

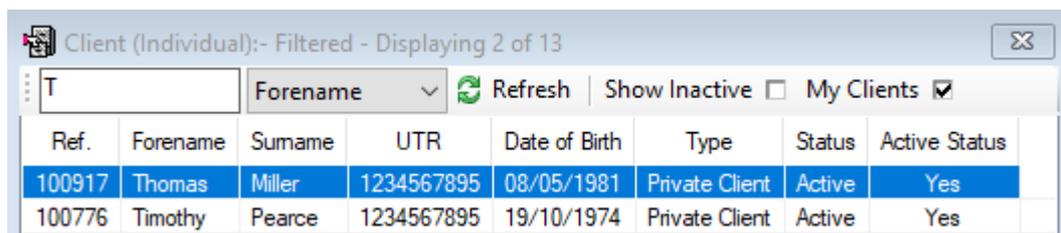
## Linking a Partnership Tax Return to an Individual Tax Return

This document demonstrates how to transfer data from a Partnership Tax Return to an Individual Tax Return.

Assuming that the **Partnership Tax Return** has been completed, the straightforward process is as follows:

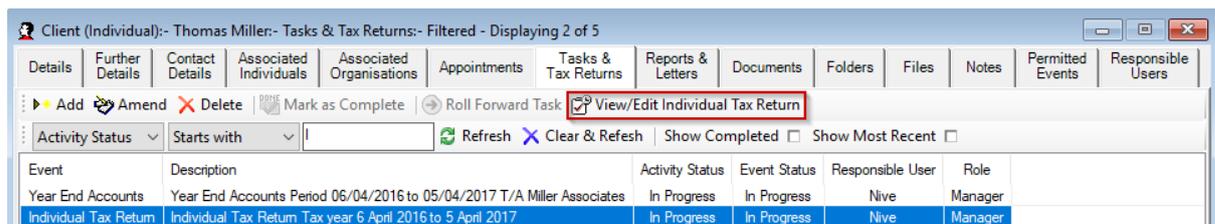
Open the selected Partner's Individual Tax Return:

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



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

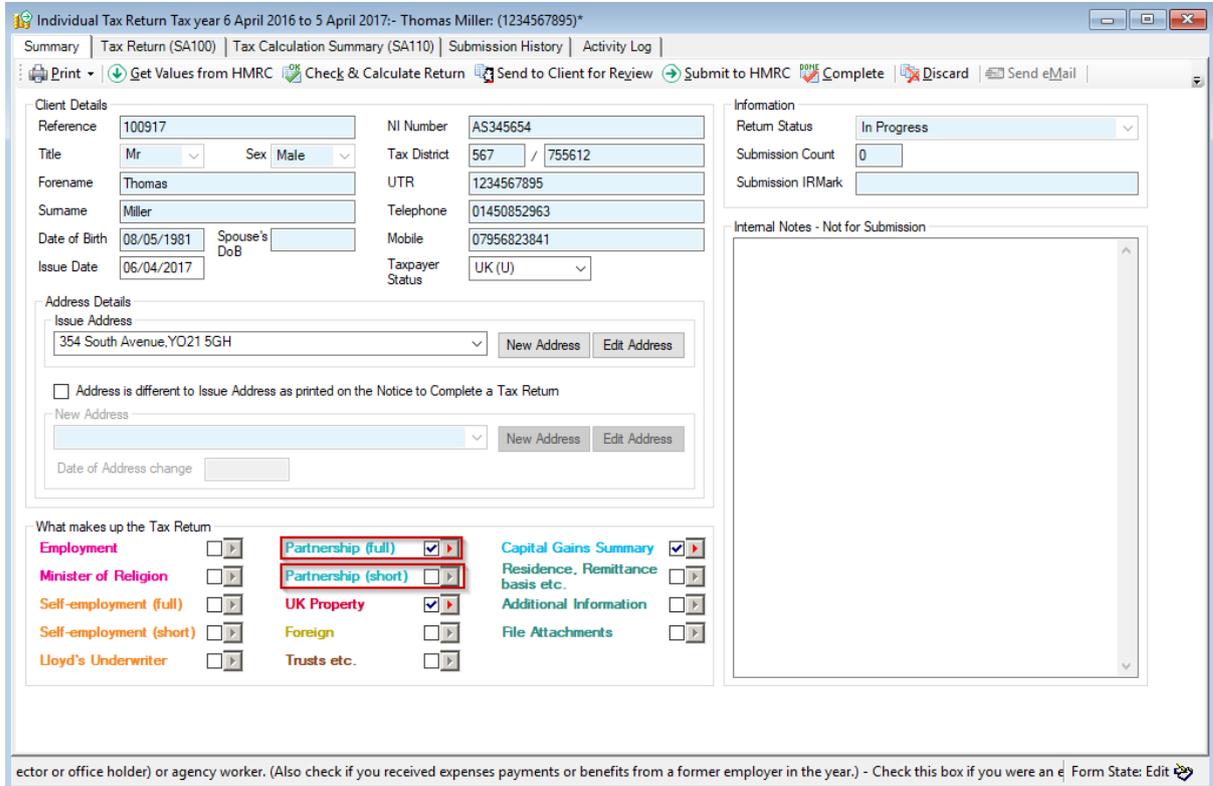
2. Choose the client from the client list on the right window
3. Navigate to the **Tasks & Tax Returns** tab on the left window



Event	Description	Activity Status	Event Status	Responsible User	Role
Year End Accounts	Year End Accounts Period 06/04/2016 to 05/04/2017 T/A Miller Associates	In Progress	In Progress	Nive	Manager
Individual Tax Return	Individual Tax Return Tax year 6 April 2016 to 5 April 2017	In Progress	In Progress	Nive	Manager

4. Highlight the Individual Tax Return
5. Click on **View/Edit Individual Tax Return** from the toolbar

## Linking a Partnership Tax Return to an Individual Tax Return



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 | Tax District: 567 / 755612  
 Forename: Thomas | UTR: 1234567895  
 Surname: Miller | Telephone: 01450852963  
 Date of Birth: 08/05/1981 | Spouse's DoB: | Mobile: 07956823841  
 Issue Date: 06/04/2017 | Taxpayer Status: UK (U)

**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: |

**What makes up the Tax Return**

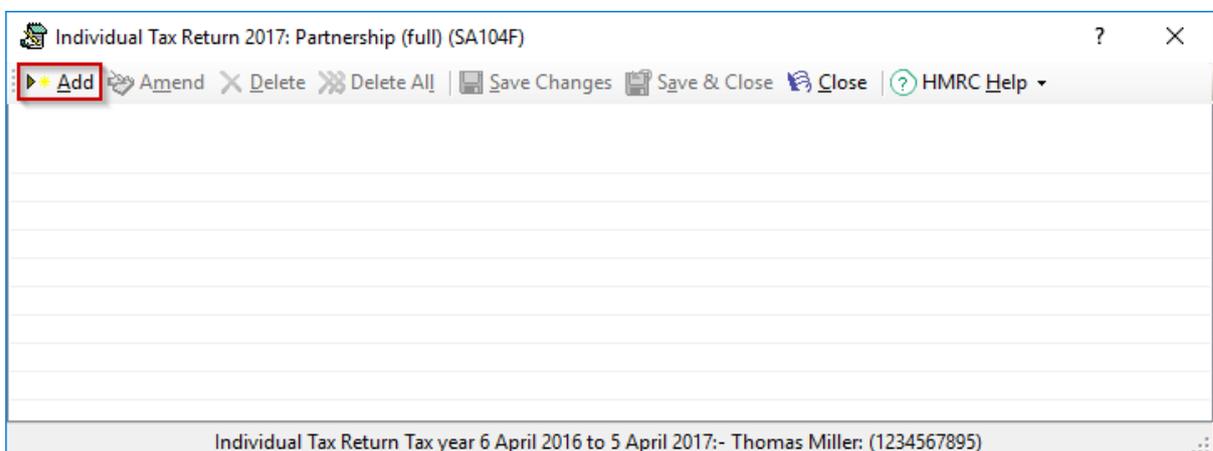
Employment <input type="checkbox"/>	Partnership (full) <input checked="" type="checkbox"/>	Capital Gains Summary <input checked="" type="checkbox"/>
Minister of Religion <input type="checkbox"/>	Partnership (short) <input checked="" type="checkbox"/>	Residence, Remittance basis etc. <input type="checkbox"/>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

Internal Notes - Not for Submission

ector or office holder) or agency worker. (Also check if you received expenses payments or benefits from a former employer in the year.) - Check this box if you were an e Form State: Edit

Open the Partnership (full)/(short) supplementary page:

1. Check either **Partnership (full)/Partnership (short)** from the list of supplementary schedules under **What makes up the Tax Return**
2. Open the Partnership pages by clicking on the arrow symbol to the side of the relevant partnership schedule



Individual Tax Return 2017: Partnership (full) (SA104F) ? X

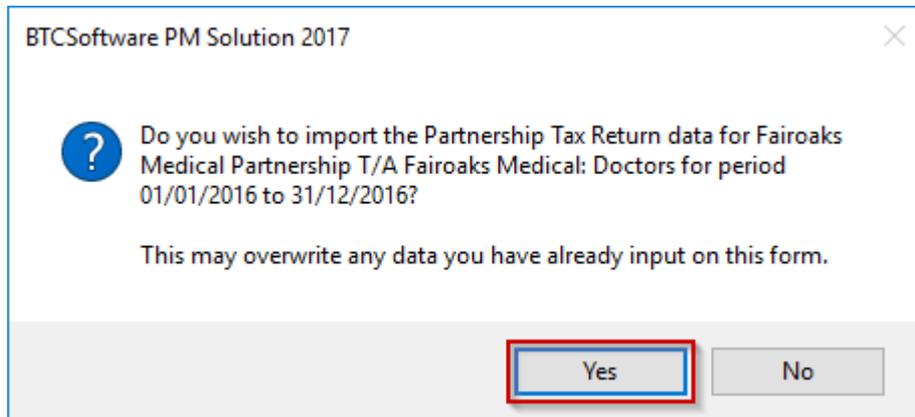
Add | Amend | Delete | Delete All | Save Changes | Save & Close | Close | HMRC Help

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



## Linking a Partnership Tax Return to an Individual Tax Return

6. Click on **Import Partnership Data**



BTCSoftware PM Solution 2017

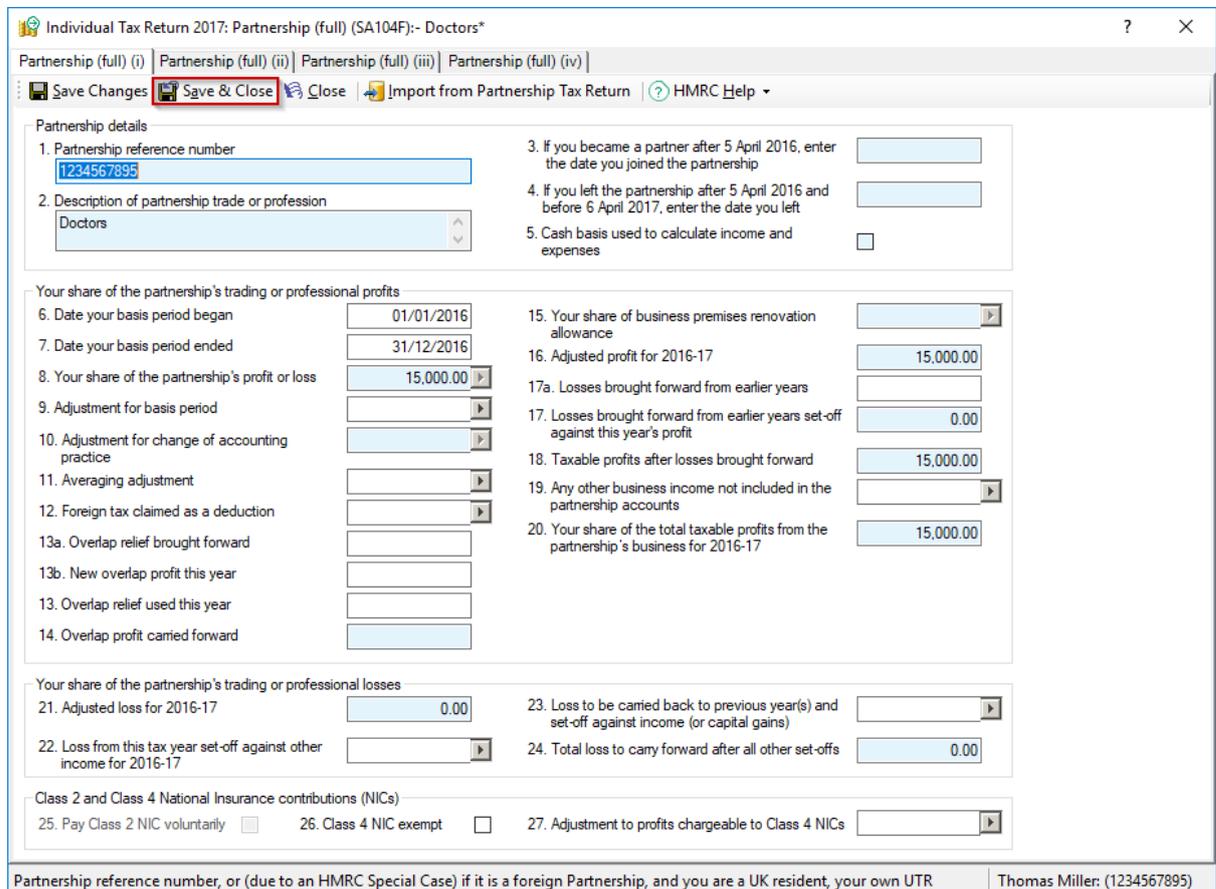
Do you wish to import the Partnership Tax Return data for Fair Oaks Medical Partnership T/A Fair Oaks Medical: Doctors for period 01/01/2016 to 31/12/2016?

This may overwrite any data you have already input on this form.

Yes No

7. Click on **Yes** to the warning message

8. The data will be imported and the relevant boxes in the Partnership Supplementary pages will be populated as shown below:



Individual Tax Return 2017: Partnership (full) (SA104F):- Doctors\*

Partnership (full) (i) | Partnership (full) (ii) | Partnership (full) (iii) | Partnership (full) (iv)

Save Changes Save & Close Close Import from Partnership Tax Return HMRC Help

Partnership details

1. Partnership reference number  
1234567895

2. Description of partnership trade or profession  
Doctors

3. If you became a partner after 5 April 2016, enter the date you joined the partnership

4. If you left the partnership after 5 April 2016 and before 6 April 2017, enter the date you left

5. Cash basis used to calculate income and expenses

Your share of the partnership's trading or professional profits

6. Date your basis period began  
01/01/2016

7. Date your basis period ended  
31/12/2016

8. Your share of the partnership's profit or loss  
15,000.00

9. Adjustment for basis period

10. Adjustment for change of accounting practice

11. Averaging adjustment

12. Foreign tax claimed as a deduction

13a. Overlap relief brought forward

13b. New overlap profit this year

13. Overlap relief used this year

14. Overlap profit carried forward

15. Your share of business premises renovation allowance

16. Adjusted profit for 2016-17  
15,000.00

17a. Losses brought forward from earlier years

17. Losses brought forward from earlier years set-off against this year's profit  
0.00

18. Taxable profits after losses brought forward  
15,000.00

19. Any other business income not included in the partnership accounts

20. Your share of the total taxable profits from the partnership's business for 2016-17  
15,000.00

Your share of the partnership's trading or professional losses

21. Adjusted loss for 2016-17  
0.00

22. Loss from this tax year set-off against other income for 2016-17

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

24. Total loss to carry forward after all other set-offs  
0.00

Class 2 and Class 4 National Insurance contributions (NICs)

25. Pay Class 2 NIC voluntarily  26. Class 4 NIC exempt  27. Adjustment to profits chargeable to Class 4 NICs

Partnership reference number, or (due to an HMRC Special Case) if it is a foreign Partnership, and you are a UK resident, your own UTR | Thomas Miller: (1234567895)

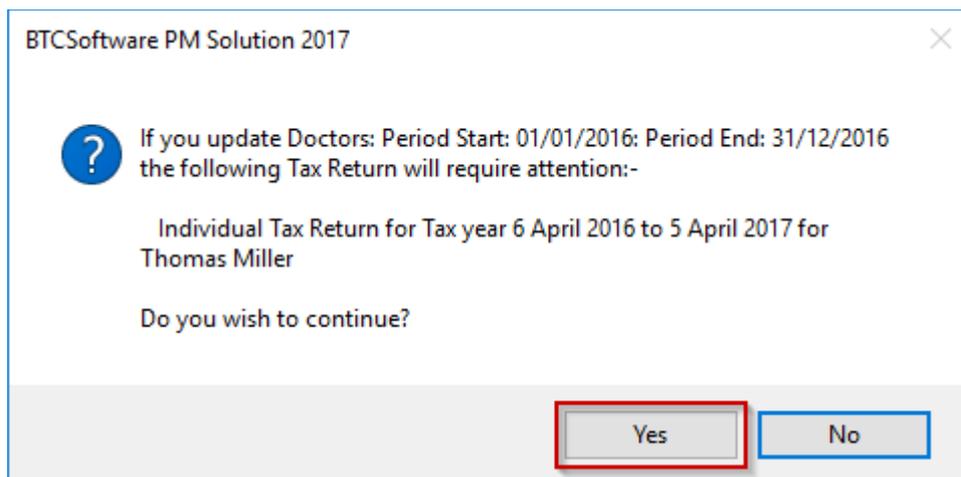
## Linking a Partnership Tax Return to an Individual Tax Return

9. Click on **Save & Close** after completion

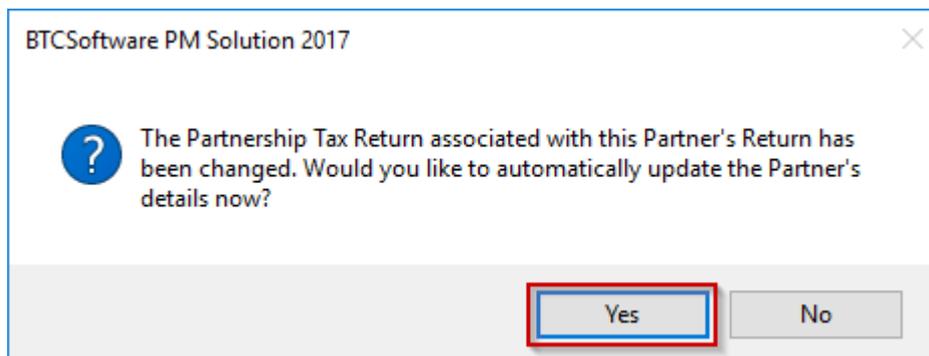
*Please Note: Should the Partnership Return be amended once data has already been transferred to the Individual Tax Return warnings will be raised BOTH in the Partnership Tax Return and the Individual Tax Return - thus helping to prevent changes being made in the Partnership Tax Return that are not reflected in the Individual Tax Return.*

The warnings appear as follows:

(a) The warning in the Partnership Tax Return when an amendment is made AFTER data has been transferred to the Individual Tax Return:



(b) A similar warning will appear in the Individual Tax Return when re-opening the Partnership supplementary pages:





## **Linking a Partnership Tax Return to an Individual Tax Return**

Warnings are also given in both the Individual and Partnership Tax Returns at the **Check Return** stage, prior to submission, if the data on the related returns is not symmetrical.