



My Virtual Financial Controller

Financial Wizardry for the Self Employed

Tax return guide

5. Finalising your return

"On a mission to help women in business"

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

Tax return guide

5. Finalising your return

You now only have the last few pages to complete. If you are aware of any underpaid tax for earlier years then you have the opportunity to amend the information, otherwise select “Yes” and continue.

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

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

HM Revenue & Customs | Home | Cymraeg | Contact HMRC | Help | Sign out

▲ Your HMRC Services | Self Assessment | ***** tax return: 2013-14 IN PROGRESS | Your tax return is 47% complete

4. Fill in your return

Underpaid tax included in PAYE coding (Page 1 of 2)

* indicates required information

Our records show that your 2013-14 PAYE Notice of Coding includes an adjustment for tax underpaid. Please complete the following question(s).

Underpaid tax for earlier years included in your tax code for 2013-14: £ 0.00

If this figure is not correct, select 'No' and you will be given a chance to amend it below. **Yes**

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

Save | Check your progress | Back | Next

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

Similarly for any underpaid tax for 2013-2014 which has been included in your 2014-2015 tax code (check your tax coding notice if you have one) you again have the opportunity to amend the information, otherwise select "Yes" and continue.

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

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

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

▲ Your HMRC Services
▲ Self Assessment

***** tax return: **2013-14 IN PROGRESS**
Your tax return is 47% complete

4. Fill in your return

Underpaid tax included in PAYE coding (Page 2 of 2)

* indicates required information

Our records show that your 2013-14 PAYE Notice of Coding includes an adjustment for tax underpaid.

Underpaid tax for 2013-14 included in your tax code for 2014-15: £ 0.00

If this figure is not correct, select 'No' and you will be given a chance to amend it below.

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

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

Check back to your tax code to see if there was any outstanding debt included in it. If no such outstanding debt was shown, or you didn't have a tax code, then enter "0" and continue.

The screenshot shows the HMRC website interface for filing a 2013-14 tax return. The page title is "4. Fill in your return" under the heading "Other debts". A red circle highlights the input field for "Outstanding debt included in your tax code for 2013-14. Please enter '0' if there is nothing shown or you did not have a PAYE code." which contains the value "£ 0".

HM Revenue & Customs
Home Cymraeg Contact HMRC Help Sign out

tax return: 2013-14 IN PROGRESS
Your tax return is 47% complete

4. Fill in your return

Other debts

* indicates required information

Outstanding debt included in your tax code for 2013-14. Please enter '0' if there is nothing shown or you did not have a PAYE code.

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

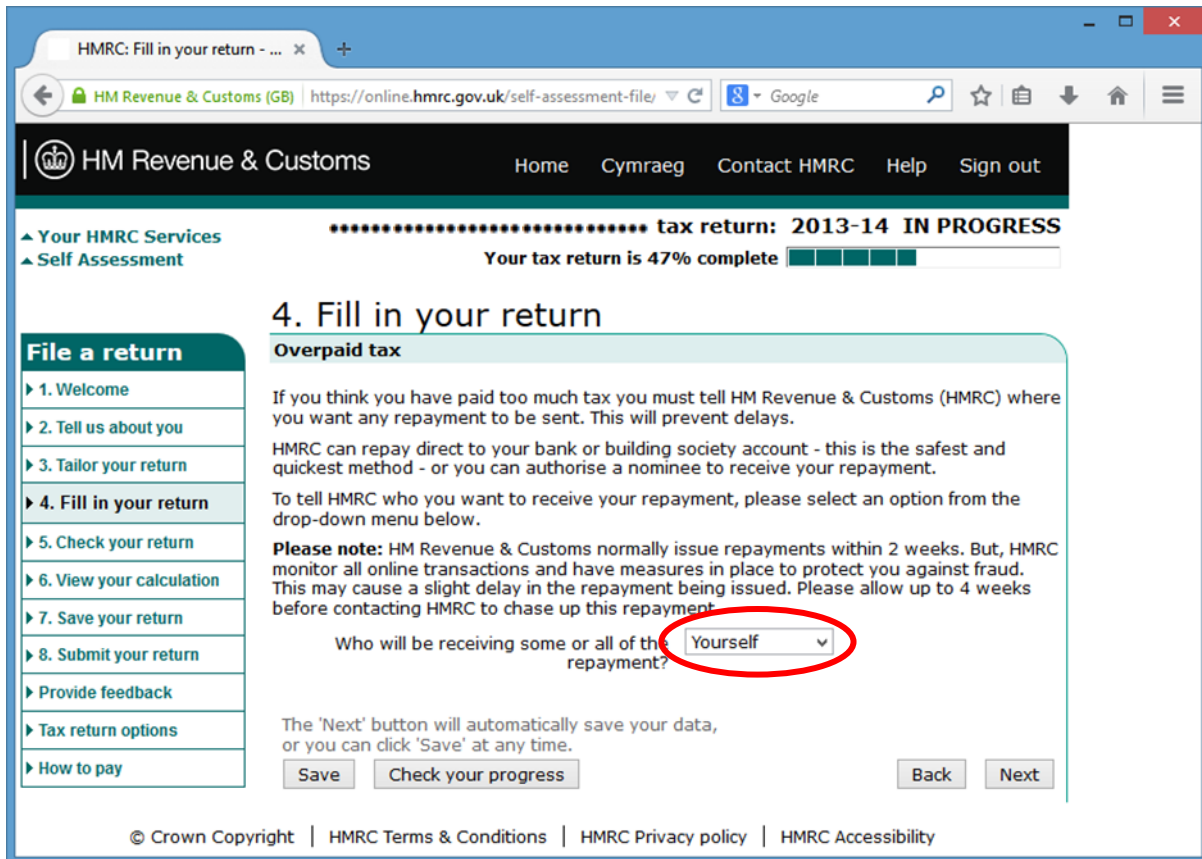
'Next' will take you to the next section of your Tax Return

Save Check your progress Back Next

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

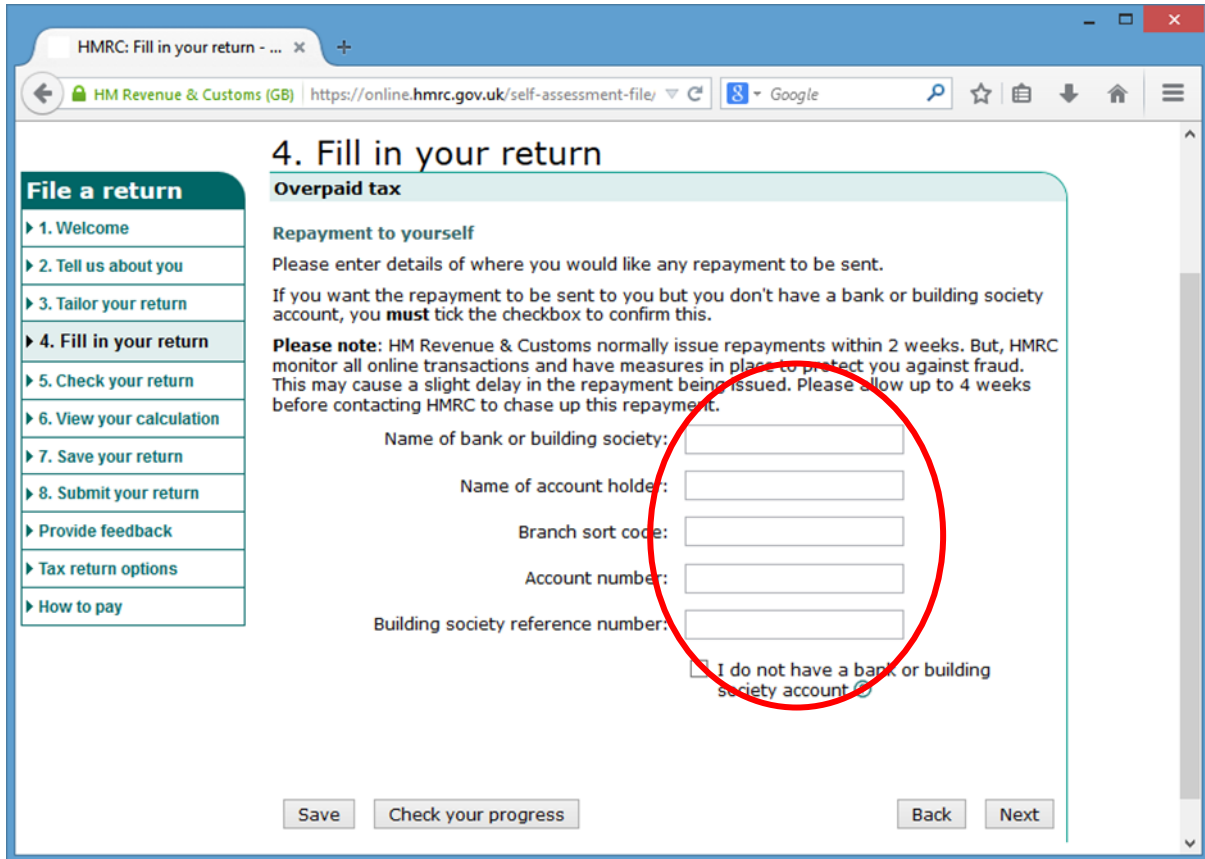
<https://online.hmrc.gov.uk/information/help?helpcategory=selfAssessmentFil...1314&affinitygroup=individual&helpid=outstandingDebtIncludedInTaxCodeHelp>

If you are owed a repayment by HMRC you can decide whether you want it to be paid out, either to you or to somebody you designate, or you can decide to leave it to be offset vs future taxes.



The screenshot shows the HMRC website interface for filing a tax return. The browser address bar shows the URL <https://online.hmrc.gov.uk/self-assessment-file/>. The page header includes the HM Revenue & Customs logo and navigation links: Home, Cymraeg, Contact HMRC, Help, and Sign out. A progress indicator shows 'tax return: 2013-14 IN PROGRESS' and 'Your tax return is 47% complete' with a progress bar. The main heading is '4. Fill in your return'. A sidebar on the left lists steps from '1. Welcome' to '8. Submit your return', with '4. Fill in your return' highlighted. The 'Overpaid tax' section contains text explaining that users can request a repayment to their bank or building society account. A note states that HMRC normally issues repayments within 2 weeks. A question asks 'Who will be receiving some or all of the repayment?' with a dropdown menu set to 'Yourself', which is circled in red. Below the question are 'Save' and 'Check your progress' buttons. At the bottom right are 'Back' and 'Next' buttons. The footer contains copyright information: '© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility'.

The quickest way to get a repayment is to provide your bank details.



HMRC: Fill in your return - ... x

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

4. Fill in your return

Overpaid tax

Repayment to yourself

Please enter details of where you would like any repayment to be sent.

If you want the repayment to be sent to you but you don't have a bank or building society account, you **must** tick the checkbox to confirm this.

Please note: HM Revenue & Customs normally issue repayments within 2 weeks. But, HMRC monitor all online transactions and have measures in place to protect you against fraud. This may cause a slight delay in the repayment being issued. Please allow up to 4 weeks before contacting HMRC to chase up this repayment.

Name of bank or building society:

Name of account holder:

Branch sort code:

Account number:

Building society reference number:

I do not have a bank or building society account

Save | Check your progress | Back | Next

You now get to decide whether you want any tax owed to be collected through your tax code, both for the tax year just ended, and for the new tax year. This is only possible if the amount owed is less than £3k, and if you are filing your tax return by 30 December.

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

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

HM Revenue & Customs | Home | Cymraeg | Contact HMRC | Help | Sign out

▲ Your HMRC Services | Self Assessment

***** tax return: 2013-14 IN PROGRESS

Your tax return is 47% complete

4. Fill in your return

If you have not paid enough tax

* indicates required information

If you are submitting by 30 December, owe tax for 2013-14 and have a PAYE tax code, do you want us to try to collect the tax due (if less than £3,000) through your tax code for 2015-16?*

Please select v ⓘ

If you are likely to owe tax for the current tax year (ended 5 April 2015) on income other than employed earnings/pensions e.g savings or the High Income Child Benefit Charge, do you want us to use your 2014-15 PAYE tax code to collect that tax during the year?*

Please select v ⓘ

'Next' will take you to the next section of your Tax Return

Save | Check your progress | Back | Next

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

If you need to make any adjustments to your tax due then you can do so here – most people will be able to leave this page blank and continue to the next page.

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

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

HM Revenue & Customs | Home | Cymraeg | Contact HMRC | Help | Sign out

▲ Your HMRC Services | Self Assessment

***** tax return: 2013-14 IN PROGRESS

Your tax return is 47% complete

4. Fill in your return

Adjustments to tax due

Please note: You do not need to enter any Payments on Account or other payments you have made towards the amount due. You will get credit for them on your statement of account.

Increase in tax due because of adjustments to an earlier year: £

Decrease in tax due because of adjustments to an earlier year: £

Any 2014-15 repayment you are claiming now: £

Save | Check your progress | Back | **Next**

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

If you work through a company and provide your services to third parties through that company then you put in the total of dividends and salary you withdrew. You can also say if provisional numbers were used.

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

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

HM Revenue & Customs | Home | Cymraeg | Contact HMRC | Help | Sign out

▲ Your HMRC Services | Self Assessment | *****tax return: 2013-14 IN PROGRESS | Your tax return is 47% complete

4. Fill in your return

Any other information (Page 1 of 2)

* indicates required information

If you provided your services through a service company (a company which provides your personal services to third parties), enter the total of the dividends (including the tax credit) and salary (before tax was taken off) you withdrew from the company in the tax year.

Does this return contain provisional or estimated figures? (If yes, please provide details on the next page.)

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

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

You can give “any other information” here, for example if you have provided provisional numbers you can explain why they are provisional.

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

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

..... tax return: 2013-14 IN PROGRESS

Your tax return is 47% complete

4. Fill in your return

Any other information (Page 2 of 2)

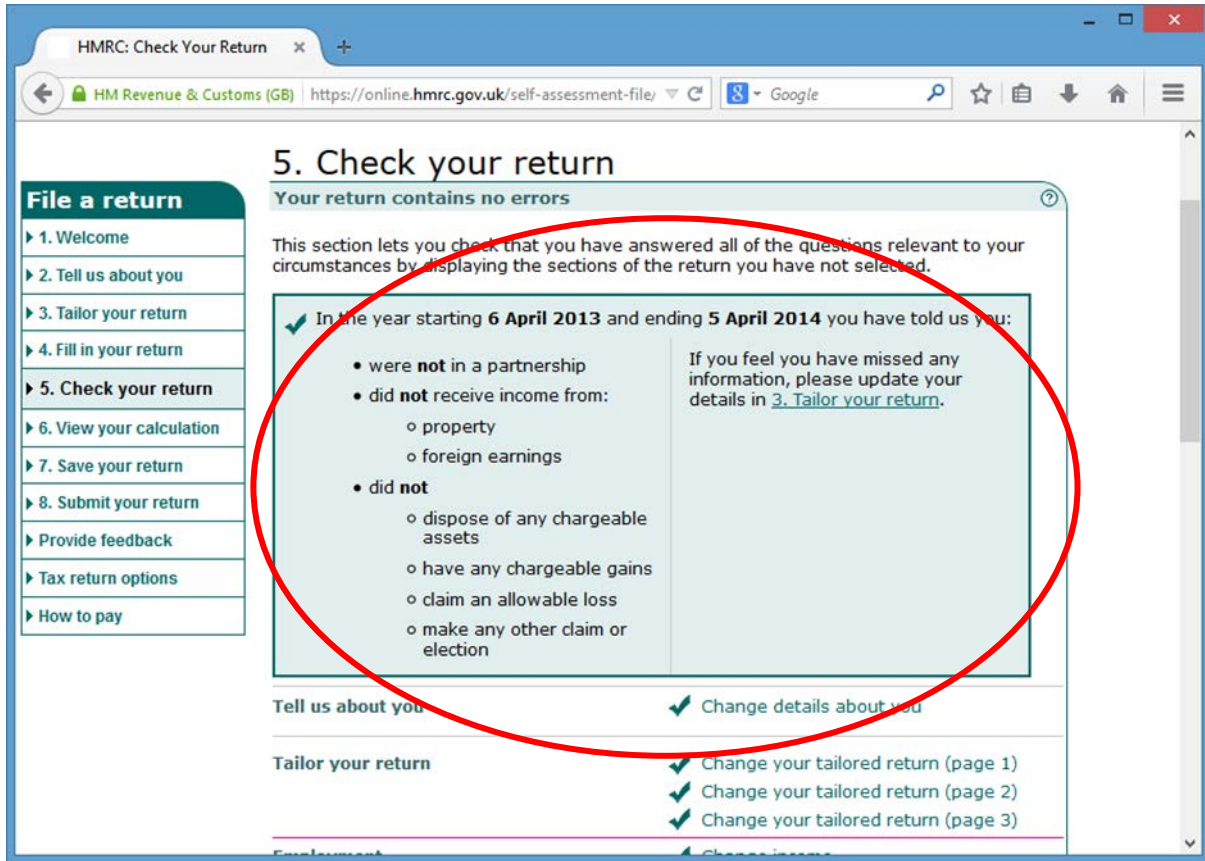
Please give any other information in this space.

Do you want to add an attachment to your return?
No

Save Check your progress Back Next

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility

This final overview shows what sections you have completed, and what you did not complete. Make sure you read through and double check that you haven't missed anything out.



The tax return calculates how much tax you owe, or what tax is repayable to you. It doesn't include any 2013-14 payments on account or other amounts that may be owed, so check your self assessment account.

HMRC: View your calculati... x +

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

***** tax return: 2013-14 IN PROGRESS

Your tax return is 90% complete

6. View your calculation

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

Summary

This section provides you with the result of your calculation. Please check the figures and amounts due carefully.

Please note: Unless you are viewing a previously submitted return you must click the 'Next' button at the bottom of this page to save then submit your return.

Total tax repayable to you for 2013-14	£521.88
-----------------------------------------------	----------------

HM Revenue & Customs will add this amount to your Self Assessment statement of account. It doesn't include any 2013-14 payments on account you may have made or any other amounts outstanding. To help you to decide how much, if anything, to pay by the due date, check your Self Assessment account and use the information above until it transfers over.

Please note: Please carefully check the figures and the amounts due, which are calculated using the amounts you have entered.

If you want to make changes or additions to your return, go to [3. Tailor Your Return](#).

[View and print your full calculation](#)

Back Next

Before you submit your tax return it is advisable to save a copy of it for future reference.

HMRC: Save your return

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

7. Save your return

You have not yet fully submitted your return.

Before you do this you can view, print or save a copy of your return to your own computer. To submit your return – go to the bottom of this page and click the 'Next' button to continue.

Black and white copy of your return

- contains all the sections you completed
- text only (does not resemble the paper form)
- HTML file
- small file size
- quick to download

View a black and white HTML copy of your return

Save a black and white HTML copy of your return

Print a black and white HTML copy of your return

Colour copy of your return

- contains all the sections you completed
- closely resembles the paper form
- colour PDF (requires a PDF file viewer. You can get one at www.adobe.com. This can be downloaded for free.)
- large file size
- slow to download

View a colour PDF copy of your return

Save a colour PDF copy of your return

Print a colour PDF copy of your return

Attachments

You can also **view, print and save** a list of all attachments that have been uploaded.

[Add an attachment](#)

[View list of attachments](#)

Then finally you need to declare that the information you have given on your tax return is correct and complete to the best of your knowledge and belief.

8. Submit your return

Declaration

* indicates required information

You have not yet fully submitted your return.

Before you can submit your return to HM Revenue & Customs, you must read and agree the following statement by ticking the checkbox below. You should then go to the bottom of the screen and click the 'Next' button to continue.

If you give false information you may have to pay financial penalties and face prosecution.

The information I have given on this Tax Return is correct and complete to the best of my knowledge and belief*

Your completed return

Tell us about you	Details about you
Tailor your return	Your tailored return (page 1) Your tailored return (page 2) Your tailored return (page 3)
Employment ABC Consulting	Income Additional information
Self-employment My trade	Self-employment details (page 1) Self-employment details (page 2) Accounting details Income

Finally re-enter your user ID and password to finally submit your tax return.

Security check

HM Revenue & Customs

Home Contact HMRC Help Sign out

Security check

As an additional security measure please re-enter your user ID and password. Please then select 'Next' to complete your request.

* indicates required information

User ID: *

Password: *

Next

Back

© Crown Copyright | HMRC Terms & Conditions | HMRC Privacy policy | HMRC Accessibility