

sage

# Sage Personal Tax Viewer

Step-by-step guide

# Sage Personal Tax Account Viewer

Sage Personal Tax Account Viewer is available to Sage Personal Tax and Sage Personal Tax Online users.

Getting started

Next steps

Help and support

Personal Tax account tab error messages

Marriage Allowance tab error messages



Please bookmark this page as you can come back here for support and access.

## Getting started

To access your clients' Personal Tax Account data you need:

- A [Government Gateway account](#).

You'll have one if you've used HMRC online services before.

- Log In details for Sage One Partner Edition.

Check with your colleagues to see if you already have your own credentials or not.

- Submitted and processed Form 64-8 with your clients, authorising you to access your client's data.
- Your client's Unique Tax Reference and tax year details



Your Government Gateway account can only be associated with a single Sage One Partner Edition account.

## Next steps

[Sign up to Sage One Partner Edition](#) if you haven't already, or

[Launch Sage Personal Tax Account Viewer](#)

## Help and support



The information you will be accessing is not stored or calculated by Sage software, the data being retrieved is solely supplied by HMRC, any queries with the data will need to be raised directly with HMRC.

Available [here](#)

## Log in to your Account

Email

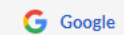
Password

Remember me

[Forgot your password?](#)

Login

Or log in with:



Google



Facebook

## Personal Tax Account

Status: **Not Connected**

To access your client's Digital Tax Accounts you must first connect your practice's Sage account to HMRC.

[Connect](#)

## Sign in

English | [Cymraeg](#)

Enter your Government Gateway credentials to sign in. You received these when you created your HMRC online account.

User ID

Password

[Sign in](#)

### Problems signing in


[Trying to file Self Assessment using GOV.UK Verify?](#)

[Don't have a Government Gateway account](#)

[Forgotten user ID](#)

[Forgotten password](#)

[Forgotten user ID and password](#)

[Get help from HMRC's automated assistant](#) 

[Get help with this page.](#)

## Enter your access code

English | [Cymraeg](#)

We just sent a 6 digit access code by text to: \*\*\*\*\*123

It may take a few minutes to arrive.

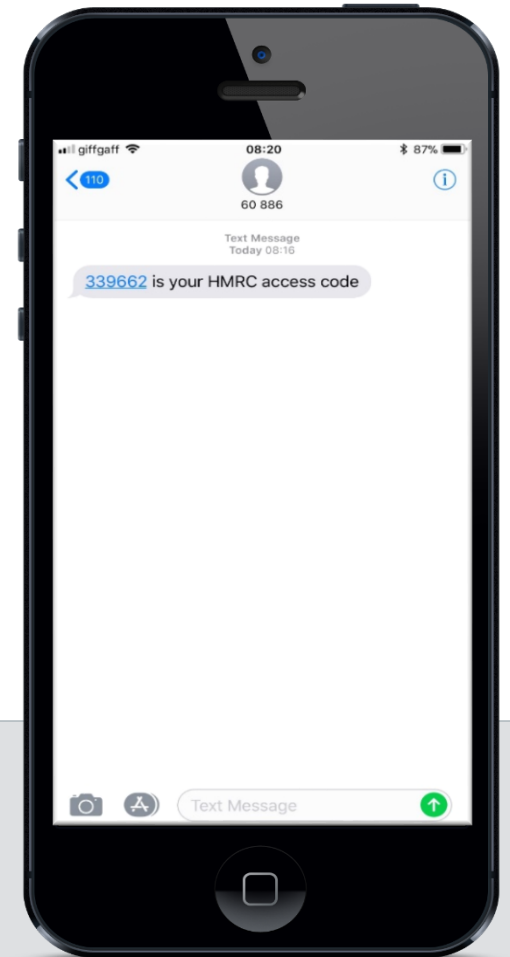
### Access code

Remember this access code for 7 days

[Continue](#)

[I can't get my access code](#)

[Get help with this page.](#)



## Authority to interact with HMRC on your behalf

The **Sage** software application is requesting to do the following:

- access tax account information
- access national insurance information
- access marriage allowance information
- access employment information
- access income information
- access benefits information

It will be able to do the above for 18 months from when you grant authority.

**Grant authority**

[Do not grant authority](#)

**Sage** will act in accordance with their [terms and conditions](#).

You can [remove this authority](#) at any time.



## Personal Tax Account

[Disconnect from HMRC](#)

### Retrieve Client Data

Unique tax reference (UTR)\*

8000040365

Tax year\*

2015-16

Search



## Personal Tax Account

[Disconnect from HMRC](#)

### Retrieve Client Data

Unique tax reference (UTR)\*

Tax year\*

✕

Unique Tax Reference: 8000040365

Tax Year: 2015-16

### Individual Employment - Company XYZ

#### Employment Details

PAYE reference	123/AB456
Pay from this employment	£22,500
UK tax deducted from this employment	£890.35

#### Benefits

Company cars and vans	£44
Fuel for company cars and vans	£99
Private medical and dental insurance	£64
Vouchers, credit cards and excess mileage allowance	£80
Goods and other assets	£125
Accommodation	£375
Other benefits (including interest free loans)	£16

Unique Tax Reference: 8000040365

Tax Year: 2015-16

### Individual Employment - Company XYZ

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Accommodation	£375
Other benefits (including interest free loans)	£16
Expenses payments received and balancing charges	£415

### Individual Employment - Company ABC

#### Employment Details

PAYE reference	456/AB456
Pay from this employment	£8,650
UK tax deducted from this employment	£224.99

#### Benefits

Company cars and vans	£50
Fuel for company cars and vans	£249
Private medical and dental insurance	£75
Vouchers, credit cards and excess mileage allowance	£23

Other benefits (including interest free loans)	£18
Expenses payments received and balancing charges	£415

## Individual Employment - Company ABC

### Employment Details

PAYE reference	456/AB456
Pay from this employment	£8,650
UK tax deducted from this employment	£224.99

### Benefits

Company cars and vans	£50
Fuel for company cars and vans	£249
Private medical and dental insurance	£75
Vouchers, credit cards and excess mileage allowance	£23
Goods and other assets	£250
Accommodation	£275
Other benefits (including interest free loans)	£87
Expenses payments received and balancing charges	£265

## Pensions and Benefits

### Pensions, Annuities and Other State Benefits

Amount of other pensions and retirement annuities	£36.50
Tax taken off other pensions and retirement annuities	£36.50
Amount of Incapacity Benefit	£980.45
Tax taken off Incapacity Benefit	£980.45
Amount of Jobseeker's Allowance	£89.99

## Individual Tax

### Refunds

Tax refunded or set off	£325
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### Benefits

Company cars and vans	£50
Fuel for company cars and vans	£249
Private medical and dental insurance	£75
Vouchers, credit cards and excess mileage allowance	£23
Goods and other assets	£250
Accommodation	£275
Other benefits (including interest free loans)	£87
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## Pensions and Benefits

### Pensions, Annuities and Other State Benefits

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Amount of Incapacity Benefit	£980.45
Tax taken off Incapacity Benefit	£980.45
Amount of Jobseeker's Allowance	£89.99

## Individual Tax

### Refunds

Tax refunded or set off	£325
-------------------------	------

## National Insurance Contributions (NIC)

Earnings liable to Class 1 NIC earnings between the Primary Threshold and the Upper Earnings Limit	£10
Total amount of Class 2 NIC due	£20
Maximum NICs reached?	False

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Tax Year: 2015-16

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Save

Cancel

Destination

Save as PDF

Change...

Pages

 All e.g., 1-5, 8, 11-13

Layout

Portrait

+ More settings

Unique Tax Reference: 8000040365

Tax Year: 2015-16

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## Marriage Allowance

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Check eligibility of recipient

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Search

Check eligibility of recipient

### Marriage Allowance

Taxpayer status	Recipient
Taxpayer is deceased?	False



## Marriage Allowance

[Disconnect from HMRC](#)

### Retrieve Client Data

Unique tax reference (UTR)\*

Tax year\*

Check eligibility of recipient 

### Recipient Information

National Insurance number\*

Date of birth\*

First name\*

Last name\*

## Marriage Allowance

[Disconnect from HMRC](#)

### Retrieve Client Data

Unique tax reference (UTR)\*

Tax year\*

Check eligibility of recipient 

### Recipient Information

National Insurance number\*

Date of birth\*



First name\*

Last name\*

### Marriage Allowance

Taxpayer status      Recipient

Taxpayer is deceased?      False

Recipient is eligible?      True

## Personal Tax Account

[Disconnect from HMRC](#)

## Retrieve Client Data

Unique tax reference (UTR)\*

Tax year\*

## Are you sure?



Disconnecting your practice from HMRC will prevent anyone in your practice from looking up HMRC held data.



**Thank you**

**[www.sage.com/accountants](http://www.sage.com/accountants)**