

FILING SEASON 2020: UPDATE ON AUTO ASSESSMENTS FIXES
11 AUGUST 2020

Since 30 July 2020, some taxpayers have been receiving an SMS of a notice of auto assessment from SARS. We have collated a detailed list of [FAQs](#) which should assist members and their clients to better understand the process. For clarity on some of the practical aspects, you may also read [SARS FAQs](#) in this regard.

SARS has provided a list of issues experienced by taxpayers in relation to auto assessments and the “fixes” related thereto:

FIXES	Issue Experienced by the Taxpayer	Recommendation to the Taxpayer
Travel allowance	Auto assessment returns with travel allowance cannot calculate the allowance without the claims container being completed. This data is not third party data and is completed by the taxpayer according to logbook kept or details for company vehicle used.	If the taxpayer has travel allowance they want to claim against, the Auto assessment must be rejected by selecting edit return and the return will populate with the defaulted field and the return can be completed as per normal including any travel claims.
Medical Aid Discrepancies	Medical aid contributions from third party data is not included in the SMS amount sent to the taxpayer.	Taxpayer must check the rebate amount and if uncertain about the medical aid contributions as per the certificate they received, they should rather edit the return and include medical aid contributions as per the normal return capture process.

Lump Sum	An error was made whereby the assessment was rejected with an error message “Missing lump sum” although the lump sum amount and source code was declared on the return.	The issue was resolved on 4 August 2020.
The Tax Free Investment (TFI) contribution amount defaults to Zero	The TFI contribution amount defaults to Zero even though the amount is on third party data.	<p>A system fix will be implemented in the coming week so that the ITR12 pre-population is included as a contribution amount (source code 4219) on TFI.</p> <p>SARS will inform taxpayers once this fix has been implemented.</p>

Note: Information noted above is based on that available as at 7 August 2020.

For further updates, please refer to the 2020 Filing Season / Auto assessments tab in Integritax Weekly newsletters.