

Obtaining Your HMRC Documents

Lenders require Tax Calculations and Tax Year Overviews for any self-employed applicants, including Limited Company Directors.

This guide has been put together in order to help you produce these documents as quickly and easily as possible.

If you use HMRC's online services to do your Self Assessment tax return, you can obtain:

- a Tax Year Overview for any year
- a Tax Calculation (also known as an 'SA302') for the last 3 years

You can only print returns that you've sent online. HMRC will send you a tax calculation if you sent your return by post or can't access your online account.

You can obtain access to your HMRC online account by registering online, although this typically takes 7 to 10 working days.

IF YOU OR YOUR ACCOUNTANT USE COMMERCIAL SOFTWARE

1. You'll need to use that software to print your Tax Calculation (or 'tax computation'). The lender will not accept the 'Tax Year Summary' that you will be able to see in your online account.
2. You'll need to use that software to print your Tax Calculation (or 'tax computation'). The lender will not accept the 'Tax Year Summary' that you will be able to see in your online account.
3. You can still print a Tax Year Overview from your HMRC online account.
4. You cannot print your Tax Calculation and Tax Year Overview until 72 hours after you sent your online tax return.

OBTAINING YOUR TAX CALCULATION

1. Log in to your HMRC online account <https://www.gov.uk/log-in-register-hmrc-online-services>.
2. Click on 'Self Assessment', then 'More details about your Self Assessment returns and payments'. This takes you to the 'Self Assessment summary' page.
3. For the latest year, select 'Get SA302 Tax Calculation', then 'Continue to SA302'.
4. For previous years, click on 'Tax Return Options' (right hand menu), select the tax year from the dropdown list and press 'go'. return to the 'Self Assessment summary' page, scroll down and click on 'View more previous years Self Assessment'.
5. Select the 'View return' button.
6. Follow the link 'View your calculation for your latest submitted return'.
7. Select 'View and print your full calculation'.

OBTAINING YOUR TAX YEAR OVERVIEW

1. Log in to your HMRC online account.
2. Click on 'Self Assessment', then 'More details about your Self Assessment returns and payments'.
3. Select 'View Account' (right hand menu), then 'Tax Years' page, choose the year from the dropdown menu and select the 'Go' button.
4. Follow the link 'Print your tax year overview'.

