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# Gift Aid

This is the **third** of three presentations

- These presentations guide you through the general process of the Gift Aid application
- Presentation 1 – Register with HMRC for Gift Aid
- Presentation 2 – The parents Gift Aid form and Register for an online account with HMRC
- Presentation 3 – Submitting your Gift Aid Claim









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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Summary

Sign In

- Sign in to [HMRC Online Services](#)

Remember HMRC Charities Helpline on 0300 123 1073

Navigate the system

- Select 'access service' (next to 'Charities'), then 'make a charity repayment claim' where you'll be asked questions about the type of claim you're making.

About the Organisation

- Answer the questions about the organisation. (The Scout Group is NOT managed by a Trust company).







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Summary

Remember HMRC Charities Helpline on 0300 123 1073

Declaration

- From the Green Ticks page select 'next' and go to the 'declaration page' to finalise your claim.



Submit Your Claim

- You'll get an on-screen confirmation with the date and time it was sent. You'll also see a reference number. Make a note of it. You can use it if you need to contact HMRC about the claim but it's not a confirmation of payment.



Save and Go Back Later

- If you log out or you're timed out during the claim process, your details will be saved. When you log in again, you'll be asked if you want to continue.
- If you do, you'll be taken to the stage you reached earlier.



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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Summary

HMRC Gift Aid Website

- This process is detailed on the
- [HMRC Gift Aid Website](#)

Remember HMRC Charities Helpline on 0300 123 1073



Helpline

- For further support or information about Gift Aid, please contact the very helpful HMRC Charities Helpline on 0300 123 1073 (open from 8am to 5pm, Monday to Friday).



Sponsored Events?

- You can also claim Gift Aid for sponsored Events – details are at the [HMRC Gift Aid Website](#). Or you may prefer to set up a [BT MyDonate website](#) to make collections easier





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Account Activisation

Now visit [www.gateway.gov.uk](http://www.gateway.gov.uk) and “Enter the Gateway” by clicking

The screenshot shows the Government Gateway homepage. At the top left is the 'Government Gateway' logo. Below it is a navigation menu with links for 'What is the Government Gateway?', 'Help desks', and 'Is it secure?'. The main content area starts with a 'Welcome to the Government Gateway' message, followed by a question: 'Do you have an existing account for online government services?'. Below this is a section for 'Enter the Government Gateway' with a button that has an arrow pointing to it from the text above. There are also links for 'Which government services are available online?' and 'More information about registration'. Below this is a registration section with three tabs: 'Individuals', 'Organisations', and 'Agents'. Each tab has a brief description and a link to 'Register as an...' followed by a list of services. At the bottom, there is a 'Privacy policy' link and a 'Recommended Links' section featuring the GOV.UK logo and the text 'The best place to find government services and information'.





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Account Activisation

Government Gateway

**Government Gateway**

Login

You will need to register before you can use our services [Register](#)

Please choose your login method: [Help?](#)

**User ID & password**

Enter your User ID & password:

[Digital certificate](#)

[Chip & pin - respond](#)

[Chip & pin - identify](#)

[One time password](#)

User ID  [Forgotten your User ID?](#)

Password  [Forgotten your password?](#)

- When you have finished your online session, you should either close the browser or log out.
- Please do not use the browser back button as it may not function as expected.

You have already registered at Step 3.

•Now Enter your User ID (you made a note of it in Step 3) and

•Password (you chose your password in Step 3)

•and Click Log in



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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Screen by screen Account Activisation

Government Gateway

Welcome Clive Richard Fenn  
You are logged in as an Organisation

**Your services**

**Services awaiting activation:**

Select the link to activate the service (requires service Activation code).

- ▶ [Charities and Community Amateur Sports Clubs - HMRC-CHAR-ORG \(Awaiting service Activation code\)](#)

Your service Activation code is sent to you in the post.

**Services available**

Select a service to enrol.

- ▶ [Alcohol & Tobacco Warehousing Declarations \(ATWD\)](#)
- ▶ [Automatic enrolment online registration \(for employers\) - The Pensions Regulator](#)

Click the service that requires the Activation Code







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Account Activisation

Government Gateway

Welcome Clive Richard Fenn  
You are logged in as an Organisation

- Your account
- Your services
- Manage services
- Change your details
- Manage logins
- Manage Administrators
- Manage Assistants

### Activate enrolment

**Charities and Community Amateur Sports Clubs**

You have successfully activated this service.

To use the service please use the following link:

[Charities and Community Amateur Sports Clubs](#)

Where would you like to go next?

[Go to 'Your services'](#)

Click the Link “Charities and Community Amateur Sports Clubs” and Log in again



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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Making a Claim

## Welcome to HMRC Online services

**Existing users**

If you're already signed up for HMRC online services and have a Government Gateway account enter your user ID and password then click the login button.

**Please note:** Fields are not case sensitive.

User ID:

Password:

Login

- ▶ [Lost User ID?](#)
- ▶ [Lost password?](#)
- ▶ [Lost or expired Activation Code?](#)
- ▶ Lost user ID and password?

Self assessment individuals can [try our new service](#) or use the [online form](#) to ask for a duplicate user ID.

For all other self assessment customers and for other online services contact the [HMRC Online Services Helpdesk](#).

- ▶ [GOV.UK Verify user \(Self Assessment Only\)](#)

**New user**

To sign up to use HMRC Online Services and to register a business for HMRC taxes, please click the 'Register' button below.

Register

- ▶ [Frequently Asked Questions \(FAQs\)](#)
- ▶ [Registration and Enrolment process](#)

Enter your User ID and password as previously





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Making a Claim

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

▲ Your HMRC services Clive Richard Fenn

- Main menu**
- ▼ Your HMRC services
    - ▶ View communications
    - ▶ Register for HMRC taxes
    - ▶ Services you can use
    - ▶ Services you can add
    - ▶ Other services
  - ▶ Your account
  - ▶ Tools & Calculators

## Services you can use

The services you have signed up for are listed below.

To access a service that you are enrolled and activated for, follow the relevant 'Access service' link.

If you have enrolled for a service but haven't activated it, please follow the relevant 'Activate service' link to enter your Activation Code.

**Business help and education emails** ▶ Access service

Business help and education emails is a free service to provide you and your business with emails from HM Revenue & Customs that are tailored to your needs.

**Charities** ▶ Access service

HMRC charities reference: EW39723

**Notification of Vehicle Arrivals** ▶ Access service

For VAT registered businesses, non VAT registered businesses or private individuals to notify HMRC of vehicles brought into the UK from abroad.

Click on "Access service" in the "Charities" section.







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Making a Claim

Your HMRC services 12th Bolton (Rosehill) Scout Group HMRC charities reference: EW39723

## Repayment claim details

### Questions about this 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? \*  ?

Are you claiming UK tax deducted from other income? \*  ?

Are you claiming a top up payment for small cash donations under GASDS? These are not your Gift Aid donations.  ?

Your claim reference number:

Back Next

Select the appropriate answers to the three questions. Probably Yes, No, No.

If you wish to use a reference for your claim, you may do so.

Click Next



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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Screen by screen Making a Claim

**Charity repayment claim**

- At a glance
- Repayment claim summary
- About the organisation
- Attach Gift Aid 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

This is to show you your progress and you have completed the Repayment claim details.

Click Next

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

Delete

Next







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Screen by screen Making a Claim

Charity repayment claim	
▶ At a glance	
▶ Repayment claim summary	
▶ About the organisation	
▶ Attach Gift Aid 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 ▶](#)

If you do not already have a Gift Aid schedule, download a Gift Aid schedule in the correct format so you can cut and paste information from your own spreadsheet software into the .ods spreadsheet you download by clicking the link.







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Screen by screen Making a Claim

HM Revenue & Customs | Home | Cymraeg | Contact HMRC | Help | Sign out

▲ Your HMRC services | **12th Bolton (Rosehill) Scout Group** | HMRC charities reference: EW39723

### 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

This page shows your progress to date. We have completed the section on Organisation details.

Now Sign Out.

You now need to complete your Gift Aid schedule before returning to this page.

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



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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Completing your Gift Aid Schedule

You can use your own spreadsheet software but to submit to HMRC the schedule has to be in ods format in a specific format and headings, and sheet details. You might prefer to complete in your own spreadsheet software and cut and paste the required information into the ods spreadsheet.

To start with, you could use this spreadsheet



For more information visit <https://www.gov.uk/guidance/schedule-spreadsheet-to-claim-back-tax-on-gift-aid-donations>





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Completing your Gift Aid Schedule

The spreadsheet requires **for each line entry:**

- title
- first name (or first initial) and last name (max 35 characters per line)
- house name or number
- postcode, using capital letters and include a space, for example, S19 2BD
- donation date, using the format DD/MM/YY or enter the latest date in a series of donations made by the donor
- donation amount, without using £ signs and showing amounts to 2 decimal places, eg 200.00 not £200









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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Uploading your Gift Aid Schedule

Once you have a completed schedule in ods format saved to your computer. You need to log back into your account. To do this click the following link

<https://www.tax.service.gov.uk/loggedout>



HM Revenue & Customs

You're signed out

You're now signed out of your tax account.

[Sign in to your tax account](#)

[Explore GOV.UK](#)

Click the link "Sign in to your tax account"







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Uploading your Gift Aid Schedule

**GOV.UK**    Your tax account    Home    Manage account    Help and contact

We're improving HMRC's online services  
[Help us get it right.](#) (Opens a short survey)

HM Revenue & Customs

Clive R  
Last sign in: 30 March 20

Payments take 4 to 7 working days to appear on this page.  
Completed return amounts take 1 to 2 days to appear on this page.

### Charities IT System for Organisations

[View account](#)



### Messages

[Go to your messages](#)

Click the link "View account"

### Other services

- [Employment intermediaries](#)
- [Intrastat Supplementary Declaration](#)
- [Notification of Vehicle Arrivals \(NOVA\)](#)
- [VAT on e-Services \(VOES\)](#)

### Help with tax

- [Money and tax on GOV.UK](#)
- [HMRC help on YouTube](#)
- [Help and contact](#)



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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Uploading your Gift Aid Schedule

Your HMRC services

12th Bolton (Rosehill) Scout Group  
HMRC charities reference: EW39723

### At a glance

<b>Charity repayment claim</b>
▶ At a glance
▶ Continue with charity repayment claim
▶ FAQs

#### Make a charity repayment claim

You have started to make a charity repayment claim using this Charities service. Please follow the link below to complete and submit your claim.

[Continue with charity repayment claim](#)

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

[View a list of commercial software](#)

#### News & updates

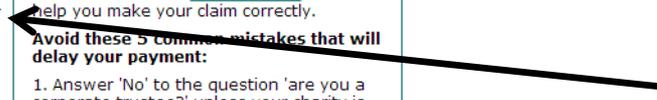
Welcome to the charities online service.

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.



Click link "Continue with charity repayment claim"







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Uploading your Gift Aid Schedule

Your HMRC services **12th Bolton (Rosehill) Scout Group**  
HMRC charities reference: EW3972

### Attach Gift Aid schedule

Gift Aid schedule - Errors

To help you check the information on your schedule you can print this page using the print button in your internet browser.

**X** The Gift Aid schedule you attached contains one or more errors. Please see details below. Please correct the errors in your Gift Aid schedule on the spreadsheet saved on your computer and then attach the updated Gift Aid schedule by following the link below.



**X ERROR: Item 2 First name is missing.**

The affected row from your schedule is shown below:

Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event	Donation date	Amount (£)
2		<b>X Error</b>						27/03/2015	187.00

In addition to the example shown above 30 more errors of this type have been found. Please check your schedule carefully and correct all similar errors.

**X ERROR: Item 2 Last name is missing.**

The affected row from your schedule is shown below:

Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event	Donation date	Amount (£)
2			<b>X Error</b>					27/03/2015	187.00

If you get an Error page – print-off and go back to your .ods file and correct errors before logging in and repeating last steps. Once all errors have been corrected you should get the next ‘Confirmation’ page.





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Uploading your Gift Aid Schedule

Click 'Next' to get the Repayment Claim Summary page – hopefully with 3 ticks in the middle of the page as shown on the next slide.





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

## Uploading your Gift Aid Schedule

12th Bolton (Rosehill) Scout Group  
HMRC charities reference: EW39723

**Charity repayment claim**

- At a glance
- Repayment claim summary
- About the organisation
- Attach Gift Aid schedule
- FAQs

### Repayment claim summary

You have completed all the required sections of your claim and you can finalise your claim by clicking the 'Next' button below.

If you want to check any part of your claim before you finish then click on the appropriate link in the 'status' column (below) which will take you to the section selected.

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

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

Delete

Next

Congratulations  
3 ticks

Click 'Next'





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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s Uploading your Gift Aid Schedule

## Security check

To increase the security of this service and to further protect the information you are providing, HM Revenue and Customs need to reauthenticate your details.

Please enter the User ID and password associated with this online service then click the 'Submit' button to continue.

**Please note:** You must only click the 'Submit' button once. Please do not log out until an acknowledgment is displayed confirming that your submission has been received.

\* indicates required information

User ID: \*  ?  
Password: \*

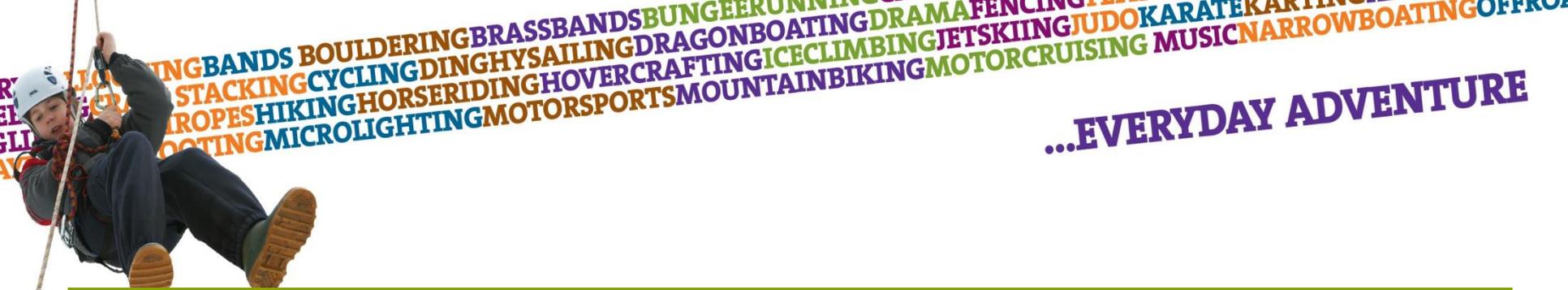
Back Submit

This is the Security page.

Re-enter your ID and Password and click the box "Submit"







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# Step 4 Submit your Gift Aid Claim and receive your Gift Aid £s

- Receiving Payment. Claims made via Charities Online are normally paid within 20 days of HMRC receiving the claim.
- You will receive a letter from HMRC telling you that payment has been made directly into your Group's Bank Account

 Congratulations you have completed



## Step 4

Annual > Submit your Gift Aid claim and receive your Gift Aid £s

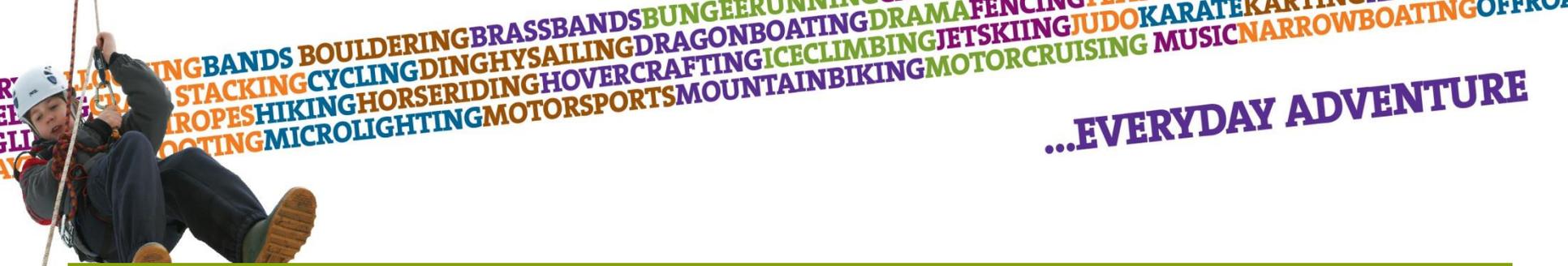


Annual >









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# Gift Aid Claim

This is the end of the final presentation  
Submitting your Gift Aid Claim

We hope you have found the series of presentations useful in your application for gift aid.