

Obtaining a HMRC Tax calculation and a Tax year overview to prove your self-employed income

As we move more into a digital world HMRC wants to reduce the need to produce paper based SA302's to prove income of self-employed applicants. Both the tax calculation and tax year overview. You can now print up to the last 3 years tax calculations from the HMRC web site. The process is as follows

Printing your last 3 year's tax calculation You need to wait 72hrs after submitting your tax return before you can print this document	
If your accountant acts as your agent	How you can do this if you file your tax returns
<ul style="list-style-type: none"> ■ Log in to your Agent online account. ■ Choose the relevant client from the authorised client list. ■ Follow the link 'tax return options'. ■ Choose the year from the drop down menu and click the 'Go' button. ■ Select the 'view return' button. ■ Follow the link 'view calculation' from the left hand navigation menu. ■ Follow the link 'view and print your calculation' at the bottom of the page. ■ Follow the link 'print your full calculation'. 	<ul style="list-style-type: none"> ■ Log into their HMRC Online Account – www.online.hmrc.gov.uk ■ Select 'Self Assessment' ■ Follow the link 'Tax Return Options' ■ Choose the year from the drop down menu ■ Follow the link 'View Calculation' ■ Follow the link 'View and Print Your Calculation' ■ Follow the link 'Print Your Full Calculation'

Printing your last 3 year's tax year overview You need to wait 72hrs after submitting your tax return before you can print this document	
If your accountant acts as your agent	How you can do this if you file your tax returns
<ul style="list-style-type: none"> ■ Log in to your Agent online account. ■ Choose the relevant client from the authorised client list. ■ Follow the link 'view account'. ■ Follow the link 'tax years' from the left hand navigation menu. ■ Choose the year from the drop down menu and click the 'Go' button. ■ Follow the link 'print your Tax Year Overview' 	<ul style="list-style-type: none"> ■ Log into their HMRC Online Account – www.online.hmrc.gov.uk ■ Select 'Self Assessment' ■ Follow the link 'View Account' ■ Follow the link 'Tax Years' ■ Choose the year from the drop down menu and click the 'Go' button ■ Follow the link 'Print Your Tax Year Overview'



MR [redacted] 2015-16 SUBMITTED

Your tax return is 100% complete [redacted]

Unique Taxpayer Reference (UTR): 1 [redacted]

View your calculation

This section provides you with a breakdown of your full calculation. If it says your tax return is 100% complete then you have submitted your return and this is a copy of the information held on your official online Self Assessment tax account with HM Revenue and Customs.

Profit from UK land and property	£25,950.00
Dividends from UK companies (plus 10% tax credits)	£3,888.00
Total income received	£29,838.00
<i>minus</i> Personal Allowance	£10,600.00
Total income on which tax is due	£19,238.00

How we have worked out your income tax

	Amount	Percentage	Total
Pay, pensions, profit etc	£15,350.00	x 20%	£3,070.00
Dividends from companies etc	£3,888.00	x 10%	£388.80
Total income on which tax has been charged	£19,238.00		
Income Tax charged			£3,458.80
<i>minus</i> 10% tax credits on dividends from UK companies (not repayable)			£388.80
Income Tax due after dividend tax credits			£3,070.00

Estimated payment due by 31 January 2017

You must pay the total of any tax and class 4 NIC due for 2015-16 plus first payment on account due for 2016-17 by **31 January 2017**.

2015-16 balancing payment	£3,070.00
1st payment on account for 2016-17 due 31 January 2017 <i>(Note: 2nd payment of £1,535.00 due 31 July 2017)</i>	£1,535.00
Total due by 31 January 2017	£4,605.00



Information as at 15 Aug 2018
acting on behalf of [redacted]
Unique Taxpayer Reference (UTR): 1 [redacted]

Tax years

Tax year overview

Please select the appropriate tax year you wish to view a summary for from the drop-down menu and click 'Go'.

Tax year ending: 05 Apr 2016

Income Tax Status : UK

You can also view tax returns due/received by following [Tax return options](#).

Tax year ending 05 Apr 2018.

This is a copy of the information held on your official online Self Assessment tax account with HM Revenue and Customs.

[Print your tax year overview](#)

Please note: To view a breakdown of an amount, follow the appropriate link in the 'Description' column.

Description	Amount (£)
Tax	11313.60
Surcharges	0.00
Interest	17.19
Penalties	0.00
Sub total	11330.79
Less payments for this year	5656.80
Less other adjustments	0.00
Total	5673.99