

A Guide to Claiming Tax Relief on Your Professional Expenses

Part I: Setting up a Personal Tax Account with HMRC

Professional Expenses: Part I



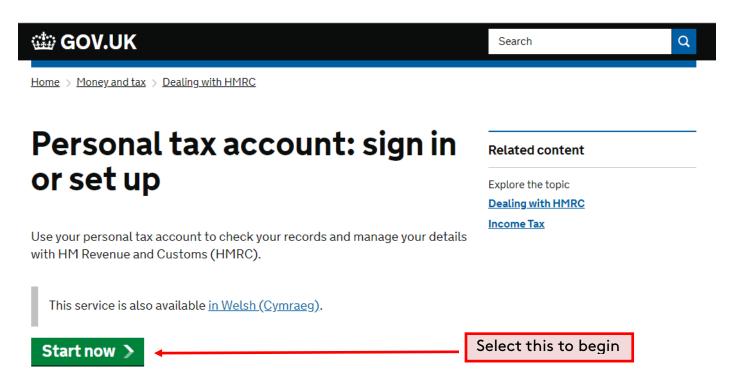


Before You Start

This is the first part of your guide to claiming tax relief on your professional expenses such as GMC, indemnity, Royal college and examination expenses. In Part I we will guide you through how to set up your Personal Tax Account with HMRC.

This assumes that you do not already have a Personal Tax Account nor that you already complete a Self Assessment Tax Return.

- Before you start you will need to gather the following:
 - Your National Insurance Number
 - A recent payslip or your P60 (both of which should also contain your National Insurance Number) or your Passport
- · Once you have that, go to
 - https://www.gov.uk/personal-tax-account



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Prove your identity to continue

You'll need an account to prove your identity and sign in to your personal tax account. Sign in with Government Gateway You'll have a user ID if you've signed up to do things like file your Self Assessment tax return online. Sign in with GOV.UK Verify If you already have a Góvernment Gateway You'll have an account if you've already proved your identity with User ID then select the either Barclays, CitizenSafe, Digidentity, Experian, Post Office, top option. We will Royal Mail or SecureIdentity. assume that you do or not already have one. In which case, select Create an account this bottom option If you do not already have one of these accounts, we'll help you choose whether to use Government Gateway or GOV.UK Verify. Continue

Create an account

To use this service, you need to create either a Government Gateway or GOV.UK Verify account. These are used to help fight identity theft.

Once you have an account, you can use it to access other government services online.

Choose a way to prove your identity

Government Gateway

Registering with Government Gateway usually takes about 10 minutes. It works best if you have:

- · your National Insurance number
- a recent payslip or P60 or a valid UK passport

Create a Government Gateway account

Make sure you have your National Insurance Number and either a recent payslip or your passport to hand and select this to continue.

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Sign in using Government Gateway

User ID	a a Cayaramant
This could be up to 12 characters. It is sometimes known a Gateway ID.	s a Government
※	
Password	
举	
Sign in	You will be asked to sign in - instead select the
Set up a user ID	"Set up a user ID" option
	
Are you an agent or	accountant acting
on behalf of a client	_
on behali of a client	. •
Yes No	Select "No" and then Continue.
	Gentanae.
Continue	
Continue	
What is your email a	ddress?
You will be sent a code to confirm your	omail address
Tou will be sent a code to commit your	
	Enter your email address and select "Continue". You will be sent a code to confirm your
	email address.

The email address I have entered is correct

Continue

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Check your email

We have sent a code to

another@gmail.com

En ¹	ter	٧	0	ur	СО	d	е

For example, CF-DNCLRK

CF-

▶ I did not get the email

Once you have entered your email address they will email you a code starting with "CF-" which you will need to enter. You will then see a screen saying that your email address has been confirmed.

They will then ask you to enter your name and create a password and a "recovery word" so that you can get back into the Government Gateway if you forget your User ID and password.

Continue

We have confirmed your email address

You can now finish setting up your user ID by adding a name and password.

Continue

Your user ID 12 34 56 78 90 12

You will receive a user ID we would recommend that you keep a note of this in a safe place

You will need your user ID and password every time you sign in. Your user ID has been sent to **another@gmail.com**

Continue

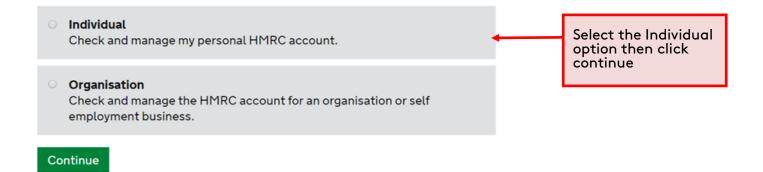
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Professional Expenses: Part I





Choose your account



How would you like to get your access code?

HMRC app for smartphone or tablet
 Get codes even with no mobile reception.
 Text message
 Get codes sent to your mobile phone.
 Voice call
 Get codes via automated message.

Continue

Every time you sign in to HMRC you will need the User ID you have just received, the password you created and a 6 digit access code. HMRC will ask you how you would like to get your access code. Select whichever of these three options you prefer, follow the instructions that you are given and then enter the access code you are given. Whichever option you choose will determine how you receive your access code going forward. You can also set up a security backup so that HMRC has another way to send you access codes.

Professional Expenses: Part I





Confirm your identity

Enter your details

This is to help us	confirm who you are, so we know what questions to ask
you.	
First name	
Last name	
Last name	
National Insuran	
For example, QQ	nal Insurance card, benefit letter, payslip or P60.
Tor example, ww	234300
l do not know my	National Insurance number
Date of birth	
For example, 313	1980
Day Month	Year

You will now be asked to confirm your identity. Enter in the details that HMRC ask for and click "continue."

Confirm your identity

Choose a way for us to identify you

\bigcirc	Payslips
\bigcirc	UK Passport
\bigcirc	P60
Make	sure you have the right documents with you

In the second part of HMRC's attempts to check your identity you will be asked to choose one of three options shown. Depending on which one you choose you will then be asked two further questions. For example, if you choose the P60 option you will be asked to enter in the total amount of National Insurance you paid in the year and then the total pay shown on the P60. If you choose the UK Passport option you will be asked for your the name on your passport, your passport number and the expiry date. After you have completed this you can now sign into your personal tax account.

Continue

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IMPORTANT NOTICE

The guidance contained in this document has been prepared by Medics Money Limited to provide general information only to assist junior doctors with claiming tax relief on their professional expenses incurred in their duties as trainee doctors. The material does not constitute investment, tax, legal or any other form of advice. You should not rely on this information to make (or refrain from making) any decisions. This guidance does not take into account specific circumstances and is for general guidance only. Always obtain independent, professional advice for your own particular situation.

This document has been prepared based on the law, regulations, judicial interpretations and guidance applying as of the date stated on the front cover of the document. Any advice contained in this document is subject to any subsequent changes in law, regulations, judicial interpretations or guidance.

Please note that not everyone will be due a repayment and in some instances tax will be payable - this is usually the case if payroll departments have not deducted the correct amounts of tax under the "Pay As You Earn" system. Medics Money excepts no liability if tax is due to HMRC. Any repayment due to you will be reduced if previous repayments have been made or if your "tax code" has already been altered to take into account your professional expenses.

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