

Personal Tax Account

Do you have one yet and how to sign up

A Personal Tax Account is an online account with HMRC which is essentially a 'one-stop shop' for your personal tax needs. ***This is separate to the information that we can access on our agents account.*** You can use the account to manage your tax affairs and to undertake a number of tasks, such as filing your self-assessment tax return and checking whether you owe any tax. The account can be accessed online. There is also an app.

This update explains how to set up, access and use your account. ***We recommend that you do this in order to help you and help us get you ready for the major changes that are rapidly coming in for tax return submission.***

What can you use a Personal tax Account for?

You can use your Personal Tax Account to check your records and manage the details that HMRC hold about you. You can also use the account to do the following:

- view a personal tax return;
- find your National Insurance number;
- tell HMRC about a change of name or address;
- check your tax code;
- check how much tax you owe;
- view your annual summary;
- claim a tax refund;
- check the income that you received from work in the previous five tax years;
- check how much income tax you paid in the previous five years;
- check your state pension forecast;
- check and manage your tax credits;
- track any forms that you submitted online;
- check or update your marriage allowance; and
- update HMRC about any benefits-in-kind that you receive through work, such as a change of company car.

How to set up an account

If you do not already have one, you will need to set up an account online. You can do this at <https://www.gov.uk/personal-tax-account>. If you have a Government Gateway account, you can sign in using your Government Gateway user ID and password. You may have a Government Gateway

account already if you have used an HMRC online service previously. If you are self-employed, you may have created a Government Gateway account when you registered as self-employed if you were recently registered. Don't worry if you have forgotten your user ID and/or password as you will be able to trigger reminders.

If you do not yet have a Government Gateway account, you can register for one with HMRC. This will take around ten minutes. You can set up an online account at <https://www.gov.uk/log-in-register-hmrc-online-services>. You will need to enter your personal email address; a 12-digit authorisation code will be sent to the email address provided. You will need to enter this code, then enter your full name and set up a password and a recovery word. You will then be issued with a Government Gateway ID (which you should note down). You can then add further security and decide where you want your access code to be sent, such as by text to your phone. Once the access code has been entered, you will need to confirm your full name, National Insurance number and date of birth, and also prove your identity, either from your passport or driving licence or by answering multiple choice questions. The account will then be ready to use. *I have just done this myself as an exercise and it works.*

Accessing your account

Once your account has been set up, you will be able to sign in using your Government Gateway ID and password. You will also need the access code sent to your phone or by email (depending on the option chosen). You can also access your personal tax account by using the dedicated app, which you can download from either the App Store (for iOS) or the Google Play Store (for Android).

Agent online account

Your personal account does not interfere with our agent account. We will continue also to register you so that we can communicate directly with HMRC on your behalf.