



Completing your online Tax Return

A step by step guide by the Tax Charities

Contents

Introduction.....	2
Getting started	3
Completing the online tax return	5
State Pension	8
Private Pension	9
Foreign Income	10
UK Interest Income	13
Dividend Income.....	14
Employment Income	14
Self-Employment	16
Underpaid and overpaid tax.....	23
Checking, saving and submitting your return.....	29
HMRC information.....	34
HMRC's helpline	34
Links to HMRC technical material:	34
Self-Assessment deadlines	34
Further help.....	34

Introduction

This guide is intended to help you with the online filing process rather than explaining the tax rules or helping you prepare your accounts.

If you find that you do need advice on these matters, you can always contact TaxAid on **0345 120 3779** or Tax Help for Older People on **01308 488066**. You can also find website links to HMRC's more technical material at the end of this guide. As you work through the online tax return, you will see the information symbol . Clicking on this will also provide further information regarding technical issues.

The information to be included on a tax return will vary from person to person and yours will depend on your own sources of income and other circumstances. To avoid becoming unwieldy, this guide concentrates on the sources of income listed below. For other sources of income, the screens you will see are likely to be along similar lines to these:

- **State pension;**
- **Private pension;**
- **Foreign income;**
- **Interest income;**
- **Dividend income;**
- **Employment;**
- **Self-employment.**

Before you start

It is important to allow time to complete your tax return well before the deadline (these are provided at the end of this guide), as you may need to register first and then be sent a code through the post before you can start completing your online form.

The starting point to get into your online Self-Assessment form will depend on whether you have previously registered for Self-Assessment and completed a paper tax return and whether you have set up your Personal Tax Account. The next section, 'Getting started', provides some information to help you find the right route into your online tax return form.

When you are ready to start your online tax return

You will need to have the information that you wish to enter onto the tax return, for example:

- Your P60 or P45;
- Figures for income and expenses from (for example) your pension(s), employment, self-employment, foreign or rental income etc.;
- Any letters and information you might have received from the Department for Work and Pensions;
- Details of any interest or dividend income, which you will find on the end of year certificates from your bank or building society and dividend vouchers.

Remember to **TAKE YOUR TIME** and make sure you understand each question before you put in your answer. You can pause part way through, save what you have done and come back to the tax return later if you need to find or check any information, or need to call and ask for help on any part of it.

Getting started

If you are already able to get into your online tax return form, this section can be skipped.

How you get into your tax return online for the first time will depend on a couple of factors; if you have previously registered for Self-Assessment with HMRC and if you have previously set up access to your Personal Tax Account.

Your Personal Tax Account is available online through HMRC and brings all of your tax details together in one place, where you can view and update your personal tax information online, at any time.

If you have not registered for Self-Assessment and do not have a Personal Tax Account

1. If you are not sure if you need to be in Self-Assessment and file a tax return, you can go through HMRC's check at www.gov.uk/check-if-you-need-a-tax-return
 2. To register for Self-Assessment, please use HMRC's form [CWF1](#) if you are self-employed or [SA1](#) if you have received other types of income, such as from property.
 3. When you are registered, you will receive a letter from HMRC called an 'SA250 welcome letter', which will have on it your Unique Taxpayer Reference (UTR), a 10-digit code. This can take 10 working days to arrive (21 if you're abroad).
 4. Once you receive your UTR number, you'll need to register for the online service: <https://www.gov.uk/log-in-file-self-assessment-tax-return/register-if-youre-not-self-employed> . You'll get an activation code in the post within 10 days of enrolling (21 if you're abroad). This code needs to be used within 28 days.
 5. Once you have received the activation code, you can complete the process to get into your online Self-Assessment by going to <https://www.gov.uk/log-in-register-hmrc-online-services> which will take you to a sign in screen.
 6. If you have previously created a Government Gateway account, please use your 12-digit ID number and password here, or else click on 'Don't have a Government Gateway account' and set your account up that way. If you cannot be verified, it is unlikely that you will be able to file your tax return online.
 7. Once through, you will get a screen saying 'services you can add'. Next to Self-Assessment, click on 'enrol for service'. You will be asked for your UTR and either your NI number, postcode or a tick box if you live abroad.
 8. Once you have completed the enrolment, you should see the Self-Assessment box which will let you complete a tax return, make a payment etc.
-

If you have not registered for Self-Assessment and do have a Personal Tax Account

1. If you are not sure if you need to be in Self-Assessment and file a tax return, you can go through HMRC's check at www.gov.uk/check-if-you-need-a-tax-return
2. To register for Self-Assessment, please use HMRC's form [CWF1](#) if you are self-employed or [SA1](#) if you have received other types of income, such as from property.
3. Once you are registered, you will receive a letter from HMRC called an 'SA250 welcome letter', which will have on it your Unique Taxpayer Reference (UTR), a 10-digit code.
4. Once you have this, you can go into your Personal Tax Account and you will see an option under Self-Assessment called 'Find out how to access Self-Assessment' – click on this and you will be advised that you need to get an activation code. Follow the instructions here and an activation code will be sent to you in the post. You'll get this within 10 working days (21 if you're abroad). This code needs to be used within 28 days.
5. Once you have received this code, you'll need to complete your enrolment by going to <https://www.gov.uk/log-in-register-hmrc-online-services> -Once you've completed your enrolment,

you will find a new link under Self-Assessment in your Personal Tax Account which says 'Complete your tax return', click on this and you will be taken to your online Self-Assessment form.

If you have registered for Self-Assessment and do not have a Personal Tax Account

1. If you have completed your Self-Assessment on paper forms before, you should have a Unique Taxpayer Reference (UTR) which is a 10-digit number, sometimes ending with a letter 'k'. You can find this on letters and forms HMRC has sent you regarding your Self-Assessment or call HMRC on 0300 200 3310
 2. You'll need to register for online Self-Assessment on the HMRC website in good time as an activation code will need to be posted to you (it can take 10-21 days). To do this, go to www.gov.uk/log-in-register-hmrc-online-services and select 'Register for HMRC online services'. On this page you will see a heading 'If you currently send paper tax returns' and below this a link to 'register to file your returns online'.
 3. You will see a 'New user' screen and will need to click on the type of account you wish to create (likely to be 'individual').
 4. Complete the questions that follow (you will need your National Insurance number, postal address, date of birth etc.) for the system to identify you. This will create your Government Gateway account, so keep a note of the 12-digit number you are given and your password as you will need this to access your account in the future.
 5. Once you have received the activation code, you can complete the process to get into your online Self-Assessment by going to <https://www.gov.uk/log-in-register-hmrc-online-services> which will take you to a sign in screen.
 6. Once you've completed your enrolment, you will find a new link under Self-Assessment in your Personal Tax Account which says 'Complete your tax return', click on this and you will be taken to your online Self-Assessment form.
-

If you have registered for Self-Assessment and do have a Personal Tax Account

1. Go into your Personal Tax Account and you will see under the heading 'Self-Assessment' there is a link called 'Find out how to access Self-Assessment'. Click on this and you will be advised that you need to get an activation code. Follow the instructions here and an activation code will be sent to you in the post. You'll get this within 10 working days (21 if you're abroad). This code needs to be used within 28 days. Once you have received this code, you'll need to complete your enrolment by going to <https://www.gov.uk/log-in-register-hmrc-online-services> and entering your PTA Government Gateway User ID and password.
2. Once you've completed your enrolment, you will find a new link under Self-Assessment in your Personal Tax Account which says 'Complete your tax return', click on this and you will be taken to your online Self-Assessment form.

Completing the online tax return

Tax year summary

To view a summary for another tax year please select the year from the drop-down menu and click 'Go'.

Please note:

- if you have only just activated your Self Assessment service, you will need to allow up to 72 hours before you can file a return for a previous tax year
- you have 12 months from 31 January following the end of the tax year to submit an online amendment to a previously submitted return. For example, you have until 31 January 2013 to make an online amendment to the return for the 2010-11 tax year. You must write to HM Revenue & Customs to request changes to a return once the 12 months have passed

Select tax year:

Tax year ending 05 Apr 2020.

Issued on:	06 Apr 2020
File on paper by:	31 Oct 2020
File online by:	31 Jan 2021
Part completed:	07 Apr 2020
Submitted on:	
Received on:	Not Yet Received

You can continue with your return using the HMRC Service. Click 'Continue with return' to proceed.



Alternatively you can file, or amend your return as appropriate, using

Tell us about you

'Optional' indicates only complete if relevant to you

First name:

Middle name: (optional)

Last name:

Unique Taxpayer Reference (UTR):
8974374632

National Insurance Number (NINO): (optional)

Telephone number (including STD): (optional)

[▶ Help about: Telephone Number Help](#)

Email address: (optional)

[Your HMRC services](#)

Self Assessment

[At a glance](#)

[About you](#)

[View account](#)

Tax return options

[Reduce payments on account](#)

[Request a repayment](#)

[View statements](#)

[View PAYE coding notices](#)

[Direct Debit payment](#)

[Frequently asked questions](#)

[Business help and education emails](#)

When you enter the Self-Assessment part of the HMRC website, you are likely to start on a screen like this, where you can select which tax year you are filing your return for.

Please select the appropriate tax year.

Once you have done this, click on the 'file return' button

This section shows what information is currently saved about you – you can update anything that is incorrect.

The 'tell us about you' section of the tax return should be reviewed and updated where appropriate.

Once you have reviewed the necessary information, click 'Save and continue'.

The information provided in this image is for illustration only.

File a return menu

[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](#)

Tailor your return

Page 1 of 3

This section aims to ensure you only answer questions relevant to you. Include **all income** even if the income has been **taxed at source**.

In the tax year 6 April 2019 to 5 April 2020:

Were you an employee (or director or office holder) or agency worker in the year to 5 April 2020?

Yes No

[Help about: Employee, director, office holder or agency worker](#)

How many employments or directorships did you have?

1

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

Employer 1 name:

Employment 1

If you are self employed or in a partnership, you must register to pay Class 2 National Insurance.

Was your turnover more than **£1,000** in total from all **self-employments**?
Please check help

Yes No

[Help about: Self-employed](#)

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

1

File a return menu

- [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](#)

In section 2 you will see a list of question to "tailor your return". This is a crucial step as it allows you to select the type of income you wish to report to HMRC. This means that your online form will be personal to you and you don't need to work through lots of unnecessary questions.

The information provided in this image is for illustration only.

Go through the questions selecting an answer for each. When finished you can save then click on next.

Tailor your return

Page 2 of 3

In the tax year 6 April 2019 to 5 April 2020:

Did you receive any **interest**, for example, from UK banks, UK building societies, UK unit trusts (or untaxed foreign interest up to £2,000)?

Yes No

[Help about: Interest \(UK\)](#)

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

Yes No

[Help about: Dividends \(UK\)](#)

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

Yes No

[Help about: UK pensions, annuities or state benefits](#)

Were you or your partner (if you have one) entitled to receive **Child Benefit** during the year 2019-20 (this applies if someone else claims **Child Benefit** for a child who lives with you and pays you for your child's upkeep)?

Yes No

[Help about: High income Child Benefit charge](#)

File a return menu

- [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](#)

In this example on the next page, we confirm whether or not you have the following sources of income: interest, dividends and pension. The pension option covers both state and private pension income.

The details of the types of income will be entered later in the process.

Tailor your return

Page 3 of 3

In the tax year 6 April 2019 to 5 April 2020:

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:

Yes No

[▶ Help about: Contribute to personal pension or retirement annuity](#)

Did you give to **charity**?

Yes No

[▶ Help about: Charitable giving](#)

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

Yes No

[▶ Help about: Married couples allowance](#)

Do you want to transfer 10% of your personal allowance to your spouse/civil partner? Please see help guidance

Yes No

[▶ Help about: Do you want to transfer 10% of your personal allowance to your spouse/civil partner?](#)

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

File a return menu

- [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](#)

Leave the options that are not applicable in your situation as "No" and when finished, click 'Save and continue' at the bottom of the page.

Fill in your return

Check your progress

[▶ To complete your return you may need the following documents:](#)

This section provides you with an overview of what pages make up your tailored return.

'ENTERED' means you have completed the information in this page. To change any information, select the page from the list below.

'NOT ENTERED' means you have yet to enter information into this page.

Tell us about you

[Change details about you](#) **ENTERED**

Tailor your return

[Change your tailored return \(page 1\)](#) **ENTERED**

[Change your tailored return \(page 2\)](#) **ENTERED**

[Change your tailored return \(page 3\)](#) **ENTERED**

Employment

Employment 1

[Enter income](#) **NOT ENTERED**

[Enter additional information](#) **NOT ENTERED**

Self-employment

Business 1

[Enter self-employment details \(page 1\)](#) **NOT ENTERED**

Class 2 National Insurance Contributions

File a return menu

- [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](#)

On the next screen you will see a further reminder of the information you should have to hand before progressing. Yours may appear slightly different to this. When you are ready to continue, click on 'Next'.

The next stages of your tax return will be specific to your own, personal circumstances. Below we have provided some examples of the sections you may need to complete.

State Pension

Complete the next section with the annual amount of **state pension** you received.

Please note that if your state pension is paid every 4 weeks, to get the annual amount you should multiply the 4 weekly payment by 13 (not 12) to get the figure for the year. Make sure that you remove attendance allowance from your pension payments.

This box can sometimes be filled in already, but do check that it matches the figure from the Department of Work & Pensions (DWP)

4. Fill in your return

UK pension and other state benefits (Page 1 of 2)

You have said that you received a UK pension and other state benefits in the tax year 6 April 2019 to 5 April 2020. Please complete the following question(s).

Please note: Do not include any amount entered below in the 'State Pension lump sum' box on the next screen.

State Pension - amount you were entitled to receive in the year, **not** the weekly or 4 weekly amount. (optional)

[Help about: State Pension - the amount due for the year, not the weekly amount](#)

[Delete UK pension and other state benefits section](#)

Save and continue

Back

File a return menu

[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](#)

Private Pension

4. Fill in your return

UK pension and other state benefits (Page 2 of 2)

Please complete the remaining UK pension and other state benefits information for 6 April 2019 to 5 April 2020.

The answers to these questions can be found in the 'About the general increases in benefits' letter that The Pension Service sent you.

State Pension **lump sum** - the gross amount of any lump sum: (optional)

[Help about: State Pension lump sum](#)

Tax taken off State Pension lump sum: (optional)

[Help about: Tax taken off State Pension lump sum](#)

The [Pension worksheet](#) will calculate the amount and will be helpful if you have more than one account.

Please note: Remember to enter any tax deducted for pensions (other than State Pension), retirement annuities and taxable triviality payments in the 'Tax taken off pensions' box below.

Pensions (**other than State Pension**), retirement annuities and taxable lump sums treated as pensions: (optional)

[Help about: Pensions, retirement annuities and taxable lump sums treated as pensions](#)

File a return menu

[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](#)

Enter any **private pension(s)** you have received here. You can use the pension worksheet if you have more than one pension.

Do not forget to include the tax that was taken off at source.

In the 'state pension lump sum' box you don't need to add your state pension here as that has already been entered.

Foreign Income

Fill in your return

If you have received any **foreign income**, the next screens will guide you through the process.

At the top of this screen is a box to check to confirm that you are providing accurate information. You must tick this box to be able to proceed.

On the first screen, you are simply asked if you were unable to transfer some or all of your foreign income to the UK. There are notes that you can read before you answer (click on 'unremittable income' to view these).

I commit to provide honest and accurate information within this section.

We routinely receive information from other countries about offshore income, gains and assets. Check your affairs and declare all offshore income and gains relevant to this section.

You have said that you had foreign income in the tax year 6 April 2019 to 5 April 2020

You will not be able to use this service if you want to make a claim for **remittance basis**. If you want to file online you will need to use commercial software. [?](#)

Were you unable to transfer some or all of your overseas income to the UK?

No

Yes - some

Yes - all

[▶ Help about: Were you unable to transfer some or all of your overseas income to the UK](#)

[Delete foreign section](#)

Save and continue

Back

File a return menu

[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](#)

Foreign income details (Page 2 of 2)

If you are claiming foreign tax credit relief for any of your foreign income, there will be a few extra steps to complete immediately prior to viewing your full tax calculation.

You said that you received foreign income in the tax year 6 April 2019 to 5 April 2020. Please complete the following question(s).

Which of the following **types of income or gain** did you receive from overseas sources?

Interest and other income from overseas savings

▶ [Help about: Interest and other income from overseas savings](#)

Dividends from foreign companies

▶ [Help about: Dividends from foreign companies](#)

Overseas pensions, social security benefits and royalties etc

▶ [Help about: Overseas pensions, social security benefits and royalties etc](#)

Dividend income received by a person abroad

▶ [Help about: Dividend income received by a person abroad](#)

All other income received by a person abroad **and** any remitted 'ring fenced' foreign income

▶ [Help about: All other income received by a person abroad and any remitted 'ring fenced' foreign income](#)

Employment, self-employment and other income which you paid foreign tax on

▶ [Help about: Employment, self-employment and other income on which you paid foreign tax](#)

File a return menu

[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](#)

On the next page, please tick which types of foreign income you received in the last tax year. Remember you can click on the  symbol next to each option to check what it means if you are not sure.

Fill in your return

You said that you received overseas pensions, social security benefits and royalties etc. in the tax year 6 April 2019 to 5 April 2020. Please complete the following question(s).

Please enter the information below and click 'Add' to add another set of income details.

All entries should be in sterling.

Convert the income into UK pounds using the [exchange rate](#) at the time the income arose.

Your reference for this income:

▶ [Help about: Foreign Tax paid on employment, Self Employment and Partnership](#)

Country:

▶ [Help about: Country help](#)

Amount of income arising or received before any tax taken off:

▶ [Help about: Amount of Income arising or received before any tax taken off](#)

File a return menu

[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](#)

This screen appears if you ticked the 'Overseas pensions, social security benefits and royalties' option in the previous screen (you may have other screens appear, depending on your selections). Please enter your details and click on 'add'.

Amount of income arising or received before any tax taken off:

[▶ Help about: Amount of Income arising or received before any tax taken off](#)

Foreign tax taken off or paid: (optional)

[▶ Help about: Foreign Tax](#)

Special Withholding Tax and any UK tax taken off: (optional)

[▶ Help about: Special Withholding Tax and any UK Tax taken off](#)

Do you wish to claim foreign tax credit relief?

Yes No

[▶ Help about: Do you wish to claim foreign Tax Credit relief](#)

Taxable amount: £ 0.00



'Add' will add another set of income details

Add

Clear

Summary

Source of income	Country	Amount of income	Foreign tax	Special Withholding Tax	Foreign tax credit relief	Taxable amount
<input type="radio"/> Dubai pension	ARE	7000.00			No	7000.00
Total		7000.00				7000.00

Delete

Change

[Delete foreign section](#)

Save and continue

Back

When you have clicked on 'add' at the bottom of the page you will see a summary box appear at the bottom of the screen (this one is for illustration only and your details are likely to be different).

When you have clicked on 'add' you will see a summary box appear at the bottom of the screen (this one is for illustration only and your details are likely to be different).

UK Interest Income

Fill in your return

Next is any **UK interest** you have received. Note that bank interest is now paid gross i.e. no tax is deducted at source, but some foreign interest has tax taken so check your details carefully. If you have foreign interest that is taxed at source, you will need to complete the foreign income section.

The figure shown here is for illustration only.

You have said that you received UK interest in the tax year 6 April 2019 to 5 April 2020. Please complete the following questions.

The answer to these questions can be found in your statement from the interest payer.

The [Taxed UK interest worksheet](#) will calculate the amount of interest and will be helpful if you have more than one account.

Taxed UK interest etc. Enter net amount **after** tax has been taken off: (optional)

► [Help about: Taxed UK interest etc. the net amount after tax has been taken off](#)

The [Untaxed UK interest worksheet](#) will calculate the amount of untaxed interest and will be helpful if you have more than one account.

Untaxed UK interest etc (amounts which have **not been taxed**). Enter total amount: (optional)

► [Help about: Untaxed UK interest etc \(amounts that have not been taxed at all\)](#)

Untaxed foreign interest (up to £2,000) - amounts which have **not had** tax taken off. Enter total amount: (optional)

File a return menu

- [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](#)

Dividend Income

Fill in your return

The next section is where you will need to put in information about any **dividends** you have received. You should refer to your dividend vouchers or other documents.

You may wish to look at the tax technical link re the taxation of dividends. Foreign dividends are asked for in sterling equivalent – you may see this if they go into a British bank account, or else you can check HMRC’s average exchange rates on their website.

Dividends

You have said that you received dividends in the tax year 2019 to 2020. Please complete the following questions.

The answers to these questions can be found in your **dividend vouchers or counterfoils**.

The [Dividends from UK companies worksheet](#) will calculate the Net amount and will be helpful if you have more than one account.

Dividends from UK companies. The amount received: (optional)

▶ [Help about: Dividends from UK companies - do not include the tax credit](#)

The [Dividends from authorised unit trusts and open-ended investment companies worksheet](#) will calculate the Net amount and will be helpful if you have more than one account.

Other dividends. The amount received: (optional)

File a return menu

- [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](#)

Employment Income

Fill in your return

Completing your tax return for **Employment Income**.

You should use your P60 or P45 to complete this page. You will need to include the Employer’s PAYE reference. This is on your payslip and P60 and P45. Do not forget to include the tax deducted from your pay.

These boxes can sometimes be filled in already, but do check that it matches the figure shown on your P45 or P60

You have said that you were employed in the tax year 6 April 2019 to 5 April 2020. Please complete the following question(s).

Employer name:

The information to help you complete these questions may be found on your P60 or P45.

▶ [Help about: Where to find information \(P60\)](#)

Employer's PAYE Reference:

▶ [Help about Employer PAYE Reference](#)

Pay from Employment 1 - total from your P45 or P60. Enter the amount before tax taken off: (optional)

▶ [Help about: Pay from this employment](#)

UK tax taken off Employment 1 pay: (optional)

▶ [Help about: Tax taken off your pay by employer](#)

File a return menu

- [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](#)

Fill in your return

Please give any other information about this employment below. (optional)

Any other information regarding your employment can be entered here.

▶ [Help about: Any other information - Employment](#)

[Delete Employment 1 section](#)

Add employment

Save and continue

Back

File a return menu

[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](#)

Self-Employment

Details for Business 1 (Page 1 of 2)

You said that you were self-employed in the tax year 6 April 2019 to 5 April 2020. Please complete the following question(s).

The information to help you complete this section can be found in your profit or loss accounts, records of business receipts and business expenses.

File a return menu

- [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](#)

Completing your tax return for **Self-Employment** income.

You will need to have your self-employment income and expenses to hand to complete this section.

Special tax rules apply to a number of trades and professions e.g. foster carer or barrister, so these need to be ticked **ONLY** if they apply to you.

The system lists a number of situations and you may wish to click on the information symbol  to help you to check if any of these apply in your case. Tick the box next to any that apply to you, or leave them blank and select 'None of these apply' at the bottom of the page.

Once you have made your selection, click 'save and continue' at the bottom of the pages.

Did you have an annual turnover of **£85,000 or more?**

Yes No

[Help about: Did you have an annual turnover of £85,000 or more?](#)

Please select the circumstances that apply to your self-employment. If none of them apply, please select the box 'None of these apply'.

I am a foster carer or adult placement carer

[Help about: Foster carer or shared lives carer](#)

I wish to make an adjustment to my profits chargeable to Class 4 NICs

[Help about: Adjustment to profits chargeable to Class 4 NICs](#)

I have changed my accounting date

[Help about: Accounting date changed](#)

The results of my accounts, made up to a date in the year to 5 April 2020, have been declared on a previous return

[Help about: Results of accounts made up to](#)

My 'basis period' (the self-employed period for which I am taxable) is not the same as my accounting period

[Help about: Basis period](#)

I provide my services under contracts for professional or other services and these contracts span my accounting date

[Help about: Services under contracts](#)

My business is carried on abroad

[Help about: Business is carried on abroad](#)

I wish to claim 'overlap relief'

[Help about: Overlap Relief help](#)

My total turnover is **£1,000** or less from all self-employments but I wish to voluntarily pay Class 2 NICs. **Please check help**

[Help about: Voluntarily paying Class 2 National Insurance Contributions](#)

My total turnover is **£1,000** or less from all self-employments but I wish to claim back tax deducted under the Construction Industry Scheme (CIS). **Please check help**

I want to declare disguised remuneration income

None of these apply

[Help about: None Of These Apply](#)

[Delete Business 1 section](#)

Save and continue

Back

Fill in your return

Details for Business 1 (Page 2 of 2)

Business name:

[▶ Help about: Business name](#)

Description of Business, Trade or Profession:

Postcode of your business address: (optional)

Has your business name, description, address or postcode changed in the last 12 months?

Yes No

[▶ Help about: Has your business name, description, address or postcode changed](#)

If your business **started** after 5 April 2019, enter the start date: (optional)

e.g. dd/mm/yyyy

File a return menu

- [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](#)

Complete the next screen with your **business** details. Often the business name is simply your name.

Fill in your return

Accounting details for Business 1

Date your books or accounts are made up to:

e.g. dd/mm/yyyy

[▶ Help about: The date your books or accounts are made up to](#)



Important: If you answer 'Yes' to Cash basis, be aware this will restrict claims to certain expenses, capital allowances and loss relief claims. [Read help.](#)

Did you use the cash basis, money actually received and paid out, to calculate your income and expense? Please read the notes.

Yes No

[▶ Help about: Cash basis](#)

[Delete Business 1 section](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

On the next screen you will need to add the date your books and records are made up to (the cut-off point). This is often the same as the tax year end date (i.e. 5 April) but it could be another date e.g. 31 December or 30 June, so do check your own records and add the relevant date.

Fill in your return

Income for Business 1

Turnover - takings, fees, sales or money earned by your business: (optional)

[▶ Help about: Your Turnover](#)

Any other business income not already included above: (optional)

[▶ Help about: Any other Business Income](#)

Trading Income Allowance: (optional)

[▶ Help about: Trading income allowance](#)

Total business income: £

Expenses

How would you like to record your expenses?

as a single total value

as a detailed breakdown

[▶ Help about: How would you like to record your expenses](#)

File a return menu

[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](#)

Continuing to the next screen, you are asked to type in your **income and expenditure** details.

Turnover is another word for sales or income.

Expenses can be entered as a single figure if the turnover is below the VAT threshold of £85k.

Fill in your return

Capital allowance and balancing charges for Business 1

You can claim capital allowances for the purchase and improvements to equipment and machinery such as vehicles, tools, computers, business furniture used in your business.

If you've completed '**Trading income allowance**' do not complete the next three questions.

There are [notes and working sheets](#) that you can download to help you calculate these allowances

Annual Investment Allowance: (optional)

[▶ Help about: Annual Investment Allowance](#)

Allowance for small balance of unrelieved expenditure: (optional)

[▶ Help about: Allowance for small balance of unrelieved expenditure](#)

Other capital allowances: (optional)

[▶ Help about: Other capital allowances](#)

The Structures and Buildings Allowance: (You must hold a valid allowance)

File a return menu

[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](#)

Onto the next screen and **Capital Allowances** may be available if you have incurred capital expenditure. The Annual Investment Allowance is a type of Capital Allowance. You may wish to click on the information symbol or check HMRC's website re Capital Allowances.

If you need help understanding what is required here, you may need an accountant. Contact us at Tax Help to discuss this if needed.

Fill in your return

Other tax adjustments for Business 1

Goods or services for your own use: (optional)

▶ [Help about: Goods or services for your own use](#)

Net business profit £
for tax purposes:

Loss brought forward from earlier years set-off against 2019-20 profits:
(optional)

▶ [Help about: Loss brought forward from earlier years set-off against 6 April 2019 to 5 April 2020 profits](#)

Any other business income not already included: (optional)

▶ [Help about: Any other business income that is not already included](#)

Total taxable profits from this business: £

Net business loss for tax purposes: £

File a return menu

- [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](#)

On the next screen you are asked to put in any other tax adjustments. You may wish to check the information symbol  before completing this screen.

Fill in your return

Losses for Business 1

You can use the [Self-employment losses worksheet](#) to help you enter this information.

Loss from this tax year set-off against other income for 2019-20: (optional)

▶ [Help about: Loss from this tax year set-off against other income for 6 April 2019 to 5 April 2020](#)

Loss to be carried back to previous year(s) and set-off against income (or capital gains): (optional)

▶ [Help about: Loss to be carried back to previous year\(s\) and set-off against income](#)

Total loss to carry forward after all other set-offs including unused losses brought forward: (optional)

▶ [Help about: Total loss to carry forward after all other set-offs](#)

[Delete Business 1 section](#)

Save and continue

Back

File a return menu

- [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](#)

This screen enables you to use any trading losses.

Fill in your return

If you have been self-employed under the Construction Industry Scheme, you should enter the tax deducted from your income under that scheme here.

Tax deducted for Business 1

If you have not registered with HMRC as a Construction Industry Sub-contractor, you can do this [here](#). The benefit of registering as a subcontractor is that a Contractor will make deductions at 20% rather than 30%. You can also apply for gross status at the same time.

Deductions on payment and deduction statements from contractors - construction industry subcontractors only: (optional)

[Help about: Deductions on payment and deduction statements from contractors](#)

[Delete Business 1 section](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Fill in your return

Class 4 NICs for Business 1



Important: Only select 'Yes' to question 'Are you exempt from paying Class 4 NICs?' if:

- on 6 April 2019 you were at or over State Pension age
- on 6 April 2019 you were under 16
- during the tax year ending 5 April 2020 you were not resident in the UK for tax purposes
- you are a trustee, executor or administrator but only in some cases
- you are a diver or diving supervisor but only in some cases

[Read help.](#)

Are you exempt from paying Class 4 NICs?

Yes No

[Help about: Are You Exempt from paying Class 4 National Insurance contributions](#)



[Delete Business 1](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

On the next screen, you will need to select whether you are exempt from paying Class 4 NIC (National Insurance). To help you understand this, you will need to read the list in the red box and only select "yes" if any of the points apply to you.

Fill in your return

In the box on the next screen, type in any other information you think is relevant about your business, or leave blank if you don't think you need to add anything else.

Any other information for Business 1

Please give any other information about this business below:

[▶ Help about: Any other information - Self-employment](#)

[Delete Business 1 section](#)

Save and continue

Back

Fill in your return

Summary for Business 1

Business income:	£ 20,000.00
Total allowable expenses:	£
Profit or Loss:	£ 20,000.00
Capital allowances:	£ 0.00
Balancing charges:	£ 0.00
Tax adjustments:	£ 0.00
Total taxable profits or net business loss (before any set-offs):	£ 20,000.00

Print this page

[Delete Business 1 section](#)

Add businesses

Save and continue

Back

File a return menu

- [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](#)

The next screen summarises the information that you have entered regarding your self-employment. The £20k shown here is just an example – your own figure is likely to be different.

File a return menu

- [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](#)

On the next screen, you will be shown how much Class 2 NIC (National Insurance) is due. The figure shown here is for illustration only.

This figure can sometimes be filled in already, but if not you can select the 'Recalculate' button to retrieve the figure.

If the figure is incorrect you can select 'Update your self employment detail' this will show you the information HMRC have that may need to be amended. Once amended you will need to return to this page and select 'Recalculate' to retrieve a new figure.

If your profits are less than small profits threshold for 2018/19 this is £6,205. You can pay voluntary Class 2 NICs.

Fill in your return

If your profits are £6365 or more you must pay Class 2 NICs.

If your profits are less than £6365 **you do not have to pay but if you want to pay voluntarily, please see the section below.**

For 2019 to 2020, Class 2 NICs are £3.00 a week.

Your self-employment record shows you owe:

Class 2 NIC amount: £ 159.00 

If you haven't told us of a change to your self-employment details for this tax year, for example you ceased self-employment, you can tell us now by clicking the link.

[Update your self-employment details](#)



If you have used the link above to make changes to your self-employment details, you must click the Recalculate button to get the new amount you owe. 

Recalculate

If your profits for 2019 to 2020 are less than £6365:

You may want to pay Class 2 NICs voluntarily to protect your entitlement to State Pension and certain benefits. Before you decide **please check help** to find out how not paying may affect you.

Do you want to pay Class 2 NICs voluntarily?

File a return menu

[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](#)

Underpaid and overpaid tax

When you have completed your specific income information, you will arrive at this screen, where you will be provided with a figure for any tax that was underpaid in previous years. If this figure is zero and/or is correct, select “yes” and continue. If the figure is incorrect, select “no”.

The figure provided is for illustration purposes only.

Fill in your return

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

Underpaid tax for earlier years included in your tax code for 6 April 2019 to 5 April 2020 (from your PAYE Notice of Coding): [?](#)
£ 1247.18

Yes No

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Fill in your return

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

Underpaid tax for earlier years included in your tax code for 6 April 2019 to 5 April 2020 (from your PAYE Notice of Coding): [?](#)
£ 1247.18

Yes No

You have indicated that the figure entered from HM Revenue and Customs records for underpaid tax for earlier years does not match your own records. Please amend the figure in the box below.

Underpaid tax for earlier years included in your tax code for 2019-20 (from your PAYE Notice of Coding):

£

Please tell us why this figure is different from the one we quoted.

For example, please tell us the name and date of the document you are using to provide the figure:

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

If you clicked ‘no’ you will see this screen where you can put in more information about your underpaid tax. If ‘yes’ you will be taken to the page 2 below.

This screen shows what happens at any stage if you forget to make a selection before you click “next”. You will get a red error message which will explain what you have missed.

Correct the error and click next again.

As above, the next screen provides an estimated figure for any tax that will be underpaid in the current financial year. If the figure shown is correct or does not apply to you, select “Yes” to proceed. If you think the figure is not correct, please select “no”.

Note: enter “0” if there is no tax debt included in your PAYE Tax code or if you do not have a code. Your February tax code letter from the previous year will show this.

There is a problem

Please complete 'Estimated underpaid tax for 6 April 2019 to 5 April 2020 to be included in your PAYE tax code for 6 April 2020 to 5 April 2021 (from your PAYE Notice of Coding)'. 'If this figure is not correct, select 'No' and you will be given a chance to amend it below'.

Fill in your return

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

Our records show that your 2019 to 2020 PAYE Notice of Coding includes an adjustment for tax underpaid.

Estimated underpaid tax for 6 April 2019 to 5 April 2020 to be included in your PAYE tax code for 6 April 2020 to 5 April 2021 (from your PAYE Notice of Coding): 
£ 0.00

ERROR: Please check and amend the entry below.

Yes No

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Fill in your return

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

Our records show that your 2019 to 2020 PAYE Notice of Coding includes an adjustment for tax underpaid.

Estimated underpaid tax for 6 April 2019 to 5 April 2020 to be included in your PAYE tax code for 6 April 2020 to 5 April 2021 (from your PAYE Notice of Coding): 
£ 0.00

Yes No

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Fill in your return

Other debts

Outstanding debt included in your tax code for 2019-20. **Please enter '0' if there is nothing shown or you did not have a PAYE code:**

£

[Help about: Outstanding debt included in your tax code for 6 April 2018 to 5 April 2019](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Fill in your return

Overpaid tax

If you think you have paid too much tax you must tell HM Revenue and Customs (HMRC) where you want any repayment to be sent. We will always try to repay back to the credit or debit card you paid with first, before making any repayment as requested. This will prevent delays.

If you did not pay by card, HMRC will repay direct to your bank or building society account - this is the safest and quickest method - or you can authorise a nominee to receive your repayment.

! Please allow up to 4 weeks before contacting HMRC to chase up this repayment.

Who will be receiving some or all of the repayment?

- Yourself
- Nominee
- Not applicable

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

If you believe you have overpaid tax for this year, and due a refund, you can select who receives this.

Fill in your return

Overpaid tax

Please enter details of where you would like any repayment to be sent. If you paid your tax due by credit or debit card, we will always try to repay back to the card you paid with first before making any repayment as requested by you below. **Remember**, if you paid your tax by direct debit you will still need to enter your bank details below to receive any repayment due.

Always double check the sort code and account number provided as HM Revenue and Customs (HMRC) cannot take responsibility for delays if the payment is made to an incorrect account.

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

▶ [Please note:](#)

Please allow up to 4 weeks before contacting HMRC to chase up this repayment.

I do not have a bank or building society account

▶ [Help about: No bank or building society account](#)

Name of bank or building society:

Name of account holder:

Branch sort code:

Account number:

Building society reference number:

Address line 1: Not available

Address line 2: Not available

Address line 3: Not available

Address line 4: Not available

Postcode: Not available

[Save and continue](#)

[Back](#)

File a return menu

[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](#)

To receive a refund into your bank account, you can put your bank details in the next screen.

If you tick 'I do not have a bank account HMRC will send you a cheque.

Fill in your return

On the next screen you are asked if you would like any tax that you owe to be collected through your tax code in the next financial year. This only applies if the amount owed is below £3,000. If this applies to you, select “yes” in the top box.

In the second box, you can also select if you want any tax that you are likely to owe in the current tax year to be taken through your tax code.

If you have not paid enough tax

If you owe less than £3,000 tax for 6 April 2019 to 5 April 2020 and you want us to try and collect the tax you owe through your 6 April 2021 to 5 April 2022 PAYE tax code, you must file and **submit** your 6 April 2019 to 5 April 2020 online Tax Return by **30 December 2020**.

If you file and **submit** your 6 April 2019 to 5 April 2020 online Tax Return **after** the **30 December 2020** we cannot collect this tax through your 6 April 2021 to 5 April 2022 PAYE tax code as this option will no longer be available.

If you are submitting by 30 December, owe tax for 2019-20 and have a PAYE tax code, do you want us to try to collect the tax and Class 4 NICs due (if less than £3,000) through your tax code for 2021-22?

Yes No

▶ [Help about: If you owe tax for 6 April 2019 to 5 April 2020 and have a PAYE tax code](#)

If you are likely to owe tax for the current tax year (ended 5 April 2021) on income other than employed earnings/pensions e.g. savings or the High Income Child Benefit Charge, do you want us to use your 2020-21 PAYE tax code to collect that tax during the year?

Yes No

▶ [Help about: If you are likely to owe tax for 6 April 2020 to 5 April 2021 on income other than employed earnings or pensions](#)

Save and continue

Back

File a return menu

- [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](#)

Fill in your return

Adjustments to tax due

Do you need to make any adjustments to increase or decrease your tax due for 6 April 2019 to 5 April 2020? This may apply if you are claiming averaging for farmers or creators of literary or artistic work or you had post-cessation receipts.

Increase in tax due because of adjustments to an earlier year: (optional)

£

▶ [Help about: Increase in tax due because of adjustments to an earlier year](#)

Decrease in tax due because of adjustments to an earlier year: (optional)

£

▶ [Help about: Decrease in tax due because of adjustments to an earlier year](#)

Any 6 April 2020 to 5 April 2021 repayment you are claiming now: (optional)

£

▶ [Help about: Any 6 April 2020 to 5 April 2021 repayment you are claiming now](#)

Save and continue

Back

File a return menu

- [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](#)

There may be a need for you to adjust the amount of tax you need to pay. Three cases where this could occur are provided for you in this screen. If none of these apply, you can click on “Next”.

Fill in your return

If you have used any provisional or estimated figures instead of actual figures, you should select “Yes” here, or “No” if all figures are actual.

Any other information (Page 1 of 2)

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

Yes No

[▶ Help about: Provisional figures](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

The next screen provides you with a space to put in any other information you feel is relevant to your return. You can also add an attachment to the return if applicable, by selecting “Yes” in the drop down box. Neither of these are compulsory, but it’s a good idea to put the private pension details in this box if you have more than one, for example, to show the individual calculations.

You can also include notes like: ‘Please remove me from SA next year as I will no longer have foreign income to declare’ if applicable.

Fill in your return

Any other information (Page 2 of 2)

Please give any other information in this space. (optional)

[▶ Help about: Any other information - Fill in your return](#)

Do you want to add an attachment to your return?

Yes No

[▶ Help about: Add attachments](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Checking, saving and submitting your return

Check your return

Your return contains no errors

This section lets you check that you have answered all of the questions relevant to your circumstances.

In the year starting **6 April 2019** and ending **5 April 2020** you have told us you:

- were **not** in a partnership
- did **not** receive income from:
 - property
- did **not**
 - dispose of any chargeable assets
 - have any chargeable gains
 - claim an allowable loss
 - make any other claim or election

If you feel you have missed any information, please update your details in [3, Tailor your return](#).

Tell us about you

[Change details about you](#) **ENTERED**

Tailor your return

[Change your tailored return \(page 1\)](#) **ENTERED**

[Change your tailored return \(page 2\)](#) **ENTERED**

[Change your tailored return \(page 3\)](#) **ENTERED**

Employment

Employment 1

[Change income](#) **ENTERED**

[Change additional information](#) **ENTERED**

Self-employment

Business 1

[Change self-employment details \(page 1\)](#) **ENTERED**

[Change self-employment details \(page 2\)](#) **ENTERED**

[Change accounting details](#) **ENTERED**

[Change income](#) **ENTERED**

[Change capital allowances](#) **ENTERED**

[Change adjustments](#) **ENTERED**

[Change losses](#) **ENTERED**

[Change tax deducted](#) **ENTERED**

File a return menu

[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](#)

In section 5 of the return, you get the opportunity to check the information you have provided and go back and change anything that is incorrect. Just click on each section in turn to check it.

View your calculation

Section 6 shows you the amount of tax you owe. You might wish simply to do a check or a calculation on paper and compare that calculation to the amount on the return.

The figures provided are for illustration purpose only.

You can view and print and save your full calculation at this stage and/or go back to section 3 to make changes or additions. Just click on the relevant link on this screen to do so, or else if you are happy with your calculation on screen, click “Next” to continue

On the next screen, you are asked if you are claiming to reduce your payments on account. Be aware that if you reduce these to lower than the tax amount you will owe for the year; you can be charged interest. It is worth seeking advice on this if you are unsure.

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 'Save and continue' button at the bottom of this page to save then submit your return.

Total amount due for 2019-20	£3,931.30
<i>Plus</i>	
First payment on account for 2020-21	£1,886.15
Total to be added to Self Assessment account due by 31 January 2021	£5,817.45

HM Revenue and Customs will add this amount to your Self Assessment statement of account. It doesn't include any 2019 to 2020 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. HM Revenue and Customs will allocate your payments against any Class 2 National Insurance first unless you have outstanding debts.

▶ [Help about: Class 2 NIC amount](#)

File a return menu

- [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](#)

View your calculation

Payments on account

Are you claiming to reduce your 2020-21 payments on account?

Yes No

▶ [Help about: Claim to reduce payments on account](#)

[Save and continue](#) [Back](#)

File a return menu

- [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](#)

Save your return

Onto section 7 now, and here you can view, print and/or save a copy of your return to your own computer. It is recommended that you do save your return so that you have a copy of it in case you need to make any changes, or check what you have submitted at a later date.

An HTML copy of your return will contain the text of your return only. A PDF copy will look like the paper version of the Self-Assessment form. View both to see which you would prefer (both can be saved/printed if you like).

You have not yet 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 'Save and Continue' button to continue.

▶ [Save your return - Privacy guidance](#)

▶ [Black and white copy of your return](#)

View Save Print

▶ [Colour copy of your return](#)

View Save Print

Attachments

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

File a return menu

- [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](#)

In section 8 you are asked to tick a box to confirm that you believe the information in your return is correct.

Submit your return

Declaration

You have not yet submitted your return.

Before you can submit your return to HM Revenue and Customs, you must read and agree the following statement by ticking the checkbox below. Please then select 'Submit' to continue to the next page where you will need to re-authenticate before your return is submitted.



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

Submit Back

File a return menu

- [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](#)

You might need to re-enter your sign in details before submitting the tax return. This is your 12 digit Government Gateway number and the password you chose previously.

Once you submit your return, it can take a while to be received by HMRC. Please save the submission receipt somewhere safe when you receive it, for your records.

This screen and the one that follows may appear slightly different to those illustrated.

You can log out and log back in later if preferred to check that your return has been received. When you log back in you should see that the tax return has been submitted (noted in the top right) and you have been given a 'submission receipt reference number'. It is worth noting this down and keeping it with your files for future reference.

On this screen you also have other options such as viewing the calculation again.

The screenshot shows the HM Revenue & Customs website interface. At the top, the logo and 'HM Revenue & Customs' are on the left, and navigation links 'Home', 'Cymraeg', 'Contact HMRC', 'Help', and 'Sign out' are on the right. Below the header, there are two main sections: 'Your HMRC Services' and 'Self Assessment'. The 'Self Assessment' section is active, and a notification in the top right corner states 'tax return: 2017-18 SUBMITTED'. On the left, a 'File a return' sidebar menu includes options like 'Welcome', 'View your calculation', 'View/print/save your return', 'Provide feedback', 'Exit File a return', 'Tax return options', and 'How to pay'. The main content area is titled 'Welcome back' and contains a 'What would you like to do today?' section. This section explains that the 2017 to 2018 tax return was successfully submitted and received by HM Revenue and Customs at 09:57 GMT on May 2018. It displays a 'Your submission receipt reference number is:' field with a blurred number. Below this, there are links to 'Save your submission receipt reference number' and 'Print your submission receipt reference number'. A second 'What would you like to do today?' section offers links to 'View your calculation for your latest submitted return', 'View/print/store your return onto your local drive', 'Pay any outstanding tax you owe using How to pay', and 'Work with your current and previous returns in Tax return options'. A 'Cancel' button is located at the bottom right of the page.

That's it! Your return is submitted

HMRC information

HMRC's [helpline](#) for assistance with online services (Tel: 0300 200 3600) or go to: <https://www.gov.uk/government/organisations/hm-revenue-customs/contact/online-services-helpdesk>

Links to HMRC technical material:

Taxation of pension income: <https://www.gov.uk/tax-on-pension>

Taxation of foreign income: <https://www.gov.uk/tax-foreign-income>

Taxation of rental income: <https://www.gov.uk/guidance/income-tax-when-you-rent-out-a-property-working-out-your-rental-income>

Taxation of interest income: <https://www.gov.uk/apply-tax-free-interest-on-savings>

Taxation of dividends: <https://www.gov.uk/tax-on-dividends>

Taxation of self-employment: <https://www.gov.uk/topic/business-tax/self-employed>

Capital Allowances: <https://www.gov.uk/capital-allowances>

Self-Assessment deadlines

(for tax year 6 April 2019 to 5 April 2020):

Register for Self-Assessment	5 October 2020
Paper tax returns	Midnight 31 October 2020
Online tax returns	Midnight 31 January 2021
Pay the tax you owe	Midnight 31 January 2021

Further help

If you find the instructions in this guide difficult to follow, you can call the tax charities for help as you work through your online tax return.

TaxAid	Tax Help for Older People
(for the under 60s and/or self-employed)	(for the over 60s and/or near retirement)
0345 120 3779	01308 488066
Open Mon-Fri 10am to 4pm	Open Mon-Fri 9am to 5pm
www.taxaid.org.uk	www.taxvol.org.uk