

# Mexico: SAT-ID and OrientaSAT for improved taxpayer service and compliance

## Introduction

The Tax Administration Service (SAT, in Spanish) has been at the forefront of using of technology tools to improve and facilitate the tax collection in Mexico and Latin America in the. Due to the COVID-19 pandemic the use of digital technology to facilitate tax procedures and to improve service to taxpayers became a priority

## Background

For some years now, in order to promote tax compliance, SAT has assisted and guided the taxpayer either in person or through remote channels such as telephone and chat.

Taking into consideration the increasing use of electronic media and digital platforms by people, in April 2020, SAT implemented SAT-ID, which is an app to assist the citizens to generate or renew their password (formed by an user and a password) and renew their Advanced Digital Signature (e.Firma) from their smartphone or computer. These elements are means of authentication that allow taxpayers to comply with their tax obligations remotely through the services available on the SAT's website. Additionally, in March 2021, taxpayers also had the opportunity to get the Tax Status Certificate through this app, which is important because it contains information regarding taxpayer's obligations and tax characteristics.

As part of SAT'S obligation to provide free assistance to taxpayers, h the Chatbot called OrientaSAT was created. This provided guidance on the 2020 Annual Return of Individuals, which had to be filed on April and May 2021.

For the purposes of the 2020 Annual Return of Individuals, the service of OrientaSAT was put into operation using a knowledge base to interact with taxpayers, consisting of 1,149 standard answers and 17,776 variants of questions.

## Results and benefits

Among the benefits of SAT-ID and OrientaSAT, the following can be highlighted:

- Taxpayers can register their requests **24 hours a day, 7 days a week, 365 days a year.**
- **Accessibilie** through a computer, tablet or smartphone.
- Can be done anywhere, , **helping to preserve the social distancing requirments.**
- **Reduces the waiting times for** taxpayers seeking in guidance/information consultations

## Conclusions

The SAT aims to provide more and better services through technology that improve and facilitate taxpayers' compliance with their tax obligations. The results of these initiatives are set out below.s

## SAT-ID

In the period from April 2020 to July 2021, SAT-ID has registered 4.7 million requests, of which 4.2 million are for passwords, 417 thousand for Advanced Digital Signature (e.Firma) renewal and 150 thousand to request a certificate.. The SAT-ID platform has generated a great acceptance by citizens, registering an increase of 123% in the number of digital procedures from January to July 2021, compared to those registered from April to December 2020.



## OrientaSAT

In the period from April to May 2021 (deadline to file the 2020 Annual Return for Individuals), OrientaSAT recorded a total of 263,000 visits to provide guidance and information, which represented 37.6% of the total number of visits provided to taxpayers through telephone, Chat and OrientaSAT channels. 51% of the taxpayers who answered the satisfaction survey said that the quality of the information and service provided by OrientaSAT was good or very good.

OrientaSAT, is now being implemented across other applications of the SAT's website. This development currently has a knowledge base, which includes an accumulated of 753 standard answers and around 10,000 variants of questions.



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