

Self Assessment Online: a step-by-step guide Useful features

The HM Revenue & Customs Self Assessment Online service has a range of features which you may find useful, including checking your return, saving and printing your work, and making changes. This booklet will also tell you everything you need to know about paying electronically.

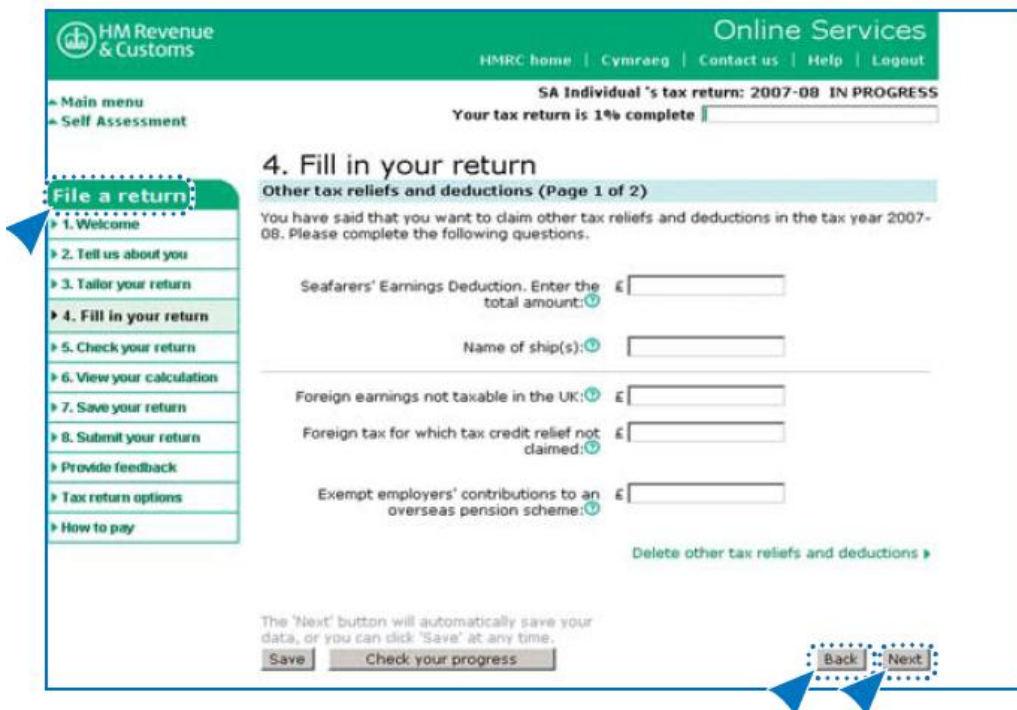
While you complete and submit your Tax Return

Moving around the Self Assessment Tax Return

There are two ways to do this:

To go back to an [earlier section](#) of your return, look at the menu called 'File a return' on the left hand side of the screen. Find the section you want and click on it. You can jump forward to another section in the same way.

If you want to go back (or forward) to [another page in the same section](#), just click 'Back' or 'Next' at the bottom right of each page. This takes you on to the previous (or next) page. An example of these features, and where you can find them, is shown below.



Use the back and next buttons to move from one page to the next and the 'File a return' menu to move from one section to the next.

To check your progress

HM Revenue & Customs Online Services
HMRC home | Cymraeg | Contact us | Help | Logout

SA Individual's tax return: 2007-08 IN PROGRESS
Your tax return is 40% complete

4. Fill in your return

Other tax reliefs and deductions (Page 1 of 2)

You have said that you want to claim other tax reliefs and deductions in the tax year 2007-08. Please complete the following questions.

Seafarers' Earnings Deduction. Enter the total amount: £

Name of ship(s):

Foreign earnings not taxable in the UK: £

Foreign tax for which tax credit relief not claimed: £

Exempt employers' contributions to an overseas pension scheme: £

Delete other tax reliefs and deductions ▶

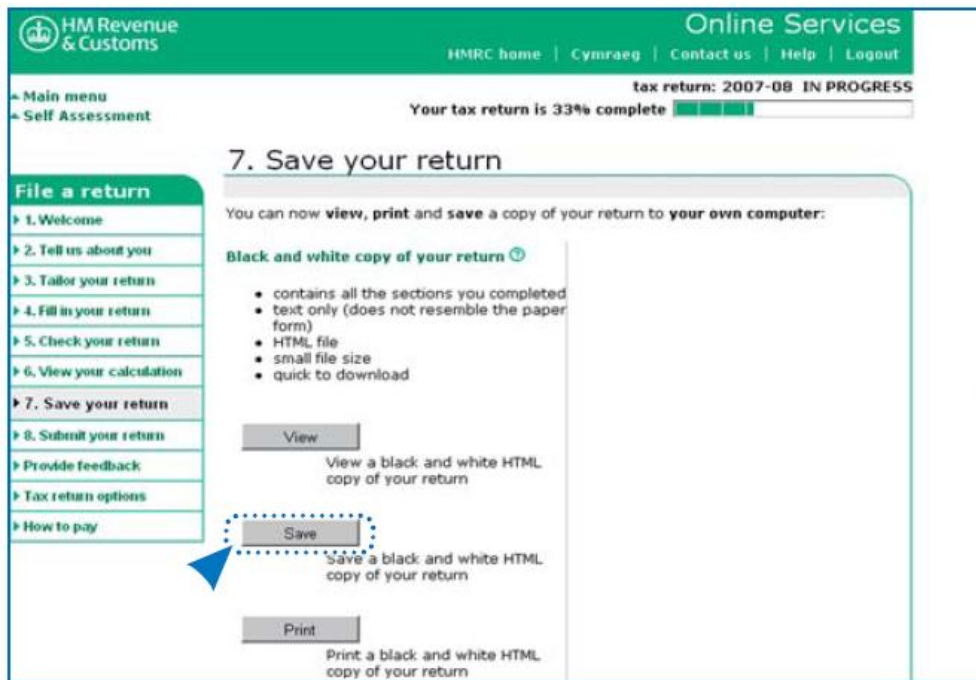
The 'Next' button will automatically save your return. You can click 'Save' at any time.

If you want to see how much you've done to date, just check the green progress bar at the top right of each page. This shows how far you've gone and how much is left to do.

To save your work

- 1. To save the work you've done so far.** Click the '[Save](#)' button at the bottom left of the screen (see screen above). **This saves everything you've done, if you want to finish off your return later.**
- 2. To save your completed return.** We recommend that you save your completed return before submitting.

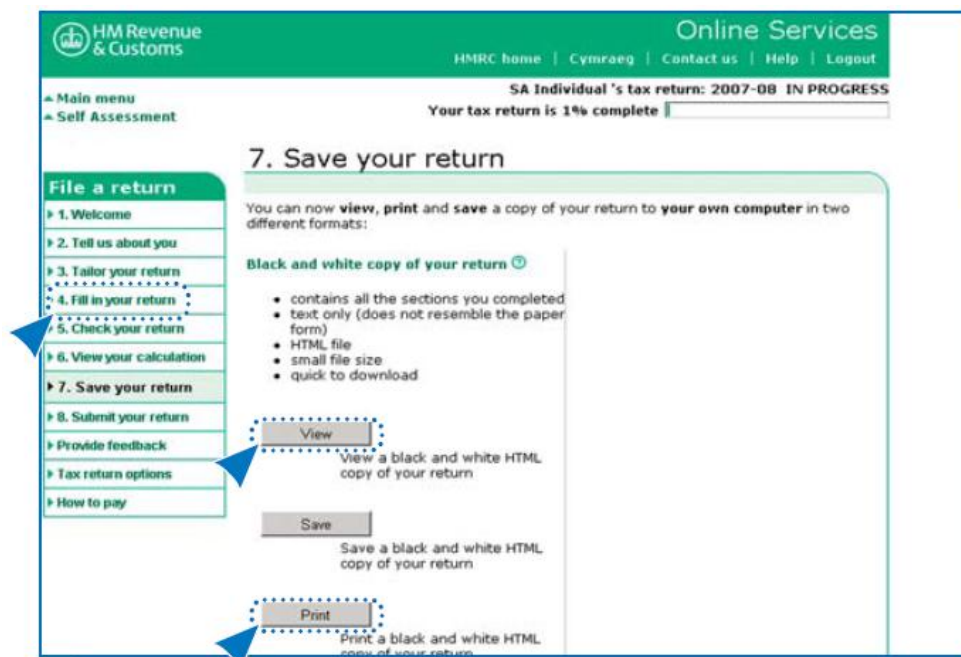
Go to the '[File a return](#)' panel on the left of the screen and click on '[Save your return](#)'.



Click 'Save' to save a black and white copy of your return to your computer. Store it in a folder with a name you'll remember easily.

To print your work to date

You can print your return at any time. To do this, go to the 'File a return' menu on the left of the screen and click on 'Save your return'. This will take you to the 'Save your return' page. Click on 'Print' and follow your software provider's usual print procedure.



You can also use this page to review what you've done so far. To do this, click on the ['View'](#) button. To continue filling in your return, go to the ['File a return'](#) panel on the left of the page, and click on ['Fill in your return'](#).

To change your return

You may need to change or correct your return before or after you've submitted it to us.

1. Before you submit

If you want to change what you've already done while you're still completing your return, you can:

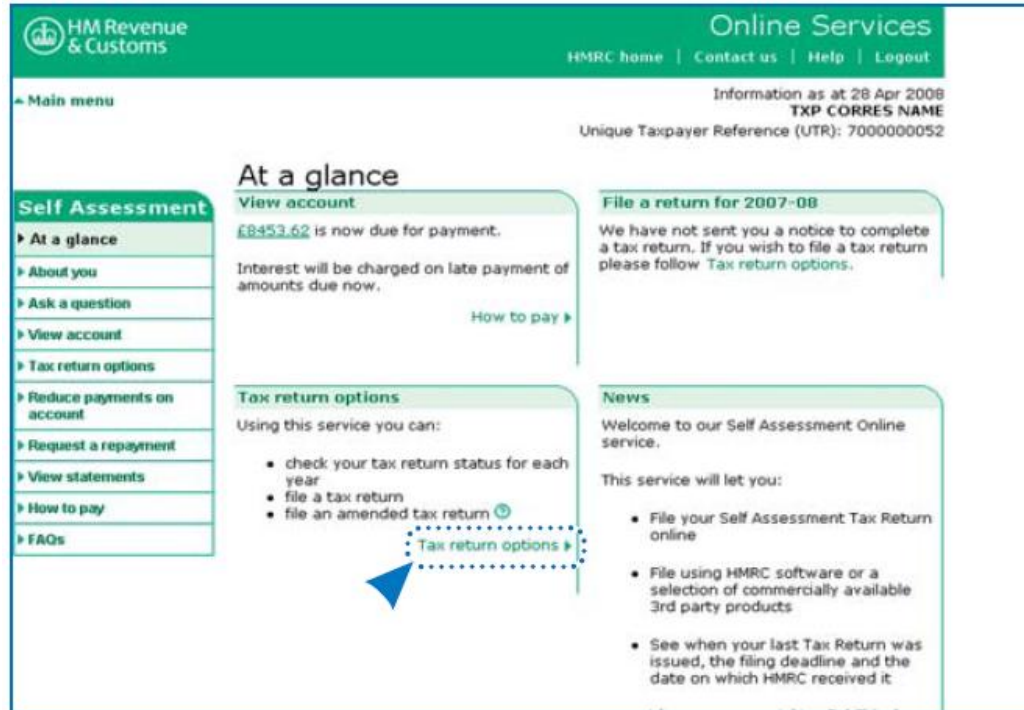
- **Add new pages or sections** by going back to ['Tailor your return'](#). To do this, go to the ['File a return'](#) panel at the left of the page and click on ['Tailor your return'](#). Work through the three pages until you reach the question(s) where you want to provide a new answer. To change the answer you originally provided, click on the relevant entry, delete the existing information and enter the new information. Then click ['Next'](#) on the bottom right of the screen.
- Change numbers that you have already inserted. To do this, you can **either**:
 - Go back through each page, until you find the one you want (by using the ['Back'](#) button at the bottom right of each page); **or**
 - Go to the ['File a return'](#) panel on the left of the page and click on ['Fill in your return'](#). This shows you a list of the pages you need to fill in. Click on the page you'd like to change.

Either way, once you've found the box you need to correct, click on it and delete the information. Then type in the correct information and click ['Next'](#) at the bottom right of the page. This saves the new details.

Once you have made the necessary changes, you can then move on to whatever section of the return you want, by going to the ['File a return'](#) panel in the left of the screen, and clicking on the appropriate link.

2. After you submit

If you want to amend your return after you've submitted it, you can do so online. You'll need to log in to the Self Assessment Online service again. To do this, type in www.hmrc.gov.uk Once there, go to the ['Do it online'](#) panel on the left hand side of the screen, and click on ['Self Assessment'](#). This takes you to the ['Welcome to Online services'](#) page, where you enter (under ['Existing users'](#)) your User ID and password. This will take you to the ['At a glance'](#) screen.



On this page, go to the '[Tax return options](#)' section, and click on the link '[Tax return options](#)'. Once at the '[Tax return options](#)' screen, click on '[Amend return](#)'; this will take you to the '[Welcome](#)' screen specifically for amendments. Here, click on the '[Start](#)' button: this will take you to the '[Fill in your return](#)' screen. That screen will list all the pages of the return, with ticks against those pages you completed. Amend your return, as necessary, by clicking on the page(s) you want to change. Delete the incorrect information and type in the correct information in its place. Click '[Next](#)' to save it.

Once you've made all the changes you want, go to the '[File a return](#)' panel on the left of the page, and click on '[Submit your return](#)'. Then follow the instructions at Stage 5 of our '[How to complete your Tax Return online](#)' booklet, to submit the new information.

Electronic payments and repayments

Viewing your account details

The Self Assessment (SA) Online service can show you the tax you have to pay, or the tax that is owed to you, for the current tax year and for earlier tax years.

To do this, you need first of all to login to our SA Online service (if you're not already logged in). To do this, please follow the instructions set out on page 4 under the heading '[After you submit](#)'. These instructions will take you to the '[At a glance](#)' page.

The screenshot shows the HM Revenue & Customs Online Services interface. At the top, there is a green header with the HMRC logo and 'Online Services' text. Below the header, there are navigation links for 'HMRC home', 'Contact us', 'Help', and 'Logout'. The user's information is displayed as 'Information as at 28 Apr 2008', 'TXP CORRES NAME', and 'Unique Taxpayer Reference (UTR): 7000000052'. A 'Main menu' is visible on the left. The primary content area is titled 'At a glance' and features several panels: 'View account' showing a balance of £8453.62 due for payment with a note about interest on late payments; 'File a return for 2007-08' with a notice to complete a return; 'Tax return options' listing services like checking status, filing returns, and amending returns; and 'News' with a welcome message and a list of service benefits. A 'Self Assessment' sidebar on the left contains a menu with 'View account' selected and highlighted by a blue arrow. Another blue arrow points to the 'View account' link in the main content area.

To see the tax outstanding (or owed to you) **for the current year**, look at the information in the left centre of the screen. To see an **earlier year's** tax payment or repayment, click on '[View account](#)'.

To get back to the main return, go to the panel in the left of the screen, called '[Self Assessment](#)', and click on the section you want.

[Paying electronically](#)

This section applies to you only if you are self-employed, or an employee or pensioner whose tax underpayments are not coded out under the PAYE system.

We accept payment by a range of methods, but recommend that you pay us electronically. Electronic payments are safer, more secure and avoid any possible postal delays. They give you better control over your money, because you decide when the payment leaves your account; and they provide certainty about when your payment will reach us. And Internet or telephone banking allows you to pay at a time convenient to you.

There are various ways in which you can pay electronically:

Use your bank/building society services and pay by:

- Internet banking – enter our bank account details (see page 8), your reference number and the payment amount on your bank/building society’s Internet screen and authorise the payment.
- Telephone banking – phone your bank and give them our bank account details (see page 8), your reference number and the payment amount.

Go online with Billpay and pay by Debit Card

If you have a Maestro, Solo, Electron or Visa debit card drawn on a UK bank account, you can pay your Self Assessment over the Internet by visiting www.billpayment.co.uk/hmrc and following the instructions. If you sign up to use the Billpay service, the service will store your Unique Reference Number, email address and payment history. The minimum payment is £0.01, and the maximum £99,999.99.

Please note: we **do not** accept payment by credit card.

You can also pay us electronically by:

- Bank giro – take your payment and payslip (this can be found at the foot of your Statement of Account) to your bank or building society branch. If you are paying by cheque, you should go to the bank or building society on which the cheque is drawn. Cheques should be made payable to HM Revenue & Customs.

Please note: some banks and building societies do not offer this payment method.

- Post Office – take your payslip (this can be found at the foot of your Statement of Account) with payment (including cheque, cash or debit card) to any participating Post Office. Any cheque payment should be made payable to Post Office Ltd.

You can find further details on all these payment methods by going to www.hmrc.gov.uk/howtopay/Self_assessment.htm

Before you decide on any of these methods, please ensure that you have read the ‘[Payment Dates](#)’ section on page 8.

