

**eazitax**

# **How to set up your Personal Tax Account with HMRC**

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Registering for a [Personal Tax Account](#) with the UK Government is free and can be done in just 10 minutes.

You'll need:

- Your National Insurance number.
- Your Passport.

You can use your personal tax account to:

- check your Income Tax estimate and tax code
- check and manage your tax credits
- check your State Pension
- track tax forms that you've submitted online
- check or update your Marriage Allowance
- tell HMRC about a change of address
- check or update benefits you get from work, for example company car details and medical insurance
- find your National Insurance number

## Step 1

Go to [www.gov.uk/personal-tax-account](https://www.gov.uk/personal-tax-account)

[www.gov.uk](#) > [personal-tax-account](#) ▾

### Personal tax account: sign in or set up - GOV.UK

**Personal tax account:** sign in or **set up**. Use your **personal tax account** to check your records and manage your details with HM Revenue and Customs (HMRC). This service is also available in Welsh (Cymraeg). There's a different service if you want to sign in to GOV.UK Verify to file your Self Assessment **tax** return.

#### Your personal tax account

Your personal tax account allows you to manage your tax ...

#### Personal Tax Account (PTA)

A quick guide to the digital personal tax account. ... metres ...

#### Help and support for the ...

Watch webinars and use our online guide to find out how to ...

#### Self Assessment is simple with...

HMRC is today urging first-time Self Assessment customers to ...

## Step 2

Click on **Start now** (Green button)

[Home](#) > [Money and tax](#) > [Dealing with HMRC](#)

## Personal tax account: sign in or set up

Use your personal tax account to check your records and manage your details with HM Revenue and Customs (HMRC).

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

There's a different service if you want to sign in to GOV.UK Verify to [file your Self Assessment tax return](#).

**Start now** >

## Step 3

Click in the circle next to **Create an account** and then press continue.

### Prove your identity to continue

- Sign in with Government Gateway**  
You'll have a user ID if you've signed up to do things like file your Self Assessment tax return online.
- Sign in with GOV.UK Verify**  
You'll have an account if you've already proved your identity with either Barclays, Digidentity, Experian, Post Office or SecureIdentity.
- Sign in with a digital identity from another European country**  
If you're part of an ID scheme in a participating country, you may be able to use it here.
- or
- Create an account**  
If you do not already have one of these accounts, we'll help you choose whether to use Government Gateway or GOV.UK Verify.

## Step 4

Next click on the green button (create a Government Gateway account).

### Choose a way to prove your identity

#### Government Gateway

Registering with Government Gateway usually takes about 10 minutes. It works best if you have:

- your National Insurance number
- a recent payslip or P60 or a valid UK passport

[Create a Government Gateway account](#)

## Step 5

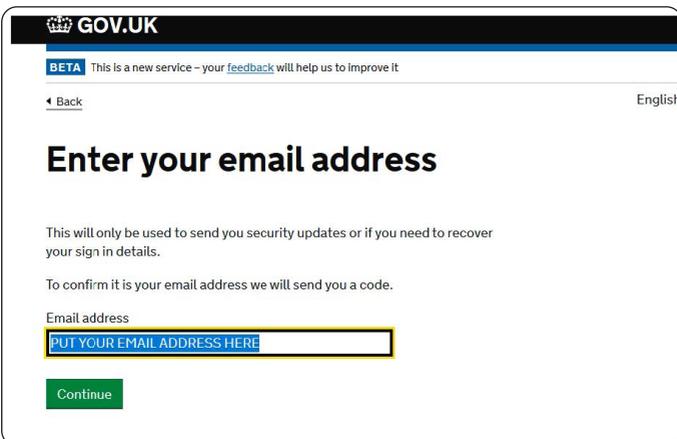
Click **Create sign in details**. (Blue writing).



The screenshot shows the GOV.UK sign-in page for Government Gateway. At the top, there is a black header with the GOV.UK logo. Below the header, a blue banner contains the text "BETA This is a new service – your [feedback](#) will help us to improve it". The main heading is "Sign in using Government Gateway". Below this, there are two input fields: "Government Gateway user ID" (with a note "This could be up to 12 characters.") and "Password". A green "Sign in" button is positioned below the password field. A blue link "Create sign in details" is located below the "Sign in" button. At the bottom left, there is a link "Problems signing in".

## Step 6

Type in your own email address, then press the green button continue.



The screenshot shows the GOV.UK page for entering an email address. At the top, there is a black header with the GOV.UK logo. Below the header, a blue banner contains the text "BETA This is a new service – your [feedback](#) will help us to improve it". On the left, there is a "Back" link, and on the right, there is a language selector set to "English". The main heading is "Enter your email address". Below this, there is a paragraph of text: "This will only be used to send you security updates or if you need to recover your sign in details." followed by "To confirm it is your email address we will send you a code." Below this text is an "Email address" label and a text input field containing the placeholder text "PUT YOUR EMAIL ADDRESS HERE". A green "Continue" button is positioned below the input field.

## Step 7

You will now be asked for a code; this would have been sent to the email address that you put in (previous step).



The screenshot shows the GOV.UK website interface. At the top, there is a 'GOV.UK' logo and a 'BETA' banner with the text 'This is a new service - your feedback will help us to improve it'. Below the banner is a 'Back' link. The main heading is 'Enter code to confirm your email address'. The text 'We have sent a code to: @HOTMAIL.COM' is displayed. A note states: 'If you use a browser to access your email, you may need to open a new window or tab to see the code.' Below this is a 'Confirmation code' section with the text 'For example, DNCLRK' and an empty input field. At the bottom, there is a link 'I have not received the email' and a green 'Confirm' button.

## Step 8

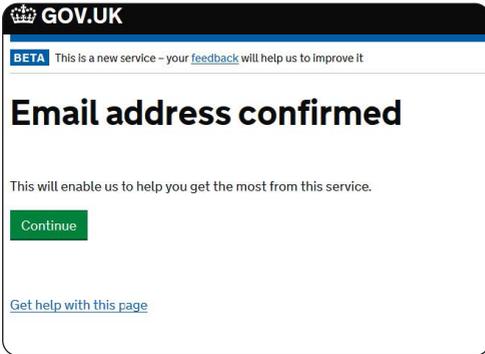
Insert code that you received by email and press continue (Green Button).



The screenshot shows the GOV.UK website interface, similar to Step 7. The 'GOV.UK' logo and 'BETA' banner are at the top. Below the banner is a 'Back' link. The main heading is 'Enter code to confirm your email address'. The text 'We have sent a code to: @HOTMAIL.COM' is displayed. A note states: 'If you use a browser to access your email, you may need to open a new window or tab to see the code.' Below this is a 'Confirmation code' section with the text 'For example, DNCLRK' and an input field containing the code 'MDVPGQ'. At the bottom, there is a link 'I have not received the email' and a green 'Confirm' button.

## Step 9

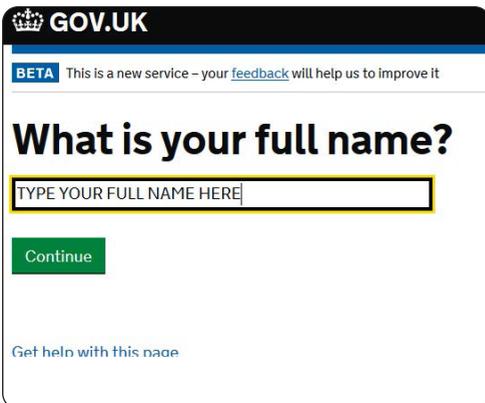
You will now see the screen below, next click **Continue** (Green button).



The screenshot shows the GOV.UK logo at the top left. Below it is a blue banner with the text "BETA This is a new service – your [feedback](#) will help us to improve it". The main heading is "Email address confirmed" in a large, bold, black font. Below the heading is a smaller line of text: "This will enable us to help you get the most from this service." Underneath this text is a green button with the word "Continue" in white. At the bottom left, there is a link that says "Get help with this page".

## Step 10

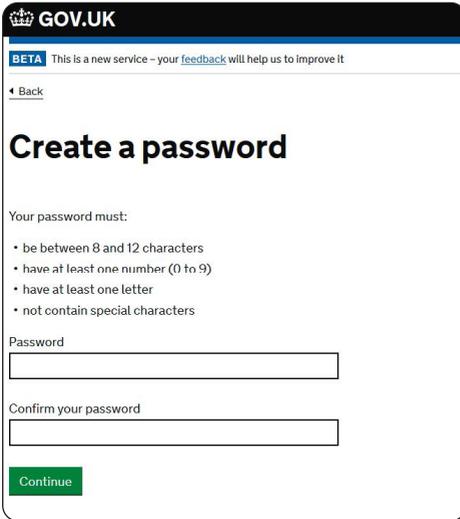
Type in your full name and press **continue** (green button).



The screenshot shows the GOV.UK logo at the top left. Below it is a blue banner with the text "BETA This is a new service – your [feedback](#) will help us to improve it". The main heading is "What is your full name?" in a large, bold, black font. Below the heading is a text input field with a yellow border and the placeholder text "TYPE YOUR FULL NAME HERE". Underneath the input field is a green button with the word "Continue" in white. At the bottom left, there is a link that says "Get help with this page".

## Step 11

Now, create your password, making sure that your password meets the HMRC criteria.



The screenshot shows the GOV.UK website interface for creating a password. At the top, there is a 'GOV.UK' logo and a 'BETA' banner with the text 'This is a new service - your feedback will help us to improve it'. Below the banner is a 'Back' link. The main heading is 'Create a password'. Underneath, it states 'Your password must:' followed by a list of requirements: 'be between 8 and 12 characters', 'have at least one number (0 to 9)', 'have at least one letter', and 'not contain special characters'. There are two input fields: 'Password' and 'Confirm your password'. At the bottom, there is a green 'Continue' button.

## Step 12

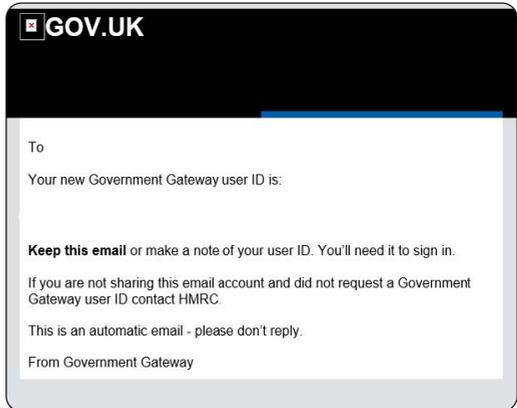
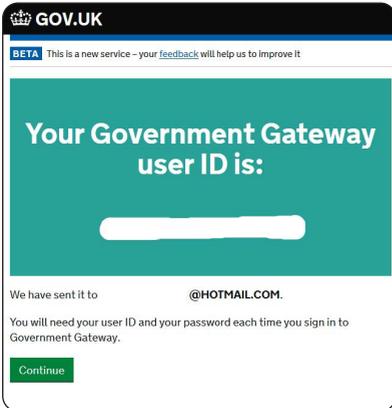
Now set up a recovery word and make sure you make a note of it and make sure it meets the HMC criteria, if it does then you will see green tick. Once you have typed in recovery word, then press **continue** (green button).



The screenshot shows the GOV.UK website interface for setting up a recovery word. At the top, there is a 'GOV.UK' logo and a 'BETA' banner with the text 'This is a new service - your feedback will help us to improve it'. Below the banner is a 'Back' link. The main heading is 'Set up a recovery word'. Underneath, it states 'Make a note of this word in case you need it in the future.' followed by 'The word must:' and a list of requirements: 'be between 6 and 12 characters', 'not contain spaces or special characters', and 'not contain numbers'. There is one input field labeled 'Recovery word' with the placeholder text 'Put your recovery word here'. At the bottom, there is a green 'Continue' button.

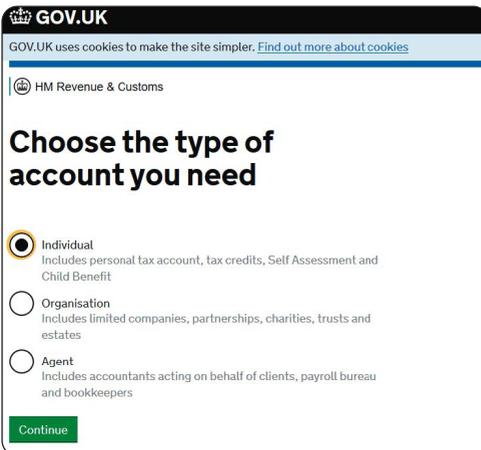
## Step 13

Now set up a recovery word and make sure you make a note of it and make sure it meets the HMRC criteria, if it does then you will see green tick. Once you have typed in recovery word, then press **continue** (green button).



## Step 14

Next you need to select the circle next to individual and then press **continue** (green button).



## Step 15

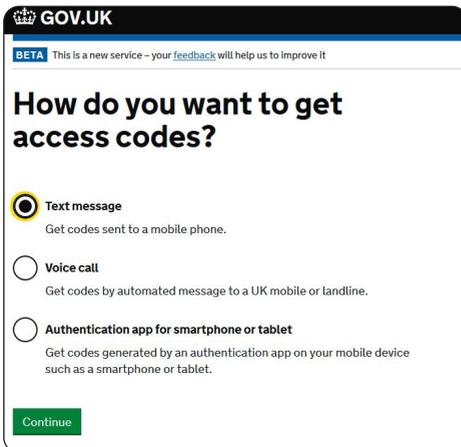
Press **continue** (Green button).



The screenshot shows the GOV.UK logo at the top left. Below it is a blue banner with the text 'BETA This is a new service – your [feedback](#) will help us to improve it'. The main heading is 'You need to set up additional security'. Below the heading is the text 'This is to make sure only you can sign in.' and a green 'Continue' button. At the bottom left, there is a link: 'Get help with this page'.

## Step 16

Next select the **circle**, next to **text message** and then press continue (green button).



The screenshot shows the GOV.UK logo at the top left. Below it is a blue banner with the text 'BETA This is a new service – your [feedback](#) will help us to improve it'. The main heading is 'How do you want to get access codes?'. There are three radio button options: 'Text message' (selected), 'Voice call', and 'Authentication app for smartphone or tablet'. Each option has a brief description below it. At the bottom left, there is a green 'Continue' button.

## Step 17

Select **Yes**.



The screenshot shows the GOV.UK interface for step 17. At the top, there is a 'GOV.UK' logo and a 'BETA' notice: 'This is a new service – your feedback will help us to improve it'. Below this is a 'Back' link. The main heading is 'Is this a UK mobile phone number?'. There are two radio button options: 'Yes' (which is selected) and 'No'. Below the options is a green 'Continue' button. At the bottom left, there is a link: 'Get help with this page'.

## Step 18

Insert your mobile phone number then press **send access code**.



The screenshot shows the GOV.UK interface for step 18. At the top, there is a 'GOV.UK' logo and a 'BETA' notice: 'This is a new service – your feedback will help us to improve it'. Below this is a 'Back' link. The main heading is 'Enter a UK mobile phone number'. Below the heading is the text: 'We will send an access code to this mobile phone by text message.' There is a label 'UK mobile phone number' above a text input field. Below the input field is a link: 'Choose a different way to get access codes'. At the bottom, there is a green 'Send access code' button.

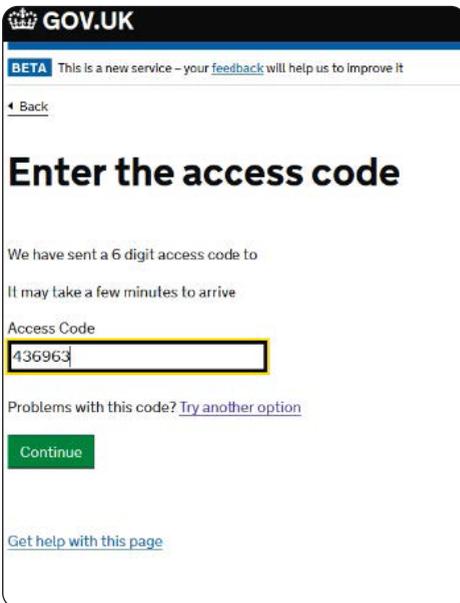
## Step 19

You will then receive a text message to the mobile phone number that you entered above.



## Step 20

You now need to enter the code that you received in the text and then press **continue** (green button).

A screenshot of the GOV.UK website showing the "Enter the access code" page. The page has a dark header with the GOV.UK logo. Below the header, there is a blue banner with the text "BETA This is a new service – your feedback will help us to improve it". A "Back" link is visible. The main heading is "Enter the access code". Below this, it says "We have sent a 6 digit access code to" and "It may take a few minutes to arrive". There is an "Access Code" label above a text input field containing "436963". Below the input field, there is a link: "Problems with this code? Try another option". A green "Continue" button is at the bottom. At the very bottom, there is a link: "Get help with this page".

## Step 21

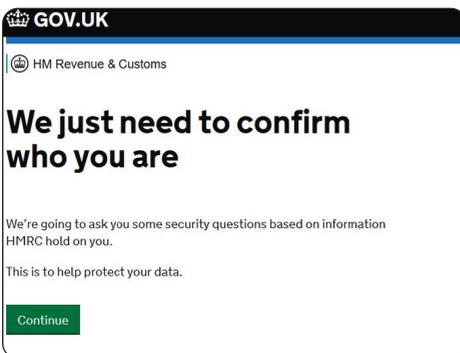
Press **continue** (green button).



The screenshot shows the GOV.UK website interface. At the top left is the GOV.UK logo. Below it is a blue banner with the text "BETA This is a new service – your [feedback](#) will help us to improve it". The main heading is "You've set up additional security". Below the heading, there are two paragraphs of text: "Every time you sign in we will request an access code." and "If you've set up more than one security preference you'll be able to choose how you get the access code." At the bottom left, there is a green button labeled "Continue".

## Step 22

This is where you will need your national insurance number and valid passport, press **continue** (green button).



The screenshot shows the GOV.UK website interface. At the top left is the GOV.UK logo. Below it is a blue banner with the text "HM Revenue & Customs". The main heading is "We just need to confirm who you are". Below the heading, there are two paragraphs of text: "We're going to ask you some security questions based on information HMRC hold on you." and "This is to help protect your data." At the bottom left, there is a green button labeled "Continue".

## Step 23

Enter all your details, if you don't know your national insurance number, you can contact us at the office, once all boxes completed, press **continue** (green button).

Confirm your identity

### Enter your details

This is to help us confirm who you are, so we know what questions to ask you.

**First name**

**Last name**

**National Insurance number**  
It's on your National Insurance card, benefit letter, payslip or P60.  
For example, QQ123456C

[I do not know my National Insurance number](#)

**Date of birth**  
For example, 31 3 1980

Day    Month    Year

<input type="text"/>	<input type="text"/>	<input type="text"/>
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**Continue**

## Step 24

Select **yes** and press **continue** (green button), if you don't have a valid passport then you will need to click no and they will take you through a different route to validate your ID.

 HM Revenue & Customs

### Do you have a valid UK passport?

Yes     No

**Continue**

[Get help with this page.](#)

## Step 25

Click **Yes** and **continue** (green button).

**GOV.UK**

HM Revenue & Customs

Confirm your identity

### We need your consent to share your information

To confirm your identity using your passport details, we need your consent to share the information you give us with HM Passport Office.

For details about how we store and process your information, see our [privacy notice \(opens in new window or tab\)](#).

**Do you consent to HMRC sharing your passport details with HM Passport Office?**

Yes  No

**Continue**

## Step 26

Type in information, just as it appears on your passport, then press **continue** (green button).

### Your UK passport

Enter your details exactly as they appear on your passport.

► [Where to find these details on your passport](#)

**Passport number**  
Your passport number contains up to 9 numbers and no letters.

**Surname**  
Exactly as it appears on your passport.

**Given names**  
Enter all given names, as they appear on your passport.

**Expiry date of your passport**  
For example, 31 MAR 2026

Day Month Year

**Continue**

## Step 27

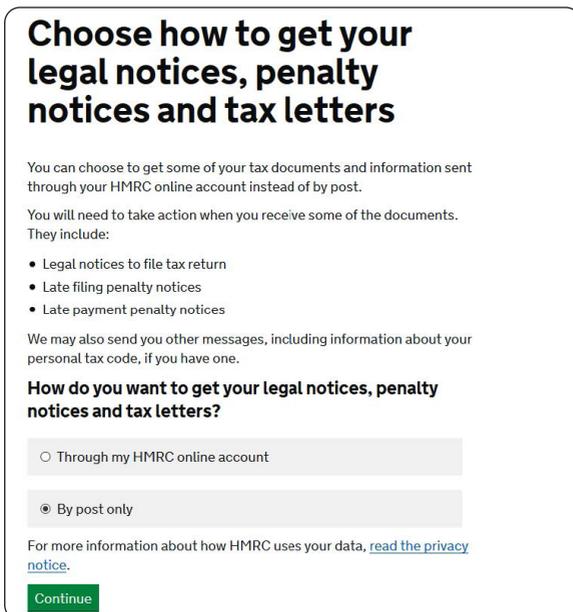
If information is correct, then you will receive this message, now press **continue** (green button).



The screenshot shows a GOV.UK message with a black header containing the GOV.UK logo. The main heading is "We have confirmed your identity" in large, bold, black text. Below the heading, it says "You can now sign in to your personal tax account". At the bottom left, there is a green button with the word "Continue" in white text.

## Step 28

As we are your agents, We would suggest that you select by post only, as this will able us to deal with late filing and payment penalties on your behalf. Once selected, press **continue** (green button).



The screenshot shows a GOV.UK message with a white background and a rounded border. The heading is "Choose how to get your legal notices, penalty notices and tax letters" in bold black text. Below the heading, it says "You can choose to get some of your tax documents and information sent through your HMRC online account instead of by post." and "You will need to take action when you receive some of the documents. They include:" followed by a bulleted list: "Legal notices to file tax return", "Late filing penalty notices", and "Late payment penalty notices". It then says "We may also send you other messages, including information about your personal tax code, if you have one." Below this is the question "How do you want to get your legal notices, penalty notices and tax letters?" with two radio button options: "Through my HMRC online account" (unselected) and "By post only" (selected). At the bottom, it says "For more information about how HMRC uses your data, [read the privacy notice.](#)" and has a green "Continue" button.

## Step 29

You now have access to your personal tax account.

You will be able to view:

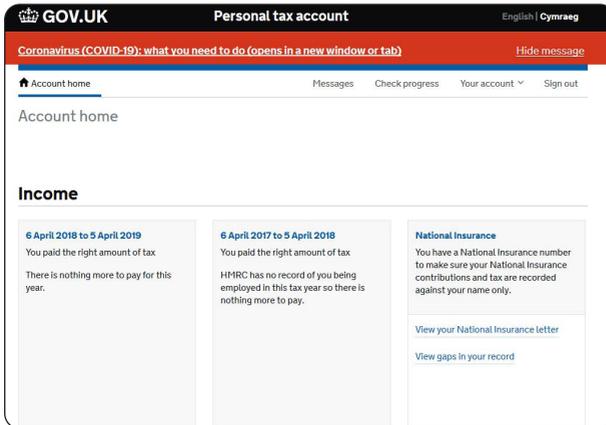
- PAYE/pension income (if you received), Check National Insurance number and any gaps in your record
- Tax credits
- Child benefit
- Transfer part of personal allowance to your partner (if applicable)
- View information about your State Pension

The screenshot shows the GOV.UK Personal tax account dashboard. At the top, there is a navigation bar with the GOV.UK logo, the text 'Personal tax account', and the language selector 'English | Cymraeg'. Below this is a red banner with the text 'Coronavirus (COVID-19): what you need to do (opens in a new window or tab)' and a 'Hide message' link. The main navigation bar includes 'Account home', 'Messages', 'Check progress', 'Your account', and 'Sign out'. The 'Account home' section is active. Below the navigation, the 'Income' section is displayed. It contains three cards: 1. '6 April 2018 to 5 April 2019' with the text 'You paid the right amount of tax. There is nothing more to pay for this year.' 2. '6 April 2017 to 5 April 2018' with the text 'You paid the right amount of tax. HMRC has no record of you being employed in this tax year so there is nothing more to pay.' 3. 'National Insurance' with the text 'You have a National Insurance number to make sure your National Insurance contributions and tax are recorded against your name only.' Below the National Insurance card are two links: 'View your National Insurance letter' and 'View gaps in your record'.

The screenshot shows the 'Benefits' and 'Pensions' sections of the GOV.UK Personal tax account. The 'Benefits' section is titled 'Benefits' and contains three cards: 1. 'Tax credits' with the text 'View your next payments and the people on your claim, and make changes to your claim.' 2. 'Child Benefit' with the text 'A tax-free payment to help parents with the cost of bringing up children.' Below this card are three links: 'Tell us if your child is staying in full-time education', 'Tell us if your child's circumstances change', and 'Tell us if your circumstances change'. 3. 'Marriage Allowance' with the text 'Transfer part of your Personal Allowance to your partner so they pay less tax.' Below this card is a link: 'Find out if you qualify for Marriage Allowance'. The 'Pensions' section is titled 'Pensions' and contains one card: 'State Pension' with the text 'View your State Pension and National Insurance contributions.'

## Step 30

When you have finished with your Personal Tax Account, make sure you **sign out**.



The screenshot shows the GOV.UK Personal tax account dashboard. At the top, there is a navigation bar with the GOV.UK logo, the text 'Personal tax account', and language options 'English | Cymraeg'. Below this is a red banner with a message about Coronavirus (COVID-19). The main content area has a navigation menu with 'Account home' selected, and links for 'Messages', 'Check progress', 'Your account', and 'Sign out'. The 'Account home' section is titled 'Account home' and features an 'Income' section with three columns. The first column is for the tax year '6 April 2018 to 5 April 2019', stating 'You paid the right amount of tax' and 'There is nothing more to pay for this year.' The second column is for '6 April 2017 to 5 April 2018', stating 'You paid the right amount of tax' and 'HMRC has no record of you being employed in this tax year so there is nothing more to pay.' The third column is for 'National Insurance', stating 'You have a National Insurance number to make sure your National Insurance contributions and tax are recorded against your name only.' Below this are links for 'View your National Insurance letter' and 'View gaps in your record'.

## Step 31

When you log back in again, go to [www.gov.uk/personal-tax-account](http://www.gov.uk/personal-tax-account) and click **start now** (green button.)

### Personal tax account: sign in or set up

Use your personal tax account to check your records and manage your details with HM Revenue and Customs (HMRC).

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

There's a different service if you want to sign in to GOV.UK Verify to file your Self Assessment tax return.

[Start now >](#)

## Step 32

Then select **Sign in with Government Gateway**, then click **continue** (green button).



### Sign in with Government Gateway

You'll have a user ID if you've signed up to do things like file your Self Assessment tax return online.



### Sign in with GOV.UK Verify

You'll have an account if you've already proved your identity with either Barclays, Digidentity, Experian, Post Office or SecureIdentity.



### Sign in with a digital identity from another European country

If you're part of an ID scheme in a participating country, you may be able to use it here.

or



### Create an account

If you do not already have one of these accounts, we'll help you choose whether to use Government Gateway or GOV.UK Verify.

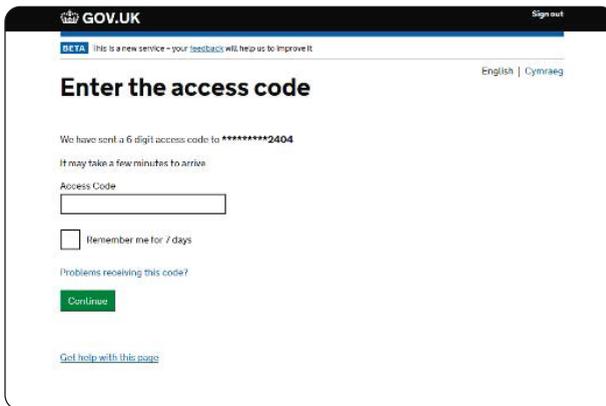
## Step 33

In Government Gateway User ID, input your unique user ID that we created before and the password that you choose, then click **Sign in** (green button.)

The screenshot shows the GOV.UK sign-in interface. At the top left is the GOV.UK logo. Below it is a blue banner with the text "BETA This is a new service - your [feedback](#) will help us to improve it". On the right side, the word "English" is displayed. The main heading is "Sign in using Government Gateway". Below this, there is a section for "Government Gateway user ID" with the instruction "This could be up to 12 characters." and a text input field containing the placeholder ". Put your user ID here". Below that is a "Password" section with a text input field containing masked characters ".....". At the bottom left, there is a green "Sign in" button. At the bottom of the page, there is a small URL: "https://www.gov.uk/sign-in/government-gateway".

## Step 34

It will now ask for an access code, this will be sent to the mobile number that you gave earlier (you will see the last four digits to confirm the mobile number that you gave, once you receive your code input the code and if you wish, you can select **remember me for 7 days** (this will stop you having to enter a access code after this code for the next 7 days.) click **continue** (green button).



The screenshot shows the GOV.UK 'Enter the access code' page. At the top left is the GOV.UK logo and 'Sign out' at the top right. A blue banner below the logo says 'BETA This is a new service - your feedback will help us to improve it'. Below this is the heading 'Enter the access code' and a language selector 'English | Cymraeg'. The main content area contains the text: 'We have sent a 6 digit access code to \*\*\*\*\*2404', 'It may take a few minutes to arrive', 'Access Code' followed by a text input field, a checkbox labeled 'Remember me for 7 days', and the text 'Problems receiving this code?'. A green 'Continue' button is positioned below the text. At the bottom left, there is a link 'Get help with this page'.

## Step 35

You will now be logged into your Personal Tax Account again! but please do remember to **logout** when you have finished.

# Any Questions?

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We're just on the other end of the line!



**020 8529 2600**



**07866 428 600**



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