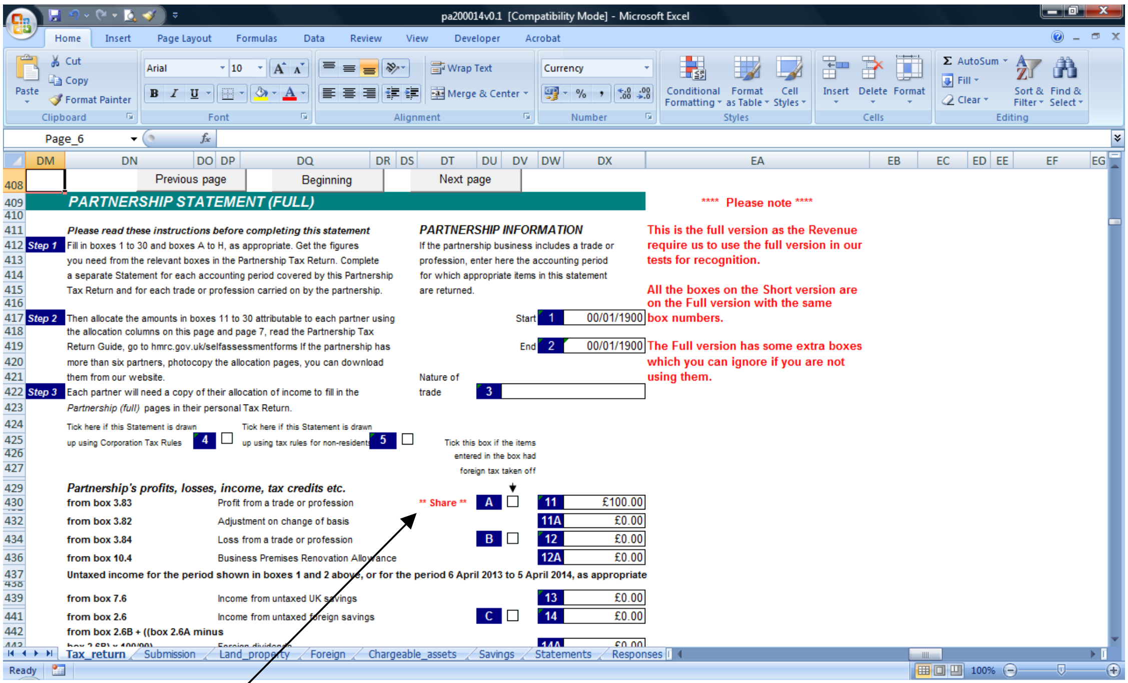
SA2000 – TAX SOFTWARE

Please note that HM Revenue and Customs no longer approves computer printouts as "substitutes". Our software is designed to submit tax returns by the internet. The print options are for your own records.

Instructions for filing online with PA2018-19ol

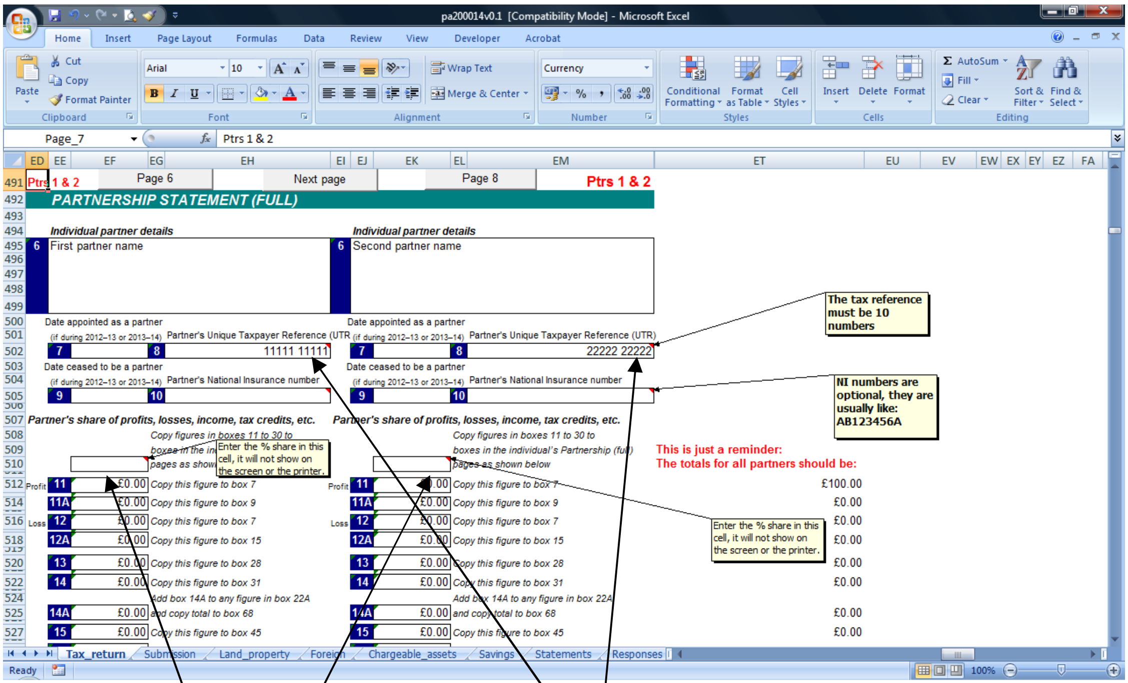
1. Download the PA2018-19ol file from our web site www.sa2000.co.uk
2. Buy the Special Code from our web site (you will need it in step 16 below);
3. (May be necessary for some versions of Excel) Start Excel and make sure Tools/Macro/Security is set to Medium;
4. Open the PA2018-19ol file with Excel;
5. (For some versions of Excel) you may get a prompt about "macros" or "security" – please choose "enable";
6. Use the arrow keys or the mouse to go from box to box and the Next and Previous buttons to go from page to page;
7. Enter partnership information on page 1, including the UTR, **but see page 4 of these instructions if you used our software last year**;
8. Use the questions on page 2 of the tax return to answer Yes for the supplementary sections you need and then use the "Fill in" buttons to go to the section;
9. Complete the rest of the tax return where appropriate;
10. Return to the Introductory page (the page before page 1 of the tax return);
11. Use the "Print options" button to print the tax return for your own reference;
12. Click the "Prepare and Submit" button to start the filing process;

You may get a message about warnings, you may see page 6 looking like:



Note the

Move to the next page (page 7) and



Please make sure each partner has a tax reference (a 10 digit UTR)

You must also allocate the total partnership figures to each partner giving each their appropriate share.

In this example the total was £100 profit on page 6 and must be allocated into the boxes 11 for the partners on page 7.

Carrying on with our checklist:

13. Enter your userid and password (from HM Revenue & Customs);
14. Choose N if you have already bought the Special Code;
15. Choose "Test" or "Live" mode ("Test" will give you a message if everything is correct, **you must choose “Live” to send the final version to HM Revenue & Customs)**;
16. Enter the Special Code (from step 2 above) only if you selected “Live”;
17. Do you want to submit the return immediately, answer Yes or No as you wish;
18. This will connect you to the Internet and submit your tax return;
19. HM Revenue & Customs’ acceptance or rejection will be displayed on the screen;
20. You should also receive an email from the Gateway;
21. Remember to save the SA2018-19ol file for your records.

Some extra guidance

Please use Copy & Paste not Cut & Paste, Cut can sometimes upset formulas.
Please don't use accents on letters (such as café), the Revenue's technology does not accept them.
If you are copying information from somewhere else (such as a set of accounts) please watch out for rounding problems – the monetary amounts must be £ and p, not fractions of a p. It is best just to work in £s, remember you can round income down to the nearest pound and expenses up to the nearest pound.
The Yes/No questions are generally set to No by default, select the Yes box if required, to unselect Yes, please select the Yes box again.

For users of our tax software last year:

You can transfer some of the information from last year's tax software to this year. This saves you having to re-enter information such as your name and address. Please follow these steps:

1. Start last year's tax software which you saved with your tax details;
2. Go to page 1 of the tax return;
3. Select the "Prepare for Taxlink (this is not SA online)" button to start the transfer;
4. Open up the new year's tax software;
5. Go to page 1 of the tax return;
6. Enter your UTR in the utr box;
7. Select the "Read Taxlink (this is not SA online)" button to complete the transfer.

We would like to thank users who have helped us with comments and suggestions to improve the software.

Prepared by QMS Ltd
Our telephone number is 01453 886735
Our web site is www.sa2000.co.uk