



HM Revenue  
& Customs

# Personal Tax Account

A new online service  
for your employees



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# Introduction



Hello,

We want to make it as easy as possible for everyone to pay the right tax at the right time. Many of our customers want user-friendly digital services from HMRC, so they can take care of their tax in the same way that they manage their banking and food shopping: online and in their own time.

At the end of last year, we introduced the Personal Tax Account - the front door to our digital services that enables individual taxpayers to understand their tax position, update us on changes to their circumstances, and access our support without the need to pick up a phone or pen. Millions of people are already using these accounts, and we really appreciate your help in promoting this new service to your employees.

We hear from businesses that their payroll teams are often the first port of call for employees who see a change in the tax they pay through their payslip, and so we hope this new service will benefit you as well.

This short booklet sets out the features already available in the Personal Tax Account, and how your employees can get started. We continue to keep improving the service, week on week. Let us know what you (and your people) think.

Thank you for your support.

A handwritten signature in black ink, appearing to read 'Ruth Owen', with a long horizontal line underneath.

**Ruth Owen**  
Director General for HMRC Customer Services

# The Personal Tax Account

It takes just a few minutes to get a Personal Tax Account, and we are adding more services all the time.

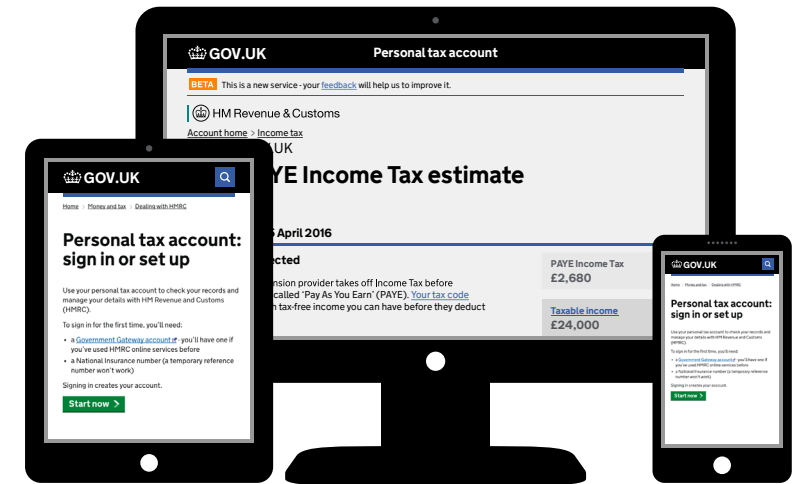
Everyone now has access to a Personal Tax Account.

Introduced last year, these digital accounts work like an online bank account, presenting taxpayers with a personalised picture of their tax affairs, along with prompts, advice and support through webchat.

Millions of people are already using their Personal Tax Account to check their details, report changes or manage their tax affairs - for instance, to renew their tax credits, check how much State Pension they will receive, or save money through Marriage Allowance.

By accessing their Personal Tax Account, your employees can solve their queries easily online, without the need to contact HMRC or your payroll teams. And they can opt for a paperless relationship with HMRC, receiving everything online rather than through the post.

It takes just a few minutes to get a Personal Tax Account, and we are adding more services all the time. This booklet sets out the services available and how to get started.



# Personal Tax Account services

There is a wide range of services available in the Personal Tax Account, with more being added all the time. People can use their account to:

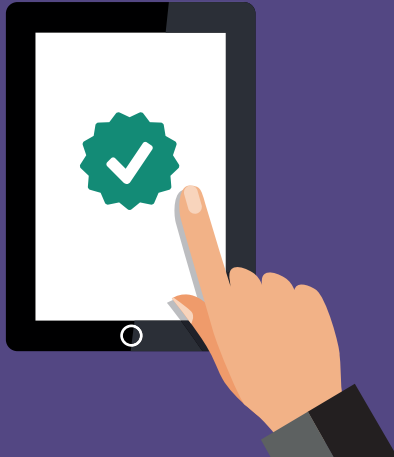
- view their personal details and update their address
- check their National Insurance contributions record and see a forecast of their State Pension and when they can expect to receive it
- view their tax code, check their estimated tax liability and report changes using HMRC online forms
- renew their tax credit claims, view payment information and tell HMRC about changes
- check any Medical Benefit deduction included in their tax code
- make changes to the company car and car fuel benefits included in their tax code
- check their eligibility for Marriage Allowance, and claim over £200 a year if they are eligible
- access a wide range of online forms, and track their progress online - for example, claim a tax refund, report changes to Child Benefit, or apply for a National Insurance contributions refund
- choose how to receive information from HMRC - for instance, by opting to receive all PAYE and Self Assessment correspondence online rather than through the post.

We hear from businesses that their payroll departments are often the first point of contact for employees with questions about their tax - for instance, when they see a change in their tax position through their payslip. Your employees will find the answers to many of their questions in their Personal Tax Account.



# Benefits of the Personal Tax Account

All your tax, tax credits and National Insurance information in one place



Available 24/7, at a time that suits you



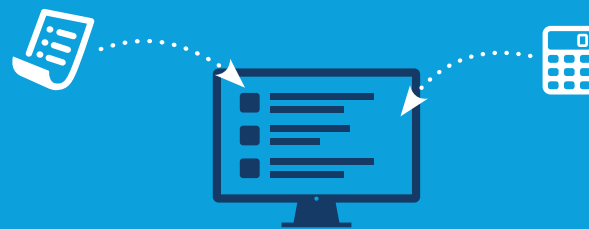
Access from your computer, tablet or smartphone



Simple, personalised and secure



Go paperless. No more forms or letters through the post



Advice and support through webchat if you need it



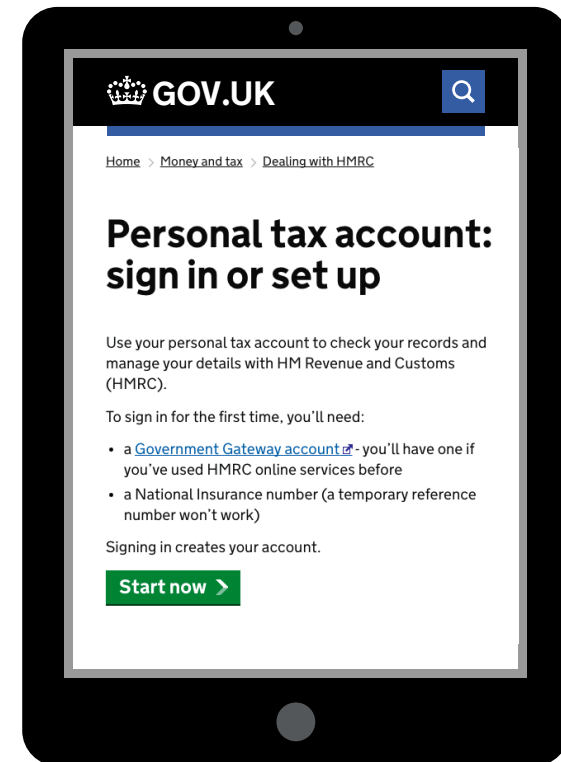
# Getting started

Your employees can access their Personal Tax Account on any device - PC, tablet or smartphone. It is really secure, and takes just a few minutes to get going. Those doing it for the first time will need the following items to hand:

- their National Insurance number
- either a recent payslip or P60 (a passport can be used if you don't have these)
- a phone, to receive a security access code.

There are three simple steps for them to get started

- 1 Go to [gov.uk/personal-tax-account](https://gov.uk/personal-tax-account) and click 'start now'.
- 2 Set up a Government Gateway account (if not already held) by answering a few simple questions. This is where their payslip or P60 are needed.  
A security access code will be sent to their phone.
- 3 Enter the access code on their phone when prompted, which will take them straight to their account.



# Questions and feedback

## Thank you for your help

If you have any questions and comments about the information in this booklet, or promoting the Personal Tax Account to your employees, please contact us at: [personaltaxaccount.feedback@hmrc.gsi.gov.uk](mailto:personaltaxaccount.feedback@hmrc.gsi.gov.uk)

We're always updating and improving our services based on what you tell us. Use the Personal Tax Account feedback service to let us know about your experience before you logout.



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