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# Your Personal Tax Account

HMRC Online Services

All the most important  
detail all in one place



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## Contents

- What you can do with your account
- Self-employed and Self Assessment
- Employees (PAYE)
- State Pension
- National Insurance
- Tax Credits
- Child Benefit
- Other Services
- Useful Links

Your personal tax account allows you to manage your tax affairs online, quickly and simply, whenever you want. It is safe, personalised, and brings together all your tax information in one place.

Whether you need to make changes to the tax you pay or have questions about when your next tax credits payment date is, your personal tax account can help.



HM Revenue  
& Customs

## **What you can do with your account**

More than 16 million people are already using their personal tax account to complete a variety of tasks, from updating an address to filing their self assessment return.

You can also do things like:

- check and change your address
- see what tax code you are on, and how your tax is calculated
- check your state pension and your National Insurance record
- go paperless – gets texts and emails from HMRC rather than letters
- manage your tax credits and Child Benefit payments
- allow a family member or friend to manage your tax affairs on your behalf
- track the progress of any forms you have submitted to HMRC

This list is growing all the time – HMRC are always working to improve the personal tax account and add new services to it.

## **How to access your personal tax account**

You can access your personal tax account on any device – desktop computer, tablet or smartphone.



## **Safety and security**

HMRC take your online security very seriously, and the personal tax account is no exception. Search how HM Revenue and Customs keep you safe online, which explains what HMRC does to protect you and your data.

## **Help and support**

If you'd like extra help when setting up or logging in to your personal tax account, HMRC's dedicated personal tax account webinars could be useful.

## **Current services**

Here are all the things you can currently do using the personal tax account.

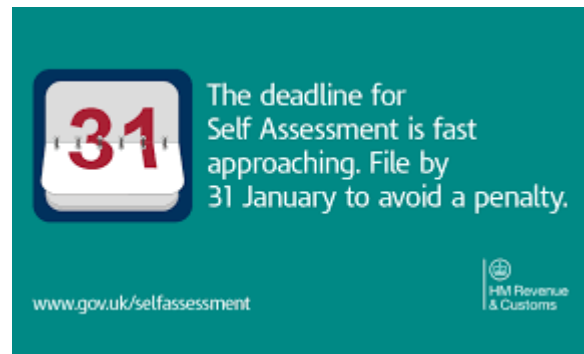
We've grouped them together in sections based on the type of things you might use the personal tax account for. See what the personal tax account can do for you if:

- you are self-employed or file a self assessment tax return
- you are employed and part of Pay As You Earn (PAYE)
- you are looking for information about your state pension
- you receive tax credits
- you receive Child Benefit

## Self-employed and Self Assessment

If you are self-employed, or you are in self assessment for other reasons, you can use your personal tax account to:

- find out what your Unique Taxpayer Reference (UTR) is for self assessment
- read your secure messages which tell you what you might need to do in self assessment
- file your self assessment tax return
- view or print your self assessment tax calculation (known as the SA302)
- make an appeal against a self assessment late filing penalty
- notify HMRC if you stop being self employed
- view your Annual Tax Summary
- apply to reduce self assessment payments on account when your profits or other income goes down



## Employees (PAYE)

If you are employed, you can use the Pay As You Earn (PAYE) section of your personal tax account to manage your affairs for the current tax year, and also for previous years.

### Current tax year

Using the 'Current Tax Year PAYE' section of your personal tax account, you can:

- see an estimate of the income tax you are likely to pay in the current year (starting April 2017) and next year (starting April 2018)
- check how your income tax has been calculated, and against which source of income it will be payable
- view and make changes to your estimated pay, and complete associated forms to update the information that makes up your tax code

- check the earnings your employer(s) have told HMRC about, including details of the tax you have paid and National Insurance contributions you have made each month-to-date in the current tax year, and for all 12 months of the previous tax year (starting April 2016)
- print these pay and tax details on HMRC-headed paper
- voluntarily disclose that you owe money to HMRC
- apply to get your rental income paid without UK tax being taken off, if you are a non-resident landlord
- claim a tax refund:
  - if you have overpaid income tax in the 2015 to 2016 tax year, or earlier tax years
  - if you think you have paid too much tax on your savings
  - if you have stopped working
  - when you have stopped working: flexibly accessed pension
  - if you have taken a small pension as a lump sum
  - if you have flexibly accessed a pension payment
  - if you overpaid when you flexibly accessed part of your pension pot
- claim any tax refund you are owed if you have left (or are about to leave) the UK
- claim tax relief on employment expenses
- claim a tax refund or authorise a representative to get the payment on your behalf if you are a foreign national assigned to the UK, and have paid too much tax
- apply for a Certificate of Residence in the UK
- apply for further information regarding a Certificate of Residence
- request a NT tax code if you are claiming to be provisionally entitled to Seafarers' Earnings Deduction (SED)
- tell HMRC about taxable income from your employment or pension
- tell HMRC about your taxable State Benefit
- tell HMRC about other sources of income aside from earnings from your main employer(s) e.g. tips, bank/building society interest, income from property rental(s), dividends etc.
- tell HMRC about investment income
- tell HMRC about your tax free allowance
- tell HMRC about your taxable company benefits
- check and tell HMRC about any changes since 6 April to your company car details or fuel benefit if your employer pays for fuel and see the impact changes will have on your income tax estimate

- check your private medical insurance company benefit and tell HMRC if you need to remove this benefit and see the impact on your income tax estimate
- view and check your position for protection from reductions in your lifetime allowance (for applications made via GOV.UK)

### Previous tax years

Using the 'Last Tax Year PAYE' section of your personal tax account, you can:



- review your income tax for the 2016 to 2017 tax year (6 April 2016 to 5 April 2017) - if you have under or overpaid PAYE tax in the last year you can see an explanation of why this has happened
- claim a tax repayment - if you have overpaid income tax via PAYE in the last year (2016 to 2017) and received a P800 form inviting you to review online, you can claim a repayment via BACs
- make a payment - if you have underpaid income tax via PAYE in the last year you can make a payment of all or part of the underpayment
- make a complaint if there is a problem with your P800 PAYE income tax calculation

### State Pension

In the 'State Pension' section of your personal tax account you can find out how much State Pension you could get (this amount is also known as your State Pension forecast), when you can get it, and how to increase it, if you can

### National Insurance

In the National Insurance section of your personal tax account you can:

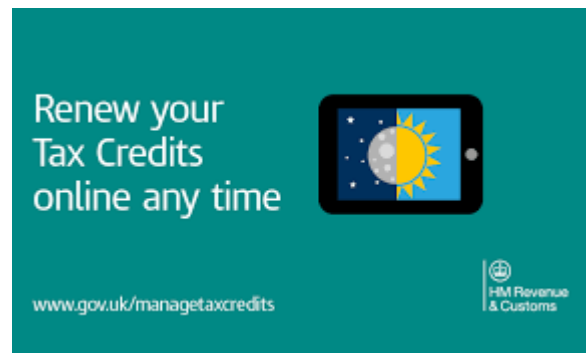
- check your National Insurance record to see if you have any gaps in your National Insurance records
- print an HMRC letter (addressed to you at your home address) confirming your National Insurance number
- request a Statement of National Insurance contributions
- apply for confirmation of your National Insurance number in writing
- apply for a refund of Class 4 National Insurance contributions
- apply for deferment of Class 1 National Insurance contributions

- tell HMRC if you work in 2 or more countries in the European Economic Area to determine which country's social security legislation applies
- apply for an E101 if self-employed in European Economic Area to confirm you remain in the UK National Insurance scheme
- apply for a healthcare certificate E106 or E109 in the European Economic Area
- apply for a refund of Class 2 National Insurance contributions
- apply or transfer National Insurance credits if you are a parent or carer of a child under 12, apply for credits as a foster carer, or kinship carer in Scotland, transfer credits from a spouse or partner who claimed the Child Benefit, apply for credits missing from your National Insurance account - if you didn't automatically get them when you claimed Child Benefit
- apply for Home Responsibilities Protection
- apply for Class 3 National Insurance credits if you accompanied your spouse or civil partner on postings outside the UK after 6 April 1975

## Tax Credits

If you receive tax credits, you can use your personal tax account to:

- tell HMRC about any changes to your circumstances, find out how much your next payment will be and when you will be paid
- tell HMRC if you have received too much tax credits and don't think you should have to pay it back because you met your responsibilities and HMRC didn't meet ours
- ask for a Child Tax Credit or Working Tax Credit decision to be looked at again



## Child Benefit

If you receive Child Benefit, you can use your personal tax account to:

- report changes that affect your child benefit by telling the Child Benefit Office about changes to your family life
- tell HMRC about changes of circumstances regarding the child(ren) you receive Child Benefit for
- tell HMRC about changes of circumstances regarding the claimant if you are in receipt of Child Benefit

- tell HMRC if your child stays in education or training post-16 (otherwise Child Benefit stops on 31 August on or after your child's 16th birthday)
- stop a claim to Child Benefit when your child leaves full time non-advanced education or training
- opt out of Child Benefit if you or your partner do not want to incur the High Income Child Benefit Charge
- authorise a tax adviser or accountant to act on your behalf for High Income Child Benefit Charge issues

### Other Services

You can also use your personal tax account to:

- track the progress of any forms you have submitted through your personal tax account notifying HMRC of a change, so you know what's happening
- allow a family member or friend to manage tax affairs on your behalf where you have signed-in to the account using the Verify ID check
- opt out of receiving paper copies of a variety of notices from HMRC, for example your coding notice
- apply for Marriage Allowance



### Useful Links

<https://www.gov.uk/personal-tax-account>

<https://www.gov.uk/manage-your-tax-credits>

<https://www.gov.uk/child-benefit>

<https://www.gov.uk/marriage-allowance>







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