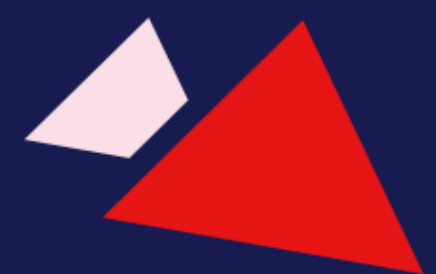




Girlguiding
Middlesex North West
county



Gift Aid Training



Last time we learned...

How to:

Get ready to claim Gift Aid

Complete the Gift Aid
Application Form

Complete the Gift Aid
Certificate

Enrol for Online Service with
HMRC



What will we learn today...

How to:

Activate your HMRC
account

Claim Gift Aid

Maintain Gift Aid



Activate your account for Online Services

GOV.UK

Coronavirus (COVID-19) | Guidance and support

Home > Paying HMRC

HMRC services: sign in or register

Contents

- Sign in to HMRC online services
- [Problems signing in](#)
- [Register for HMRC online services](#)

Sign in to HMRC online services

Once you've registered, you can sign in for things like your personal or business tax account, Self Assessment, Corporation Tax, PAYE for employers and VAT.

This page is also available [in Welsh \(Cymraeg\)](#).

Sign in

When your letter arrives go to <http://www.gov.uk/hmrconline>

9. Click sign in

- Sign in using your government gateway user ID and password
- Select Activate for charities and community amateur sports clubs
 - Enter your activation code
 - Select Get Access

Claiming Gift Aid



Claiming Gift Aid

The screenshot shows the GOV.UK website interface. At the top, there is a search bar and navigation links for Departments, Worldwide, How government works, Get involved, Consultations, Statistics, and News and communications. Below this is a yellow banner for 'Coronavirus (COVID-19) | Guidance and support'. The main content area is titled 'Form' and 'Gift Aid schedule spreadsheets to claim back tax on donations'. It includes a description: 'Use these schedule spreadsheets to claim back tax through Gift Aid, Gift Aid Small Donations Scheme (GASDS) or other income using Charities Online.' Below this, it states 'Published 1 March 2013' and 'Last updated 17 April 2019 — see all updates'. The 'Documents' section lists two files: 'Gift Aid donations schedule - Excel' (ODS, 29KB) and 'Gift Aid donations schedule - LibreOffice' (ODS, 87.3KB). A 'Related content' section lists several links: 'Schedule spreadsheet to claim back tax on Gift Aid donations', 'Claim tax back on donations using Charities Online', 'Charities and CASC: Gift Aid declaration forms for multiple donation', 'Gift Aid declarations: claiming tax back on donations', and 'Claim top-up payments for the Gift Aid Small Donations Scheme'.

To start you need to prepare the Gift Aid donation schedule document this can be downloaded from gov website

<https://www.gov.uk/government/publications/gift-aid-schedule-spreadsheets-to-claim-back-tax-on-donations>

Claiming Gift Aid

When your account is activated your login page will look like this

1. Click claim tax back on donations
You will be taken to this page

GOV.UK Business tax account Sign out

Coronavirus (COVID-19): guidance and support

Home Manage account Messages Help and contact English | Cymraeg

Business tax summary

View and access your business taxes in one place

Add a tax to your account to [get online access to a tax, duty or scheme.](#)

Payments will take up to 7 working days to show, depending on how you pay. After you complete your return your tax calculation will take up to 7 days.

Charities

Claim tax back on things like Gift Aid donations.

[Claim tax back on donations](#)

Other services

[Anti-money laundering supervision](#)

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

Your HMRC services

Charity repayment claim

Make a charity repayment claim

You can make a charity repayment claim using the HMRC online service by following the link below.

[Make a charity repayment claim](#)

To make a charity repayment claim using commercial software follow the link below.

[View a list of commercial software](#)

At a glance

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To make a charity repayment claim using commercial software follow the link below.

[View a list of commercial software](#)

News & updates

Welcome to the charities online service. Before you make your claim please complete and save any schedules. Please refer to the [demonstrator](#) which will help you make your claim correctly.

Avoid these 5 common mistakes that will delay your payment:

1. Answer 'No' to the question 'are you a corporate trustee?' unless your charity is managed by a trust company, or trust department of a bank. See demonstrator page 8
2. Do not confuse Gift Aid with the Gift Aid Small Donations Scheme (GASDS). See demonstrator page 6
3. Do not confuse your charity regulator's number with your HMRC reference or User ID. See demonstrator page 8
4. If you are including a tax adjustment on any schedule make sure you enter the amount of tax over-claimed and not the value of the donations.
5. Make sure you only give details of an official who is already known to HMRC.

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Claiming Gift Aid

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- Make a charity repayment claim
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At a glance

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2. Click Make a charity repayment claim

Claiming Gift Aid

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▲ Your HMRC services

Repayment claim details

Questions about this claim

I commit to providing honest and accurate information in the following claim

You can use this service to claim tax repayments on Gift Aid donations, claim UK tax deducted from other income and claim top-up payments under the Gift Aid Small Donations Scheme (GASDS). Please answer the questions below indicating which of the three areas you want to claim under then, click the 'Next' button to continue.

* Indicates required information

Are you claiming Gift Aid? * Yes No

Are you claiming UK tax deducted from other income? * No Yes

Are you claiming a top up payment for small cash donations * under GASDS? These are not your Gift Aid donations. Yes No

Your claim reference number:

If you indicated you are claiming a top-up payment under GASDS you must provide the information below. *

Are you claiming a top up payment under GASDS for donations that were not collected in a community building? Yes No

Are you claiming for donations collected in community buildings? No Yes

Are you connected to any other charities or CASCs for the purpose of GASDS? No Yes

Are you making an adjustment to a previous GASDS claim? No Yes

Back Next

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3. Tick to confirm you are providing honest and accurate information and then complete the form.

If you are also claiming on subs where you do not have a gift aid form select Yes to the third question.

This reveals additional questions which you need to answer with YES for the first one and NO to all of the others and click NEXT.

Claiming Gift Aid

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Charity repayment claim

- ▶ At a glance
- ▶ **Repayment claim summary**
- ▶ About the organisation
- ▶ Attach Gift Aid schedule
- ▶ Gift Aid Small Donations Scheme schedule
- ▶ FAQs

Repayment claim summary

You have not completed all the required sections of your claim. You must complete all the sections shown below with an arrow or cross beside them before you can finalise your claim.

To complete, view or amend a section, please follow the relevant link in the 'Status' column or click the 'Next' button to start completing the first section.

To delete this charity repayment claim click the 'Delete' button.

- ✓ A tick means you have entered information in this section
- An arrow means you haven't entered information in this section
- ✗ A cross means this section is incomplete

Section	Status
Questions about this claim	✓ Repayment claim details
About the organisation	→ Organisation details
Gift Aid schedule:	→ Attach Gift Aid schedule
Gift Aid Small Donations Scheme schedule	→ Donation details

To delete this repayment claim click the 'Delete' button below.

Delete Next

You will be taken to you
Repayment Claim
Summary and you can
see the next 3 sections
you need to complete.

Claiming Gift Aid

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

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Charity repayment claim

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- ▶ **About the organisation**
- ▶ Attach Gift Aid schedule
- ▶ Gift Aid Small Donations Scheme schedule
- ▶ FAQs

About the organisation

Organisation details

You must provide the information below then, click the 'Next' button to continue. The person making this claim must be a recognised authorised official or corporate trustee that has already been notified to HM Revenue & Customs as the authorised official.

* indicates required information

Name of charity regulator:*

Please select

If you selected Charity Commission for England and Wales, Charity Commission for Northern Ireland or Office of the Scottish Charity Regulator, you must provide the information below.*

Charity regulator's number - enter the numerical characters only (not the HMRC Charities reference number):

Is this claim being made by a corporate trustee such as the Trust Department of a bank, a Trust Company or a Trust Corporation? Please select

Your daytime telephone number (including international dialling code if outside the UK):

"Next" automatically saves your data.

Back Next

4. Select NONE for the charity regulator

Claiming Gift Aid

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About the organisation

Organisation details

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* indicates required information

Name of charity regulator: *

None

Please provide a reason for not being registered with a regulator:

Please select

Is this claim being made by a corporate trustee such as the Trust Department of a bank, a Trust Company or a Trust Corporation? *

Please select

Your daytime telephone number (including international dialling code if outside the UK): *

Next automatically saves your data.

Back Next

This will change the options
5. Select YOUR CHAIRTY IS EXCEPTED

This brings up a description of who is allowed to use this option and you will see Scout and Guide groups listed

Claiming Gift Aid

None

Please provide a reason for not being registered with a regulator:

Your charity is Excepted

Income is £100,000 or less & your charity is in one of the following groups:

- Churches/Chapels belonging to some Christian denominations
- Charities that provide premises for some types of school
- Scout and Guide groups
- Charitable service funds of the Armed Forces
- Student Unions

Is this claim being made by a corporate trustee* such as the Trust Department of a bank, a Trust Company or a Trust Corporation? No

If you selected that this claim is not being made by a corporate trustee, you must provide details below about your organisation's authorised official.*

Title: _____

First name: _____

Last name: _____

Please enter a postcode or indicate if your address is not in the UK. *

Postcode: _____
eg AB12 3YZ

Please select if your address is not in the UK

Your daytime telephone number (including* international dialling code if outside the UK): _____

6. Select NO

This brings up a section where you need to provide the details about your organisation's authorised official. These are the details you provided in your application.

7. Once you have added in the correct details click NEXT

Claiming Gift Aid

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- Attach other income schedule
- Gift Aid Small Donations Scheme schedule
- FAQs

Attach Gift Aid schedule

Gift Aid schedule

Download a Gift Aid schedule

You have indicated that you want to claim a repayment of tax on Gift Aid donations. Your claim must include full details of the donors and their donations on which you are claiming a repayment of tax.

You must have already completed and saved an HM Revenue & Customs (HMRC) Gift Aid schedule on your computer with details of your Gift Aid donations to support this claim.

Please note: If you haven't already done so please follow the link below to download the HMRC Gift Aid schedule.

To complete the schedule now you will need to log out of this service. Any information you have already entered will be saved.

Once you have completed the schedule you will be able to log back into this service and attach it to your claim.

[Download a Gift Aid schedule](#)

Further information about Gift Aid schedules can be found in the online guidance. HMRC recommend you read this guidance before you complete and save your schedule.

Attach your Gift Aid schedule

When you are ready to attach your Gift Aid schedule to this claim, click on the 'Browse' button below to find and select the completed schedule on your computer.

Gift Aid schedule: no file selected

If you do not want to attach a Gift Aid schedule now please tick the checkbox below then, click the 'Next' button to continue.

Please note: You must attach a Gift Aid schedule before you can submit your charity repayment claim.

I do not want to attach a Gift Aid schedule at this time.

[Repayment claim summary](#) [Next](#)

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7. Upload your donation schedule document
8. Click next

Claiming Gift Aid

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Your HMRC services

Attach Gift Aid schedule

Gift Aid schedule - Confirmation

Please confirm that the details shown below match the information in the Gift Aid schedule that you have attached to this claim.
If the information is correct please click the 'Confirm details' button to continue.
If the information is incorrect, you will have to amend the Gift Aid schedule saved on your computer and then follow the 'Attach an updated Gift Aid schedule' link below to continue with your claim.

Gift Aid schedule details

Earliest donation date: 09 September 2016
Adjustment for Gift Aid previously over-claimed: £0.00
Total donations: £2325.00

Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event	Donation date	Amount (£)
1						Not applicable	Not applicable	09/09/2016	40.00
2						Not applicable	Not applicable	09/09/2016	40.00
3						Not applicable	Not applicable	11/10/2017	65.00
4						Not applicable	Not applicable	11/10/2017	25.00
5						Not applicable	Not applicable	11/10/2017	25.00
6						Not applicable	Not applicable	11/10/2017	25.00
7						Not applicable	Not applicable	11/10/2017	65.00
8						Not applicable	Not applicable	11/10/2017	25.00
9						Not applicable	Not applicable	11/10/2017	65.00
10						Not applicable	Not applicable	11/10/2017	25.00
11						Not applicable	Not applicable	10/10/2018	75.00
12						Not applicable	Not applicable	10/10/2018	75.00
13						Not applicable	Not applicable	10/10/2018	75.00
14						Not applicable	Not applicable	10/10/2018	50.00
15						Not applicable	Not applicable	10/10/2018	75.00
16						Not applicable	Not applicable	10/10/2018	75.00

All of your donations are loaded onto the system and listed. Scroll through to check the data is correct.

9. Confirm your donations

10. Click Next

Claiming Gift Aid

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Gift Aid Small Donations Scheme (GASDS) schedule

Donation details

Use this page to claim for payments under the Gift Aid Small Donations Scheme (GASDS). This is separate from your Gift Aid claim.

The GASDS is for small cash donations of £20 or less that the charity or Community Amateur Sports Club that you do not have a Gift Aid declaration for. It only applies to donations you have received since 6 April 2013.

If you are only claiming under Gift Aid you must not complete any of the boxes on this page. You should return to the 'Repayment Claim Details' screen and answer 'No' to the question 'Are you claiming under GASDS?'

* indicates required information

Tax year 1 ending 5 April: *

eg YYYY

Amount of donations on which you are claiming * a top up payment under GASDS. Do not include any donations collected in a community building: £

Do you want to make a claim for second tax * year? Please select

Repayment claim summary

Next automatically saves your data.

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11. Add in your ending tax year
If you are also claiming on subs where you do not have a gift aid form, add together the non-gift aid subs and enter the total.

12. Add the correct answer for your claim to the 3rd question

13. Click Next

Claiming Gift Aid

You will be taken to a summary page where you should have all green ticks and this mean you are ready to submit.

14. Click Next

15. Click to agree to the declaration and submit your Gift Aid claim.

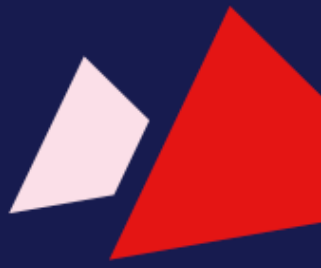


Claiming Gift Aid

If approved you will receive a letter from HMRC and your payment will be paid directly in your units bank account.



Maintaining Gift Aid



Maintaining Gift Aid Records



All Gift Aid information needs to be kept securely in a file with the following sections:

Correspondence with HMRC, including claims made

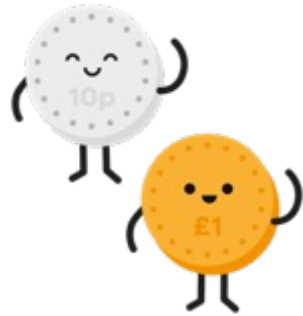
A record of subscriptions received to support the Gift Aid claims made

Gift Aid declarations filed alphabetically

Declarations must be kept for 7 years after the last claim made for that parent.



Maintaining Gift Aid Claims



Claims can be made at any time of the year to suit you

Claiming once a year in line with your accounting period is recommended.

However you can choose to claim more or less frequently.

If you want to claim more than once a year, each claim should be for at least £100 of Gift Aid.





Questions

?

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Girlguiding
Middlesex North West
county

