



Kreston Reeves

Guide to setting up a Personal Tax account

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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).

You can:

- check your Income Tax estimate and tax code
- submit, view or manage a Self Assessment tax return
- claim a tax refund
- check your Child Benefit
- check your income from work in the previous 5 years
- check how much Income Tax you paid in the previous 5 years
- check and manage your tax credits
- check your State Pension
- check if you'll benefit from paying voluntary National Insurance contributions and if you can pay online
- track tax forms that you've submitted online
- check or update your Marriage Allowance
- tell HMRC about a change of name or address
- check or update benefits you get from work, for example company car details and medical insurance
- find your National Insurance number
- find your Unique Taxpayer Reference (UTR) number, if you already have one
- check your Simple Assessment tax bill

There's a different service to register for Self Assessment and your UTR number or report and pay Capital Gains Tax on UK property.

Before you start

You'll need to sign in to use this service. If you do not already have sign in details, you'll be able to create them.

You'll be told when you sign in if you need to prove your identity. This is to keep your details safe and normally involves using photo ID like a passport or driving licence.

The steps on the following pages will show you how to set up a Government Gateway login, if you do not have one already.

1. To sign in to your Personal Tax account, you will need to sign in using your Government Gateway log in details via the following web address or by clicking the link below- <https://www.gov.uk/personal-tax-account>

[Personal tax account: sign in or set up - GOV.UK](#)

If you do not already have sign in details, you can select “Create sign in details” as shown below:



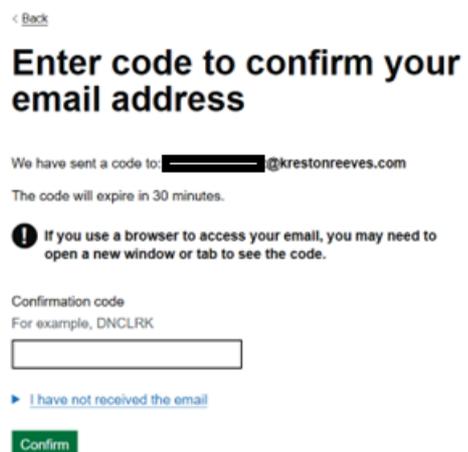
The screenshot shows the Government Gateway sign-in page. At the top, there is a black header with the GOV.UK logo and the text "Government Gateway". Below the header, there is a language selector showing "English" and "Cymraeg". A blue box contains the text "Keeping your information secure" and "Do not share your Government Gateway user ID and password with anyone else." Below this is the main heading "Sign in using Government Gateway". There are two input fields: "Government Gateway user ID" (with a note "This could be up to 12 characters.") and "Password" (with a "Show" button). A green "Sign in" button is below the fields. At the bottom, there is a section for "New users of Government Gateway" with a link "Create sign in details".

2. After you have entered in your personal email address, you will receive a code via email



The screenshot shows an email confirmation code. The header is "GOV.UK". The main text reads: "You have requested a code you can enter on the Government Gateway screen to confirm your email address." Below this, it says "Your confirmation code is:" followed by the code "YDRVHB" in large bold letters. It then states "This code will expire in 30 minutes." and "If you did not request this code, you can safely ignore this email." At the bottom, it says "This is an automated email - do not reply." and "Government Gateway".

Once you have received your confirmation code, enter this into the box on your browser.



The screenshot shows the "Enter code to confirm your email address" page. At the top, there is a "< Back" link. The main heading is "Enter code to confirm your email address". Below this, it says "We have sent a code to: [redacted]@krestonreeves.com" and "The code will expire in 30 minutes." There is an information icon and a note: "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 the label "Confirmation code" and "For example, DNCLRK" followed by an input field. At the bottom, there is a link "I have not received the email" and a green "Confirm" button.

- The below message will then pop up to confirm your email address:

Email address confirmed

This will enable us to help you get the most from this service.

[Continue](#)

- Next, enter your full name:



What is your full name?

First name Last name

[Continue](#)

- You will then be asked to create a password:



[Back](#)

Create a password

Your password needs to be 10 or more characters. To help you create a long and strong password, the National Cyber Security Centre recommends using three random words.

You can use a mix of letters, numbers or symbols in these three words.

Password

..... [Show](#)

Confirm your password

..... [Show](#)

[Continue](#)

- Once you have created a password, you will be provided with your Government Gateway user ID. You should keep this number as password safe, as it will be needed each time you log in to your Personal Tax account:



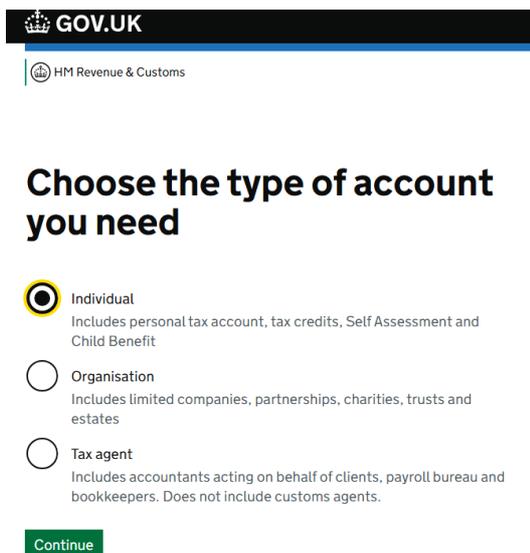
We have sent it to [redacted]@krestonreeves.com.

You will need your user ID and your password each time you sign in to Government Gateway.

Never share your Government Gateway user ID or password with anyone else.

[Continue](#)

7. Select continue, and you will then be asked for the type of account that you need. Select the “Individual” option, which will allow you to access your personal tax account, along with tax credits, Self Assessment and Child Benefit:



The screenshot shows the GOV.UK HM Revenue & Customs website. The main heading is "Choose the type of account you need". There are three radio button options: "Individual" (selected), "Organisation", and "Tax agent". Each option has a brief description of what it includes. A green "Continue" button is at the bottom.

GOV.UK
HM Revenue & Customs

Choose the type of account you need

Individual
Includes personal tax account, tax credits, Self Assessment and Child Benefit

Organisation
Includes limited companies, partnerships, charities, trusts and estates

Tax agent
Includes accountants acting on behalf of clients, payroll bureau and bookkeepers. Does not include customs agents.

[Continue](#)

8. Now, you will be taken through the steps to set up additional security, select continue:



The screenshot shows the GOV.UK Government Gateway website. The main heading is "You need to set up additional security". Below the heading is a sub-heading "This is to make sure only you can sign in." and a green "Continue" button.

GOV.UK **Government Gateway**

You need to set up additional security

This is to make sure only you can sign in.

[Continue](#)

9. You will be asked how you would like to receive access codes, each time that you access your account. For example, by selecting text message, you will receive a code to your mobile when you are signing in, that you will need to enter during the sign in process, before you are signed in:



The screenshot shows the GOV.UK Government Gateway website. The main heading is "How do you want to get access codes?". There are three radio button options: "Text message" (selected), "Voice call", and "Authenticator app for smartphone or tablet". Each option has a brief description of how codes are delivered. A green "Continue" button is at the bottom.

GOV.UK **Government Gateway**

How do you want to get access codes?

Text message
Get codes sent to a mobile phone.

Voice call
Get codes by automated message to a UK mobile or landline.

Authenticator app for smartphone or tablet
Get codes generated by an authenticator app on your mobile device such as a smartphone or tablet.

[Continue](#)

10. Enter your mobile number, and select “send access code”- you will now receive an access code for you to use:

Are you adding a UK mobile number?

Yes No

Continue



[< Back](#)

Enter a UK mobile phone number

We will send an access code to this mobile phone by text message.

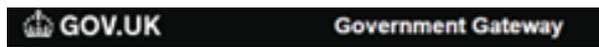
UK mobile phone number

07*****

[Choose a different way to get access codes](#)

Send access code

11. Enter this code into the box shown on this screen, and select continue:



[< Back](#)

Enter the access code

We have sent a 6 digit access code to +44 [REDACTED]

It may take a few minutes to arrive

If you have a UK mobile your 6-digit code will arrive from the phone number 60 551.

Access code

012345

Problems with this code? [Try another option](#)

Continue

You have now completed the additional security set up, select continue to proceed:



You've set up additional security

Every time you sign in we will request an access code.

If you've set up more than one security preference you'll be able to choose how you get the access code.

Continue

12. HMRC will now ask to confirm your identity, select continue:



We need to check your identity

We will ask you for personal details, like your:

- name
- date of birth
- National Insurance number
- postcode

We will check the details you give us with our records and then ask some security questions to confirm your identity.

[Continue](#)

13. Enter your personal details on the screen shown below, and select continue:



Check your identity

Enter your details

First name

Last name

Date of birth

For example, 31 3 1980

Day Month Year

[Continue](#)

14. HMRC will ask you about your National Insurance number, select the “yes” option and then continue:



Check your identity

We will ask you about your National Insurance number

Your National Insurance number helps us check your identity. It is 9 characters like, 'QQ 12 34 56 C'.

You need to get your National Insurance number.

You can find it on:

- your National Insurance number card or letter
- official letters about your tax, pensions or benefits
- your payslip or P60

▶ [I have never had a National Insurance number](#)

Do you have your National Insurance number?

Select one option

Yes, I have my National Insurance number

No, I have lost or forgotten my National Insurance number

Continue

15. Enter your National Insurance number and select continue:



< [Back](#)

Check your identity

Enter your National Insurance number

It's on your National Insurance card, benefit letter, payslip or P60. For example, 'QQ 12 34 56 C'.

Continue

16. You will now be asked to provide a number of items to confirm your identity. One option will be to use the GOV.UK ID Check mobile app, and you will need one of the following: UK Photocard driving license, UK passport, UK biometric residence permit, UK biometric residence card, UK frontier worker permit, or international passport. The second option, will involve entering details about your documents and records using two of the following documents: UK passport, UK photocard driving license, Self Assessment, tax credits (including voice ID), or your credit record.



Confirm your identity

We need you to confirm your identity

We will ask you about items you may have, like your:

- UK or international passport
- UK photocard driving licence (including provisional licences)
- UK biometric residence permit
- UK biometric residence card
- UK frontier worker permit
- Self Assessment
- Tax credits (optional Voice ID)
- Credit record

You will be able to choose how to confirm your identity.

We do this to protect you against fraud.

[Continue](#)

[I do not have any of these items](#)

Select “continue”. However, if you do not have any of these items, your identity cannot be verified, as shown below. You can select the “contact us” link for any technical support or other assistance.



Confirm your identity

We cannot confirm your identity

If you cannot give us evidence to confirm your identity, you cannot log in and use our online services.

You can [contact us to access our services](#) and speak to an advisor. Our advisors can help you finish your task and give you information over the phone or via webchat. They cannot complete online identity verification for you.

Alternatively, give us details from one or two of the evidence types listed, and try again to [confirm your identity online](#).

We also offer [technical support](#) if your details do not match our records.

[Contact us](#)

17. Once you have selected “continue” in the above step, you are then presented with the 2 options, of using the mobile app where HMRC will provide on screen instructions of how to proceed and download this, or by entering your details online. Select the option that you wish to use.



Confirm your identity

There are two ways to confirm your identity:

- **Option 1: Use the GOV.UK ID Check mobile app**

Take a photo and scan your face to match your documents using the GOV.UK ID Check mobile app, using one of the following evidence types: UK photocard driving licence, UK passport, UK biometric residence permit, UK biometric residence card, UK frontier worker permit or international passport.

- **Option 2: Enter your details online**

Enter details about your documents and records, using two of the following evidence types: UK passport, UK photocard driving licence, Self Assessment, tax credits (including voice ID) or credit record.

Choose how to confirm your identity

Select one option

- Scan your face to match your document using the GOV.UK ID Check mobile app
- Enter details about your documents and records online

Continue

18. If you select option 2, to enter your details online, HMRC will then ask you to choose two items that you will provide. Select your two options:



Choose 2 items we can ask you about

- UK passport
You need a valid UK passport
- UK photocard driving licence (including provisional licences)
You need a driving licence issued by the DVA or the DVLA
- Credit reference questions
For example, the year you took out a credit card or phone contract

Continue

You will then be asked to enter in details of the items you have chosen. Once your identity is confirmed, you can start using your account.

You will also be asked whether you want to get your documents (like penalty notices for late filing and payment, tax filing notices, and more) by post or through your online account.

Final steps

Make a note of your User ID, password, and access code for future reference. It is important to note that your User ID, is a 12 digit number, and not to confuse this with your Unique Tax Reference (UTR) number, which is 10 digits. Contact HMRC's helpline at 0300 200 3600 if you encounter any issues.

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