



Partnership Tax Return Guide

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

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2. [Review rolled forward data](#)
3. [Partnership Tax Return](#)
4. [Partnership Trade & Income Source](#)
5. [Check Return](#)
6. [Printing the Tax Return](#)
7. [Submitting the Partnership Tax Return](#)

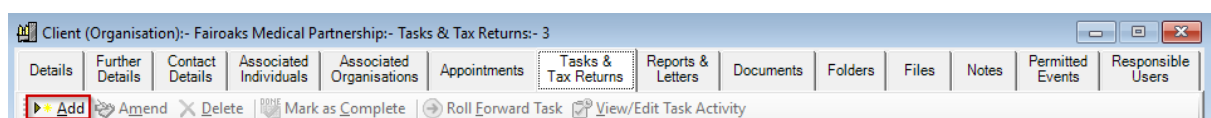
Creating the Partnership Tax Return

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

1. Open the **Client (Organisation)** window
 - Go to **Client > Organisation** from the top menu

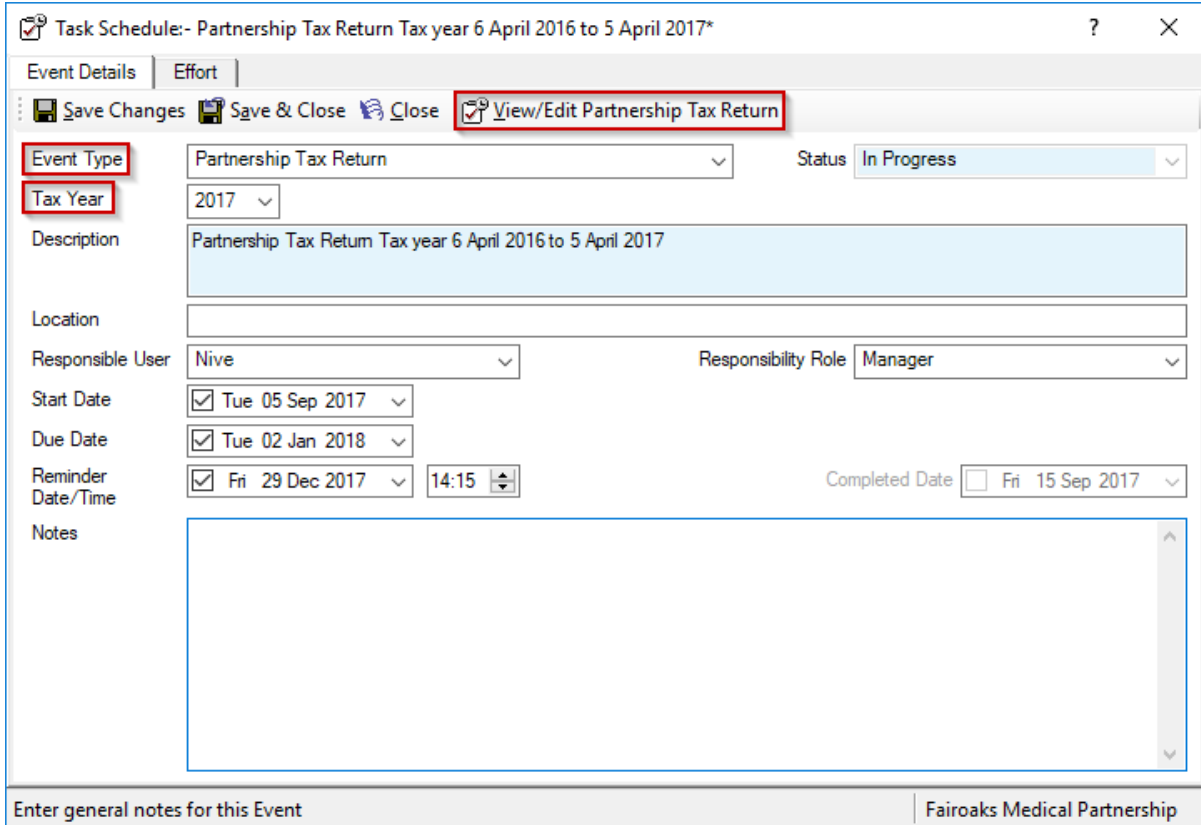
Ref.	Organisation	Reg. No.	UTR	Type	Status	Active Status
101039	Fairoaks Medical Partnership	12345678	1234567895	Partnership	Active	Yes
100818	Flynn Pictures	12345678	1234567895	Limited Company	Active	Yes

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



4. Click on **Add**

Partnership Tax Return Guide



The screenshot shows a software window titled "Task Schedule:- Partnership 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 menu bar with icons for "Save Changes", "Save & Close", "Close", and "View/Edit Partnership Tax Return". The "View/Edit Partnership Tax Return" option is highlighted with a red box. Below the menu bar are several fields:

- Event Type:** Partnership 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:** Partnership 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:** Tue 05 Sep 2017 (dropdown menu)
- Due Date:** Tue 02 Jan 2018 (dropdown menu)
- Reminder Date/Time:** Fri 29 Dec 2017 (dropdown menu) 14:15 (time spinner)
- Completed Date:** Fri 15 Sep 2017 (dropdown menu)
- 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 "Fairoaks Medical Partnership" on the right.

5. Choose **Partnership 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 Partnership Tax Return**



Partnership Tax Return Guide

Creating the Partnership 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 (Organisation)** window
 - Go to **Client > Organisation** from the top menu

Client (Organisation):- Filtered - Displaying 2 of 26

Ref.	Organisation	Reg. No.	UTR	Type	Status	Active Status
101039	Fairoaks Medical Partnership	12345678	1234567895	Partnership	Active	Yes
100818	Flynn Pictures	12345678	1234567895	Limited Company	Active	Yes

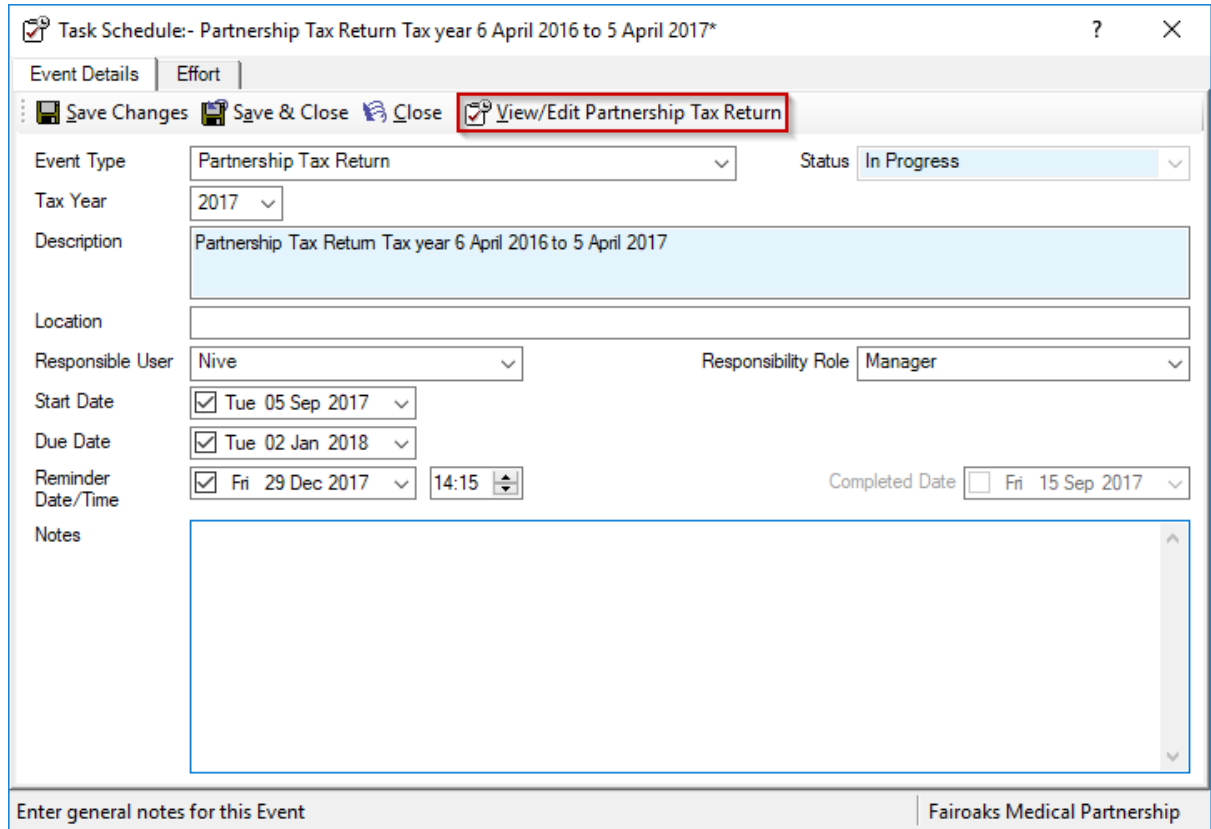
2. Choose the client in the right window
3. Navigate to the **Tasks & Tax Returns** tab on the left window

Client (Organisation):- Fairoaks Medical Partnership:- Tasks & Tax Returns:- 1

Event	Description	Activity Status	Event Status	Responsible User	Role	Completed
Partnership Tax Return	Partnership Tax Return Tax year 6 April 2015 to 5 April 2016	Complete	Completed	Nive	Manager	31/08/2017

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

Partnership Tax Return Guide



Task Schedule:- Partnership Tax Return Tax year 6 April 2016 to 5 April 2017*

Event Details | Effort

Save Changes Save & Close Close View/Edit Partnership Tax Return

Event Type: Partnership Tax Return Status: In Progress

Tax Year: 2017

Description: Partnership Tax Return Tax year 6 April 2016 to 5 April 2017

Location:

Responsible User: Nive Responsibility Role: Manager

Start Date: Tue 05 Sep 2017

Due Date: Tue 02 Jan 2018

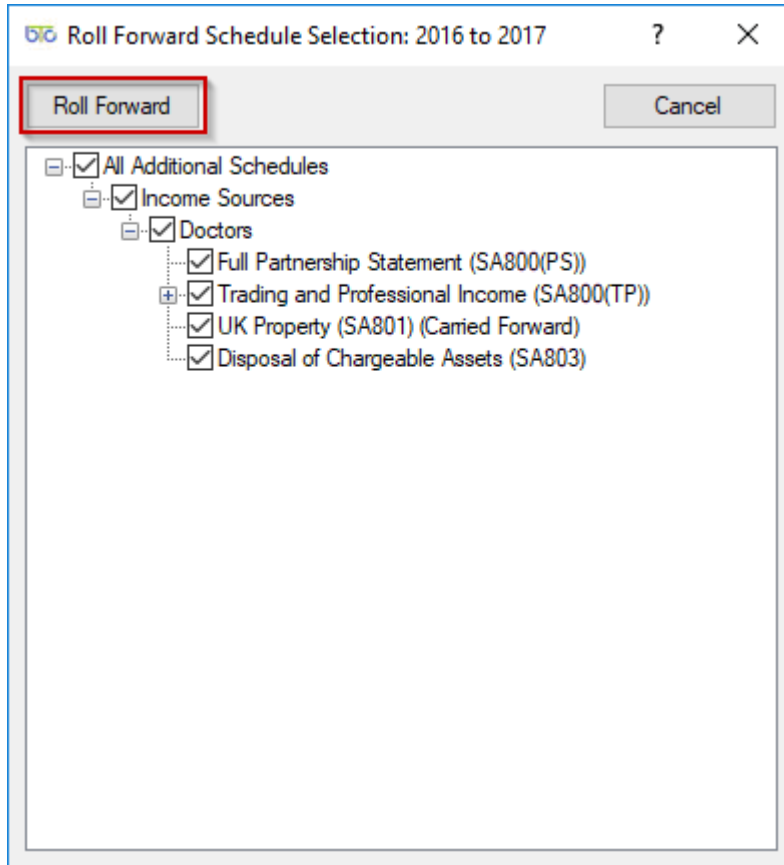
Reminder Date/Time: Fri 29 Dec 2017 14:15 Completed Date: Fri 15 Sep 2017

Notes

Enter general notes for this Event | Fair Oaks Medical Partnership

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 Partnership Tax Return**

Partnership 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

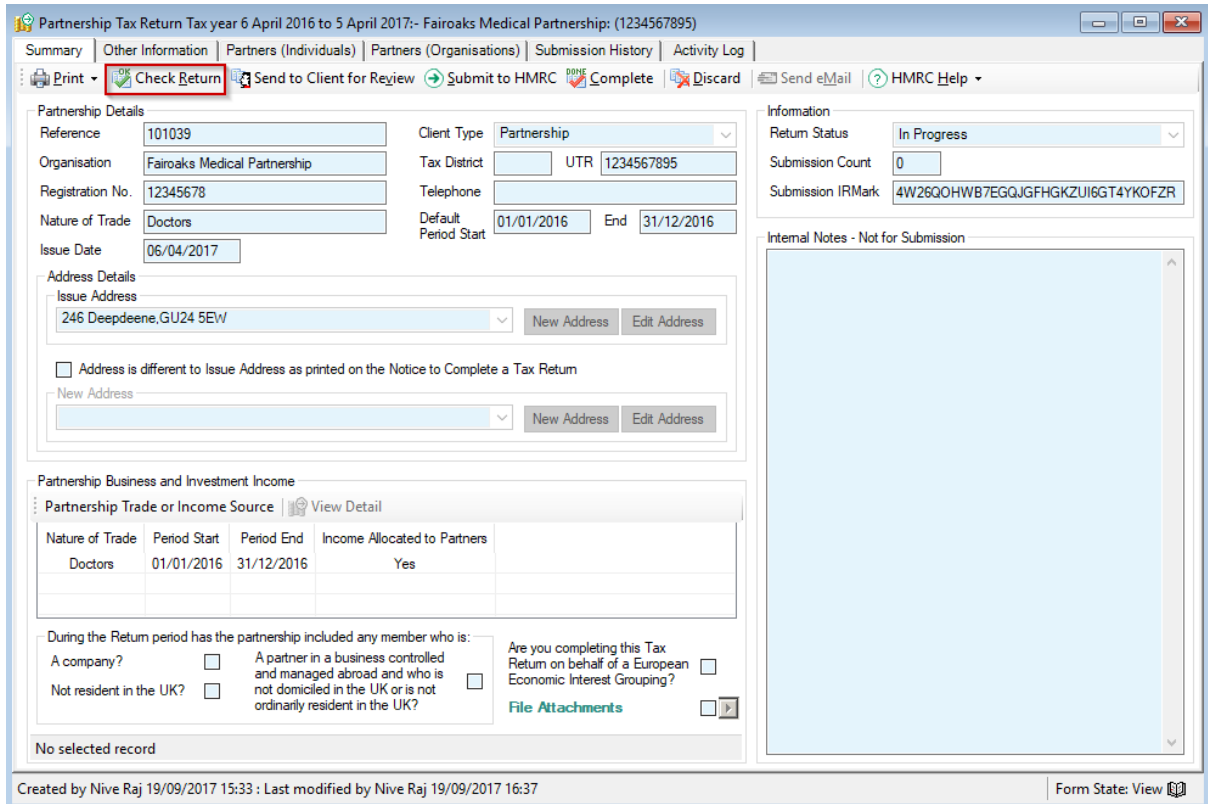
When you roll forward data from the previous year, you have to review this data.

Review rolled forward data

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

1. From the **Partnership Tax Return's summary** screen, click on **Check Return** to generate a list of data that needs to be reviewed

Partnership Tax Return Guide



Partnership Tax Return Tax year 6 April 2016 to 5 April 2017:- Fairoaks Medical Partnership: (1234567895)

Summary | Other Information | Partners (Individuals) | Partners (Organisations) | Submission History | Activity Log

Print | **Check Return** | Send to Client for Review | Submit to HMRC | Complete | Discard | Send eMail | HMRC Help

Partnership Details

Reference: 101039 | Client Type: Partnership
 Organisation: Fairoaks Medical Partnership | Tax District: UTR 1234567895
 Registration No.: 12345678 | Telephone:
 Nature of Trade: Doctors | Default Period Start: 01/01/2016 | End: 31/12/2016
 Issue Date: 06/04/2017

Information

Return Status: In Progress
 Submission Count: 0
 Submission IRMark: 4W26QOHWB7EGQJGFHGKZUI6GT4YKOFZR

Address Details

Issue Address: 246 Deepdeene, GU24 5EW | 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

Partnership Business and Investment Income

Partnership Trade or Income Source | View Detail

Nature of Trade	Period Start	Period End	Income Allocated to Partners
Doctors	01/01/2016	31/12/2016	Yes

During the Return period has the partnership included any member who is:

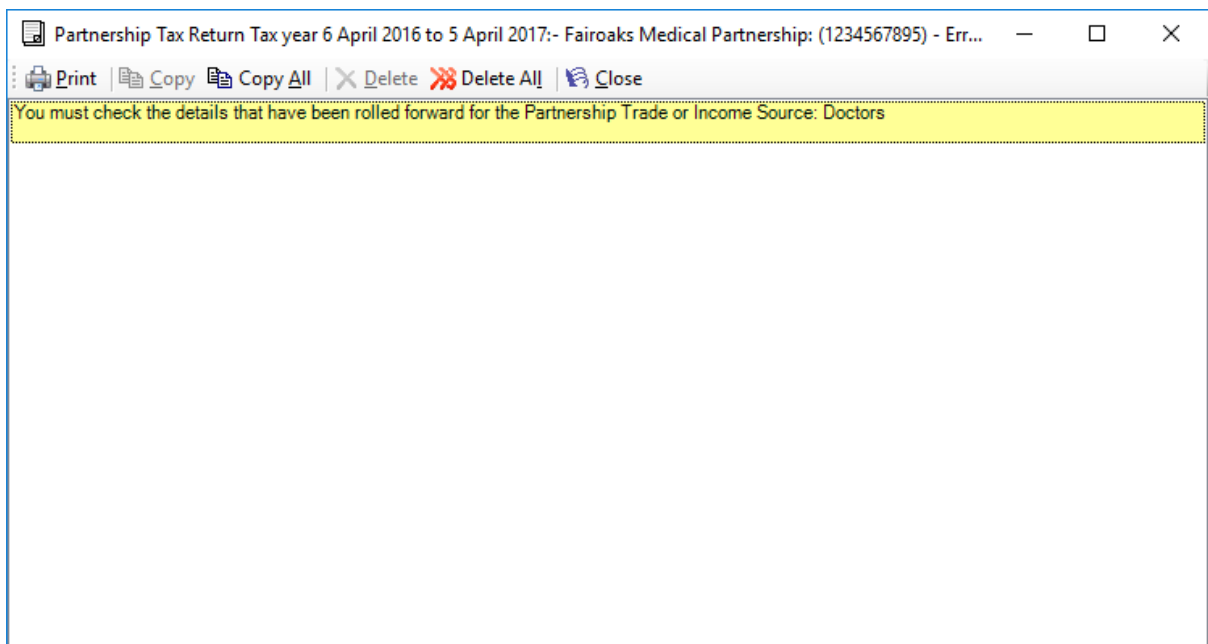
A company? | A partner in a business controlled and managed abroad and who is not domiciled in the UK or is not ordinarily resident in the UK? | Are you completing this Tax Return on behalf of a European Economic Interest Grouping?

Not resident in the UK? | [File Attachments](#)

No selected record

Created by Nive Raj 19/09/2017 15:33 : Last modified by Nive Raj 19/09/2017 16:37 | Form State: View

2. An Example is as follows:



Partnership Tax Return Tax year 6 April 2016 to 5 April 2017:- Fairoaks Medical Partnership: (1234567895) - Err...

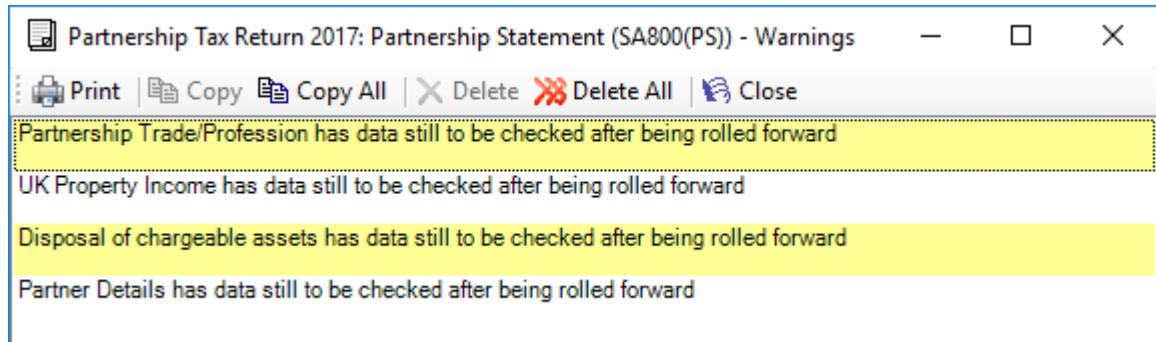
Print | Copy | Copy All | Delete | Delete All | Close

You must check the details that have been rolled forward for the Partnership Trade or Income Source: Doctors

3. Select the Trade from under the **Partnership Trade or Income Source** section

Partnership Tax Return Guide

4. Click on **Amend**
5. From the **Partnership Statement (i)** screen, click on **Save & Close** and a new list of items to check is produced as follows:



6. Go into each of the supplementary schedules with rolled forward data by clicking on the arrow symbol to the side of each schedule
7. From within these schedules, to review the entries, open each item and click on **Save & Close**
8. Go to **Partnership Statement (ii)**
9. Double click on the each of the partners and check their details
10. Click on **Save & Close** on all the partner windows opened
11. Then click on **Save & Close** on the Partnership Statement screen



Partnership Tax Return Guide

Partnership Tax Return

The Partnership Tax Return is made up of two main sections:

Summary

Other Information

Partnership Tax Return Tax year 6 April 2016 to 5 April 2017:- Fairoaks Medical Partnership: (1234567895)*

Summary | Other Information | Partners (Individuals) | Partners (Organisations) | Submission History | Activity Log

Print | Check Return | Send to Client for Review | Submit to HMRC | Complete | Discard | Send eMail | HMRC Help

Partnership Details

Reference: 101039 | Client Type: Partnership
Organisation: Fairoaks Medical Partnership | Tax District: UTR 1234567895
Registration No.: 12345678 | Telephone:
Nature of Trade: Doctors | Default Period Start: 01/01/2016 | End: 31/12/2016
Issue Date: 06/04/2017

Address Details

Issue Address: 246 Deepdene, GU24 5EW | 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

Partnership Business and Investment Income

Partnership Trade or Income Source | Add | Amend | Delete | Delete All

Nature of Trade	Period Start	Period End	Roll Forward
Doctors	01/01/2016	31/12/2016	To Review

During the Return period has the partnership included any member who is:

A company? | A partner in a business controlled and managed abroad and who is not domiciled in the UK or is not ordinarily resident in the UK? | Are you completing this Tax Return on behalf of a European Economic Interest Grouping?

File Attachments

No selected record

Internal Notes - Not for Submission

A company? | Form State: Edit

Partnership Tax Return Guide

Summary

This section contains the client details and address details that are picked up from Practice Manager. It also includes details of the Partnership Business and Investment Income.

Other Information

This screen has three areas for entering/editing other information:

Contact details

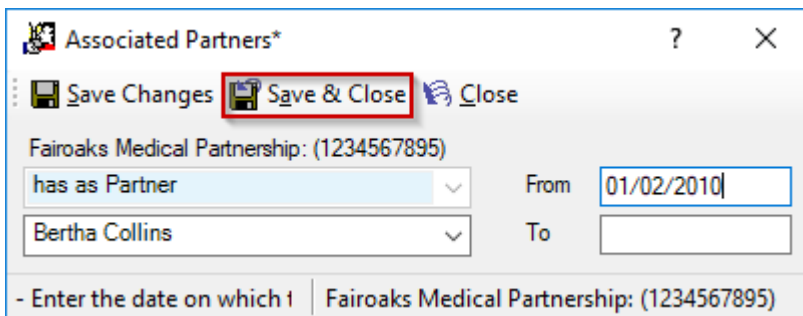
Tax avoidance schemes

Signing your form and sending it back

Partners (Individuals)

If you have used **Practice Manager** to add **Associated Individuals** to the Partnership, this information is available here to **view/amend**

- If you have not **Associated Individuals**, you can do this here by using the **Add** option



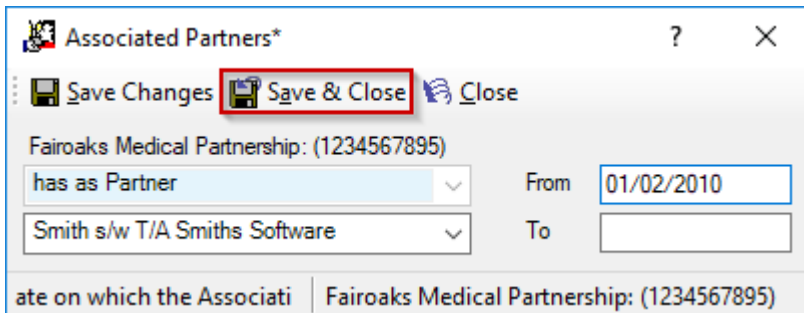
- Choose the Partner from the drop-down menu (*the individual needs to be within the list of Private Clients, if not this needs to be added before creating association*)
- Click on **Save & Close**

Partnership Tax Return Guide

Partners (Organisation)

If you have used Practice Manager to add **Associated Organisations** to the Partnership, this information is available here to **view/amend**

- If you have not **Associated Organisations**, you can do this here by using the **Add** option



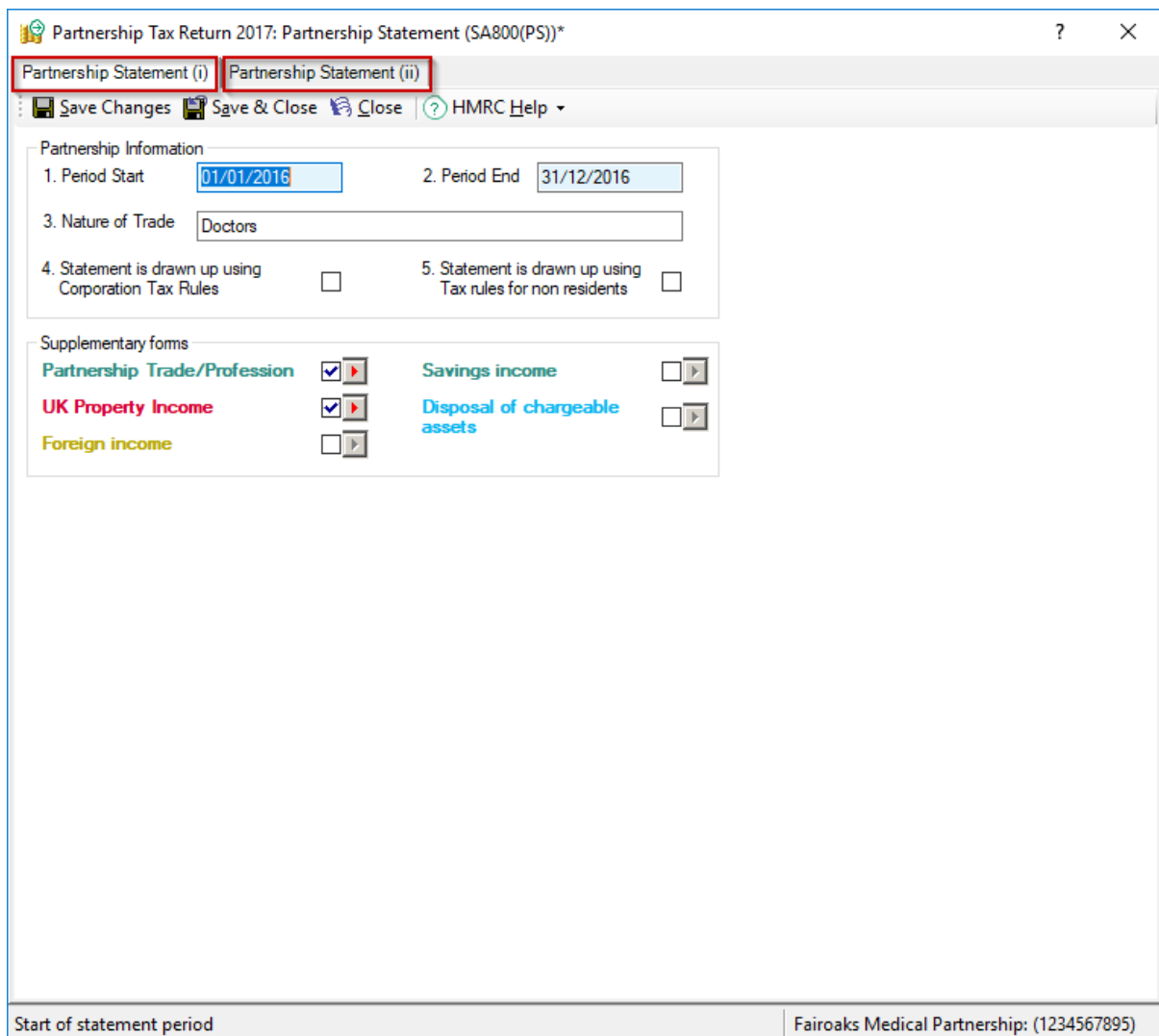
The screenshot shows a dialog box titled "Associated Partners*" with a question mark and a close button. At the top, there are three buttons: "Save Changes", "Save & Close" (highlighted with a red box), and "Close". Below the buttons, the text "Fairoaks Medical Partnership: (1234567895)" is displayed. There are two dropdown menus: the first is labeled "has as Partner" and shows "Smith s/w T/A Smiths Software"; the second is labeled "To" and is empty. To the right of the first dropdown is a "From" date field containing "01/02/2010". At the bottom, there is a label "ate on which the Associati" and the text "Fairoaks Medical Partnership: (1234567895)".

- Choose the Organisation from the drop-down menu (*the organisation needs to be within the list of Organisation Clients, if not this needs to be added before creating association*)
- Click on **Save & Close**

Partnership Tax Return Guide

Partnership Trade or Income Source

If you have rolled forward the data, you will have the trade details under this section. If not, you can add this information by clicking on **Add** from under the Partnership Business and Investment Income section.



Partnership Tax Return 2017: Partnership Statement (SA800(PS))*

Partnership Statement (i) Partnership Statement (ii)

Save Changes Save & Close Close HMRC Help

Partnership Information

1. Period Start 01/01/2016 2. Period End 31/12/2016

3. Nature of Trade Doctors

4. Statement is drawn up using Corporation Tax Rules 5. Statement is drawn up using Tax rules for non residents

Supplementary forms

Partnership Trade/Profession Savings income

UK Property Income Disposal of chargeable assets

Foreign income

Start of statement period Fairoaks Medical Partnership: (1234567895)

The Partnership Trade or Income Source is made up of 2 tabs:

[Partnership Statement \(i\)](#)

[Partnership Statement \(ii\)](#)



Partnership Tax Return Guide

Partnership Statement (i)

The Partnership Statement (i) holds Partnership Information and Supplementary Schedules.

To go into a supplementary 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](#)

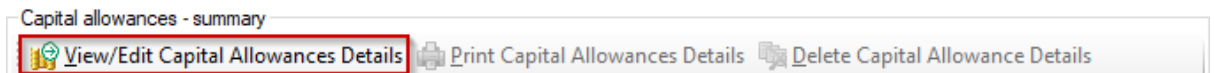
[Linking with BTCSoftware AP Solution](#)

[Importing Accounts from Accounts Package](#)

Capital Allowances

The Capital Allowances calculator can be found on the supplementary schedule **Partnership Trade/Profession > Income (ii)**. Please see the following instructions on how to complete the Capital Allowances section.

1. Click on **View/Edit Capital Allowances Details**



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.

Partnership Tax Return Guide

Capital Allowances Calculator 2017: 01/01/2016 to 31/12/2016

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

Save Changes | Save & Close | Close | HMRC Help

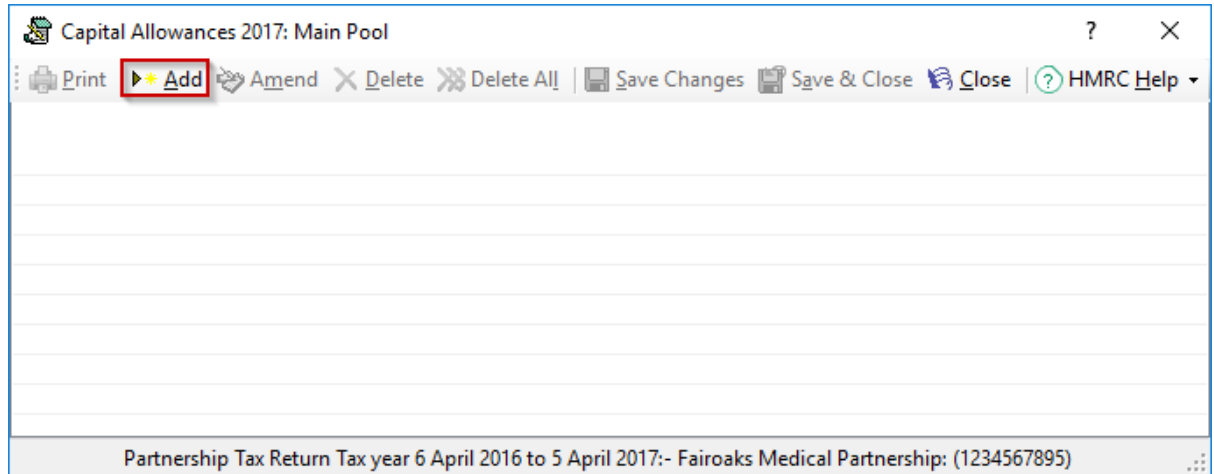
Main Summary - Plant and Machinery (no private use restrictions)

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

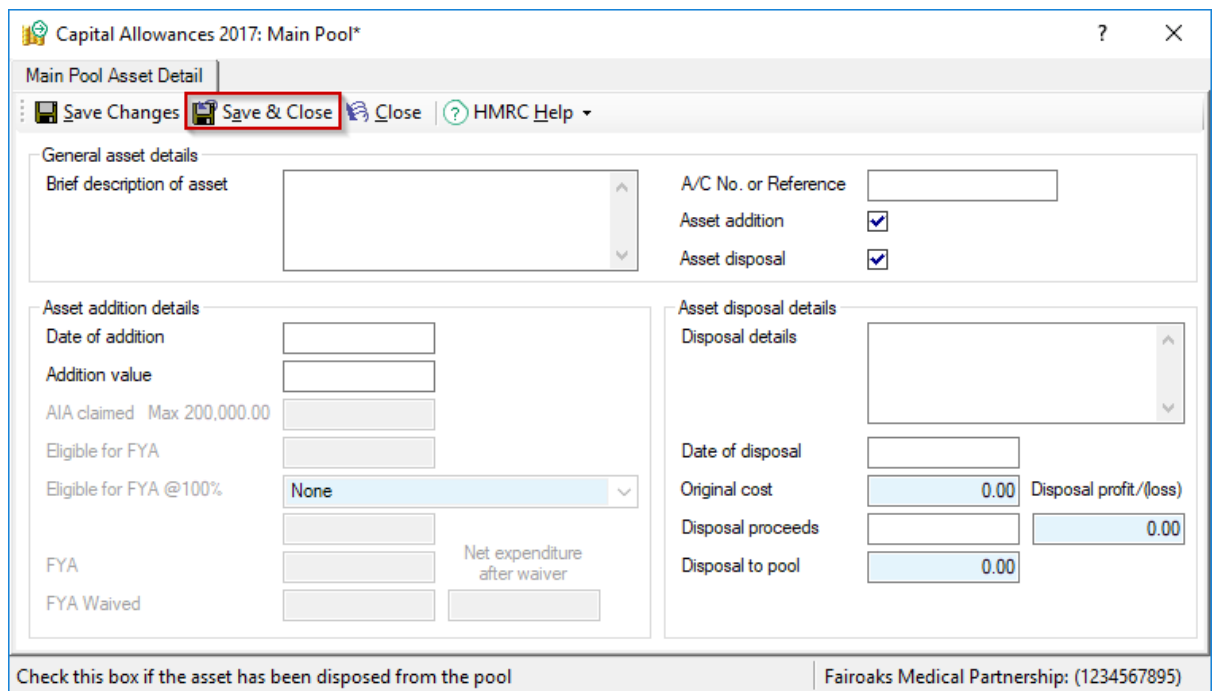
Fairoaks Medical Partnership: (1234567895)

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

Partnership Tax Return Guide



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



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 200,000.00

Eligible for FYA

Eligible for FYA @100% **None**

FYA

FYA Waived

Net expenditure after waiver

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

Fair Oaks Medical Partnership: (1234567895)

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

8. Click on **Save & Close**

Partnership Tax Return Guide

Capital Allowances 2017: Main Pool

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

No.	Description	Addition Date	Cost	Disposal Date	Proceeds
1	Van	26/02/2013	20,000.00	25/06/2016	15,000.00

Partnership Tax Return Tax year 6 April 2016 to 5 April 2017:- Fairoaks Medical Partnership: (1234567895)

9. After adding the assets to the pool, click on **Save & Close**

Capital Allowances Calculator 2017: 01/01/2016 to 31/12/2016*

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
WDV Brought Forward	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Additions	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
AIA Claimed	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Eligible for FYAs	0.00	0.00	<input type="text"/>	0.00	0.00	<input type="text"/>
Net Exp. after Waiver	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Disposals	(15,000.00)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
WDA/Small Pool	0.00	0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
WDA Waived	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balancing Allowance	0.00	0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balancing Charge	15,000.00	0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Eligible for FYAs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FYAs	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FYAs Waived	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Net Exp. after Waiver	0.00	0.00	<input type="text"/>	0.00	0.00	<input type="text"/>
WDV Carried Forward	0.00	0.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
S266 Election taken upon ceasing	<input type="checkbox"/>					

Amount of WDV brought forward from the last accounting/basis period (Main pool) | Fairoaks Medical Partnership: (1234567895)

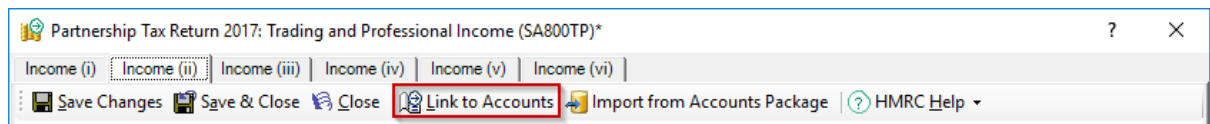
10. The **Balancing Charge/Balancing Allowance** is calculated dependant on the entries made

Partnership Tax Return Guide

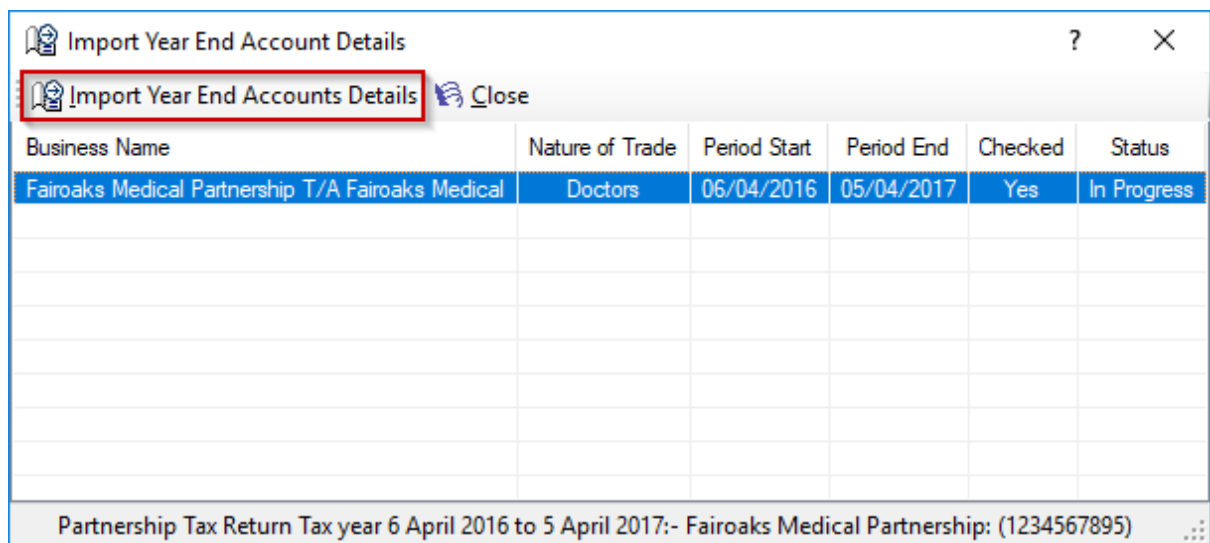
11. Click on **Save & Close** once all relevant information is completed

Linking with BTCSoftware AP Solution

If you are using BTCSoftware to prepare partnership accounts, you are able to import the year end accounts details into the partnership trade pages of the return and this will be a direct link between the Accounts and the Tax module.



1. Click on **Link to Accounts**



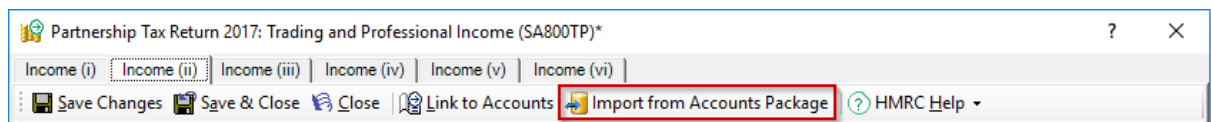
2. Highlight the Business
3. Click on **Import Year End Accounts Details**

Partnership Tax Return Guide

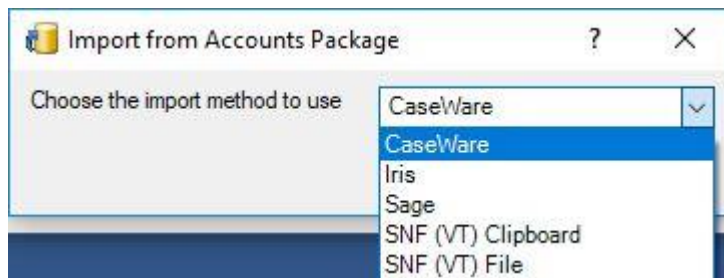
Importing Accounts from Accounts Package

If you are using CaseWare, IRIS, Sage or VT, you are able to import a set of partnership accounts into the partnership trade 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

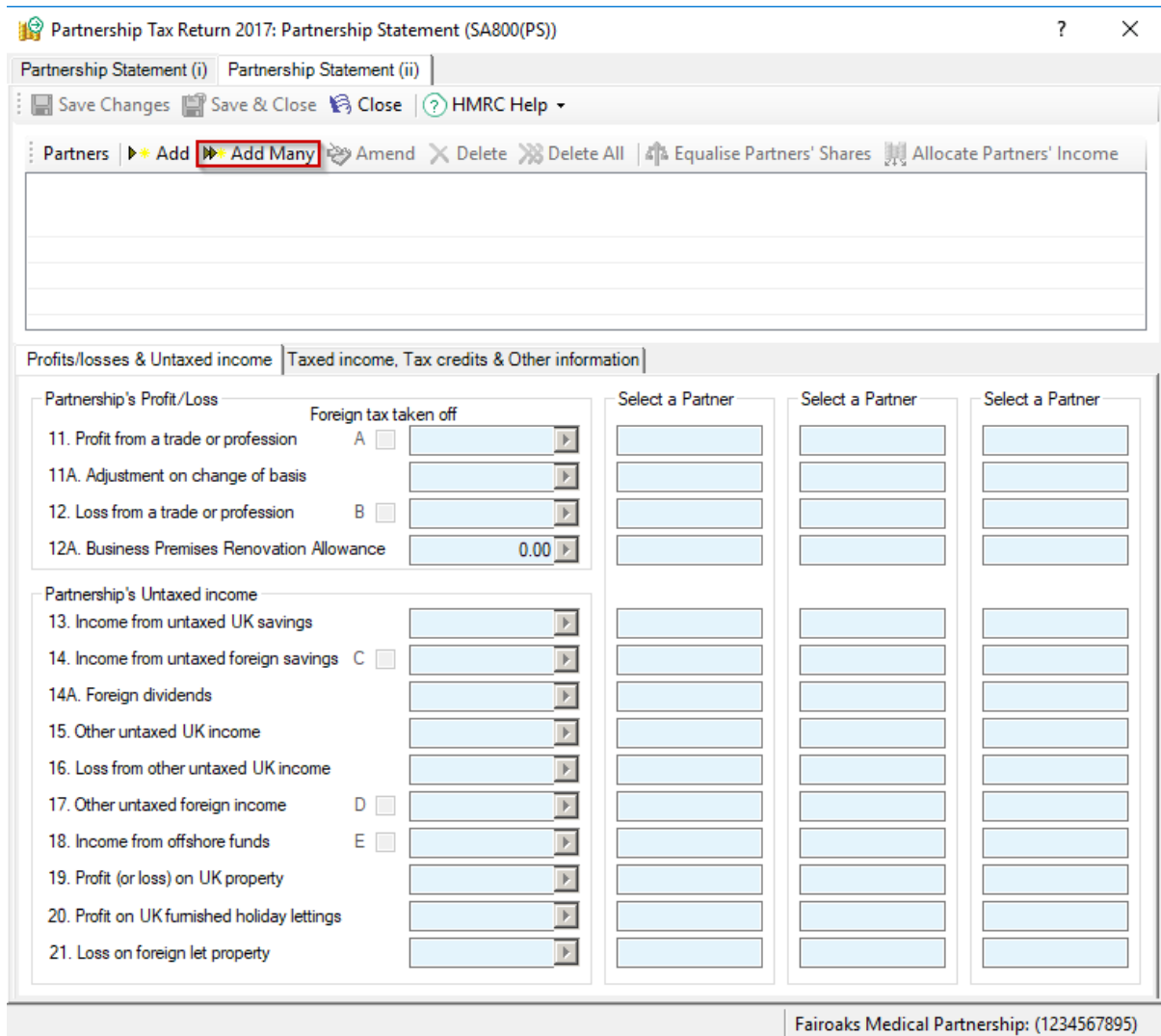


3. Click on **Import**

Partnership Tax Return Guide

Partnership Statement (ii)

The Partnership Statement (ii) holds data such as Partnership's Profit/Loss share Information for Untaxed, Taxed income, Tax credits & Other information.



Partnership Tax Return 2017: Partnership Statement (SA800(PS))

Partnership Statement (i) Partnership Statement (ii)

Save Changes Save & Close Close HMRC Help

Partners Add Add Many Amend Delete Delete All Equalise Partners' Shares Allocate Partners' Income

Profits/losses & Untaxed income Taxed income, Tax credits & Other information

Partnership's Profit/Loss

Foreign tax taken off

11. Profit from a trade or profession A

11A. Adjustment on change of basis

12. Loss from a trade or profession B

12A. Business Premises Renovation Allowance

Partnership's Untaxed income

13. Income from untaxed UK savings

14. Income from untaxed foreign savings C

14A. Foreign dividends

15. Other untaxed UK income

16. Loss from other untaxed UK income

17. Other untaxed foreign income D

18. Income from offshore funds E

19. Profit (or loss) on UK property

20. Profit on UK furnished holiday lettings

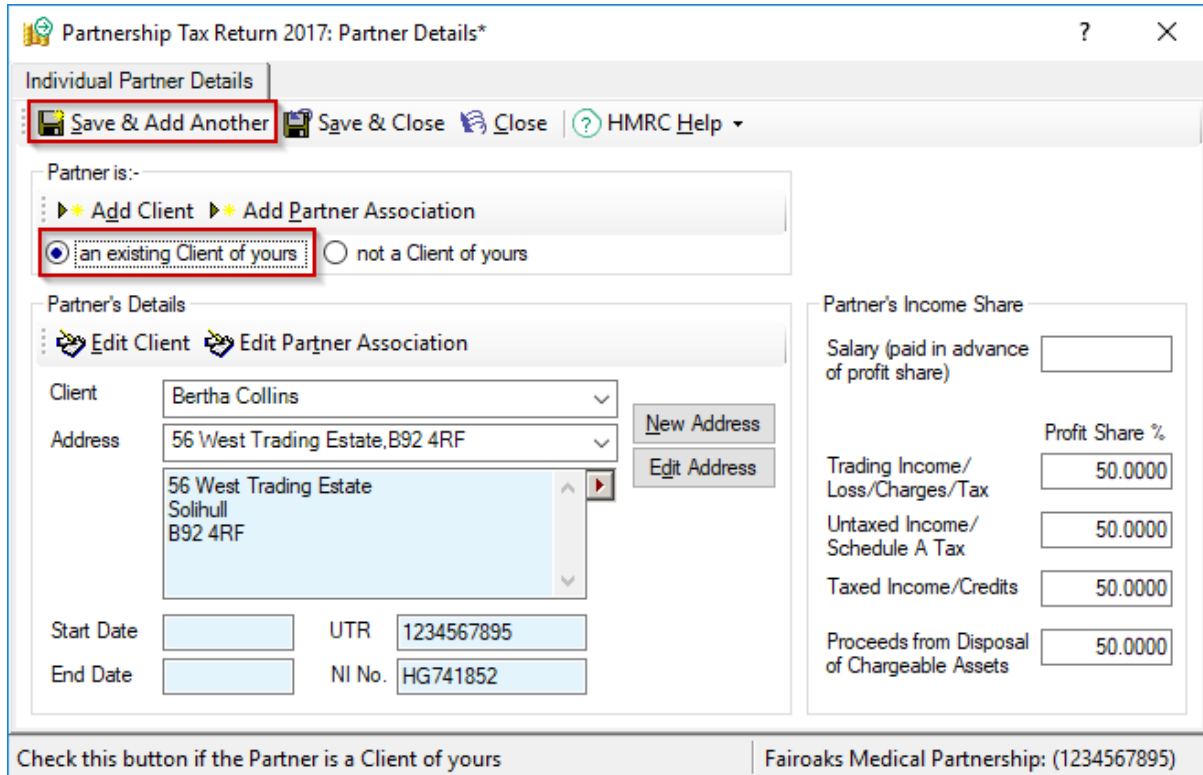
21. Loss on foreign let property

Select a Partner Select a Partner Select a Partner

Fairoaks Medical Partnership: (1234567895)

1. Click on **Add Many** which opens the **Partner Details** wizard

Partnership Tax Return Guide



Partnership Tax Return 2017: Partner Details*

Individual Partner Details

Save & Add Another Save & Close Close HMRC Help

Partner is:-

Add Client Add Partner Association

an existing Client of yours not a Client of yours

Partner's Details

Edit Client Edit Partner Association

Client Bertha Collins

Address 56 West Trading Estate, B92 4RF

56 West Trading Estate
Solihull
B92 4RF

Start Date UTR 1234567895

End Date NI No. HG741852

Partner's Income Share

Salary (paid in advance of profit share)

Profit Share %

Trading Income/Loss/Charges/Tax 50.0000

Untaxed Income/Schedule A Tax 50.0000

Taxed Income/Credits 50.0000

Proceeds from Disposal of Chargeable Assets 50.0000

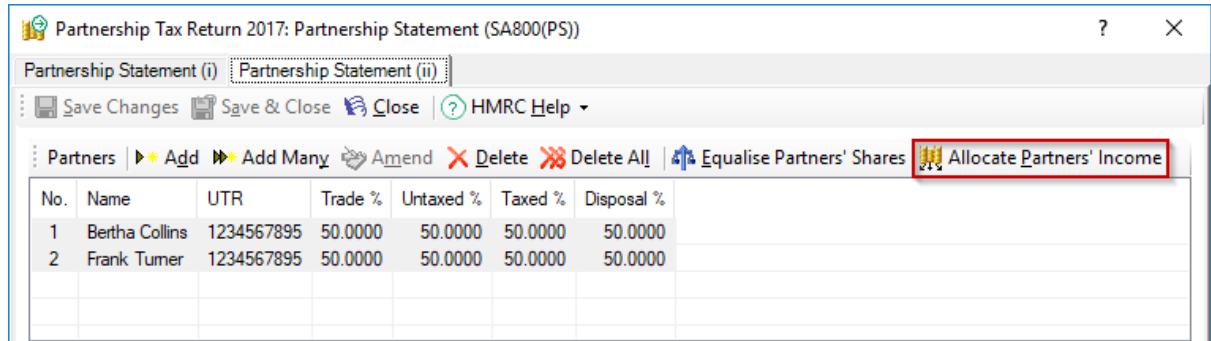
Check this button if the Partner is a Client of yours Fairoaks Medical Partnership: (1234567895)

- If the partners are already associated with the partnership, **an existing Client of yours** is selected as a default

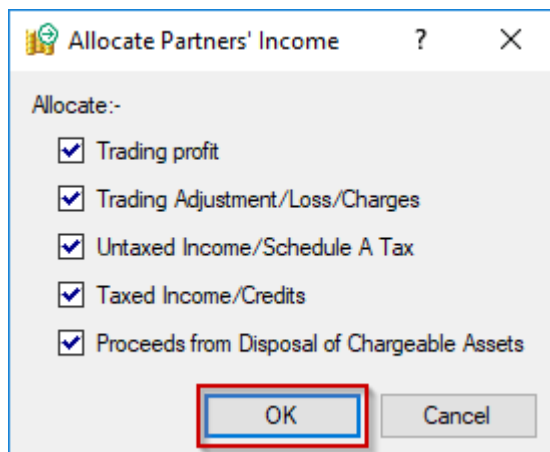
*Please note: If the partner is not your client, “select **not a Client of yours**” to enter the partner’s details manually. You also have options to add the partner to the database and also “**Add Partnership Association**” if this has not been done previously.*

- The Partner’s Details are also defaulted automatically and all you need to enter is any **Salary (paid in advance of profit share)** and the **Profit Share %** information
- Click on **Save & Add Another** to continue adding data for all the partners of this partnership as mentioned on steps 2 and 3.

Partnership Tax Return Guide

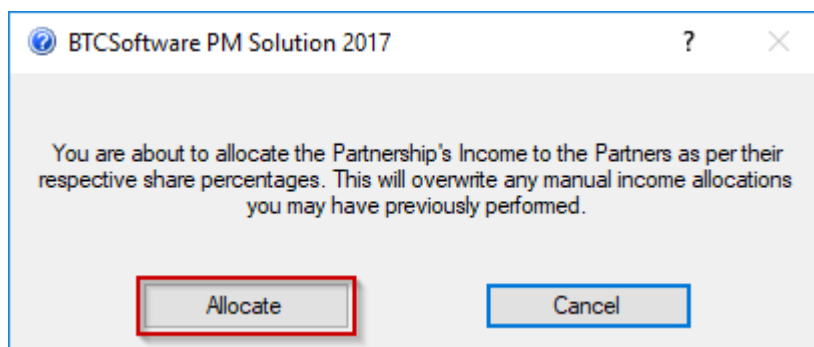


5. Click on **Allocate Partners' Income**



6. Check boxes against the Income that needs to be allocated

7. Click on **OK**



8. Click on **Allocate**

Partnership Tax Return Guide

Partnership Tax Return 2017: Partnership Statement (SA800(PS))*

Partnership Statement (i) | Partnership Statement (ii)

Save Changes | **Save & Close** | Close | HMRC Help

Partners | Add | Add Many | Amend | Delete | Delete All | Equalise Partners' Shares | Allocate Partners' Income

No.	Name	UTR	Trade %	Untaxed %	Taxed %	Disposal %
1	Bertha Collins	1234567895	50.0000	50.0000	50.0000	50.0000
2	Frank Turner	1234567895	50.0000	50.0000	50.0000	50.0000

Profits/losses & Untaxed income | Taxed income, Tax credits & Other information

Partnership's Profit/Loss

Foreign tax taken off

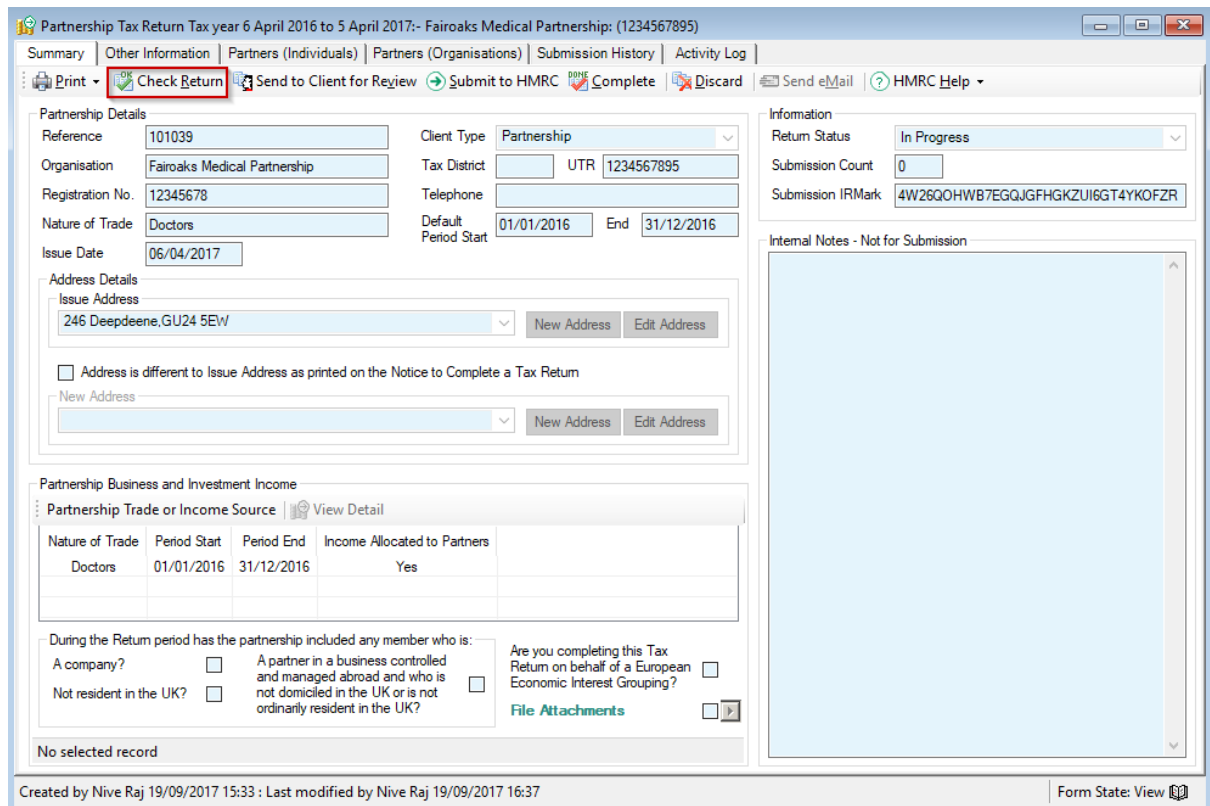
	A	Bertha Collins	Frank Turner	Select a Partner
11. Profit from a trade or profession	<input type="checkbox"/>	135,000.00	67,500.00	67,500.00
11A. Adjustment on change of basis				
12. Loss from a trade or profession	<input type="checkbox"/>	0.00		
12A. Business Premises Renovation Allowance		0.00		

- Click on **Save & Close** after completing all the relevant entries

Partnership Tax Return Guide

Check Return

1. From the Partnership Tax Return Summary screen, click on **Check Return** from the toolbar after completing all the necessary entries on the SA800 return



Partnership Tax Return Tax year 6 April 2016 to 5 April 2017:- Fair Oaks Medical Partnership: (1234567895)

Summary | Other Information | Partners (Individuals) | Partners (Organisations) | Submission History | Activity Log

Print | **Check Return** | Send to Client for Review | Submit to HMRC | Complete | Discard | Send eMail | HMRC Help

Partnership Details

Reference: 101039 | Client Type: Partnership | Organisation: Fair Oaks Medical Partnership | Tax District: UTR 1234567895 | Registration No.: 12345678 | Telephone: | Nature of Trade: Doctors | Default Period Start: 01/01/2016 | End: 31/12/2016 | Issue Date: 06/04/2017

Information

Return Status: In Progress | Submission Count: 0 | Submission IRMark: 4W26QOHWB7EGQJGFHGKZUI6GT4YKOFZR

Address Details

Issue Address: 246 Deepdeene, GU24 5EW | 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

Partnership Business and Investment Income

Partnership Trade or Income Source | View Detail

Nature of Trade	Period Start	Period End	Income Allocated to Partners
Doctors	01/01/2016	31/12/2016	Yes

During the Return period has the partnership included any member who is:

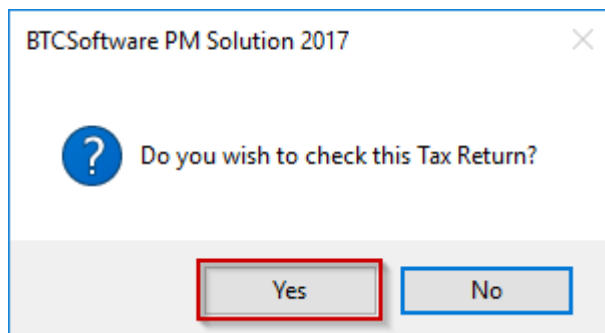
A company? | A partner in a business controlled and managed abroad and who is not domiciled in the UK or is not ordinarily resident in the UK? | Are you completing this Tax Return on behalf of a European Economic Interest Grouping?

Not resident in the UK? | [File Attachments](#)

No selected record

Created by Nive Raj 19/09/2017 15:33 : Last modified by Nive Raj 19/09/2017 16:37 | Form State: View

2. Click on **Yes** to confirm you want to check the return



BTCSoftware PM Solution 2017

Do you wish to check this Tax Return?

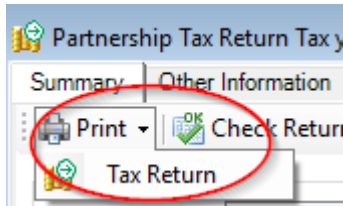
Yes | No

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

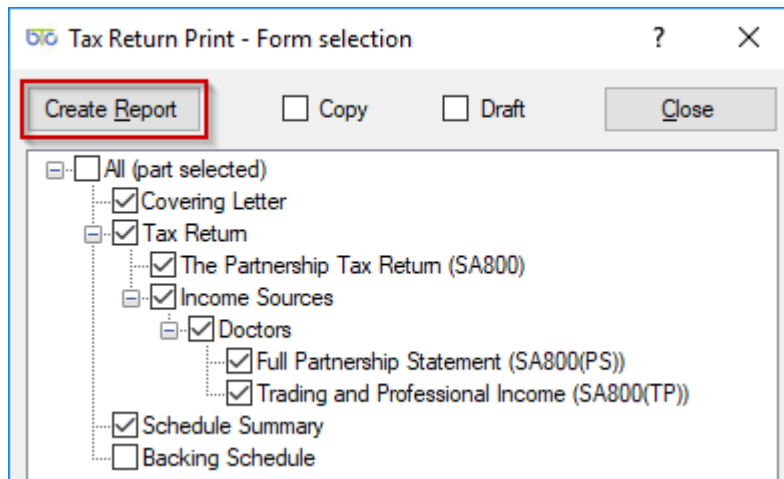
Partnership Tax Return Guide

Printing the Tax Return

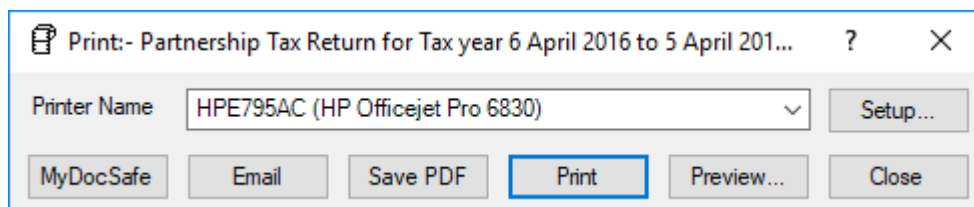
1. To do this, From the summary screen, click on **Print > Tax Return**



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



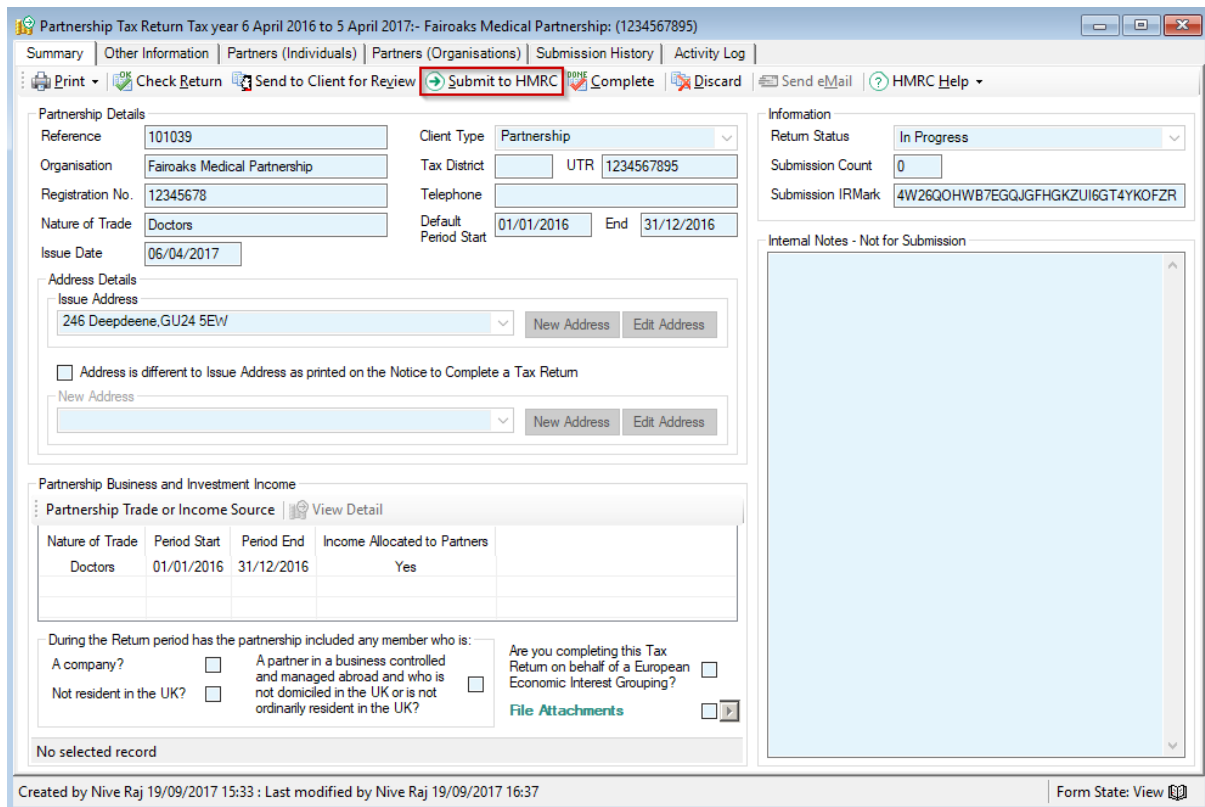
3. Then, click on **Create Report**
4. You then have options to Email, Print, Preview or use [MyDocSafe](#) (3rd party API to cater for GDPR Regulations)



Partnership Tax Return Guide

Submitting the Partnership Tax Return

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



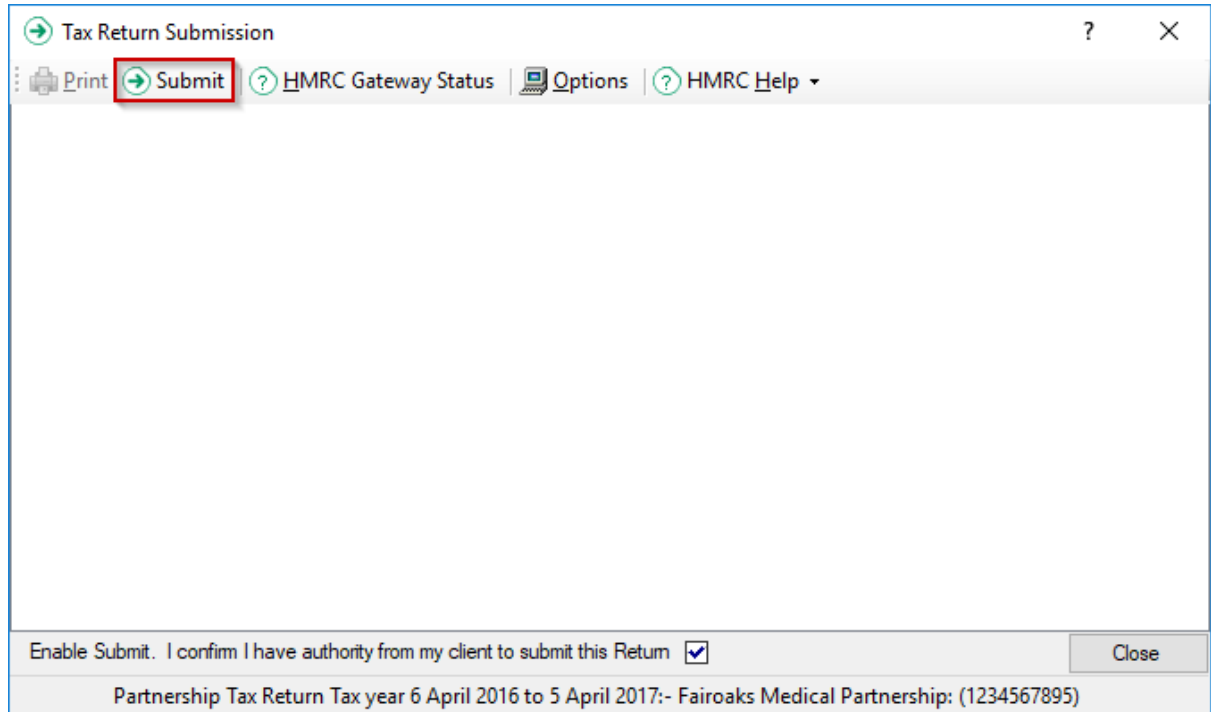
The screenshot shows the 'Partnership Tax Return' software interface for the tax year 6 April 2016 to 5 April 2017. The window title is 'Partnership Tax Return Tax year 6 April 2016 to 5 April 2017:- Fairoaks Medical Partnership: (1234567895)'. The toolbar includes buttons for 'Print', 'Check Return', 'Send to Client for Review', 'Submit to HMRC' (highlighted with a red box), 'Complete', 'Discard', 'Send eMail', and 'HMRC Help'. The main form is divided into several sections:

- Partnership Details:** Reference (101039), Organisation (Fairoaks Medical Partnership), Registration No. (12345678), Nature of Trade (Doctors), Issue Date (06/04/2017), Client Type (Partnership), Tax District (UTR 1234567895), Telephone, and Default Period Start (01/01/2016) to End (31/12/2016).
- Information:** Return Status (In Progress), Submission Count (0), and Submission IRMark (4W26QOHWB7EGQJGFHGKZUI6GT4YKOFZR).
- Address Details:** Issue Address (246 Deepdeene, GU24 5EW) and a checkbox for 'Address is different to Issue Address as printed on the Notice to Complete a Tax Return'.
- Partnership Business and Investment Income:** A table with columns for Nature of Trade, Period Start, Period End, and Income Allocated to Partners. The table shows 'Doctors' from 01/01/2016 to 31/12/2016 with 'Yes' allocated to partners.
- Checkboxes:** 'During the Return period has the partnership included any member who is: A company?', 'Not resident in the UK?', 'A partner in a business controlled and managed abroad and who is not domiciled in the UK or is not ordinarily resident in the UK?', and 'Are you completing this Tax Return on behalf of a European Economic Interest Grouping?'.
- File Attachments:** A button labeled 'File Attachments'.
- Internal Notes - Not for Submission:** A large empty text area.

At the bottom, it says 'Created by Nive Raj 19/09/2017 15:33 : Last modified by Nive Raj 19/09/2017 16:37' and 'Form State: View'.

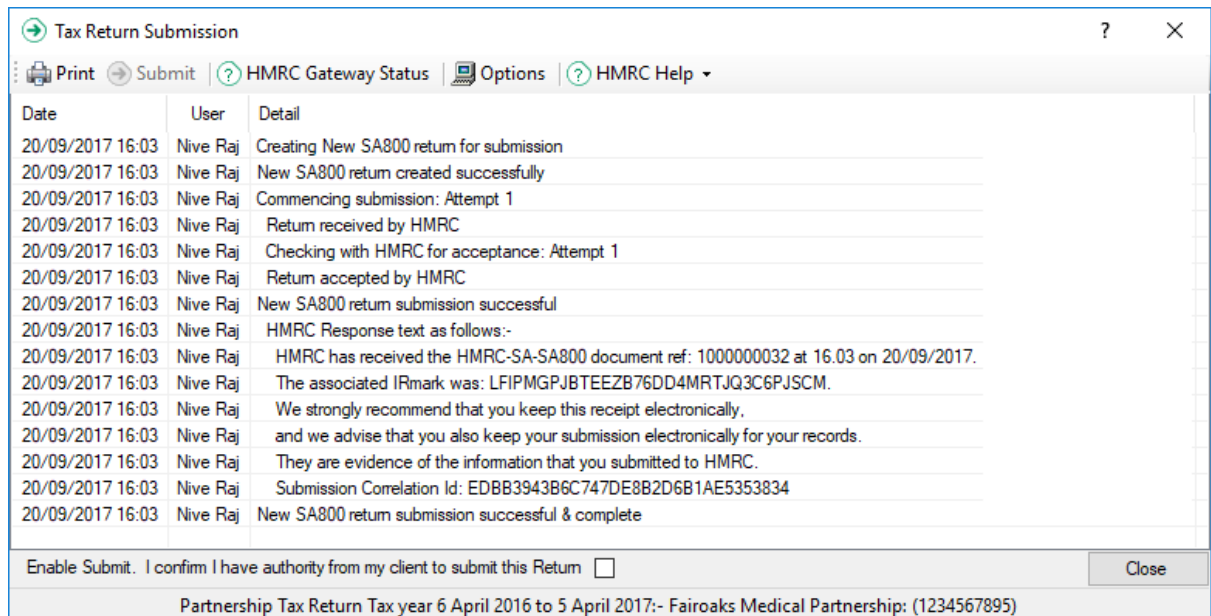
1. Click on **Submit to HMRC** from the toolbar
2. The **Tax Return Submission** window opens as below

Partnership 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'

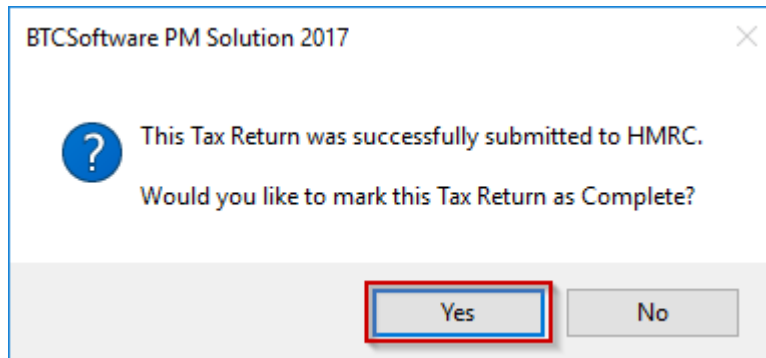
4. Click on **Submit**





Partnership 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