

SARS AUTO-ASSESSMENTS

Auto-Assessments: what are they?

SARS Auto-Assessments on personal tax returns is a SARS innovation where you and/or your tax practitioner are cut out of the tax return submission loop. SARS submits a tax return on your behalf using third party data (e.g. IRP5's submitted by employers, medical aid certificates supplied by medical aid funds etc.). Should the third party data be incorrect or you have relevant information NOT reflected on the SARS auto-assessment, such as extra expense claims or income, a corrected return will need to be submitted before the deadline date of 21 October 2024.

Do you want us to look at and report to you on your auto-assessment? OPT IN OR OPT OUT.

The SARS auto-assessments create difficulties for us as your tax practitioner. We feel that we cannot charge for the auto-assessments as we do no work on it. There is however a cost in time/effort to us to communicate auto-assessment information to you, notably requests to check if all auto-assessment data is reflected accurately. We would therefore like to give you the choice if you do or do not want to receive auto-assessment communication from us.

OPT OUT (no charge):

This makes you 100% responsible for checking the accuracy of your SARS auto-assessment. The only way you can do this is by accessing your eFiling profile using your PERSONAL eFiling username and password. We do not have access to and are not allowed to have access to your eFiling logon name and password. If you do not know what your eFiling username and password is, please follow the SARS eFiling registration and/or eFiling username and password recovery processes.

https://sarsguide.co.za/how-do-i-reset-my-sars-username-and-password/?gad_source=1&gclid=CjwKCAjwjgWzBhAqEiWAQmtgT4pVJPjRmS_tB5Hscl4vDp3UynoUB8EeHGJyUvjpcdcBIT0uDT8BaBoChJoQAvD_BwE

<https://www.sars.gov.za/individuals/how-do-i-register-for-tax/register-for-e-filing/>

Should you require our intervention after your auto-assessment, we will be happy to help and will charge this out at our regular rates.

OPT-IN (R250 fee applicable)

We will check for SARS notices issued via eFiling and inform you if SARS selected your return for auto-assessment. We will let you know if this is the case and provide you with an opinion on the accuracy of the auto-assessment and a breakdown of the tax due/refund payment amounts.

Should you request a correction on the auto-assessment, we will charge you for the submission(s) at our regular rates and the R250 auto-assessment fee will then become deductible off of your account.