



OCTA
ACCOUNTANTS

HOW TO SET UP A PERSONAL TAX ACCOUNT?

A STEP BY STEP GUIDE.

Registration of a PTA requires formation of an individual's personal tax account that helps in overseeing of taxation affairs in the United Kingdom of Great Britain and Northern Ireland. The Government has provided a convenient online service where HM Revenue and Customs (HMRC) allows users to view, add or update their personal details on matters relating to their tax returns. Use the following guidelines in order to open up your Personal Tax Account today:

Step 1: They should Google the official website

First, visit the [GOV.UK](https://www.gov.uk) that contains the Personal Tax Account provided by the UK government. This site contains all the details and resources needed for the process described below.

- a valid UK passport or non-UK passport with a biometric chip
- a UK photocard driving licence issued by the DVLA (or DVA in Northern Ireland)
- a UK biometric residence permit or card
- a payslip from the last 3 months or a P60 from your employer for the last tax year
- details of a tax credit claim if you made one
- details from a Self Assessment tax return if you made one
- information held on your credit record if you have one (such as loans, credit cards or mortgages)

Sign in to or set up your personal tax account

Start now >

Step 2: As part of the registration process, build a Government Gateway Account

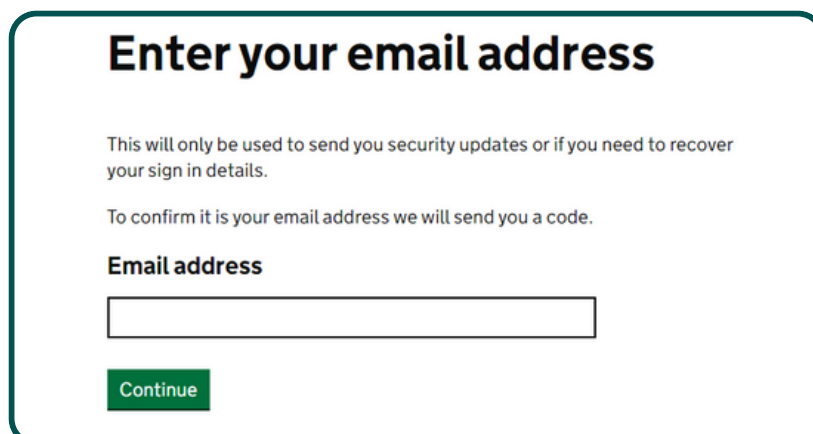
To access your PTA, you will be required to log in using a Government Gateway user ID and a password. You can login with your account if you already have one from the credentials you previously created. Else, if you don't have a user account in that site, you will be required to register as a new user.

Here's how:

- Click on '**Sign in using Government Gateway**': This option appears on the PTA page



- Select '**Create sign in details**': You will now be asked to fill in your email address.



- **Confirm your email:** An acknowledgement code will be forwarded to the supplied email address. As you are on the website, type this code.

Set up your recovery information: This involves selecting a recovery word in case one forgets login details as per the instruction that I gave my friends.

- **Create a password:** Just make sure that it is strong

Step 3: By now, we are all too familiar with the card that says, 'Show us your legitimate ID,' while 'ID, please.'

- **Government Gateway account:** Once you have registered for one you require an identity check. HMRC provides several options for verification:
- **P60 or recent payslip:** The final pay record information that can be used is that from your annual P60 or the latest payslip.
- **Passport details:** That means that thanks to the United Kingdom passport you have an opportunity verifying your identity.
- **Tax credit information:** If tax credit is given, information from these can also be accommodated.

Select the option which is easier for you.

Step 4: File Your Taxes And Get A Transcript

- From this, the government has provided ways through which the public can prove their identity hence get access to their Personal Tax Account. Here's what you can do with it:
- **View your tax code and estimate of the tax you owe:** This enables you to track your tax liabilities towards the revenue authority.
- **Check and update your personal details:** Check with the HMRC to maintain accurate details such as your address, phone number and any other relevant contact details up to date.

- **Manage your child benefit:** Register births, marriages and deaths, tax administration, claiming benefits, child benefits & updating details, and other general information.
- **Access letters and messages from HMRC:** Stay up to date with correspondence from HMRC.

Step 5: It is essential to keep your information safe when using a smart home.

Personal tax account is filled with personal information that one would not want to be public. Here are a few tips to keep it secure:

- **Use a strong, unique password:** It should be recognized that the same password should not be used with different websites and services.
- **Enable two-factor authentication:** This also brings an extra level of security.
- **Regularly update your recovery information:** Check that your new email address and recovery word are correct.
- **Log out after each session:** Especially in case of using a shared or even a public computer such as a computer found in a campus or college.

Octa Accountants understand that working on taxes and personal finances is often a daunting task. Therefore, we provide a flexible self-assessment tax service to plan, prepare and submit taxes on your behalf.

If you're struggling with HMRC affairs or concerned about the tax position on a specific return, Octa Accountants are available to assist. Feel free to contact us and talk to an expert about the ways to minimise tax liabilities.



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octaaccountants.co.uk



58 Peregrine Road, Hainault,
Ilford, Essex IG6 3SZ, UK



business@octaaccountants.co.uk



+44 033 0001 0872