

Welcome to TaxCalc

[FAQS](#)

Tax Returns

Please click on the Tax Years below to open it.



TaxCalc 2021

Create and manage tax returns for the 2020/21 tax year.

Create Older Years



TaxCalc 2020



TaxCalc 2019



TaxCalc 2018

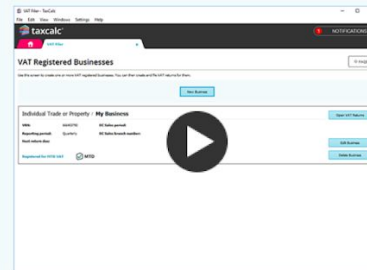


TaxCalc 2017

Introducing VAT Filer MTD

TaxCalc's new VAT Filer software allows you to file VAT returns for your VAT registered business. Whether you're a sole trader or limited company, whether your VAT Returns are simple or complex, we've worked hard to make it all as quick and easy as possible. It's also MTD-ready so you can continue to use VAT Filer when [MTD becomes mandatory](#) (for most businesses) in April 2019.

Take a look at these short video tutorials to see how it all works. If you want to read more about VAT Filer please [click here](#)



Setting up your VAT business


[Buy VAT Filer](#)



TaxCalc 2021

Managing Tax Returns

Import Returns from TaxCalc 2020

Create a New SA100 Individual

Other Forms You Can Create

Create an R40 Repayment Form

Create an SA303 Application

Create an CWF1 Form

Create an SA1 Form

Create an FBI-2 Form

Actions

Open Selected Tax Return

Show Return File Location

Remove Return From List

View Licence Information

Buy More Returns

Activate Upgrade

Icon View

List View

Individual Returns and Forms





TaxCalc 2021

21

SA100 – SimpleStep

Switch to HMRC Forms

- Set up return
- Joint income importing
- Personal details
- Residence and remittance
- Your work
- Pension income and benefits
- Other income
- Any other income
- Tax reliefs and allowances
- Capital Gains Tax
- Working out your tax
- Other information
- Tax Calculation

Summaries

Check and Finish

Whatif Planner

Total Tax & NIC

£0

Check & Finish

Two ways to file your tax return

File your return online

In order to do so you must be registered with HMRC. Register [here](#)

HMRC online filing credentials

- If you used TaxCalc to file online last year and have imported the details, then your HMRC ID and password will be shown below.
- Alternatively, you can enter them yourself.

HMRC User ID -
this is made up of
12 digits and is also
used to access the
UK government's
secure online
services



Show password on
entry?

Yes ☐ ?

HMRC Password -
this is the password



Print and file a paper return

HMRC would prefer you to file online. However, if you are unable to do so or would prefer to file a paper return, you can print and file your return using TaxCalc.

To see the requirements, penalties and exceptions for filing by paper, you can view our knowledge base article here: [Filing by paper](#).



TaxCalc 2021

21

SA100 – SimpleStep

Switch to HMRC Forms

- ☒ Set up return
- ☒ Joint income importing
- > ☒ Personal details
- > ☒ Residence and remittance
- ▼ ☒ Your work
 - ☐ Unpaid Director and Office Holders
 - > ☐ Employment
 - > ☐ Minister of religion
 - > ☐ Parliamentary pages
 - ☐ Lump Sums
 - ☐ Work abroad
 - > ☐ UK patent royalty payments
 - > ☐ Self Employment
 - > ☐ Partnership
- ▼ ☒ Pension income and benefits
 - ☐ State retirement pension and other taxable state pensions
 - ☐ Taxable incapacity benefit and ESA
 - ☐ Jobseeker's allowance
 - ☐ Private pensions
 - ☐ Pensions - Unauthorised payments
 - ☐ Pensions - Lump Sums from abroad
 - ☐ Pensions - Lifetime Pension Allowance
- ▼ ☒ Other income
 - > ☐ Savings and investments
 - > ☐ Other income

Tools

Add note

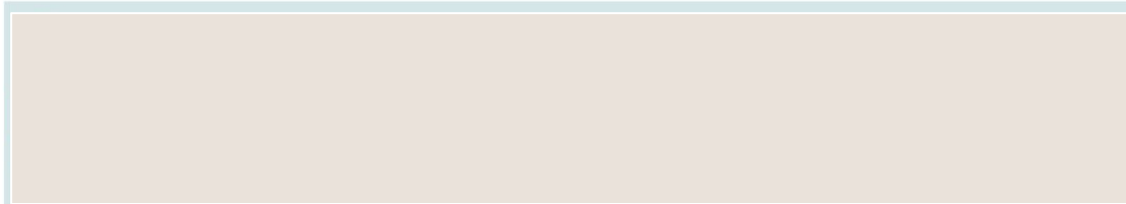
Total Tax & NIC

▼

£0

Prepare

Check and Review your Return



Please choose what you would like to do next:

Review the TaxCalc summaries on screen

Review

Add your own PDF attachments to the return

Attach

File your Tax Return online

File online

Print and review or paper file your Tax Return

Print

Forecast your 2021-2022 tax charge

Whatif

To go back to your return use the Navigation menu or click on 'Prepare' above.



TaxCalc 2021

21

SA100 – SimpleStep

Switch to HMRC Forms

- ☒ Set up return
- ☒ Joint income importing
- > ☒ Personal details
- > ☒ Residence and remittance
- ▼ ☒ Your work
 - ☐ Unpaid Director and Office Holders
 - > ☐ Employment
 - > ☐ Minister of religion
 - > ☐ Parliamentary pages
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 - ☐ Work abroad
 - ☐ UK patent royalty payments
 - > ☐ Self Employment
 - > ☐ Partnership
- ▼ ☒ Pension income and benefits
 - ☐ State retirement pension and other taxable sta
 - ☐ Taxable incapacity benefit and ESA
 - ☐ Jobseeker's allowance
 - ☐ Private pensions
 - ☐ Pensions - Unauthorised payments
 - ☐ Pensions - Lump Sums from abroad
 - ☐ Pensions - Lifetime Pension Allowance
- ▼ ☒ Other income
 - > ☐ Savings and investments
 - ☐ Choose Scheme

Total Tax & NIC

£0

Prepare

File Return by Internet

From this screen you can file your completed return securely online to HMRC. Ensure that your HMRC User ID and Password is entered in the boxes below and click on the Submit button to file your return.

By default, 'Test File' has been selected, this allows you to check whether or not your return will file successfully.

To file a **'Live' submission** to HMRC **untick** 'Test File' below

E-mail:

  ?

HMRC User ID - *this is made up of 12 digits and is also used to access the UK government's secure online services*

  ?

Show password on entry?

Yes ☐ ?

HMRC Password - *this is the password used with your HMRC User ID to access the UK government's secure online services*

  ?

Test File

Yes ☒  ?

Amended

Yes ☐  ?

Lock return

Yes ☐  ?

Submit



TaxCalc 2021

21

SA100 – SimpleStep

Summaries

Check and Finish

Check for errors

Add your own PDF attachment

Print or paper file return

File Tax Return online to HMRC

Send to Document Manager

WhatIf Planner

Tools



Add note

Total Tax & NIC

▼

£0

Prepare

Currently displaying the results of your **last** submission.

Show results for: LAST 2021-10-28 22:44:43 [LIVE SUCCESS]

Submission local timestamp: 2021-10-28 22:44:43+08:00.

Document IRMark: CQKYJ2J6PATXJE2HOUWNN5SHUHTXWARH

This 2020-21 return has been successfully submitted to HMRC.

Full details

Next Steps:

Proof of filing

Although this receipt of online filing is stored within the TaxCalc file, we would recommend that you also print a copy of the filing receipt for your records.

Print this FBI receipt


Printing Options

If you want to print a copy of the whole return, or any selection of pages or summaries, then choose the Printing Preferences option:

Printing Preferences


Amended return

If you have made a mistake or updated anything in the return since you originally filed, you will need to file the amended return online once again. To do so, choose the File Amendment option:

File Amendment

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