



Individual Tax Return Guide

This document is a quick start guide to producing an Individual Tax Return using BTCSoftware's PM Solution or SA Solution.

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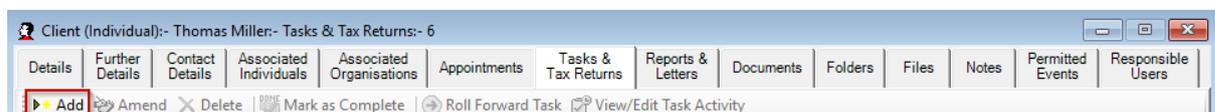
Creating the Individual Tax Return

Creating the Individual Tax Return (If Using BTCSoftware for the 1st time for a given client)

- Open the **Client (Individual)** window
 - Go to **Client > Individual** from the top menu

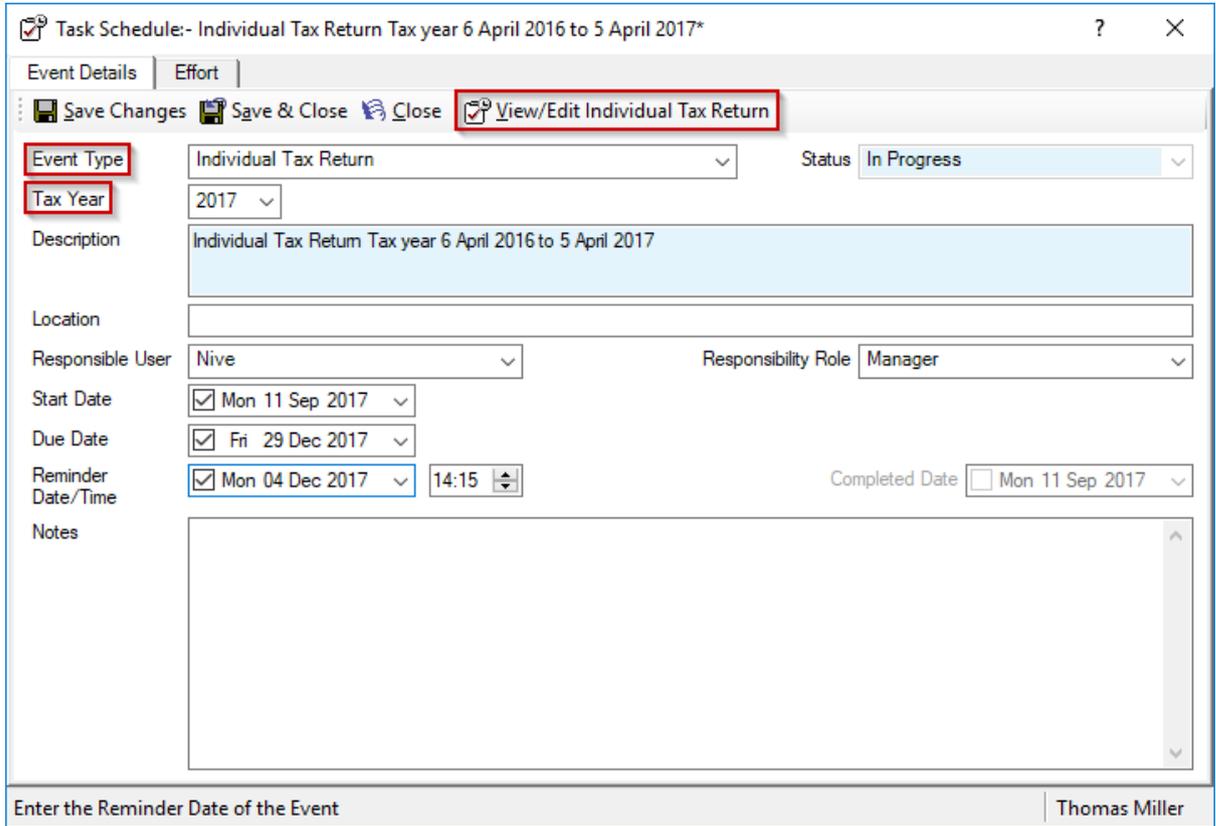
Ref.	Forename	Surname	UTR	Date of Birth	Type	Status	Active Status
100917	Thomas	Miller	1234567895	08/05/1981	Private Client	Active	Yes
100776	Timothy	Pearce	1234567895	19/10/1974	Private Client	Active	Yes

- Choose the client from the client list on the right window
- Navigate to the **Tasks & Tax Returns** tab on the left window



Individual Tax Return Guide

4. Click on **Add**



The screenshot shows a software window titled "Task Schedule:- Individual Tax Return Tax year 6 April 2016 to 5 April 2017*". The window has two tabs: "Event Details" and "Effort". Below the tabs is a toolbar with icons for "Save Changes", "Save & Close", "Close", and "View/Edit Individual Tax Return". The "View/Edit Individual Tax Return" button is highlighted with a red box. The main form area contains the following fields:

- Event Type:** Individual Tax Return (dropdown menu, highlighted with a red box)
- Tax Year:** 2017 (dropdown menu, highlighted with a red box)
- Status:** In Progress (dropdown menu)
- Description:** Individual Tax Return Tax year 6 April 2016 to 5 April 2017
- Location:** (empty text field)
- Responsible User:** Nive (dropdown menu)
- Responsibility Role:** Manager (dropdown menu)
- Start Date:** Mon 11 Sep 2017 (dropdown menu)
- Due Date:** Fri 29 Dec 2017 (dropdown menu)
- Reminder Date/Time:** Mon 04 Dec 2017 (dropdown menu) 14:15 (time spinner)
- Completed Date:** Mon 11 Sep 2017 (dropdown menu)
- Notes:** (empty text area)

At the bottom of the window, there is a status bar with the text "Enter the Reminder Date of the Event" on the left and "Thomas Miller" on the right.

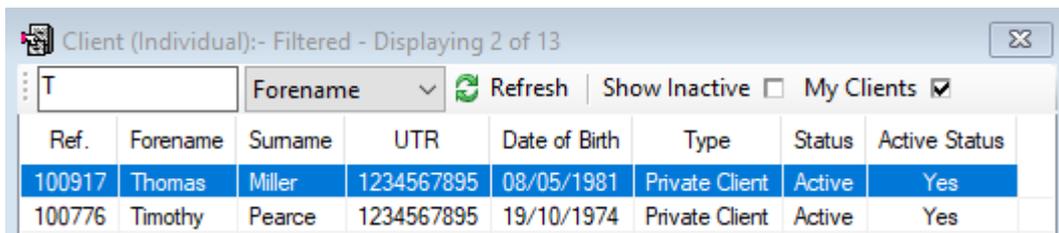
5. Choose **Individual Tax Return** from the **Event Type** drop-down menu
6. Select the **Tax Year**
7. You are able to add location, choose a responsible user and also additional notes
8. You can then set up **Start** and **Due Date/Time** along with a **Reminder Date/Time**
9. Click on **View/Edit Individual Tax Return**

Individual Tax Return Guide

Creating the Individual Tax Return (If you have used BTCSoftware previously for a given client)

If you have used **BTCSoftware** to prepare the previous year's tax return, you are able to roll forward the data from the previous year's tax return to the current year's tax return. To do this, please see the following instructions:

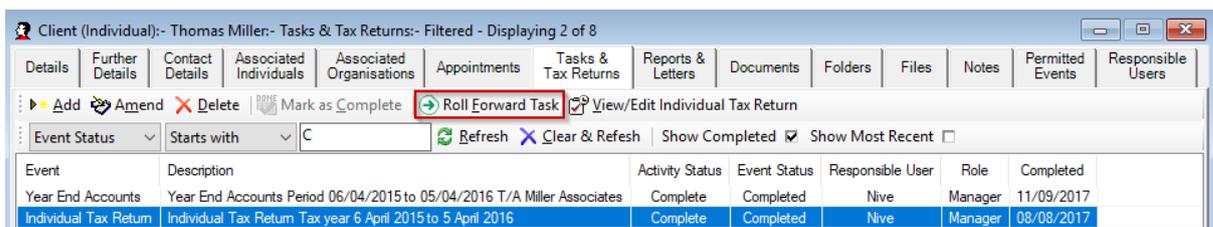
1. Open the **Client (Individual)** window
 - Go to **Client > Individual** from the top toolbar



Client (Individual):- Filtered - Displaying 2 of 13

Ref.	Forename	Surname	UTR	Date of Birth	Type	Status	Active Status
100917	Thomas	Miller	1234567895	08/05/1981	Private Client	Active	Yes
100776	Timothy	Pearce	1234567895	19/10/1974	Private Client	Active	Yes

2. Choose the client from the client list on the right window
3. Navigate to the **Tasks & Tax Returns** tab on the left window

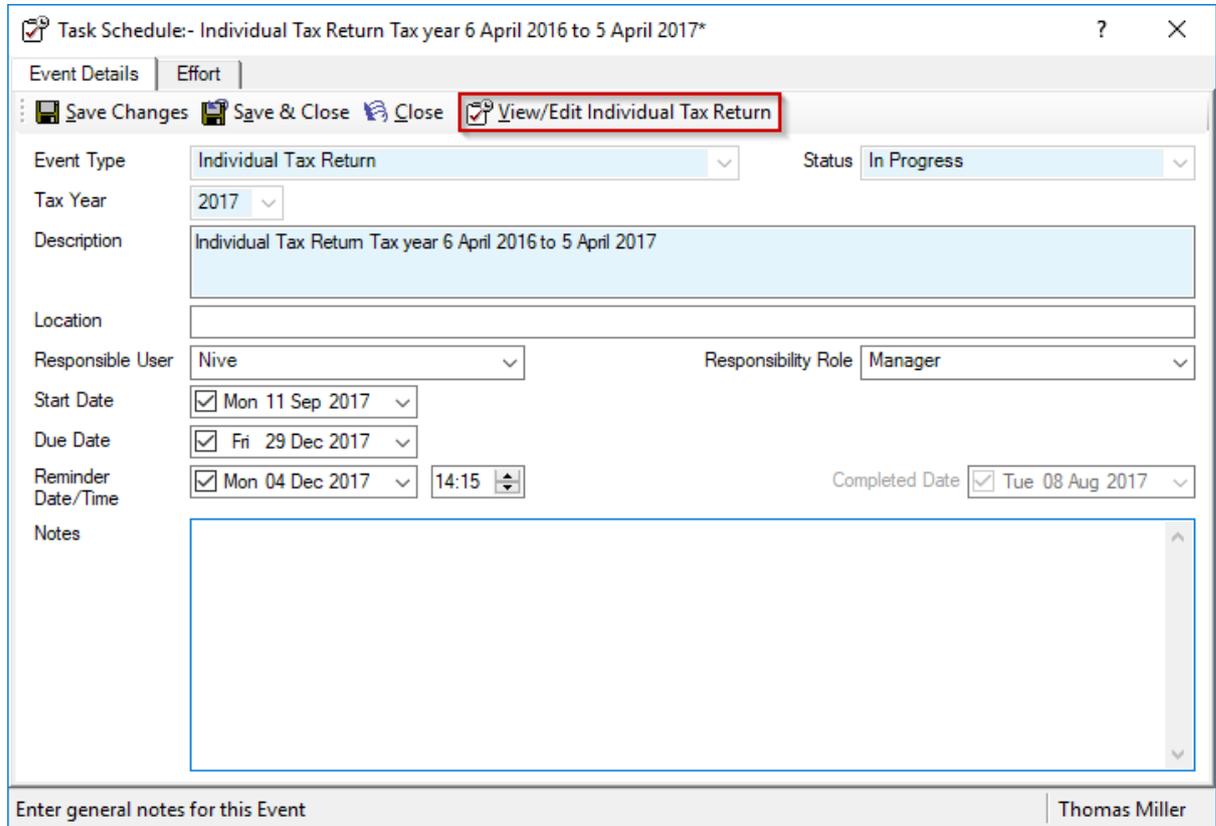


Client (Individual):- Thomas Miller:- Tasks & Tax Returns:- Filtered - Displaying 2 of 8

Event	Description	Activity Status	Event Status	Responsible User	Role	Completed
Year End Accounts	Year End Accounts Period 06/04/2015 to 05/04/2016 T/A Miller Associates	Complete	Completed	Nive	Manager	11/09/2017
Individual Tax Return	Individual Tax Return Tax year 6 April 2015 to 5 April 2016	Complete	Completed	Nive	Manager	08/08/2017

4. Highlight previous years' Individual Tax Return
5. Click on **Roll Forward Task**

Individual Tax Return Guide



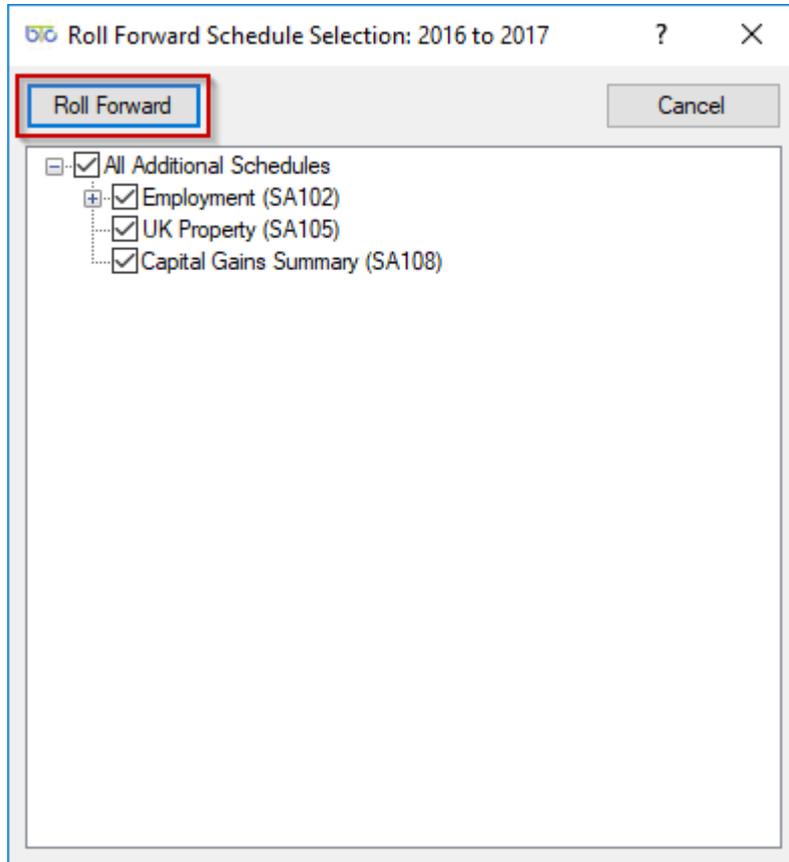
The screenshot shows a software window titled "Task Schedule:- Individual Tax Return Tax year 6 April 2016 to 5 April 2017*". The window has two tabs: "Event Details" (selected) and "Effort". Below the tabs is a toolbar with icons for "Save Changes", "Save & Close", "Close", and "View/Edit Individual Tax Return" (which is highlighted with a red box). The main area contains the following fields:

- Event Type:** Individual Tax Return (dropdown)
- Tax Year:** 2017 (dropdown)
- Status:** In Progress (dropdown)
- Description:** Individual Tax Return Tax year 6 April 2016 to 5 April 2017 (text area)
- Location:** (empty text field)
- Responsible User:** Nive (dropdown)
- Responsibility Role:** Manager (dropdown)
- Start Date:** Mon 11 Sep 2017 (dropdown)
- Due Date:** Fri 29 Dec 2017 (dropdown)
- Reminder Date/Time:** Mon 04 Dec 2017 (dropdown) 14:15 (time spinner)
- Completed Date:** Tue 08 Aug 2017 (dropdown)
- Notes:** (empty text area)

At the bottom of the window, there is a footer bar with the text "Enter general notes for this Event" on the left and "Thomas Miller" on the right.

6. The **Event Type** and **Tax Year** are auto populated
7. You are able to add location, choose a responsible user and also additional notes
8. You can then set up **Start** and **Due Date/Time** along with a **Reminder Date/Time**
9. Click on **View/Edit Individual Tax Return**

Individual Tax Return Guide



10. Check/uncheck boxes to select/unselect schedules you want to bring into the current year's tax return

11. Click on **Roll Forward** to open the tax return

When you roll forward data from the previous year, you have to review this data.

Review rolled forward data

Please see the following instructions on how to review data that has been rolled forward from the previous year:

1. Click on **Check & Calculate Return** to generate a list of data that needs to be reviewed.



Individual Tax Return Guide

The screenshot shows the 'Check & Calculate Return' window in the software. The window title is 'Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)'. The 'Check & Calculate Return' button is highlighted with a red box. The interface is divided into several sections:

- Underpaid tax:** Fields for 7. Underpaid tax for earlier years included in your tax code for 2016-17, 8. Underpaid tax for 2016-17 included in your tax code for 2017-18, and 9. Outstanding debt included in your tax code for 2016-17.
- Payments on account:** Fields for 10. Claiming to reduce 2017-18 payments on account (checkbox), 11. Reduced first payment on account for 2017-18, and 16a. Payments already made towards 2016-17 payments on account.
- Blind person's surplus allowance and married couple's surplus allowance:** Fields for 12. Blind person's surplus allowance you can have and 13. Married couple's surplus allowance you can have.
- Adjustments to tax due:** Fields for 14. Increase in tax due because of adjustments to an earlier year, 15. Decrease in tax due because of adjustments to an earlier year, 16. Any 2017-18 repayment you are claiming now, 16a. Payments already made towards 2016-17 payments on account, and 16b. Any other payments, not included in boxes 14, 15 or 16a, made towards your 2016-17 tax bill.
- 17. Any other information:** A large text area for additional notes.
- HMRC Digital Tax Account central values:** Fields for Total Class 2 NICs Due and Total Class 1 NICable earnings between the PT (Primary Threshold) and UEL (Upper Earnings Limit).
- Self Assessment:** A list of 6 items with corresponding input fields: 1. Total tax, Student Loan repayment, Class 2 NICs and Class 4 NICs due before any payments on account; 2. Total tax, Student Loan repayment, Class 2 NICs and Class 4 NICs overpaid; 3. Student Loan repayment due; 4. Class 4 NICs due; 4.1. Class 2 NICs due; 5. Capital Gains Tax due; 6. Pension charges due.
- Payment schedule:** A table showing various tax and repayment amounts, all currently set to 0.00.

At the bottom of the window, it says 'Created by Nive Raj 11/09/2017 13:50 : Last modified by Nive Raj 11/09/2017 16:45' and 'Form State: Edit'.

2. An Example is as follows:

The screenshot shows an 'Errors' window titled 'Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895) - Errors'. The window contains a list of error messages, each highlighted in yellow:

- Employment has data still to be checked after being rolled forward
- UK Property has data still to be checked after being rolled forward
- Capital Gains Summary has data still to be checked after being rolled forward
- Tax Return (SA100):- Income: Box 1 has data still to be checked after being rolled forward
- Tax Return (SA100):- Income: Box 2 has data still to be checked after being rolled forward
- Tax Return (SA100):- Income: Box 4 has data still to be checked after being rolled forward
- Tax Calculation Summary (SA110): Box 16a has data still to be checked after being rolled forward



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3. From the **Individual Tax Return Summary** screen, go into the supplementary schedules with rolled forward data by clicking on the arrow symbol to the side of each schedule
4. From within these schedules, to review the entries, open each item and click on **Save & Close**
5. Go to the **Tax Return (SA100)** tab
6. You need to go into all the relevant tabs (refer to the list in the above image) under this section to review entries within the wizards (boxes with a red arrow symbol to its side)
7. Click on the arrow symbol to open the wizards
8. Within these wizards, open the entries individually to review them before clicking on **Save & Close**
9. Go to the **Tax Calculation Summary (SA110)**
10. Follow steps 5 and 6



Individual Tax Return Guide

Individual Tax Return

The Individual Tax Return is made up of three sections:

[Summary](#)

[Tax Return \(SA100\)](#)

[Tax Calculation Summary \(SA110\)](#)

Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)*

Summary | Tax Return (SA100) | Tax Calculation Summary (SA110) | Submission History | Activity Log

Print | Get Values from HMRC | Check & Calculate Return | Send to Client for Review | Submit to HMRC | Complete | Discard | Send eMail

Client Details

Reference	100917	NI Number	AS345654
Title	Mr	Sex	Male
Forename	Thomas	Tax District	567 / 755612
Surname	Miller	UTR	1234567895
Date of Birth	08/05/1981	Telephone	01450852963
Issue Date	06/04/2017	Mobile	07956823841
Spouse's DoB		Taxpayer Status	UK (U)

Information

Return Status	In Progress
Submission Count	0
Submission IRMark	

Address Details

Issue Address: 354 South Avenue, YO21 5GH [New Address] [Edit Address]

Address is different to Issue Address as printed on the Notice to Complete a Tax Return

New Address: [New Address] [Edit Address]

Date of Address change: [Date]

What makes up the Tax Return

<input checked="" type="checkbox"/> Employment	<input type="checkbox"/> Partnership (full)	<input checked="" type="checkbox"/> Capital Gains Summary
<input type="checkbox"/> Minister of Religion	<input type="checkbox"/> Partnership (short)	<input type="checkbox"/> Residence, Remittance basis etc.
<input type="checkbox"/> Self-employment (full)	<input checked="" type="checkbox"/> UK Property	<input type="checkbox"/> Additional Information
<input type="checkbox"/> Self-employment (short)	<input type="checkbox"/> Foreign	<input type="checkbox"/> File Attachments
<input type="checkbox"/> Lloyd's Underwriter	<input type="checkbox"/> Trusts etc.	

Internal Notes - Not for Submission

check if you disposed of any chargeable assets (including, for example, stocks, shares, land and property, a business), or have any chargeable gains. If checked, read the n Form State: Edit



Individual Tax Return Guide

Summary

This section contains client details and address details that are picked up from Practice Manager. It also contains the supplementary schedules that make up the Tax Return (e.g., Employment, UK Property pages, etc.)

[Supplementary schedules](#) can be accessed by checking the boxes for the schedules that need to be completed. To go into a schedule, click on the arrow symbol to the right of the checkbox.

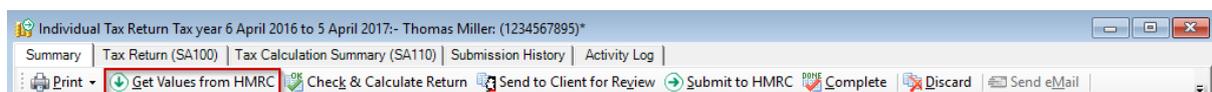
Get Values from HMRC

The Get Values from HMRC is an Application Programming Interfaces (APIs) facility which allows agents to retrieve client data for pre-populating Self-Assessment (SA) returns.

The following client data is being made available through the APIs:

- PAYE data, including employments, benefits, income and tax
- National Insurance contributions (NICs) data, specifically aimed at self-employed taxpayers
- Marriage allowance data

To use this facility, agents need to grant authority to their accounting software (BTCSoftware) to access their clients' HMRC data, and also undertake security for each Government Gateway (GG) account they currently use. Agents will need to complete 2-Step Verification (2SV) to secure each Government Gateway accounts used with the new APIs.

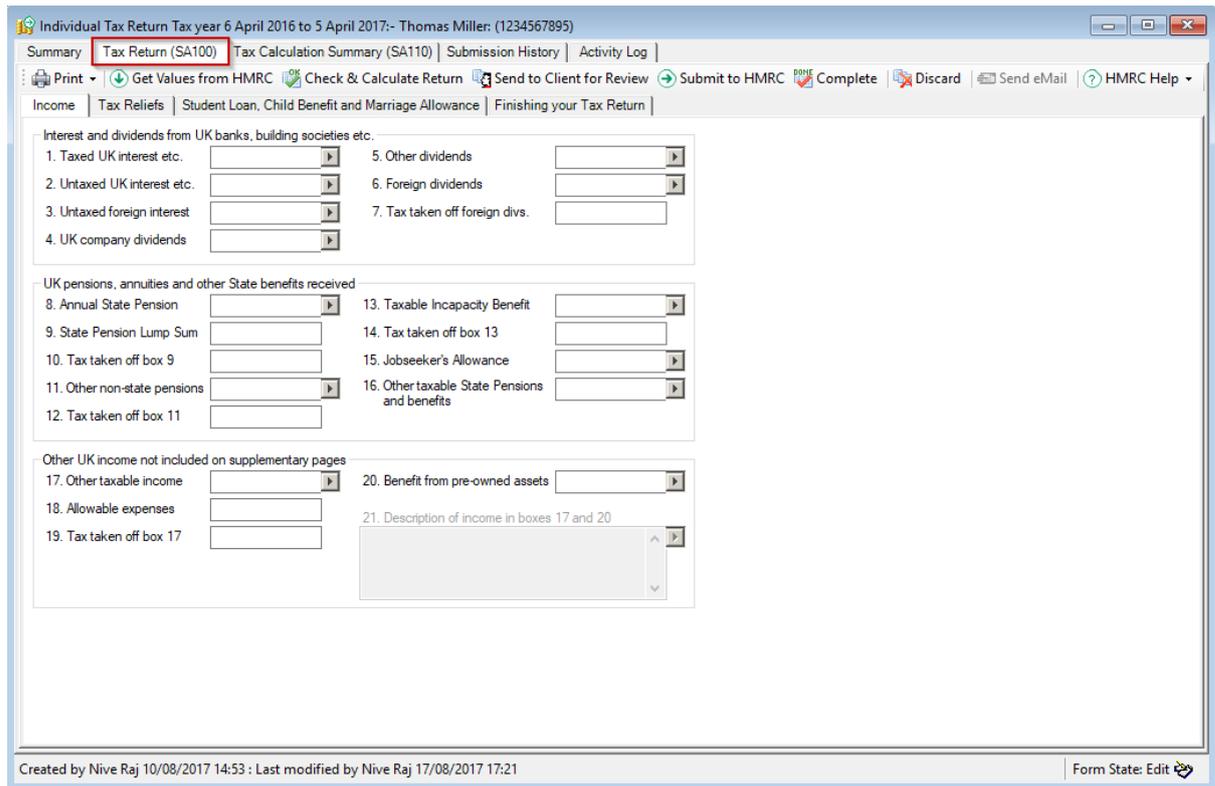


You can access the API link **Get Values from HMRC** from the toolbar

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Tax Return (SA100)

Navigate to the **Tax Return (SA100)** tab



This screen is made up of 4 tabs:

Income (page TR 3)

Tax Reliefs (page TR 4)

Student Loan, Child Benefit and Marriage Allowance (page TR 5)

Finishing your Tax Return (pages TR 6 & TR 7)

Entries can be made directly into the given boxes or you can use the wizards to make multiple entries.

For Example, you can either enter the total consolidated figure for Taxed UK interest or you can use the wizard to provide details of each item. To do this follow the steps below:

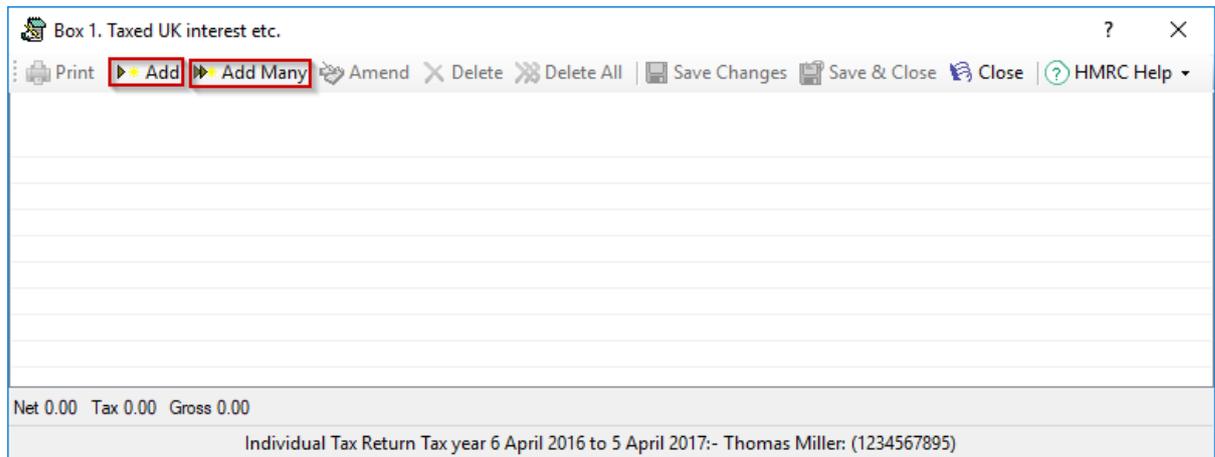
Individual Tax Return Guide

1. Click on the arrow button side of the box for **Taxed UK interest**

Interest and dividends from UK banks, building societies etc

1. Taxed UK interest etc.

2. Click on **Add/Add Many**



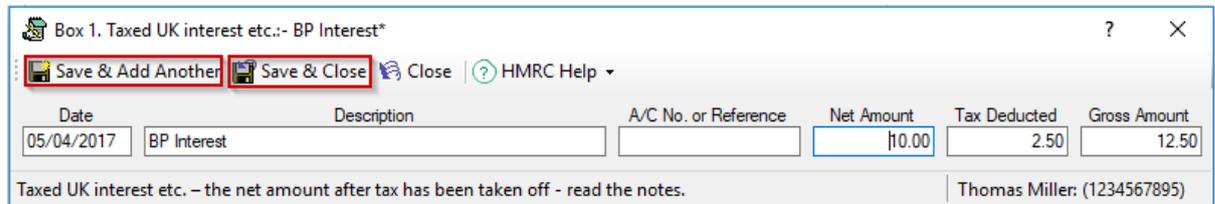
Box 1. Taxed UK interest etc. ? X

Print Add Add Many Amend Delete Delete All Save Changes Save & Close Close HMRC Help

Net 0.00 Tax 0.00 Gross 0.00

Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)

3. Then, key in the details about an item



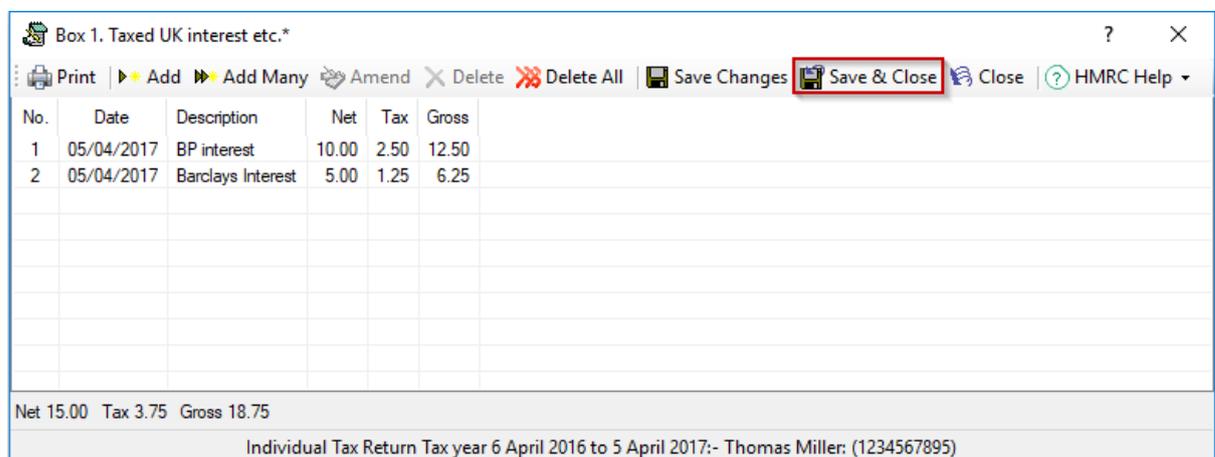
Box 1. Taxed UK interest etc.: - BP Interest* ? X

Save & Add Another Save & Close Close HMRC Help

Date	Description	A/C No. or Reference	Net Amount	Tax Deducted	Gross Amount
05/04/2017	BP Interest		10.00	2.50	12.50

Taxed UK interest etc. - the net amount after tax has been taken off - read the notes. Thomas Miller: (1234567895)

4. Click on **Save & Add Another/ Save & Close**



Box 1. Taxed UK interest etc.* ? X

Print Add Add Many Amend Delete Delete All Save Changes Save & Close Close HMRC Help

No.	Date	Description	Net	Tax	Gross
1	05/04/2017	BP interest	10.00	2.50	12.50
2	05/04/2017	Barclays Interest	5.00	1.25	6.25

Net 15.00 Tax 3.75 Gross 18.75

Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)



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5. After adding multiple items within the wizard click on **Save & Close**

Supplementary Schedules

Supplementary schedules can be accessed through the **Summary** tab. To go into a schedule:

- Check the box to the right of the schedules that need to be completed
- Click on the arrow symbol to the right of the checkbox

Further guidance on certain important sections are as follows:

[Capital Allowances](#)

[Linking with BTCSoftware AP Solution](#)

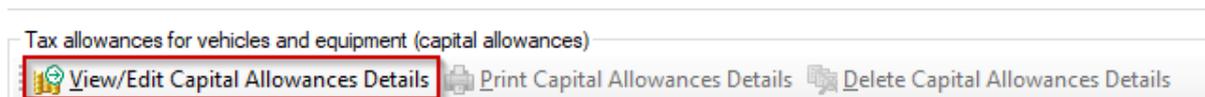
[Importing Accounts from Accounts Package](#)

[Capital Gains Summary](#)

Capital Allowances

The Capital Allowances calculator can be found on Self-employment (full) (iii)/Self-employment (short) (ii). Please see the following instructions on how to complete the Capital Allowances section.

1. Click on **View/Edit Capital Allowances Details** from within the Self-employment schedule



2. This opens the **Capital Allowances Calculator** that will calculate all necessary allowances and pool balances based on the information that is entered by the user

Individual Tax Return Guide

Capital Allowances Calculator 2017: 26/06/2015 to 25/06/2016

Main Summary - Plant and Machinery | Main Summary - Buildings | Main Summary - Sundry | Allowances Claimed Summary

Save Changes | Save & Close | Close | HMRC Help

Main Summary - Plant and Machinery (no private use restrictions)

	The Main Pool	Special Rate Pool	Long Life Pool	Single Assets Private Use	Single Assets Short Life	Single Assets Expensive Cars
	View/Edit					
WDV Brought Forward	<input type="text"/>					
Total Additions	<input type="text"/>					
AIA Claimed	<input type="text"/>					
Eligible for FYAs	<input type="text"/>					
Net Exp. after Waiver	<input type="text"/>					
Disposals	<input type="text"/>					
WDA/Small Pool	<input type="text"/>					
WDA Waived	<input type="text"/>					
Balancing Allowance	<input type="text"/>					
Balancing Charge	<input type="text"/>					
Eligible for FYAs	<input type="text"/>					
FYAs	<input type="text"/>					
FYAs Waived	<input type="text"/>					
Net Exp. after Waiver	<input type="text"/>					
WDV Carried Forward	<input type="text"/>					
S266 Election taken upon ceasing	<input type="checkbox"/>					

Thomas Miller: (1234567895)

- There are different sections on the capital allowances calculator such as **Plant and Machinery, Buildings, Sundry** and **Allowances Claimed Summary**.
- If you are using BTCSoftware for the first time for a given client, this is where you would key in any **WDV Brought Forward** amount under the relevant category.
- To add asset additions/disposals to the pool, click on **View/Edit** under the relevant section

Individual Tax Return Guide

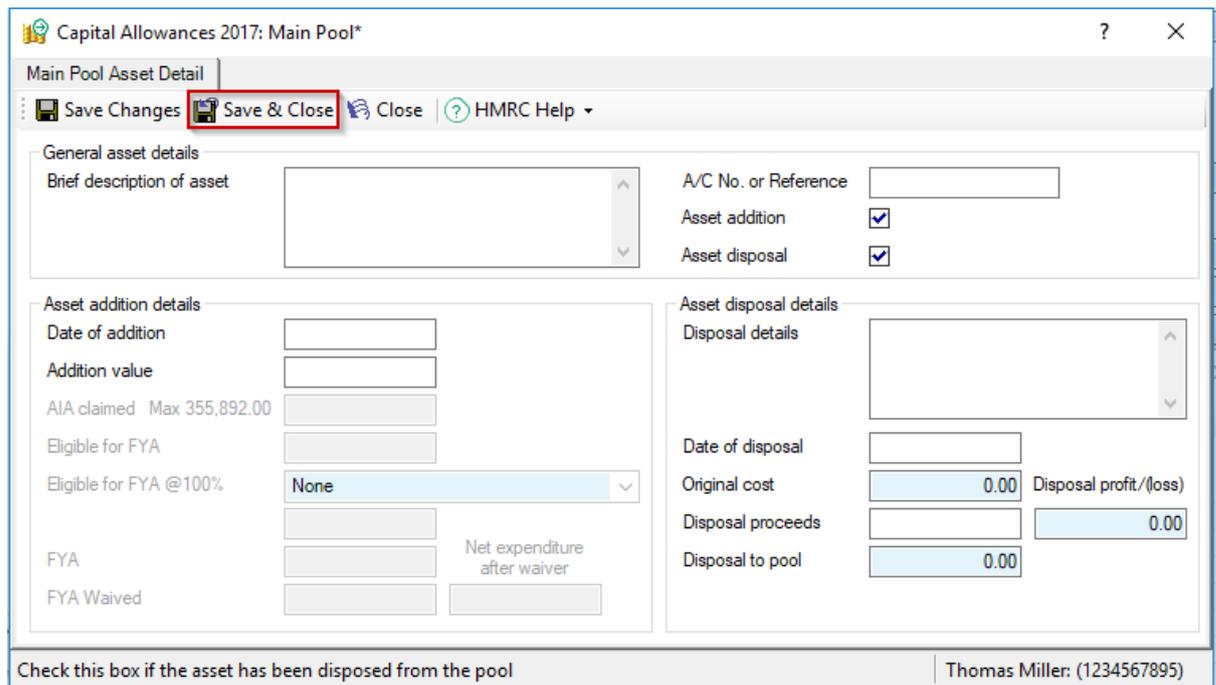


Capital Allowances 2017: Main Pool

Print Add Amend Delete Delete All Save Changes Save & Close Close HMRC Help

Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)

6. Click on **Add** to enter individual asset details



Capital Allowances 2017: Main Pool*

Main Pool Asset Detail

Save Changes Save & Close Close HMRC Help

General asset details

Brief description of asset A/C No. or Reference

Asset addition

Asset disposal

Asset addition details

Date of addition

Addition value

AIA claimed Max 355,892.00

Eligible for FYA

Eligible for FYA @100% **None**

FYA Net expenditure after waiver

FYA Waived

Asset disposal details

Disposal details

Date of disposal

Original cost Disposal profit/(loss)

Disposal proceeds

Disposal to pool

Check this box if the asset has been disposed from the pool Thomas Miller: (1234567895)

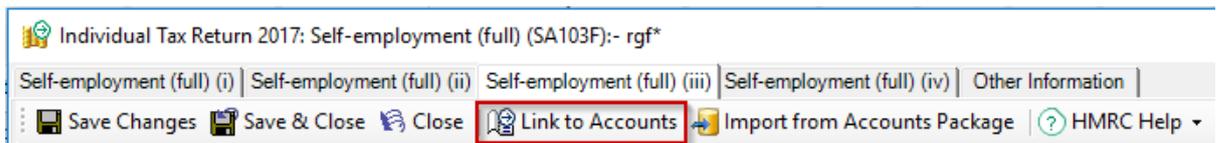
7. Input the details, for the asset addition and/or disposal

8. Click on **Save & Close**

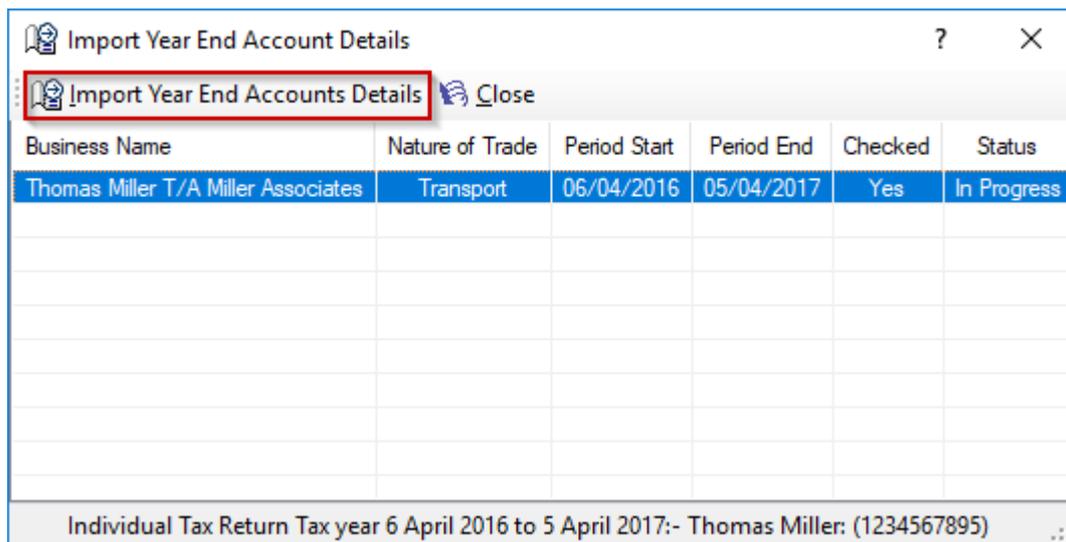
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Linking with BTCSoftware AP Solution

If you are using BTCSoftware to prepare the sole trader accounts, you are able to import year end accounts data into the Self-Employment (full) pages of the tax return and this will be a direct link between BTCSoftware's accounts and the tax module.



1. Click on **Link to Accounts** from within the Self-employment (full) schedule



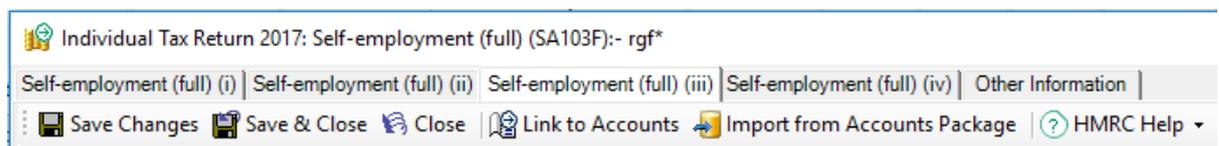
2. Highlight the Business
3. Click on **Import Year End Accounts Details**

Individual Tax Return Guide

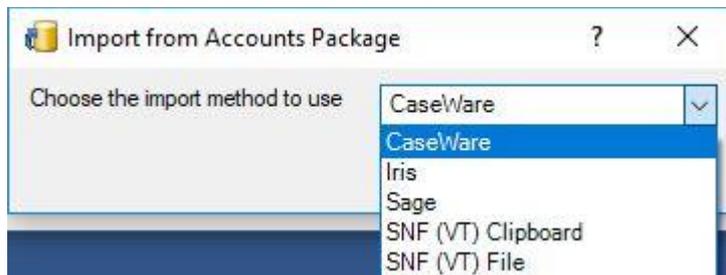
Importing Accounts from Accounts Package

If you are using CaseWare, IRIS, Sage or VT, you are able to import a set of sole trader accounts into the Self-Employment pages of the return. You will need to extract the file from your accounting package and save a copy locally on your machine or on a Clipboard (VT).

1. Click on **Import from Accounts Package**



2. Choose the import method from the option available from the drop-down menu



3. Click on **Import**

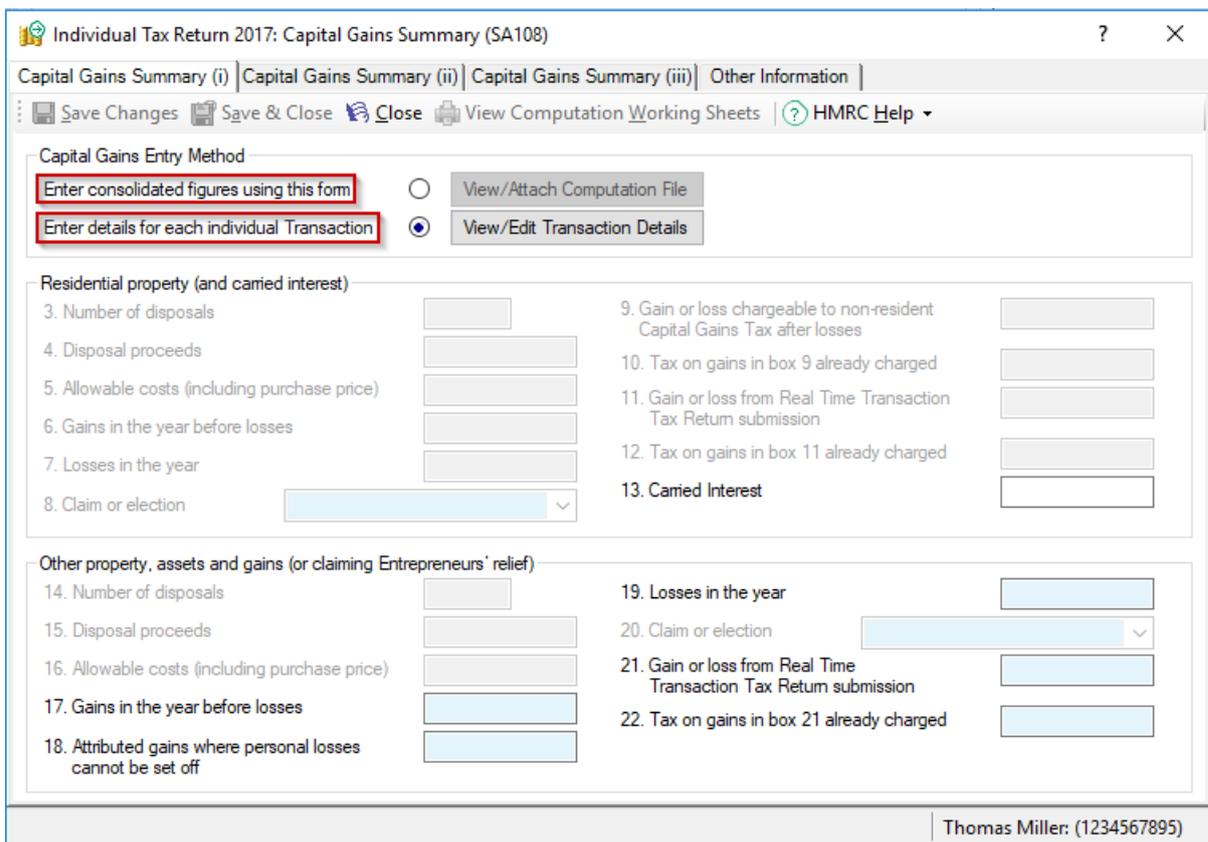
Individual Tax Return Guide

Capital Gains Summary

The Capital Gains Summary includes pages CG1, CG2, CG3 and CG4 of the SA108 supplementary schedule. There are two ways to enter information into this section.

[Enter consolidated figures using this form](#)

[Enter details for each individual Transaction](#)



Individual Tax Return 2017: Capital Gains Summary (SA108)

Capital Gains Summary (i) | Capital Gains Summary (ii) | Capital Gains Summary (iii) | Other Information

Save Changes | Save & Close | Close | View Computation | Working Sheets | HMRC Help

Capital Gains Entry Method

Enter consolidated figures using this form | View/Attach Computation File

Enter details for each individual Transaction | View/Edit Transaction Details

Residential property (and carried interest)

3. Number of disposals	<input type="text"/>	9. Gain or loss chargeable to non-resident Capital Gains Tax after losses	<input type="text"/>
4. Disposal proceeds	<input type="text"/>	10. Tax on gains in box 9 already charged	<input type="text"/>
5. Allowable costs (including purchase price)	<input type="text"/>	11. Gain or loss from Real Time Transaction Tax Return submission	<input type="text"/>
6. Gains in the year before losses	<input type="text"/>	12. Tax on gains in box 11 already charged	<input type="text"/>
7. Losses in the year	<input type="text"/>	13. Carried Interest	<input type="text"/>
8. Claim or election	<input type="text"/>		

Other property, assets and gains (or claiming Entrepreneurs' relief)

14. Number of disposals	<input type="text"/>	19. Losses in the year	<input type="text"/>
15. Disposal proceeds	<input type="text"/>	20. Claim or election	<input type="text"/>
16. Allowable costs (including purchase price)	<input type="text"/>	21. Gain or loss from Real Time Transaction Tax Return submission	<input type="text"/>
17. Gains in the year before losses	<input type="text"/>	22. Tax on gains in box 21 already charged	<input type="text"/>
18. Attributed gains where personal losses cannot be set off	<input type="text"/>		

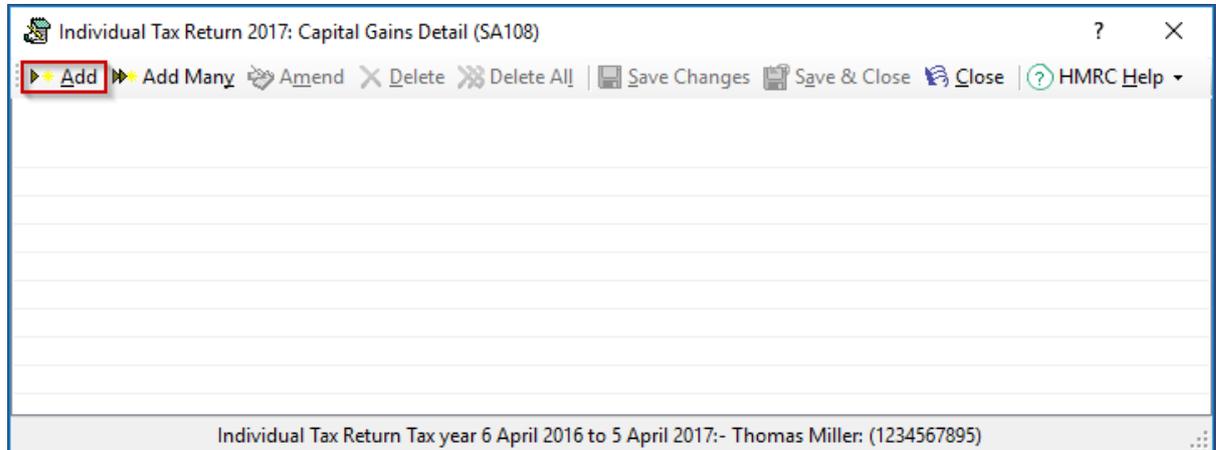
Thomas Miller: (1234567895)

Enter details for each individual Transaction

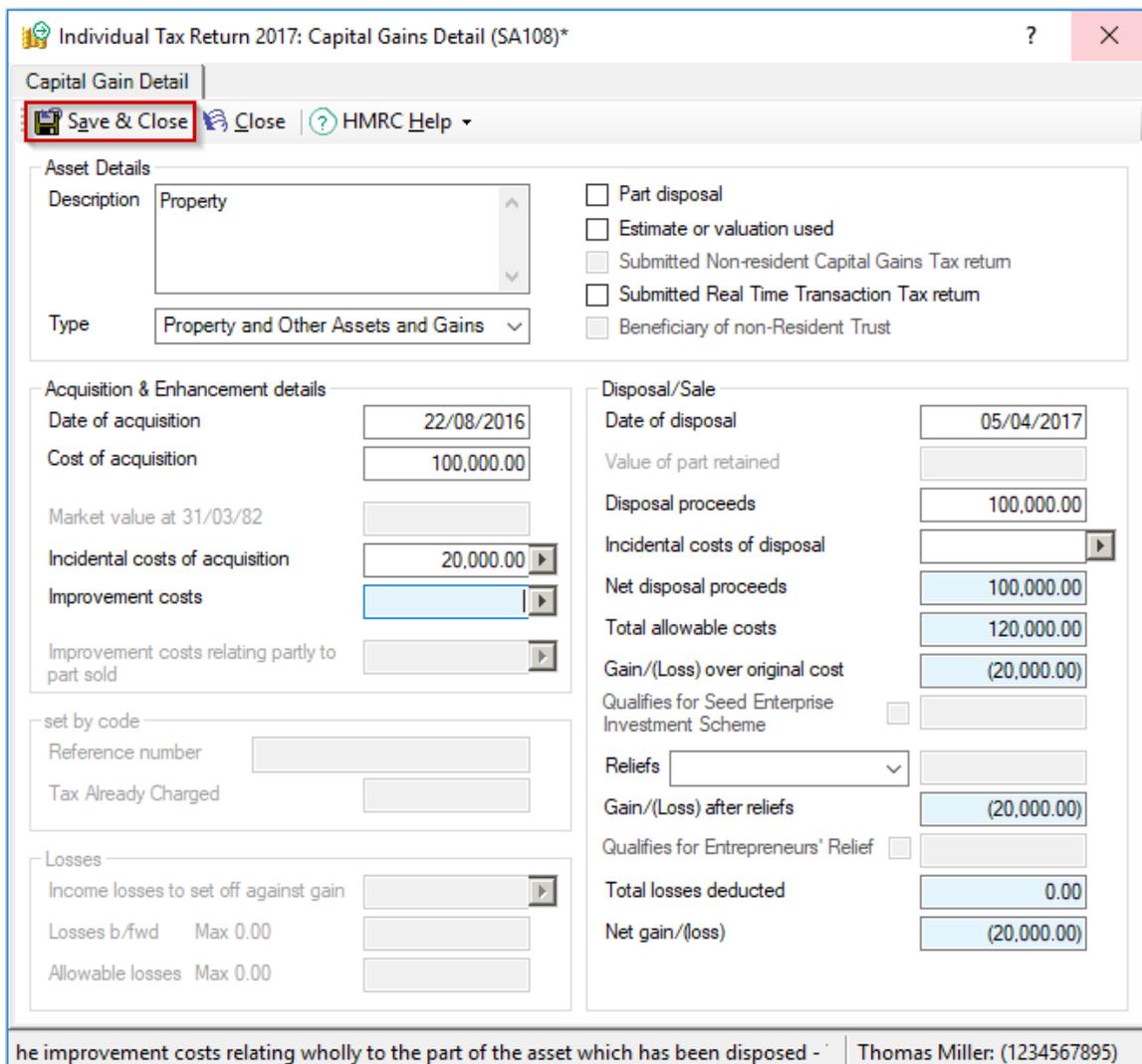
Choose this option to enter details of each individual transaction. Please see the following instructions on how to do this:

1. Click on **View/Edit Transaction Details**

Individual Tax Return Guide



2. Click on **Add**



Individual Tax Return 2017: Capital Gains Detail (SA108)*

Capital Gain Detail

Save & Close Close | HMRC Help

Asset Details

Description Property

Type Property and Other Assets and Gains

Part disposal

Estimate or valuation used

Submitted Non-resident Capital Gains Tax return

Submitted Real Time Transaction Tax return

Beneficiary of non-Resident Trust

Acquisition & Enhancement details

Date of acquisition 22/08/2016

Cost of acquisition 100,000.00

Market value at 31/03/82

Incidental costs of acquisition 20,000.00

Improvement costs

Improvement costs relating partly to part sold

Disposal/Sale

Date of disposal 05/04/2017

Value of part retained

Disposal proceeds 100,000.00

Incidental costs of disposal

Net disposal proceeds 100,000.00

Total allowable costs 120,000.00

Gain/(Loss) over original cost (20,000.00)

Qualifies for Seed Enterprise Investment Scheme

Reliefs

Gain/(Loss) after reliefs (20,000.00)

Qualifies for Entrepreneurs' Relief

Total losses deducted 0.00

Net gain/(loss) (20,000.00)

set by code

Reference number

Tax Already Charged

Losses

Income losses to set off against gain

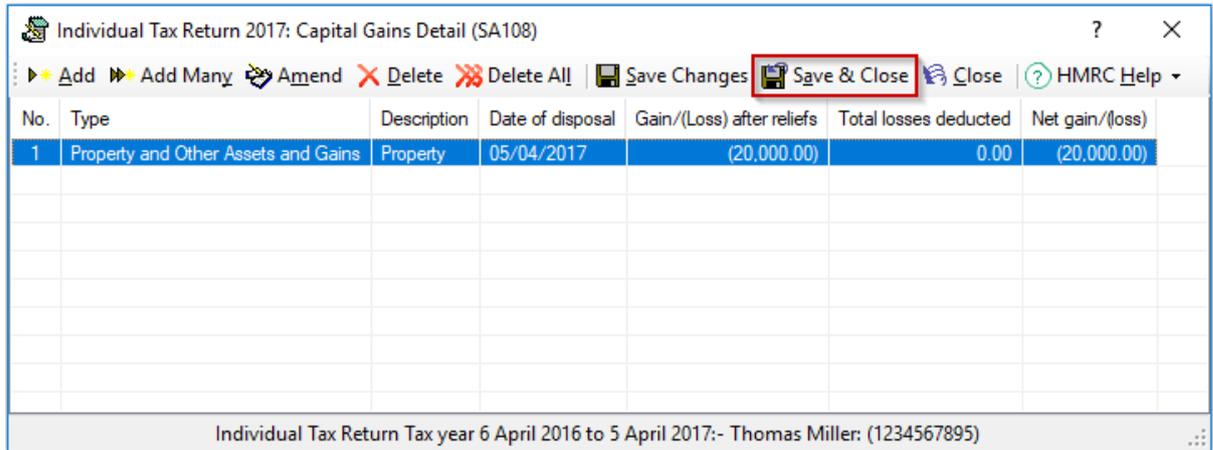
Losses b/fwd Max 0.00

Allowable losses Max 0.00

he improvement costs relating wholly to the part of the asset which has been disposed - Thomas Miller: (1234567895)

Individual Tax Return Guide

3. Click on **Save & Close** after adding the details



No.	Type	Description	Date of disposal	Gain/(Loss) after reliefs	Total losses deducted	Net gain/(loss)
1	Property and Other Assets and Gains	Property	05/04/2017	(20,000.00)	0.00	(20,000.00)

Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)

4. Continue to add multiple transactions
5. Click on **Save & Close** once complete

Enter consolidated figures using this form

Choose this option to enter consolidated figures into the capital gains pages and attach a computation file produced externally or you may enter the details on the **Other Information** tab. To attach a computation file, follow the steps below:

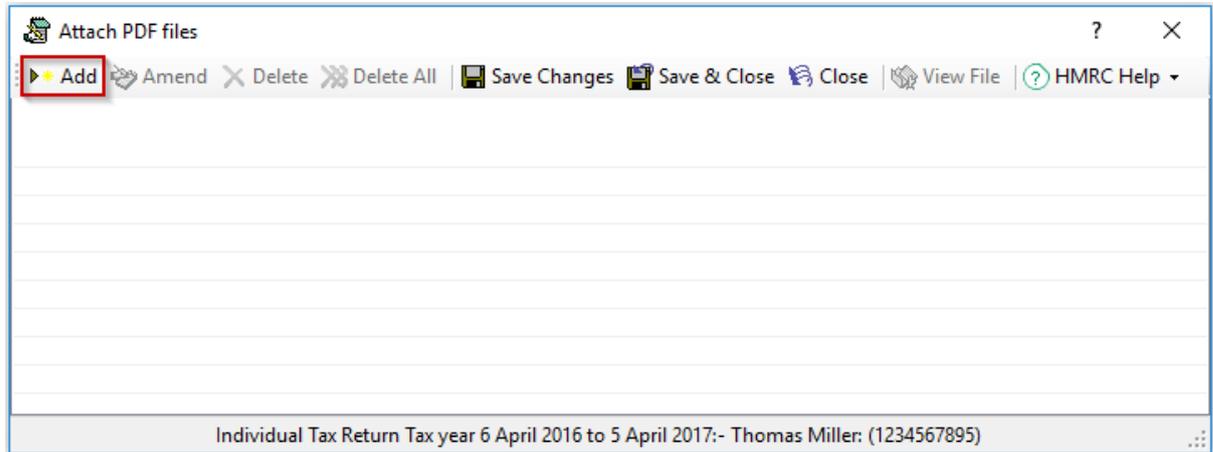
1. Once you have entered the consolidated figures, **Save & Close** the Capital Gains Summary (SA108) screen

What makes up the Tax Return

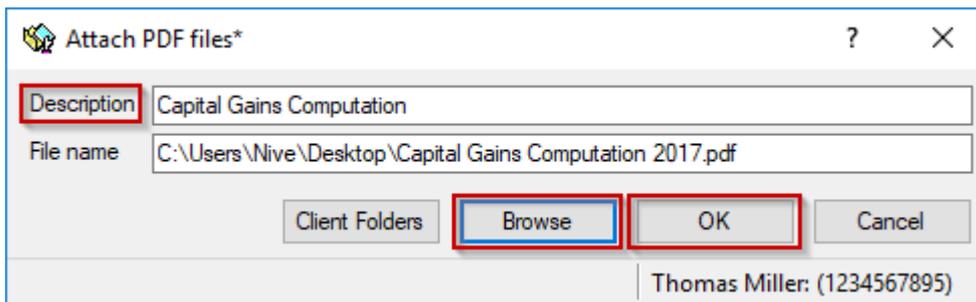
Employment <input checked="" type="checkbox"/>	Partnership (full) <input type="checkbox"/>	Capital Gains Summary <input checked="" type="checkbox"/>
Minister of Religion <input type="checkbox"/>	Partnership (short) <input type="checkbox"/>	Residence, Remittance basis etc. <input type="checkbox"/>
Self-employment (full) <input checked="" type="checkbox"/>	UK Property <input checked="" type="checkbox"/>	Additional Information <input type="checkbox"/>
Self-employment (short) <input type="checkbox"/>	Foreign <input type="checkbox"/>	File Attachments <input checked="" type="checkbox"/>
Lloyd's Underwriter <input type="checkbox"/>	Trusts etc. <input type="checkbox"/>	

2. To attach the PDF computational file, Check the box for **File Attachments**

Individual Tax Return Guide



3. Click on **Add**



4. Enter the **Description**
5. Click on **Browse** to choose the file
6. Click **Ok**

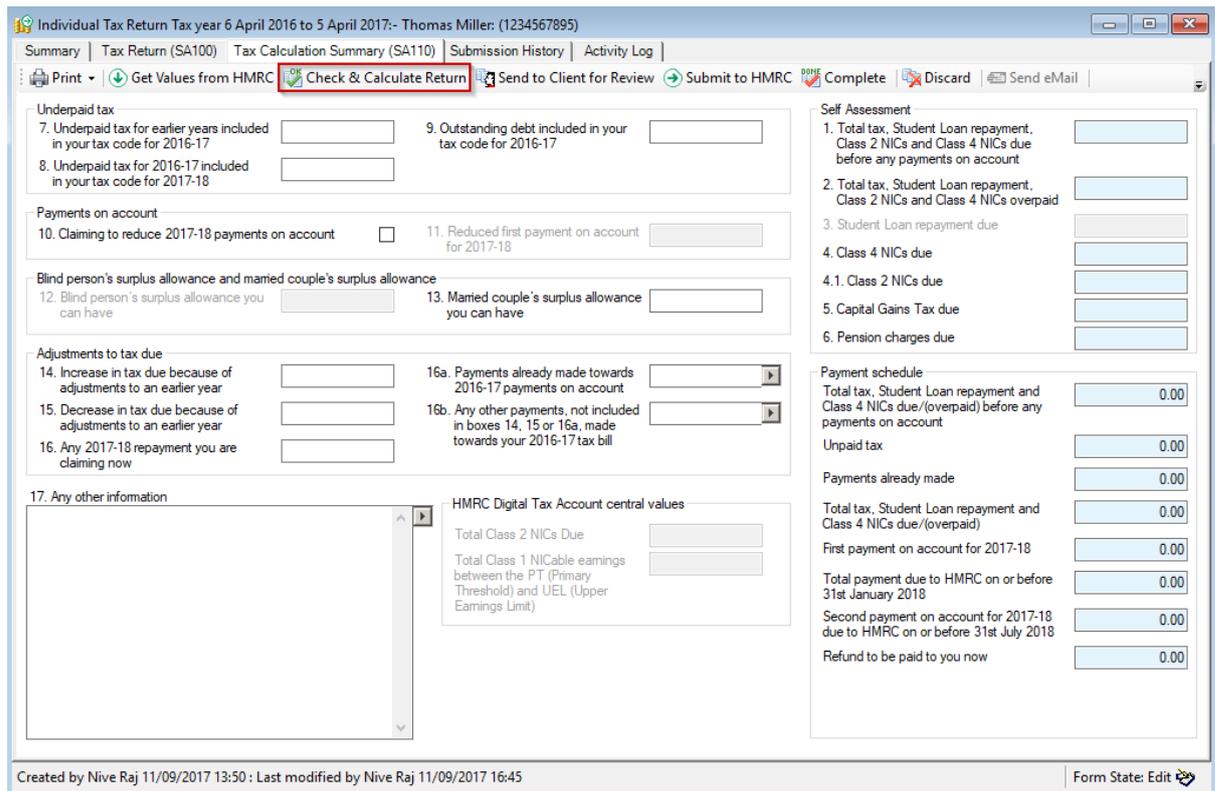
Tax Calculation Summary (SA110)

The Tax Calculation Summary (SA110) is where you would make entries in relation to Underpaid tax, Payments on Account etc.

Individual Tax Return Guide

Check & Calculate Return

1. Click on **Check & Calculate Return** from the toolbar after completing all of the necessary entries on the SA100 return plus the supplementary schedules.

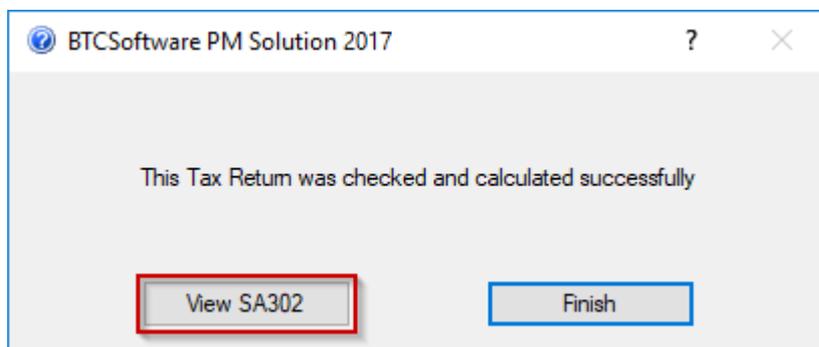


The screenshot shows the 'Individual Tax Return Tax year 6 April 2016 to 5 April 2017:- Thomas Miller: (1234567895)' window. The toolbar contains several buttons, with 'Check & Calculate Return' highlighted by a red box. The main area is divided into several sections for data entry:

- Underpaid tax:** Fields for 7. Underpaid tax for earlier years included in your tax code for 2016-17, 8. Underpaid tax for 2016-17 included in your tax code for 2017-18, 9. Outstanding debt included in your tax code for 2016-17, and 10. Claiming to reduce 2017-18 payments on account.
- Payments on account:** Field for 11. Reduced first payment on account for 2017-18.
- Blind person's surplus allowance and married couple's surplus allowance:** Fields for 12. Blind person's surplus allowance you can have and 13. Married couple's surplus allowance you can have.
- Adjustments to tax due:** Fields for 14. Increase in tax due because of adjustments to an earlier year, 15. Decrease in tax due because of adjustments to an earlier year, and 16. Any 2017-18 repayment you are claiming now.
- HMRC Digital Tax Account central values:** Fields for 16a. Payments already made towards 2016-17 payments on account and 16b. Any other payments, not included in boxes 14, 15 or 16a, made towards your 2016-17 tax bill.
- 17. Any other information:** A large text area for additional notes.
- Self Assessment:** A list of 6 items to be calculated, including total tax, student loan repayment, and various NICs due.
- Payment schedule:** A table showing the total tax, student loan repayment, and Class 4 NICs due, with fields for unpaid tax, payments already made, and first and second payments on account for 2017-18.

At the bottom of the window, it says 'Created by Nive Raj 11/09/2017 13:50 : Last modified by Nive Raj 11/09/2017 16:45' and 'Form State: Edit'.

2. This will run through various checks in the background and warn you of any errors you might have made on the return.

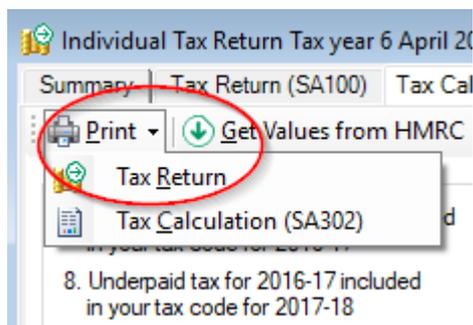


Individual Tax Return Guide

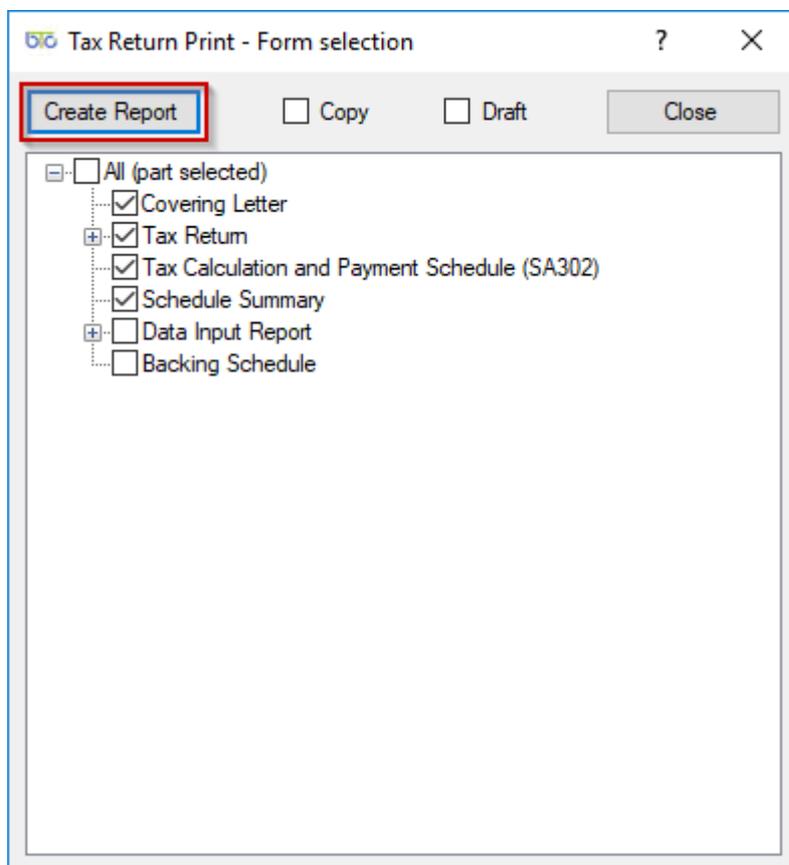
3. Click on **View SA302** after the Tax Return was checked and calculated successfully.

Printing the Tax return along with the SA302 summary & the Payment Schedule

1. To do this, from the summary screen, click on **Print > Tax Return**

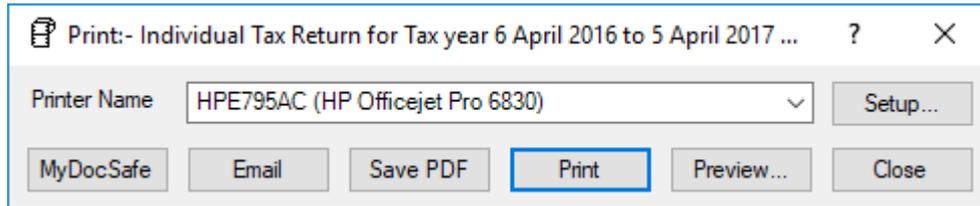


2. Choose the pages you want to include in the print by checking the relevant boxes



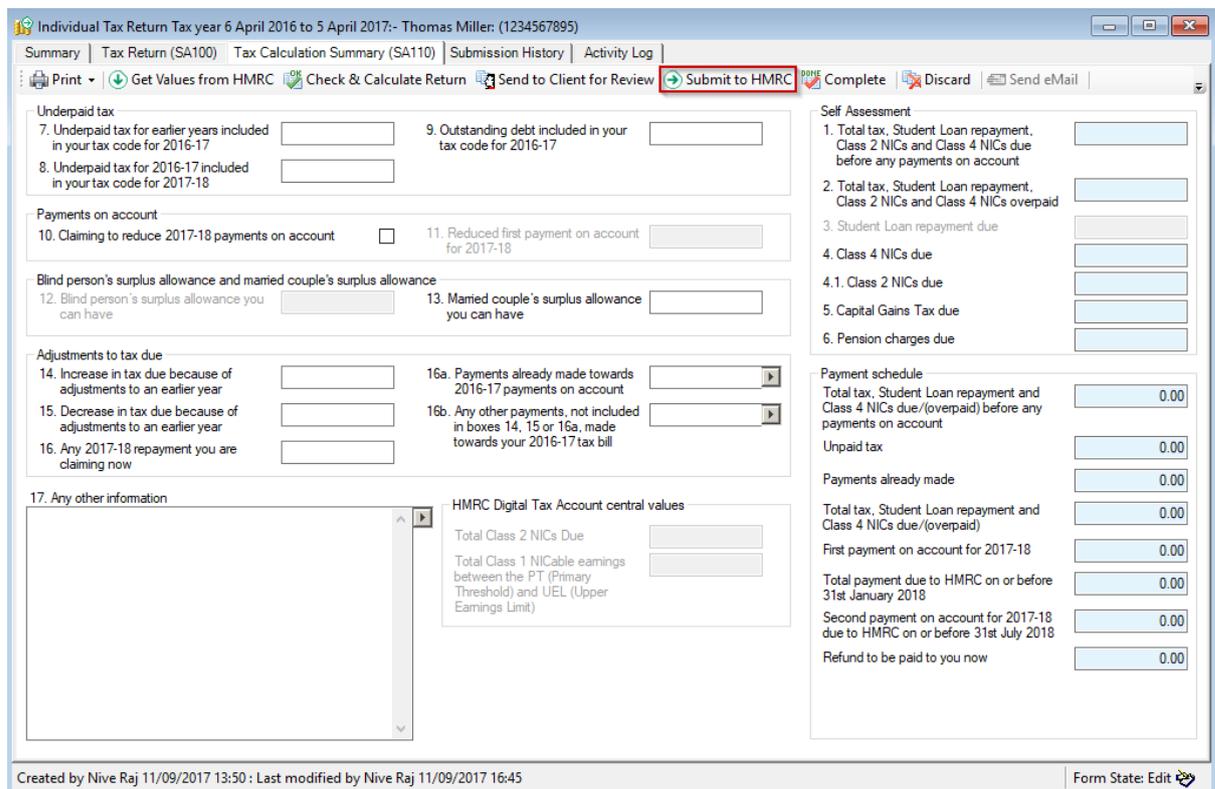
Individual Tax Return Guide

- Then, click on **Create Report**
- You then have options to Email, Print, Preview or use [MyDocSafe](#) (3rd party API to cater for GDPR Regulations)



Submitting the Individual Tax Return

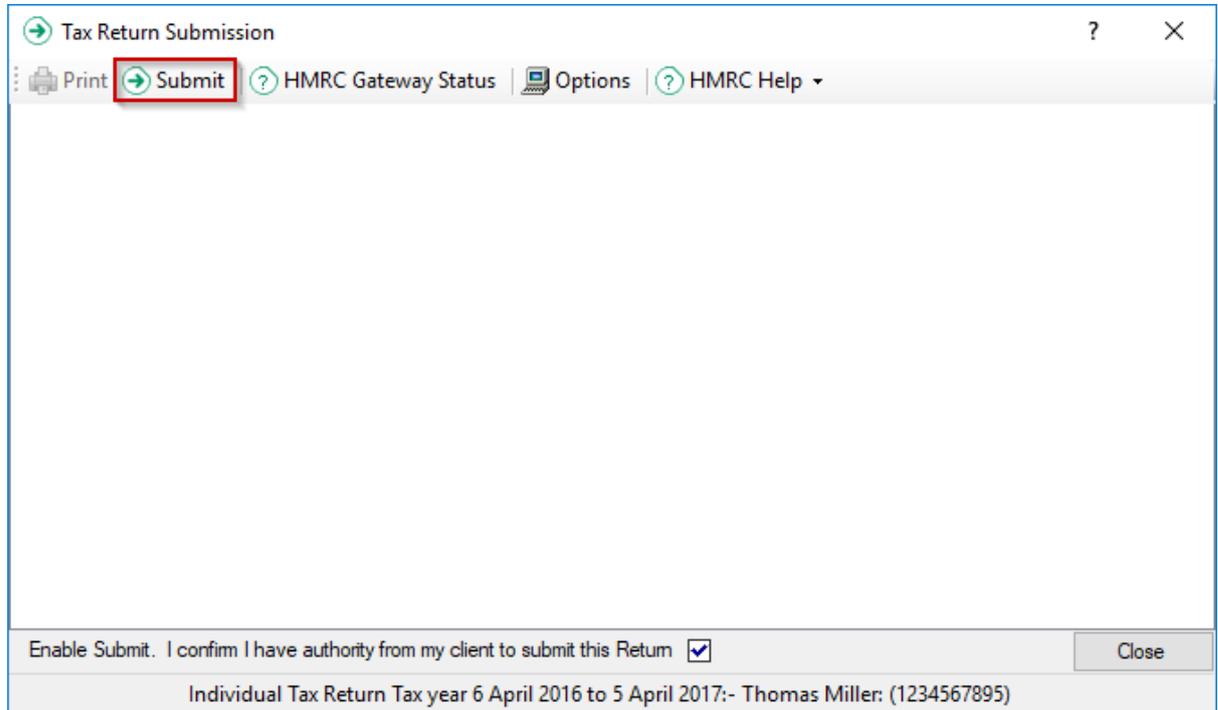
Once the Individual Tax Return has been checked and calculated and you have authority to file, you can then proceed to the submission of the return to HMRC.



Total tax, Student Loan repayment and Class 4 NICs due/(overpaid) before any payments on account	0.00
Unpaid tax	0.00
Payments already made	0.00
Total tax, Student Loan repayment and Class 4 NICs due/(overpaid)	0.00
First payment on account for 2017-18	0.00
Total payment due to HMRC on or before 31st January 2018	0.00
Second payment on account for 2017-18 due to HMRC on or before 31st July 2018	0.00
Refund to be paid to you now	0.00

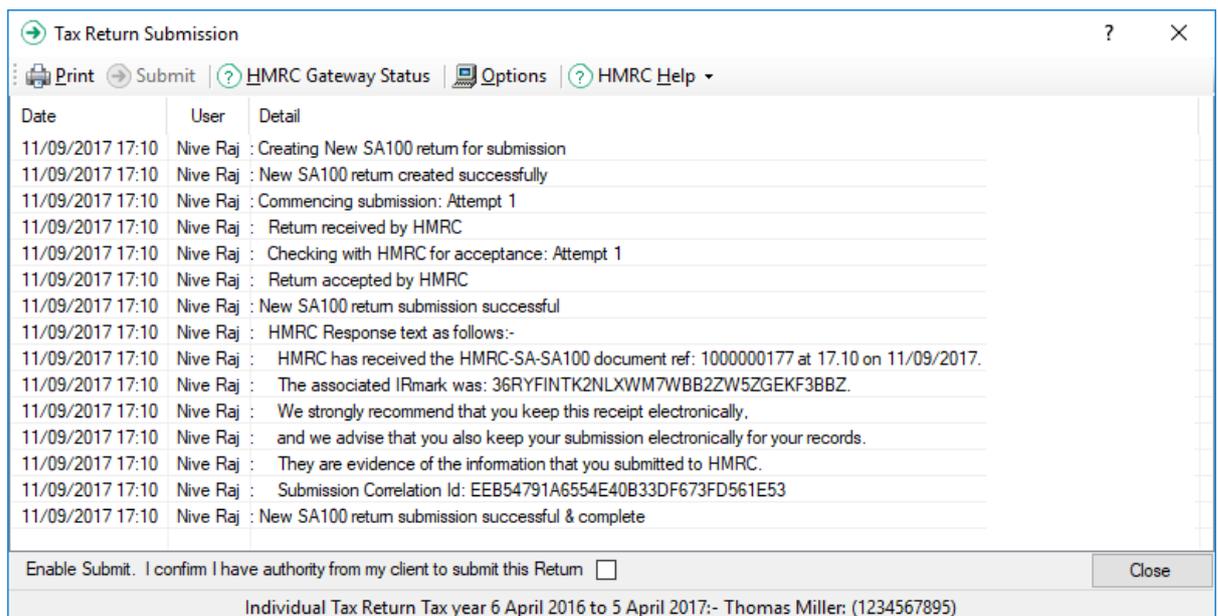
- Click on **Submit to HMRC** from the toolbar
- The Tax Return Submission window opens as below

Individual Tax Return Guide



3. Check box on the bottom of this window 'Enable Submit. I confirm I have authority from my client to submit this Return'

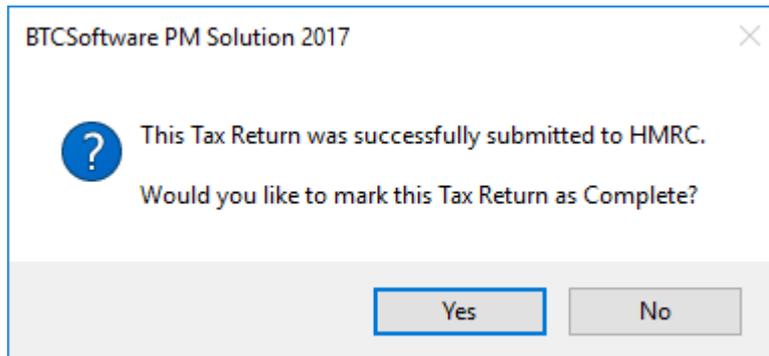
4. Click on **Submit**





Individual Tax Return Guide

5. Once the tax return has been submitted successfully, you will be prompted to mark the return as complete



6. Click on **Yes** and the return will be marked as complete