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 TA2025-26ol

1. Download the TA2025-26ol file from our web site www.sa2000.co.uk
2. Buy the Special Code from our web site (you will need it in step 18 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 TA2025-26ol 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 personal information on page 1, including your UTR **but see page 2 of these instructions if you used our software last year**;
8. Use the questions on page 3 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. There are "Supporting List" buttons on pages 4 and 5 for each type of interest and dividend;
10. Complete the rest of the tax return where appropriate;
11. If you are due a repayment remember to complete Question 18 on page 10;
12. Return to the Introductory page (the page before page 1 of the tax return);
13. Use the "Print options" button to print the tax return for your own reference;
14. Click the "Prepare and Submit" button to start the filing process;
15. Choose N if you have already bought the Special Code;
16. Enter your userid and password (from HM Revenue & Customs);
17. 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**);
18. Enter the Special Code (from step 2 above);
19. Do you want to submit the return immediately, answer Yes or No as you wish;
20. This will connect you to the Internet and submit your tax return;
21. HM Revenue & Customs' acceptance or rejection will be displayed on the screen;
22. You should also receive an email from the Gateway;
23. Remember to save the TA2025-26ol 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. There may be a prompt to over write an existing transfer file, select Yes to do so;
5. Open up the new year's tax software;
6. Go to page 1 of the tax return;
7. Enter your UTR in the utr box;
8. 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 701310
Our web site is www.sa2000.co.uk