

Self-Assessment Information Form – Guidance Notes

Year ended 5th April 2024

Contents

1. Saving your form
2. Questionnaires
3. Entering the detail
4. Attaching documents
5. Additional information & comments
6. Submitting your completed form

We have prepared some guidance notes to assist you in completing our new style Self-Assessment Tax Return Information Form.

The form is now online based and can be completed on desktop computer or on your mobile phone.

The following notes will assist you in completing the form.

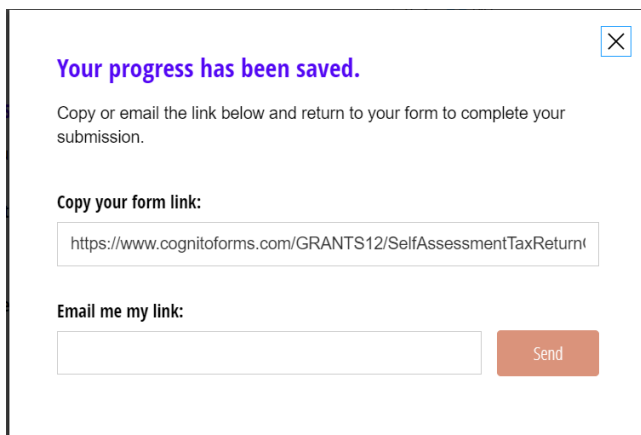
We have designed the form to cover most types of income, outgoings and capital gains, but if you are unsure of where something should be entered, please let us know.

1) **Saving your form**

If your form is simple, you may be able to complete it and immediately submit it. However, sometimes you may have to go back and finalise this at a later date. We have, therefore, included a save facility. This is found at the bottom right of the form and looks like this:



If you click this button, the following screen will appear:



You can then copy and save the link or you can enter your email address to have the link emailed to you.

The link will be individual to you and it will load with the details you have entered up to the point of saving. **Please ensure you do not lose this link, or you will not be able to access your saved form.**

2) Questionnaires

There are three different questionnaire sections on the form as follows:

- Income
- Capital Gains – Property
- Capital Gains - Other
- Outgoings

You should work through each questionnaire, changing the selection to 'Yes' for any applicable types of income, capital gains or outgoings in respect of the 2023/24 tax year.

You should answer all questions in these four questionnaires before moving on.

3) Entering the detail

When you change any of the questionnaire buttons to 'Yes', a section will appear at the bottom of the form (after the outgoings questionnaire) to allow you to enter the appropriate details.

By way of an example, if you answered 'Yes' to 'Interest received':

Interest received

Yes No

Then scroll down the page, you will see the section for Interest received is now visible:

Interest Received

Please enter the amount of interest received between 6th April 2023 and 5th April 2024 from banks, building societies and other financial institutions. Only one entry per payer is required.

Name of payer	Interest received - £
<input type="text"/>	<input type="text"/>
<input type="button" value="+ Add another payer"/>	

You can now enter details of the bank interest received during the year.

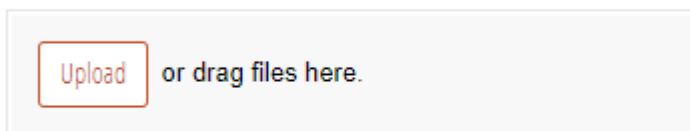
There will be a detailed entry section for each question you enter 'Yes' to on the questionnaires.

4) **Attaching documents**

It is possible to attach documents to the form (e.g. P60 or completion statement for the sale of property) before you submit this.

You can use the below button which you will find near the bottom of the form and also in some detailed entry sections:

Additional File Upload



Please attach any files here that you haven't already attached elsewhere in the form.

To use this button, simply click on 'upload', navigate to where the files are saved on your device and select them.

Then, when you submit your form to us, the documents will also be sent.

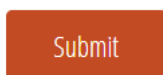
5) **Additional Information & Comments**

You can add any additional information or comments in the section at the bottom of the form (just above the submit button):

Any other information / comments

6) **Submitting your completed form**

Once you have completed your form and are comfortable that the details entered are correct (and any documents are attached), you should click on the submit button at the bottom of the form:



The form will then be sent to us.