle	Quarterly and Annually
Desired performance	An actual achievement higher than target
Indicator responsibility	Taxpayer Service Charter Unit