



Introduction

SARS will be automatically assessing a large number of taxpayers in the 2022 filing year. If you are auto-assessed, you will be notified by SMS during July – so there will be no need for you to call us or visit a branch if the assessment accurately captures all your information, income, and expenditure. Simply sit back and relax, SARS has made it easier for you.

What is different this year?

This year, we have made it much easier – if you agree with your auto-assessment then there is no need to “accept” the assessment. If SARS did not get your assessment right, you can still let us know by filing a tax return in the normal way with the additional information, within 40 business days of the date of your assessment.

How does auto-assessment work?

SARS receives data from employers, medical schemes, banks, retirement annuity funds and others. We then use that data to calculate your tax assessment. If we are satisfied that the data and tax calculation is correct, we issue the assessment to you via eFiling or the SARS MobiApp. At the same time, we also send you a message via your preferred channel of communication (like SMS or email) to let you know that your assessment on eFiling or SARS MobiApp is ready for you to view.

What must I do when I receive my auto-assessment?

The first thing to do is to log into eFiling or the SARS MobiApp and view your assessment. You will be able to see all the data we used to calculate your assessment.

If you agree with the assessment, then check if a refund is due to you or if you owe SARS. If a refund is due, then there is nothing more you need to do – you can log out of eFiling or SARS MobiApp and wait for the refund, which you can expect within approximately seventy-two (72) hours,

provided your banking details with SARS are correct. If you owe SARS, then make the payment via eFiling or SARS MobiApp.

If you do not agree with the assessment, you can access your tax return via eFiling or the SARS MobiApp, complete the return, and file it within 40 business days from the date that SARS issued your assessment to you.

How do I know that the data is correct?

This year, for the first time, you can view your data in detail, as follows:

1. Login onto eFiling
2. Select the “Third Party Data Certificate” search button on the menu bar
3. Submit / search any certificate that you wish to verify
4. Select the certificate type in question.

If there is an error on your data or the data is incomplete, you can correct it by doing two things:

1. Ask the institution that provided the data to SARS to correct it by sending updated data to SARS and yourself.
2. When you receive the updated data, access your tax return on eFiling or SARS MobiApp, update the data on the tax return, and file your tax return via eFiling or the SARS MobiApp.

For more information and explanation on everything you need to know about the auto-assessment process, go to the sars.gov.za website, and click on ‘How does Auto-Assessment work’ under ‘Top Queries’.