



A Guide to Claiming Tax Relief on Your Professional Expenses

Part I: Setting up a Personal Tax Account with HMRC

Guidance for Claiming Tax Relief on 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>



[Home](#) > [Money and tax](#) > [Dealing with HMRC](#)

Personal tax account: sign in or set up

Use your personal tax account to check your records and manage your details with HM Revenue and Customs (HMRC).

This service is also available [in Welsh \(Cymraeg\)](#).

[Start now >](#)

Select this to begin

Related content

- Explore the topic
- [Dealing with HMRC](#)
 - [Income Tax](#)

Guidance for Claiming Tax Relief on Professional Expenses: Part I



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
You'll have an account if you've already proved your identity with either Barclays, CitizenSafe, Digidentity, Experian, Post Office, Royal Mail or SecureIdentity.

or

Create an account
If you do not already have one of these accounts, we'll help you choose whether to use Government Gateway or GOV.UK Verify.

If you already have a Government Gateway User ID then select the top option. We will assume that you do not already have one. In which case, select this bottom option

[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.

Sign in using Government Gateway

User ID

This could be up to 12 characters. It is sometimes known as a Government Gateway ID.

Password

Sign in

[Set up a user ID](#)

You will be asked to sign in - instead select the "Set up a user ID" option

Are you an agent or accountant acting on behalf of a client?

Yes

No

Select "No" and then Continue.

Continue

What is your email address?

You will be sent a code to confirm your email address.

Enter your email address and select "Continue". You will be sent a code to confirm your email address.

e v1.0

The email address I have entered is correct

Continue

Guidance for Claiming Tax Relief on Professional Expenses: Part I



Check your email

We have sent a code to

another@gmail.com

Enter your code

For example, CF-DNCLRK

CF-

▶ [I did not get the email](#)

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

[Get help](#)

.0

Guidance for Claiming Tax Relief on Professional Expenses: Part I



Choose your account

- Individual**
Check and manage my personal HMRC account.
- Organisation**
Check and manage the HMRC account for an organisation or self employment business.

Select the Individual option then click continue

Continue

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.

Guidance for Claiming Tax Relief on 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

National Insurance number

It's on your National Insurance card, benefit letter, payslip or P60.
For example, QQ123456C

[I do not know my National Insurance number](#)

Date of birth

For example, 31 3 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

Payslips

UK Passport

P60

Make sure you have the right documents with you

Continue

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.

Guidance for Claiming Tax Relief on Professional Expenses: Part I



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 accepts 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.

Medics Money Limited is a limited company registered in England under registered number 09062977, with its registered address at The Victoria, 25 St Pancras, Chichester, West Sussex, PO19 7LT.