

A guide to HMRC Tax Assessments and Tax Overviews



Newbury
Building Society

If applicants are self employed, we require the last two years HMRC tax assessments and corresponding tax overview forms.

You will need your secure Gateway ID (twelve digit number or less) and password details, if you do not have these you will need to register online. If you have forgotten your details you will need to contact HMRC.

Three ways to access HMRC documents:

1. HMRC self assessment online

Applicants who usually send off their tax return through a HMRC self assessment online account, can print both required documents from their online account too.

How to access the tax assessments

Log into the HMRC online account via online.hmrc.gov.uk

Select **'Self Assessment'** (NB. If your clients are only registered for Self Assessment they will be automatically directed to this screen)

Follow the link **'View your Tax Return'**

Follow the link **'Tax Return options'**

Select the desired year from the drop down menu and click the **'Go'** button

Select the **'View return'** button

Follow the link **'View calculation'**

Follow the link **'View and print your calculation'**

Follow the link at the bottom of the page to **'Print your full calculation'**

How to access the tax overview forms

Log into the HMRC online account via online.hmrc.gov.uk

Select **'Self Assessment'** (NB. If your clients are only registered for Self Assessment they will be automatically directed to this screen)

Follow the link **'Self Assessment Overview'**

Follow the link **'View account'**

Follow the link **'Tax years'**

Select the desired year from the drop down menu and click the **'Go'** button

Follow the link **'Print your Tax Year Overview'**

Repeat the last three steps if you require Tax Year Overviews for any previous years

2. Commercial Software

Some applicants use commercial software to send their tax returns, this software should allow the applicant to print their tax assessments. The tax overviews however will have to be accessed through their self assessment account.


3. Post and Phone


Applicant who send their paper tax return to HMRC will receive a copy of their tax assessments by post.


A copy of their year overview can then be requested by calling HMRC on 0300 200 3310 using their Unique Taxpayer Reference (UTR) and NI.

Example of Tax Assessment Form

HMRC: View your calculation - View your full calculation








 **GOV.UK**
Self Assessment













Unique Taxpayer Reference (UTR): 
Your tax return is 100% complete

 tax return: 2019-20

View your calculation

This section provides you with a breakdown of your full calculation. If it says your tax return is 100% complete then you have submitted your return and this is a copy of the information held on your official online Self Assessment tax account with HM Revenue and Customs.

Pay from all employments	£	
<i>plus</i> benefits and expenses received	£	
Total from all employments	£	
Profit from UK land and property	£	
Total income received	£	
<i>minus</i> Personal Allowance	£	
Total income on which tax is due	£	

How we have worked out your income tax	Amount	Percentage	Total
Pay, pensions, profit etc. (UK rate for England and Northern Ireland)			
Basic rate	£ 	x 20%	£ 
Higher rate	£ 	x 40%	£ 
Total income on which tax has been charged			£ 
Income Tax due			£ 
<i>minus</i> Relief for finance costs	£ 	x 20%	£ 
Income Tax due after allowances and reliefs			£ 
<i>minus</i> Tax deducted			
From all employments, UK pensions and state benefits			£ 
Total tax deducted			£ 
Total Income Tax due			£ 

Estimated payment due by 31 January 2021
You must pay the total of any tax and class 4 NIC due for 2019-20 plus first payment on account due for 2020-21 by 31 January 2021
(Note: 2nd payment of £0.00 due 31 July 2021)

Example of Tax Overview Form

HMRC: Tax years



Information as at 03 Feb 2021

Unique Taxpayer Reference (UTR):

Tax years

Tax year overview

Tax year ending 05 Apr 2020.

This is a copy of the information held on your official online Self Assessment tax account with HM Revenue and Customs.

Please note: To view a breakdown of an amount, follow the appropriate link in the 'Description' column.

? Description	Amount (£)
Tax	
Surcharges	0.00
Interest	0.00
Penalties	0.00
Sub total	
Less payments for this year	
Less other adjustments	0.00
Total	0.00