



My Virtual Financial Controller

Financial Wizardry for the Self Employed

Tax return guide

1. Introduction

“On a mission to help women in business”

Accounting, tax & bookkeeping services
for women in business & microbusiness

Tax return guide

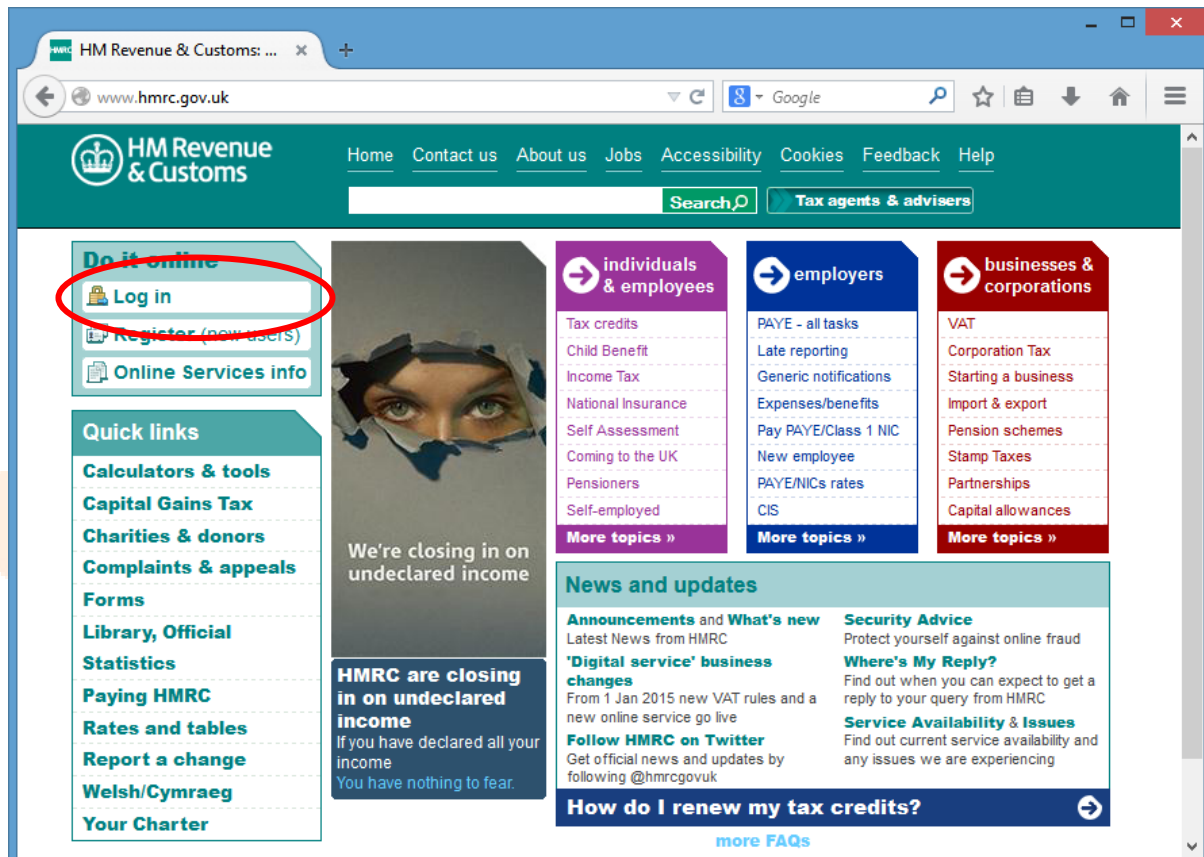
1. Introduction

Introduction and tailoring your return

- This guide will help you with logging in and completing the main sections of your self assessment tax return for the 2013-2014 tax year.
- In order to submit your self assessment tax return you have to be registered for HMRC taxes and signed up for online services.
- You need to have a Unique Tax Reference (UTR) to sign up for self assessment online.
- Signing up for HMRC online services takes several days so don't leave it until the last minute!

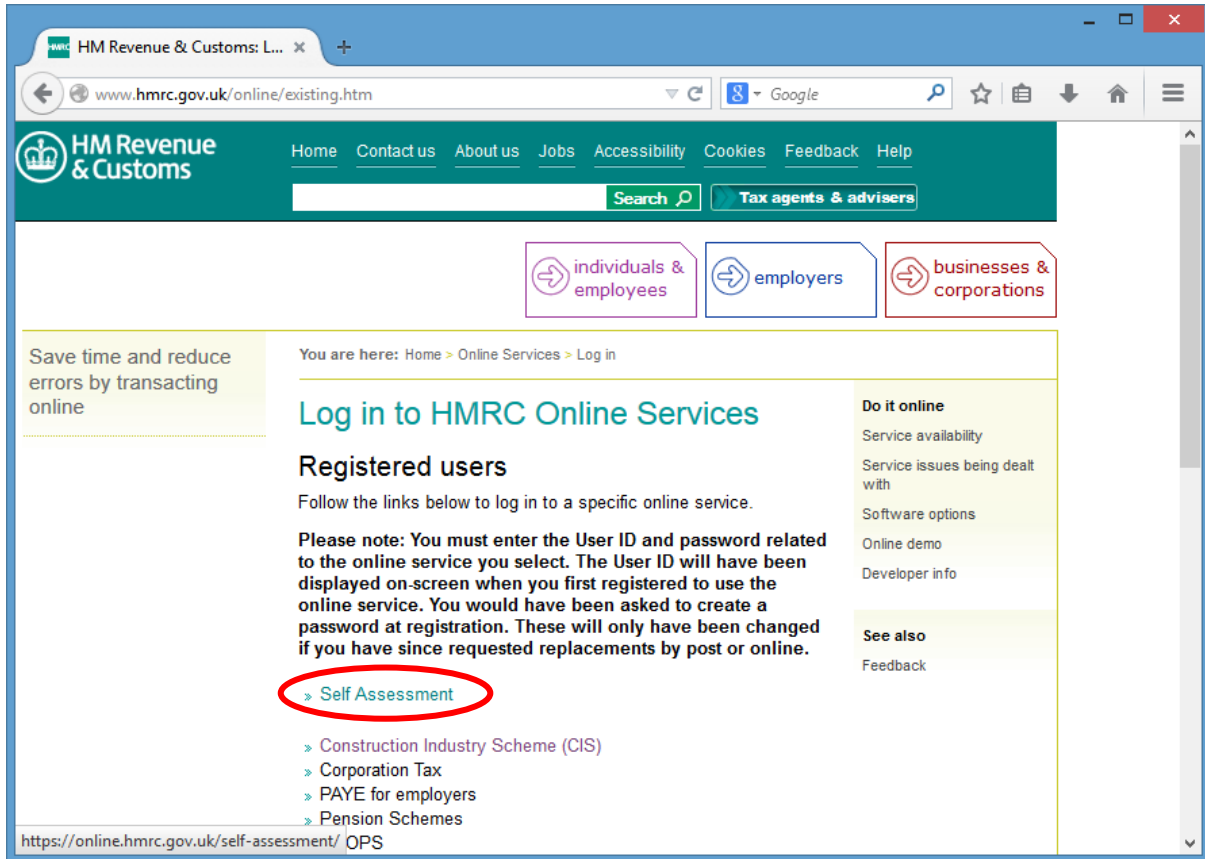
Getting started

Log in from the HMRC website <http://www.hmrc.gov.uk/>



The screenshot shows the HMRC website homepage. The browser address bar displays 'www.hmrc.gov.uk'. The main navigation bar includes links for Home, Contact us, About us, Jobs, Accessibility, Cookies, Feedback, and Help. A search bar and a 'Tax agents & advisers' button are also present. The 'Do it online' section is highlighted with a red circle, containing 'Log in', 'Register (new users)', and 'Online Services Info'. Below this is a 'Quick links' section with various categories like 'Calculators & tools', 'Capital Gains Tax', 'Charities & donors', 'Complaints & appeals', 'Forms', 'Library, Official', 'Statistics', 'Paying HMRC', 'Rates and tables', 'Report a change', 'Welsh/Cymraeg', and 'Your Charter'. A central banner features a woman's face and the text 'We're closing in on undeclared income' and 'HMRC are closing in on undeclared income'. To the right, there are three columns of services: 'Individuals & employees', 'Employers', and 'Businesses & corporations'. A 'News and updates' section is at the bottom, including 'Announcements and What's new', 'Security Advice', 'Where's My Reply?', 'Service Availability & Issues', and 'How do I renew my tax credits?'. A 'more FAQs' link is at the bottom right.

Follow the self assessment link.



The screenshot shows the HMRC website interface. At the top, there is a navigation bar with the HM Revenue & Customs logo and links for Home, Contact us, About us, Jobs, Accessibility, Cookies, Feedback, and Help. Below this is a search bar and a 'Tax agents & advisers' button. The main content area is divided into three sections: 'individuals & employees', 'employers', and 'businesses & corporations'. The 'Log in to HMRC Online Services' section is highlighted, and the 'Self Assessment' link is circled in red. The page also includes a 'Do it online' sidebar with links for Service availability, Service issues being dealt with, Software options, Online demo, and Developer info. A 'See also' section contains a link for Feedback.

HM Revenue & Customs

Home Contact us About us Jobs Accessibility Cookies Feedback Help

Search Tax agents & advisers

individuals & employees employers businesses & corporations

Save time and reduce errors by transacting online

You are here: Home > Online Services > Log in

Log in to HMRC Online Services

Registered users

Follow the links below to log in to a specific online service.

Please note: You must enter the User ID and password related to the online service you select. The User ID will have been displayed on-screen when you first registered to use the online service. You would have been asked to create a password at registration. These will only have been changed if you have since requested replacements by post or online.

- > **Self Assessment**
- > Construction Industry Scheme (CIS)
- > Corporation Tax
- > PAYE for employers
- > Pension Schemes

Do it online

- Service availability
- Service issues being dealt with
- Software options
- Online demo
- Developer info

See also

- Feedback

<https://online.hmrc.gov.uk/self-assessment/> OPS

Enter your user ID (not your UTR) and password.

HMRC: Login

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/login?GAREASONCC

Google

HM Revenue & Customs Home Cymraeg Contact HMRC Help

Welcome to HMRC Online services

Existing users

If you are already signed up to use HM Revenue & Customs (HMRC) Online Services and have a Government Gateway account, please enter your User ID and password, then click the 'Login' button below.

Please note: Fields are not case sensitive.

User ID:

Password:

Login

New user

To sign up to use HMRC Online Services and to register a business for HMRC taxes, please click the 'Register' button below.

Register

- [Digital Certificate user](#)
- [Frequently Asked Questions \(FAQs\)](#)
- [View a demo of HMRC's services](#)
- [Registration and Enrolment process](#)

[Digital Certificate user](#)

[Lost User ID?](#)

[Lost password?](#)

[Lost or expired Activation Code?](#)

If you have lost both your User ID and password and are a Self Assessment individual or partnership, you may be able to use the [online form](#) to request a duplicate User ID.

For all other online services you will need to contact the [HMRC Online Services Helpdesk](#).

Click through from the security message into the main site.

HMRC: Security message

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/users/lastlogir

Google

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

Security message

For your information: You last logged in at the HM Revenue & Customs (HMRC) portal on
.....

Please check the HMRC [Reporting online security issues](#) page if this is not the last time you logged in.

Have you taken steps to protect yourself from online fraud?

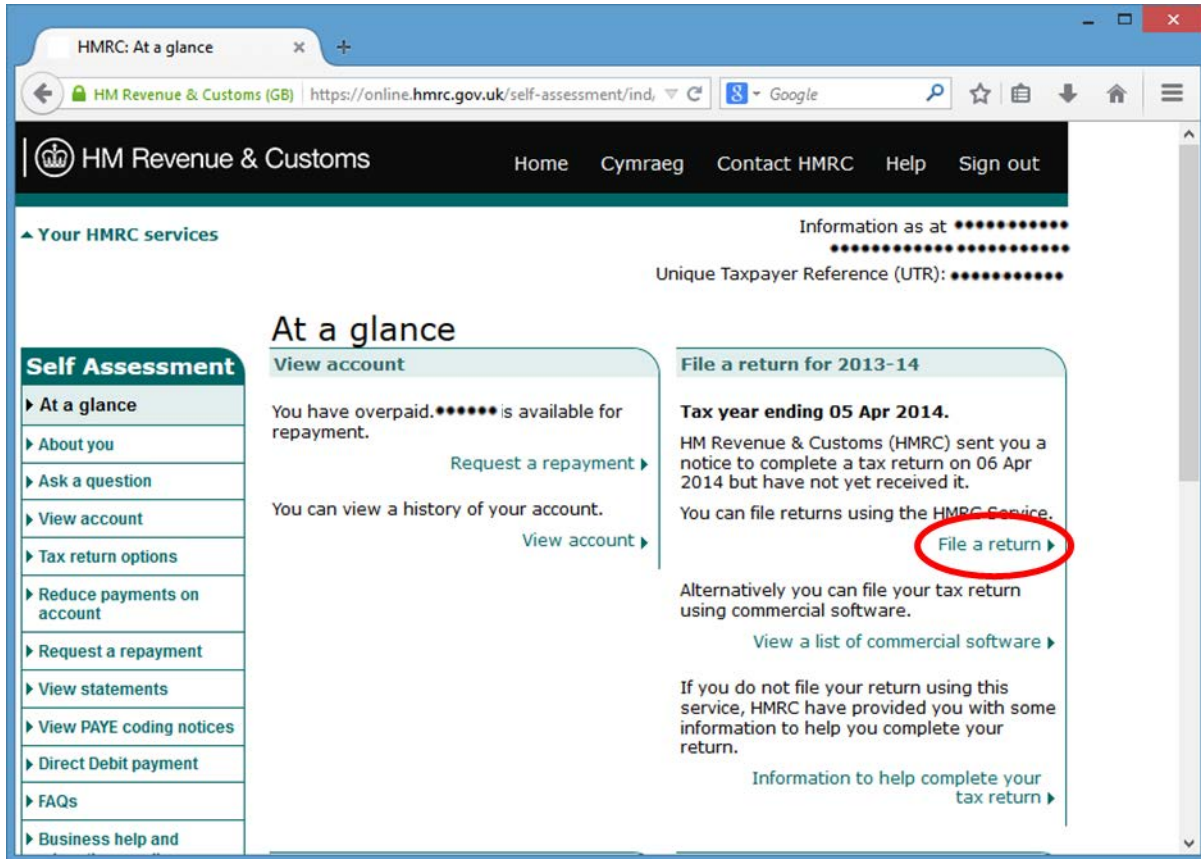
Criminals are using increasingly sophisticated ways to commit online fraud and it is important that you do everything you can to protect yourself.

Please take some time to read the security advice on the HMRC [Online security](#) page to find out how you can do this and for details of the steps HMRC is taking to protect your information.

Please click the 'Next' button to continue.

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Click on "File a return".



The screenshot shows a web browser window with the URL <https://online.hmrc.gov.uk/self-assessment/ind>. The page header includes the HM Revenue & Customs logo and navigation links: Home, Cymraeg, Contact HMRC, Help, and Sign out. The main content area is titled "At a glance" and is divided into three sections:

- View account:** "You have overpaid.***** is available for repayment." with a "Request a repayment" link.
- File a return for 2013-14:** "Tax year ending 05 Apr 2014." "HM Revenue & Customs (HMRC) sent you a notice to complete a tax return on 06 Apr 2014 but have not yet received it." "You can file returns using the HMRC Service." The link "File a return" is circled in red.
- Alternatively you can file your tax return using commercial software.** with a "View a list of commercial software" link.

A left-hand navigation menu under "Self Assessment" includes: At a glance, About you, Ask a question, View account, Tax return options, Reduce payments on account, Request a repayment, View statements, View PAYE coding notices, Direct Debit payment, FAQs, and Business help and.

The initial screen is your main point of navigation.

HMRC: Welcome

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/ Google

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

..... tax return: 2013-14

▲ Your HMRC Services
▲ Self Assessment

1. Welcome

'Start' will take you to '2. Tell us about you'

Cancel Start

This section explains who can and cannot file a return online using this service.

Please note: Not everyone can use this service and some will need to use commercial software, for example, if you were not resident in the UK in the tax year or you claim the remittance basis. For full details read the information **below** before clicking the 'Start' button.

<p>✓ You can use this service if in the tax year ending 5 April 2014 you received</p> <ul style="list-style-type: none">• employment income• self-employment income• partnership income• UK property income ⓘ• pensions• UK interest, dividends etc ⓘ• foreign income ⓘ• capital gains (If you are entitled to the annual exempt amount) ⓘ	<p>It is very important that you enter the correct amount in the appropriate box on the return. Errors or mistakes can lead to you being asked to pay the wrong amount of tax, and can take time to correct.</p> <p>Find out which financial records you will need to complete your return online.</p> <p>ⓘ</p> <p>Help icons are provided throughout if you need specific help or information</p>
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File a return

- ▶ 1. Welcome
- ▶ 2. Tell us about you
- ▶ 3. Tailor your return
- ▶ 4. Fill in your return
- ▶ 5. Check your return
- ▶ 6. View your calculation
- ▶ 7. Save your return
- ▶ 8. Submit your return
- ▶ Provide feedback
- ▶ Tax return options
- ▶ How to pay



Start at “Tell us about you”.

This will be prepopulated with some data, you can then add info as needed.

HMRC: Tell us about you

HM Revenue & Customs

Home Cymraeg Contact HMRC Help Sign out

tax return: 2013-14 IN PROGRESS

Your tax return is 1% complete

2. Tell us about you

* indicates required information

First name: *

Middle name:

Last name: *

Unique Taxpayer Reference (UTR): *

National Insurance Number (NINO): *

Telephone number (including STD):

Email address:

Address line 1: *

Address line 2: *

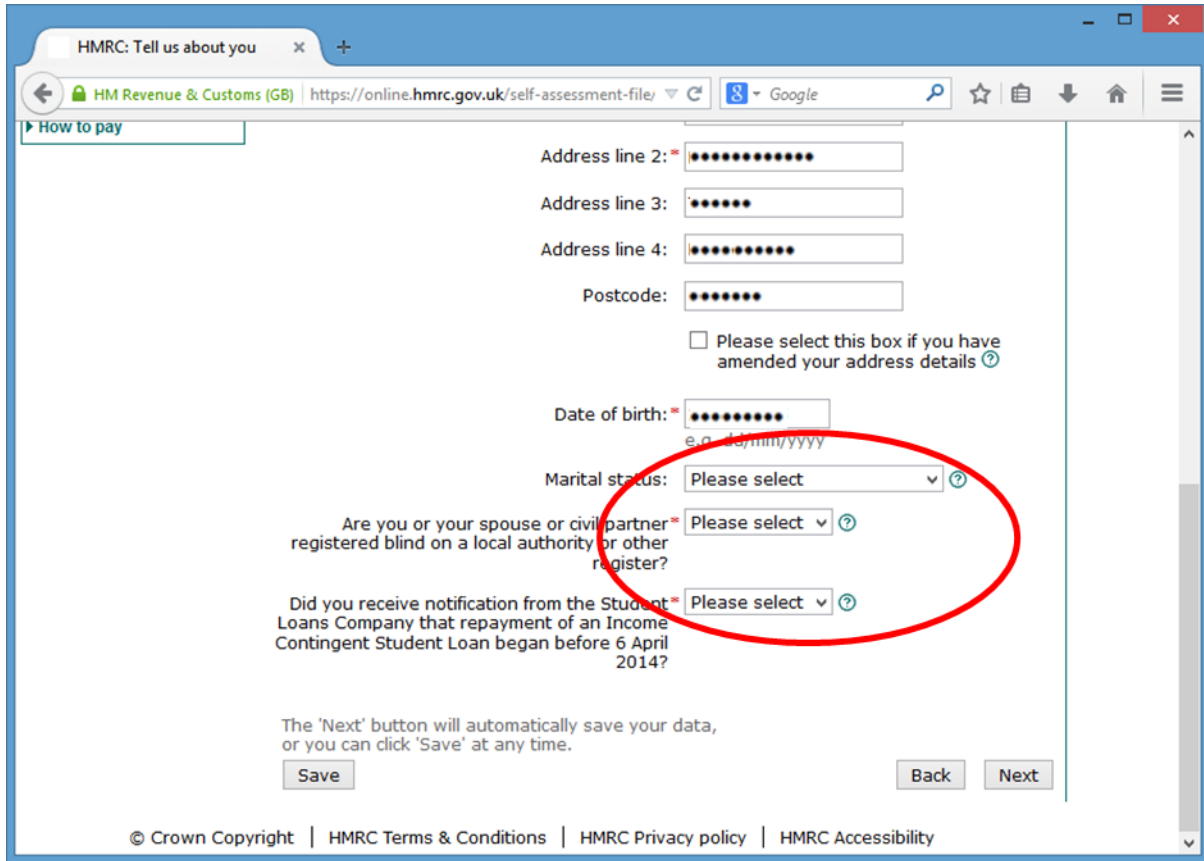
Address line 3: *

File a return

- 1. Welcome
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Including your marital status, and whether you are repaying a student loan.



HMRC: Tell us about you

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/

Address line 2: *

Address line 3:

Address line 4:

Postcode:

Please select this box if you have amended your address details ?

Date of birth: *
e.g. dd/mm/yyyy

Marital status: Please select ?

Are you or your spouse or civil partner registered blind on a local authority or other register? Please select ?

Did you receive notification from the Student Loans Company that repayment of an Income Contingent Student Loan began before 6 April 2014? Please select ?

The 'Next' button will automatically save your data, or you can click 'Save' at any time.

Save Back Next

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Tailoring your return

One of the most important sections is tailoring your return.

HMRC: Tailor your return - ... x +

HM Revenue & Customs (GB) | https://online.hmrc.gov.uk/self-assessment-file/ | Google

Self Assessment **Your tax return is 1% complete**

3. Tailor your return

Page 1 of 3

* indicates required information

This section aims to ensure you only answer questions relevant to you.

In the tax year 6 April 2013 to 5 April 2014:

Were you an employee, director, office holder or agency worker? ?

Were you **self-employed**? ?

Were you in a **partnership**? ?

Did you receive income from **UK property** including income from land? ?

If you received any foreign income, do you need to complete the **foreign** section? Please check help: ?

If you disposed of any chargeable assets, or had any chargeable gains, or you wish to claim an allowable loss, or make any other claim or election, do you need to complete the **Capital Gains** section? Please check help: ?

The 'Next' button will automatically save your data, or you can click 'Save' at any time.

If you were an employee you will need to complete the employment section.

HMRC: Tailor your return -... x +

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/ Google

Self Assessment Your tax return is 1% complete

3. Tailor your return

Page 1 of 3

* indicates required information

This section aims to ensure you only answer questions relevant to you.

In the tax year 6 April 2013 to 5 April 2014:

Were you an employee, director, office holder or agency worker? ?

How many employments or directorships did you have?

Please provide us with the **name** of your employer(s):

Employer 1 name:

Were you **self-employed**? ?

Were you in a **partnership**? ?

Did you receive income from **UK property** including income from land? ?

If you received any foreign income, do you need to complete the **foreign** section? Please check help: ?

If you disposed of any chargeable assets, or had any chargeable gains, or you wish to claim an allowable loss, or make any other claim or election, do you need to complete the **Capital Gains** section? Please check help: ?

As a sole trader you will need to complete the self employment pages – this is also where you need to say if you have more than one trade.

HMRC: Tailor your return -... x +

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/ Google

Self Assessment Your tax return is 1% complete

3. Tailor your return

Page 1 of 3

* indicates required information

This section aims to ensure you only answer questions relevant to you.

In the tax year 6 April 2013 to 5 April 2014:

Were you an employee, director, office holder or agency worker?

Were you **self-employed**?

How many **self-employed businesses** did you have?

Please provide us with the **name** of your business(es):

Business 1 name:

Business 2 name:

Were you in a **partnership**?

Did you receive income from **UK property** including income from land?

If you received any foreign income, do you need to complete the **foreign** section? Please check help:

If you disposed of any chargeable assets, or had any chargeable gains, or you wish to claim an allowable loss, or make any other claim or election, do you need to complete

You also need to state whether you received other income (for example interest income).

HMRC: Tailor your return -... x +

HM Revenue & Customs (GB) | https://online.hmrc.gov.uk/self-assessment-file/ | Google

File a return

- 1. Welcome
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- 8. Submit your return
- Provide feedback
- Tax return options
- How to pay

Page 2 of 3

* indicates required information

In the tax year 6 April 2013 to 5 April 2014:

Did you receive any **interest** etc, for example, from UK banks, UK building societies, UK unit trusts? ?

Did you receive any **dividends**, for example, UK companies, authorised unit trusts, open-ended investment companies, foreign companies (up to £300)? ?

Did you receive any **UK pensions, annuities or state benefits**, for example, state pension, occupational pension, retirement annuity, Incapacity Benefit? ?

Were you or your partner (if you have one) entitled to receive Child Benefit during the year 2013-14 (this applies if someone else claims Child Benefit for a child who lives with you and pays you for your child's upkeep)? ?

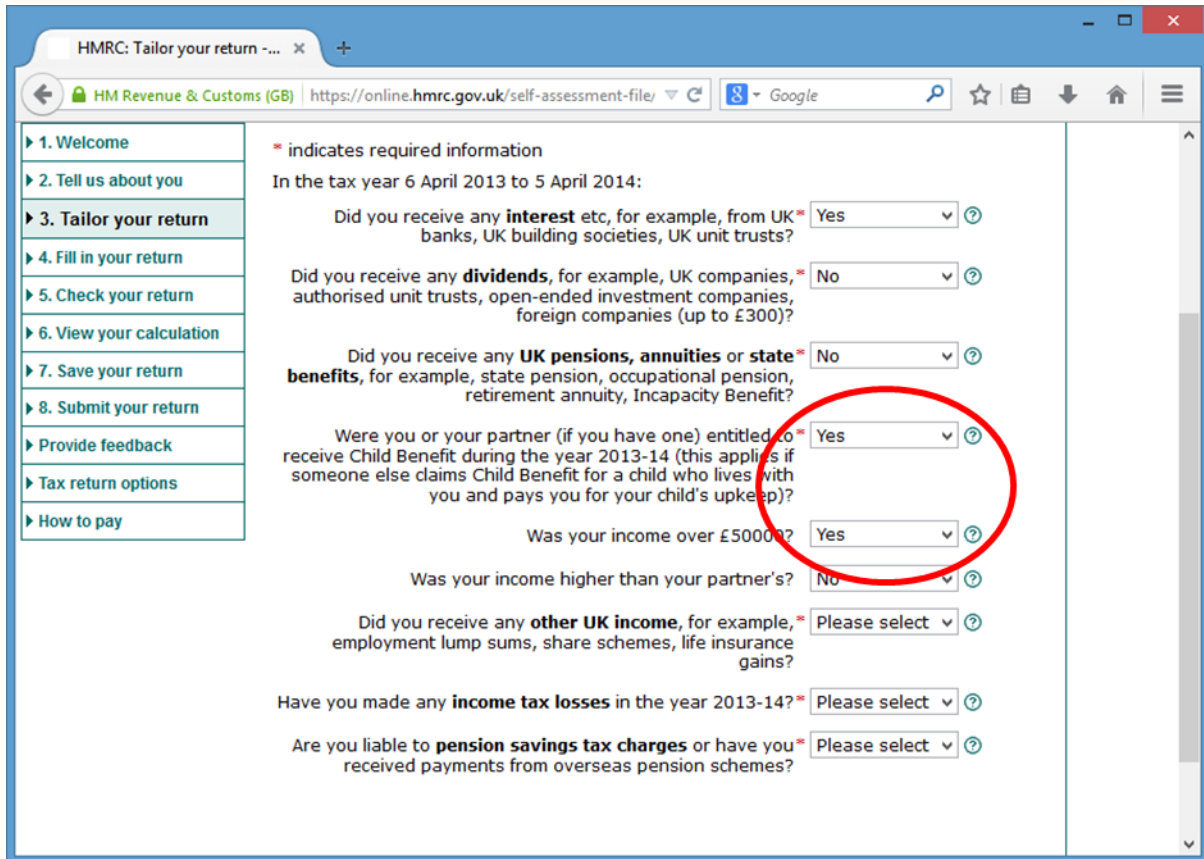
Did you receive any **other UK income**, for example, employment lump sums, share schemes, life insurance gains? ?

Have you made any **income tax losses** in the year 2013-14? ?

Are you liable to **pension savings tax charges** or have you received payments from overseas pension schemes? ?

Save Back Next

If you received child benefit then you also need to provide that information here, you will be asked whether your income was over £50,000, and if so you will be asked whether your income was higher than your partner's. This is where HMRC claw back child benefit so be careful with your responses.



HMRC: Tailor your return - ... x +

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/ Google

1. Welcome

2. Tell us about you

3. Tailor your return

4. Fill in your return

5. Check your return

6. View your calculation

7. Save your return

8. Submit your return

Provide feedback

Tax return options

How to pay

* indicates required information

In the tax year 6 April 2013 to 5 April 2014:

Did you receive any **interest** etc, for example, from UK banks, UK building societies, UK unit trusts? Yes

Did you receive any **dividends**, for example, UK companies, authorised unit trusts, open-ended investment companies, foreign companies (up to £300)? No

Did you receive any **UK pensions, annuities or state benefits**, for example, state pension, occupational pension, retirement annuity, Incapacity Benefit? No

Were you or your partner (if you have one) entitled to receive Child Benefit during the year 2013-14 (this applies if someone else claims Child Benefit for a child who lives with you and pays you for your child's upkeep)? **Yes**

Was your income over £50,000? Yes

Was your income higher than your partner's? No

Did you receive any **other UK income**, for example, employment lump sums, share schemes, life insurance gains? Please select

Have you made any **income tax losses** in the year 2013-14? Please select

Are you liable to **pension savings tax charges** or have you received payments from overseas pension schemes? Please select

Finally you provide information on outgoings, tax reliefs, etc.

HMRC: Tailor your return -... x +

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/ Google

3. Tailor your return

Page 3 of 3

* indicates required information

In the tax year 6 April 2013 to 5 April 2014:

Did you make contributions towards a **personal pension** or **retirement annuity**? This does not include payments you make to your employer's pension scheme, which are deducted from your pay:

Did you give to **charity**?*

If you, or your spouse or civil partner, were born before 6 April 1935 do you want to claim married couple's allowance?

Do you want to claim **other tax reliefs** and deductions, for example, community investment tax relief, venture capital, maintenance / alimony payments?

Have you had any 2013-14 Income Tax refunded or offset by us or JobCentre Plus?

Did you have a tax adviser?*

Were you party to one or more tax avoidance schemes?*

Are you acting in capacity on behalf of someone else?*

'Next' will take you to '4. Fill in your return'

You are then advised what documents you may need based on the information you provided.

HMRC: Fill in your return - ... x +

HM Revenue & Customs (GB) https://online.hmrc.gov.uk/self-assessment-file/ Google

4. Fill in your return

Check your progress

To complete your return you may need the following documents:

- Profit or loss accounts
- Records of business receipts and business expenses
- Bank, building society, unit trust, etc statements and certificates or passbooks
- Bank statements or any receipts from the charity

2013-14 and 2014-15 Notices of Coding

This section provides you with an overview of what pages make up your tailored return.
✔ A tick means you have entered information into this page. To change this please select from the list below.
→ An arrow means you have yet to enter information into this page.

Tell us about you	✔ Change details about you
Tailor your return	✔ Change your tailored return (page 1) ✔ Change your tailored return (page 2) ✔ Change your tailored return (page 3)
Self-employment My trade	→ Enter self-employment details (page 1)
My other trade	→ Enter self-employment details (page 1)
UK interest	→ Enter UK interest etc

To continue with your tax return please select the appropriate sections from the Tax Return Guide menu.