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ide House ston eshead 1 9HU			Select VAT perio Start Date	od Due Stat	Date	
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VAT Payments VAT Liabi	ities Sybmissio Details	n <u>S</u> ubmit VA <sup>*</sup> Return	T Pay ⊻AT	Print	Cancel	Qlose
	per Dérait	Submit VAT Return	Pay 1AT			Ğoss

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## **DOCUMENT PURPOSE**

This document is intended to give step by step instructions for using Calidore's Power-Gx VAT Return via HMRC's new Making Tax Digital (MTD) service.

#### SIGN UP TO MAKING TAX DIGITAL

Before submitting a VAT Return, using Power-Gx via Making Tax Digital (MTD), please check the guidance on the Gov.uk website, click on the link below.

#### HMRC Making Tax Digital

Once your business has signed up for MTD you may use these steps to submit your VAT return, view a previously submitted VAT return, view VAT liabilities or view VAT payments.

#### **POWER-GX VAT RETURN**

Before proceeding to the Power-Gx VAT Return select the Company Details option from the Administration menu, please note that only administration users have this option enabled. Ensure the VAT Registration Number (VRN) is present and correct, the MTD software will use the VRN to submit your VAT Return.

Select VAT Return from the Gx Nominal menu. The first time you select this on or after 1<sup>st</sup> April 2019 you will see the following prompt.



If you have signed up to MTD then answer "Yes" to this question, otherwise click "No". For those businesses answering "Yes" you will not see this question again, users who answered "No" will see the prompt each time they select the VAT Return menu option. Once you have selected "Yes" you cannot undo your choice so please be sure to select the correct option.

If you declined to use MTD then you will see the usual VAT Return form where you may submit your VAT Return in the normal way. If you are using MTD then you will see a new VAT Return window as below.

OP Demonstration Company (EP) Unit 1a Gibside House Waterside Drive Dunston Gateshead Tyne and Wear United Kingdom NE11 9HU End Date End Date Start Date End Date 1 2 3 4 5 6		 Get	Get Outstanding Returns	3-2019	<mark>4/17</mark>	3	urrent eriod End		TD VAT RE
Waterside Drive Dunston Gateshead Tyne and Wear United Kingdom NE11 9HU V I I I I I I I I I I I I I I I I I I				t VAT period	^ s			Company (EP) Ise	P Demonstration hit 1a Gibside Hou
Linited Kingdom NE11 9HU End Date Status Received Date 1 2 3 4 4 5		Date	Due Dat	Date	s			unston	aterside Drive D Iteshead Ine and Wear
Received Date		15	Status	Date	E		yne and Wear Inited Kingdom IF11 9HU		
1         2         3         4         5         6		ived Date	Receive		~				
		 1							
4 5 6		 3							
5		4							
5									
6		5							
	_	6							
7		7							
8		 8							
<u> </u>		9							

## SUBMITTING A VAT RETURN

- 1. Select the Financial Year from the drop-down list at the top of the window, this will default to the current financial year according to the current Nominal Ledger period end which is displayed to the left.
- Click the "Get Outstanding Returns" button, this will begin the process to retrieve a list of VAT obligations from HMRC. A progress window will appear with the message "Retrieving VAT Obligations from HMRC, please wait...".
  - a. The first time the software communicates with HMRC you must go through an authorisation process to grant Power-Gx permission to retrieve and submit data on behalf of your business. The first window will explain the process, please read it, scroll down and press "Continue".

^	uthority to interact with UMPC on
y	our behalf
Pc be	wer-HMRC-VAT needs permission to interact with HMRC on your half. To grant this authority, you'll need to:
1.	Sign in to your Government Gateway account.
2.	Enter the 6 digit access code we'll send to your mobile phone, landline or other device.
3.	You might need to confirm who you are by answering some security questions on, for example, your passport, P60 or other documents.
4.	Grant authority for this software to interact with HMRC on your behalf.

b. The next window will ask you for your HMRC Gov.uk username and password, please enter them and press "Sign In".

Authorise	-		×
📾 GOV.UK			í
HM Revenue & Customs			
Sign in			
Enter your Test User credentials to sign in.			
User ID			
Password			
Sign in			
Problems signing in			
Don't have Test User credentials			
Gat haln with this name			
Getrep murans page.			
			`
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c. The next window will ask you to grant premission to Power-Gx to interact with HMRC on your behalf, to do this click on the "Grant Authority" button.

Authority to interact with HMRC on because behaviour application is requesting to do the lolowing: • View your VAT information • Otange your VAT information t will be able to do the above for 18 months from when you grant authority. You can remove this authority (opens in a new tab) at any time.	HM Revenue & Custom	is 05727360	7619
The Power-HMRC-VAT software application is requesting to do the ollowing: • View your VAT information • Change your VAT information • will be able to do the above for 18 months from when you grant authority. Grant authority Grant authority You can remove this authority (opens in a new tab) at any time.	Authority to into your behalf	eract with HMRC on	
View your VAT information     Change your VAT information It will be able to do the above for 18 months from when you grant authority.     Grant authority     You can remove this     authority (opens in a     new tab) at any time.	The Power-HMRC-VAT softwa following:	re application is requesting to do the	
It will be able to do the above for 18 months from when you grant authority. Grant authority Grant authority new tab) at any time.	View your VAT information     Change your VAT informatio	n	
Grant authority You can remove this authority (opens in a new tab) at any time.	It will be able to do the above f authority.	or 18 months from when you grant	
	Grant authority	You can <u>remove this</u> <u>authority (opens in a</u> <u>new tab)</u> at any time.	
	(		

d. The final window confirms that you have granted authorisation, close the window using the X in the top right corner.

	1	ш	_
📾 GOV.UK			
HM Revenue & Customs			
Authorisation granted			
Please close this window to return to Power-HMRC-VAT.			
Cookies Privacy policy. Terms and conditions. Help using GOV.UK.			
Cookies. Privacy policy. Terms and conditions. Help using GOV.UK.	therwise		
Cookies. Privacy policy. Terms and conditions. Help using GOV.UK. CCL All context is available under the <u>Open Government Licence v1.0</u> , except where of statled	therwise		

- e. Please note that authorisation last 2 years, after this time you will have to repeat the process again.
- 3. The VAT Obligations retrieved from HMRC will be listed in the "Select VAT period" drop down list. This is the list of VAT Periods that are outstanding with HMRC, click on the list and select the desired period.

Select VAT period	I		
	Start Date	End Date	Due Date Status
	01/04/17	30/06/17	07/08/17 OPEN
Start Date Due I	Date		^
End Date Statu	IS		
Recei	ived Date		<b>,</b>

4. Using the start and end dates for the selected VAT period the system will now build the VAT totals for the VAT Return. An information window will appear whilst this is in progress displaying the message "Building VAT Return Totals, please wait...". Once completed you will see a screen similar to the sample below.

		Select Financial Year			
MTD VAT RETURN	Current 28/02/19 Period End	2018-2019 Get Ou Re	utstanding eturns	Get S	ubmitted Return
Test Company Ltd. Unit 1a	^	Select VAT period	0	1/04/1	.7
Gibside House Dunston Gateshead U.K.		Start Date         01/04/17           End Date         30/06/17	7 Due Date 7 Status	1	07/08/1 Open
NETT AHO	× .		Received	Date	
AT due in this period on sales	and other outputs			1	<b>#</b> 25.4 <b>8</b> 0
AT due in this period on sales AT due in this period on aquis	s and other outputs sitions from EC Member States			1 2	<b>#</b> 25,4 <b>4</b> 0. 0.1
AT due in this period on sales AT due in this period on aquis otal VAT Due (the sum of box	s and other outputs sitions from EC Member States res 1 and 2)			1 2 3	<b>∦</b> 25,4 <b>4</b> 0. 0. <b>1</b> ∦25,440.
AT due in this period on sales AT due in this period on aquis Jtal VAT Due (the sum of box AT reclaimed in this period or	s and other outputs sitions from EC Member States (es 1 and 2) 1 purchases and other inputs (i	ncluding acquisitions from EC;	)	1 2 3 4	<b>/\$</b> 25,4 <b>\$</b> 0.1 0.1 <b>\$}</b> \$5,4¢0.1 70.1
AT due in this period on sales AT due in this period on aquis Jtal VAT Due (the sum of box AT reclaimed in this period or	s and other outputs sitions from EC Member States (es 1 and 2) 1 purchases and other inputs (1	ncluding acquisitions from EC;	)	1 2 3 4	(\$25,440. 0. \$\$5,440. \$0.
AT due in this period on sales AT due in this period on aquis Ital VAT Due (the sum of box AT reclaimed in this period or at VAT to be paid to Customs	s and other outputs sitions from EC Member States ies I and 2) a purchases and other inputs (i s or reclaimed by you. (Differen	ncluding acquisitions from EC ce between boxes 3 and 4)	)	1 2 2 3 2 4 2 5 2	(\$25,4&0. 0. \$}\$5,4@0. ¥0.; ₩15,4@9.
AT due in this period on sales AT due in this period on aquis tal VAT Due (the sum of box AT reclaimed in this period or et VAT to be paid to Customs	s and other outputs sitions from EC Member States (es 1 and 2) n purchases and other inputs (i or reclaimed by you. (Differen	ncluding acquisitions from EC, ce between boxes 3 and 4)	)	1 2 3 4 5 5	(\$25,4&0. 0. \$}\$5,4\$0. ₽0. ₽25,4 <u>72</u> ;
AT due in this period on sales AT due in this period on aquis tal VAT Due (the sum of box AT reclaimed in this period or et VAT to be paid to Customs tal value of sales and all oth tal value of purchases and c	s and other outputs sitions from EC Member States res 1 and 2) a purchases and other inputs (i s or reclaimed by you. (Differen er outputs excluding any VAT ther inputs excluding any VAT	ncluding acquisitions from EC, ce between boxes 3 and 4)	)	1 2 3 4 5 6 7	(\$25,440. 0. \$\$25,440. \$0. \$\$35,470 \$\$35,470 \$\$35,470 \$\$797,240. 104.
AT due in this period on sales AT due in this period on aquis ttal VAT Due (the sum of box AT reclaimed in this period or et VAT to be paid to Customs otal value of sales and all oth otal value of purchases and o	s and other outputs sitions from EC Member States res 1 and 2) a purchases and other inputs (i s or reclaimed by you. (Differen er outputs excluding any VAT other inputs excluding any VAT	ncluding acquisitions from EC ce between boxes 3 and 4)	)	1 2 3 4 5 6 7	(\$25,440. 0. 1\$25,460. 10. 10. 10. 10. 104.
AT due in this period on sales AT due in this period on aquis tal VAT Due (the sum of box AT reclaimed in this period or at VAT to be paid to Customs tal value of sales and all oth otal value of purchases and o otal sales of goods/related so	s and other outputs sitions from EC Member States (es 1 and 2) a purchases and other inputs (i s or reclaimed by you. (Differen er outputs excluding any VAT ther inputs excluding any VAT ervices excluding VAT to EC Me	ncluding acquisitions from EC ce between boxes 3 and 4) mbers	)	1 2 3 4 5 6 7 8	(\$25,440. 0. \$\$5,440. 10. \$105,450. \$105,450. \$104. 104.
AT due in this period on sales AT due in this period on aquis tal VAT Due (the sum of box AT reclaimed in this period or <b>et VAT to be paid to Customs</b> otal value of sales and all oth otal value of purchases and o tal sales of goods/related so tal goods/related services a	s and other outputs sitions from EC Member States (ses 1 and 2) a purchases and other inputs (i c or reclaimed by you. (Differen (ser outputs excluding any VAT ther inputs excluding any VAT ervices excluding VAT to EC Me aquisitions excluding VAT form I	ncluding acquisitions from EC; ce between boxes 3 and 4) mbers EC Members	)	1 2 3 4 5 6 7 8 8	(\$25,4&0. 0. \$\$6,4\$0. 10. 105,4\$9: \$,7\$7,2\$0. 104. 104. 0.

Notice that the "Submit Vat Return", "VAT Payments" and "VAT Liabilities" buttons have become active.

- 5. You may view/print the VAT analysis report or double click on the totals to view the transaction screen.
- 6. When you are ready to submit your VAT Return click on "Submit VAT Return", you will be presented with a Declaration from HMRC as below.

Test Company Ltd.\BEN\I	POWER-Gx NOMINAL\V X
HMRC De	eclaration;
When you submit this making a legal declara is true and complete. result in p	VAT information you are tion that the information A false declaration can prosecution.
Please tick here to con declaration.	firm you have read the
<u>O</u> K	Cancel

Tick the bow to confirm you have read it and press the OK button. Your return will now be sent to HMRC, a progress window will appear informing you of this.

7. Once the submission has been successful you will see a confirmation message similar to this.

Informatio	on Message Control Centre	×
?	Your VAT Return has been submitted successfully to HMRC. HMRC processed it on 11/03/19 at 14:20:23. Payment will be collected by Direct Debit.	
	ОК	

Click OK to return to the VAT Return screen. Notice the status has changed to "Fulfilled" and the Received Date is today's date.

8. You may check the details of when the VAT Return was received and processed at any time using the "Submission Details" button, this displays the following information.

informatio	on Message Control Centre	х
?	Submission Details Received on 11/03/19 at 14:20:23 Processed on 11/03/19 at 14:20:23 Form Bundle Number 064657626817 Charge Reference Number 81TGaQvULtpa2H7J Receipt Id 1ffadb95-0c53-46e5-b1b8-115c26ec466d Receipt Signature This has been deprecated - DO NOT USE	
	ОК	

9. You may use the "VAT Payments" and "VAT Liabilities" buttons to view any payments you have made or any monies owed during the 12 months preceding the end date of the VAT period you are viewing.

## VIEW A PREVIOUSLY SUBMITTED VAT RETURN

- 1. Select the Financial Year from the drop-down list at the top of the window, this will default to the current financial year according to the current Nominal Ledger period end which is displayed to the left.
- Click the "Get Submitted Returns" button, this will begin the process to retrieve a list of VAT Returns that have been submitted to HMRC via MTD. A progress window will appear with the message "Retrieving VAT Obligations from HMRC, please wait...".
- 3. The VAT Obligations retrieved from HMRC will be listed in the "Select VAT period" drop down list. This is the list of VAT Periods that have had a VAT Return submitted to HMRC via MTD, click on the list and select the desired period.



4. The system will now retrieve the VAT Return from HMRC. An information window will appear whilst this is in progress displaying the message "Retrieving VAT Return from HMRC, please wait...". Once completed you will see a screen similar to the sample below.

	Current .	Select Financial Year				
MTD VAT RETURN	Period End	2018-2019 Get 0 R	utstanding leturns	Get Submitted Retur		
Test Company Ltd.	^	Select VAT period		01/01/	17	
Unit 1a Gibside House						
Dunston		Start Date 01/01/1	7 Due Da	ite	07/05/	
Gateshead						
NE11 9HU		End Date 31/03/1	7 Status		FULFILLED	
	v .		Receiv	ed Date	06/05/	
'AT due in this period on sale: 'AT due in this period on aqui	s and other outputs sitions from EC Member States			1 2 2	<b>\$43,83</b> 2 0	
/AT due in this period on sale /AT due in this period on aqui otal VAT Due (the sum of box /AT reclaimed in this period o	s and other outputs sitions from EC Member States (es 1 and 2) n purchases and other inputs ()	including acquisitions from EC	2)	1 2 3 4	<b>#43,89</b> 2 0 <b>3</b> 4 <b>1,8</b> 4	
/AT due in this period on sale /AT due in this period on aqui otal VAT Due (the sum of box /AT reclaimed in this period or	s and other outputs sitions from EC Member States (es 1 and 2) n purchases and other inputs (	including acquisitions from EC	<b>;</b> )	1 2 3 4	<b>j/43,8%2</b> 0 <b>3</b> /4 <b>1/,8%</b> 2 0	
AT due in this period on sale AT due in this period on aqui otal VAT Due (the sum of bos AT reclaimed in this period on let VAT to be paid to Customs	s and other outputs sitions from EC Member States ces 1 and 2) n purchases and other inputs ( s or reclaimed by you. (Differen	including acquisitions from EC	:)	1 2 3 4 5	₿ <b>43,8</b> 92 0 <b>344</b> 8, <b>8</b> 92 0 <b>948,49</b> 2	
AT due in this period on sales AT due in this period on aqui otal VAT Due (the sum of bos VAT reclaimed in this period o let VAT to be paid to Customs otal value of sales and all oth	s and other outputs sitions from EC Member States ces 1 and 2) n purchases and other inputs ( s or reclaimed by you. (Differen er outputs excluding any VAT	including acquisitions from EC ice between boxes 3 and 4)	;)	1 2 3 4 5	₿43,8% 0 ₽4₿,8% 0 ₽4₿,8% 0 ₽4₿,8%	
/AT due in this period on sale: /AT due in this period on aqui otal VAT Due (the sum of box /AT reclaimed in this period on let VAT to be paid to Customs fotal value of sales and all oth otal value of purchases and	s and other outputs sitions from EC Member States (ses 1 and 2) n purchases and other inputs ( s or reclaimed by you. (Differen er outputs excluding any VAT other inputs excluding any VAT	including acquisitions from EC Ince between boxes 3 and 4)	:)	1 2 3 4 5 6 7	₿43,850 0 ₽4₿,852 0 94₿,662 8,600,219 0	
AT due in this period on sale AT due in this period on aqui otal VAT Due (the sum of boo AT reclaimed in this period on let VAT to be paid to Customs otal value of sales and all oth otal value of purchases and o	s and other outputs sitions from EC Member States ces 1 and 2) n purchases and other inputs ( s or reclaimed by you. (Differen er outputs excluding any VAT other inputs excluding any VAT	including acquisitions from EC icce between boxes 3 and 4)	)	1 2 3 4 5 6 7	<b>j</b> 43,842 0 <b>3</b> 4 <b>1</b> ,452 0 <b>9</b> 4 <b>2</b> ,462 6,4704,219 0	
AT due in this period on sale: (AT due in this period on aqui otal VAT Due (the sum of box (AT reclaimed in this period or let VAT to be paid to Customs otal value of sales and all ot otal value of purchases and of otal sales of goods/ related s	s and other outputs sitions from EC Member States (se 1 and 2) n purchases and other inputs ( s or reclaimed by you. (Differen eer outputs excluding any VAT other inputs excluding any VAT ervices excluding VAT to EC Me	including acquisitions from EC ice between boxes 3 and 4) mbers	c)	1 2 3 4 5 5 6 7 8	₿43,892 0 948,492 0 948,492 8,4704,219 0 0 0 0 0	
AT due in this period on sale AT due in this period on aqui otal VAT Due (the sum of box AT reclaimed in this period or let VAT to be paid to Customs otal value of sales and all oth otal value of purchases and otal sales of goods/related s otal goods/related services	s and other outputs sitions from EC Member States ces 1 and 2) n purchases and other inputs ( s or reclaimed by you. (Differen ner outputs excluding any VAT other inputs excluding any VAT rervices excluding VAT to EC Me aquisitions excluding VAT from	including acquisitions from EC ice between boxes 3 and 4) embers EC Members	;)	1 2 3 4 5 6 7 8 9	₿43,832 0 <b>248,66</b> 2 0 <b>948,66</b> 2 6 <b>8</b> 00 <b>0</b> ,219 0 0 <b>(\$4</b> ,162 0	

Notice the "VAT Payments", "VAT Liabilities" and "Submission Details" buttons have become active.

- 5. You may view/print the VAT analysis report or double click on the totals to view the transaction screen.
- 6. If you wish to check when the VAT Return was submitted and processed click on the "Submission Details" button, this will show you information as shown in the sample below.

nformatio	on Message Control Centre	×
?	Submission Details Received on 11/03/19 at 14:20:23 Processed on 11/03/19 at 14:20:23 Form Bundle Number 064657626817 Charge Reference Number 81TGaQvULtpa2H7J Receipt Id 1ffadb95-0c53-46e5-b1b8-115c26ec466d Receipt Signature This has been deprecated - DO NOT USE	
	ОК	

7. You may use the "VAT Payments" and "VAT Liabilities" buttons to view any payments you have made or any monies owed during the 12 months preceding the end date of the VAT period you are viewing.

### **VIEW VAT LIABILITIES**

Please see the sections on Submitting a VAT Return and View previously submitted VAT Return.

### **VIEW VAT PAYMENTS**

Please see the sections on Submitting a VAT Return and View previously submitted VAT Return.

### AMEND A VAT RETURN USING CURRENT PROCESS

You should use the current process for correcting errors on a submitted VAT Return:

If the net value of the errors is below  $\pounds 10,000$ , or between  $\pounds 10,000$  and  $\pounds 50,000$  and does not exceed 1% of the box 6 amount, you can adjust your current VAT Return using this method.

#### Method 1

If the net value of the errors is greater than that, you must notify HMRC in writing with full details of the errors, see this method below.

#### Method 2

You can choose to use method 2 and notify HMRC separately in any case. Please note that these instructions are directly from HMRC.

### PAY VAT OR GET REPAYMENT

There are multiple ways to pay a VAT bill, please see this site for all the methods.

#### Pay your VAT bill

#### **NOTIFY A CHANGE OF CIRCUMSTANCES**

You can update a range of information online which includes email address, principle place of business, VAT return dates, repayment bank account details and deregistering from VAT.

You can do this by visiting your Business Tax Account at:

**Business Tax Account**