

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

This guide is my attempt to help other leaders by making the Gift Aid online claim a little easier. It is a completely unofficial document. If there are errors, please let me know and I'll do my best to fix them.

Units in Scotland have different Charity rules, so the process will be different. If your unit has it's own personal charity number, do not use this guide.

Before using this guide, you need to have already registered for claiming Gift Aid and received your charity reference number, then used this reference number to register for a Government gateway login.

I have used Windows 8.1 and Excel 2010. The programmes may just look slightly different if you have a different version.

PART ONE - COMPLETING THE SPREADSHEET

1. Follow the link below (or copy and paste into your browser):

<https://www.gov.uk/government/publications/gift-aid-schedule-spreadsheets-to-claim-back-tax-on-donations>

The screenshot shows a web browser window with the URL <https://www.gov.uk/government/publications/gift-aid-schedule-spreadsheets-to-claim-back-tax-on-donations>. The page title is "Setting up and running a charity - form Gift Aid: schedule spreadsheets to claim back tax on donations". The page content includes:

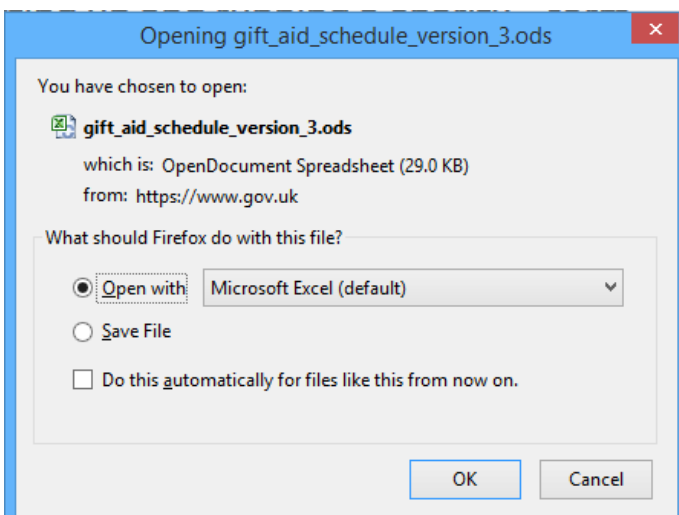
- From: HM Revenue & Customs
- First published: 1 March 2013
- Part of: Charity money, tax and accounts, Setting up and running a charity, Community amateur sports clubs (CASCs) and Community organisations

Use schedule spreadsheets to claim back tax through Gift Aid, Gift Aid Small Donations Scheme (GASDS) or other income using Charities Online.

Documents

- [Gift Aid donations schedule - Excel](#) (highlighted in red)
- ODS, 29KB
- This file is in an [OpenDocument](#) format
- This file may not be suitable for users of assistive technology. [Request a different format.](#)

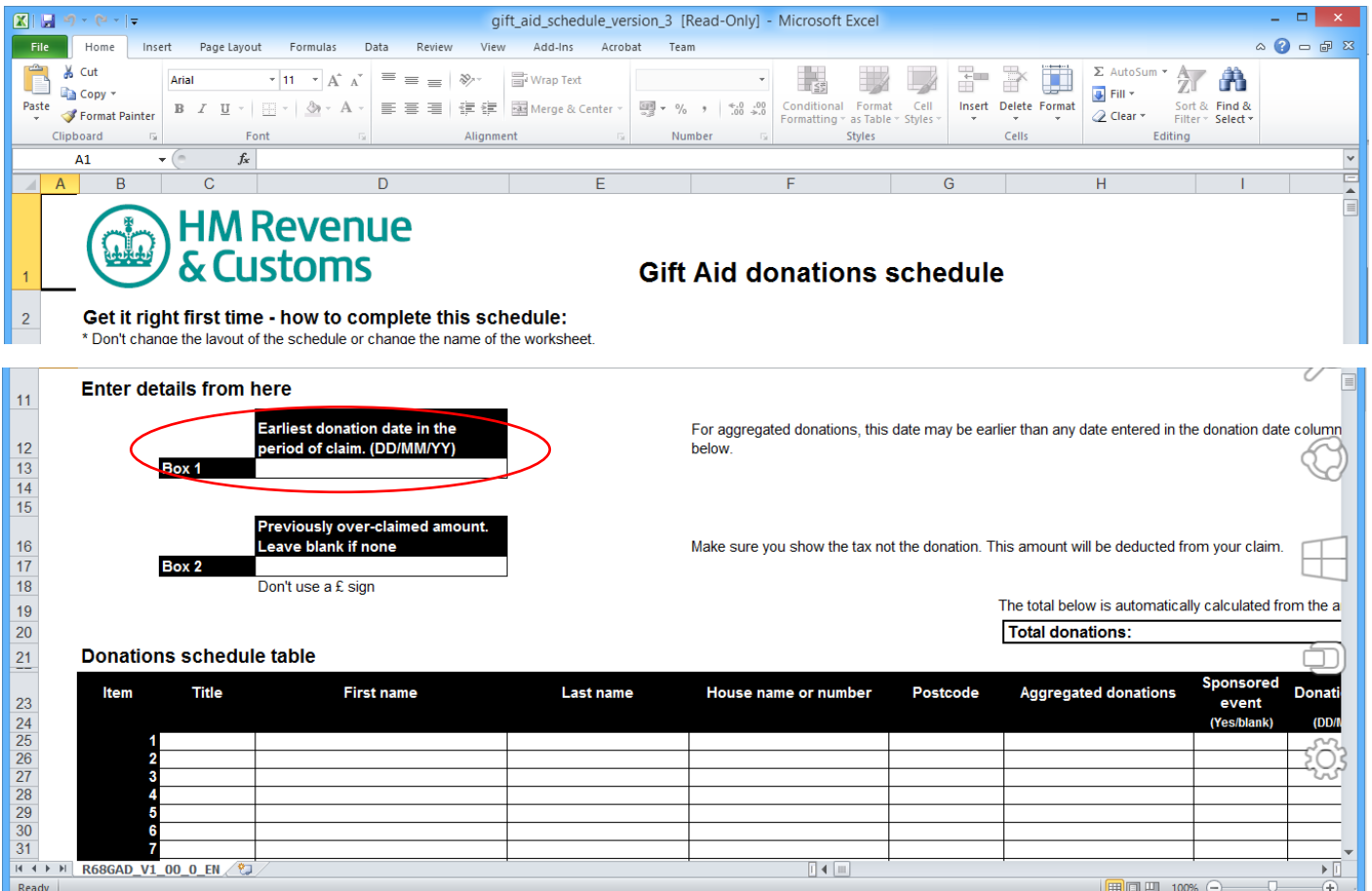
2. Choose the link highlighted in red above (presuming you have Excel). If you are using LibreOffice the next bit will be of limited help, as I have no knowledge of that programme.



3. OPEN the document with Excel.

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

4. It should look like this...

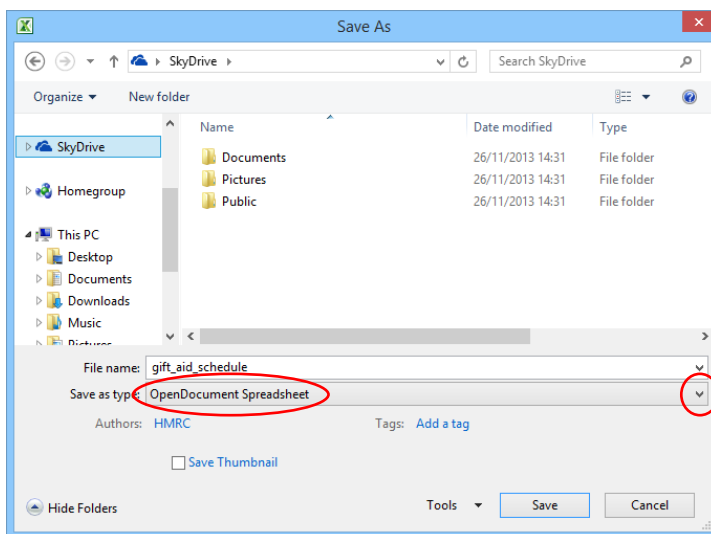


5. Enter the date of the earliest donation in Box 1. For example, if you are claiming for 1st September 2014 to 31st August 2015 - enter 01/09/14 in Box 1.

Ignore Box 2 unless you have over-claimed Gift Aid previously (which is highly unlikely!)

6. If you're anything like me, you'll want to save what you've done at every given opportunity to make sure you don't lose anything!

Do this by selecting "save as"



7. Choose where you want to save your spreadsheet.

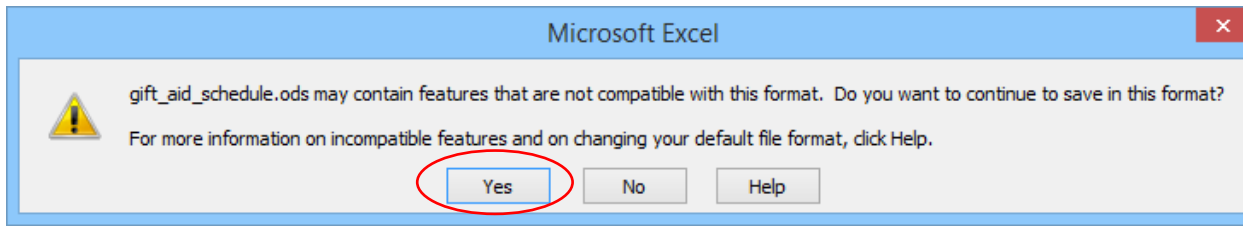
You can rename it if you like... for example xxxbrownies2015

Make sure the "Save as type" says Open Document Spreadsheet.

If it doesn't, open the drop down box and choose Open Document Spreadsheet from the list.

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

8. This message may pop up (depending on which version of Excel you use). Click "Yes"



9. Scroll down on the spreadsheet. It will look like this...

Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event (Yes/blank)	Donation date (DD/MM/YY)	Amount
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									

Total donations: £0.00

10. Start to enter your donations...

- * Enter the names of your donors (usually parents) from your declaration forms - title, first name and surname must all be entered.
- * Enter the house number or name and the postcode. If for any reason you do not know the postcode, you can use the Royal Mail postcode finder.
- * Leave the aggregated donations box blank.
- * Either put YES in the sponsored event box if the donation is from a sponsored event. Leave the box blank if it isn't - e.g. subs.
- * Enter the donation date. If the claim relates to a series of donations, e.g. subs, enter the date the LAST donation was made.
- * Enter the total donation amount in the end box.

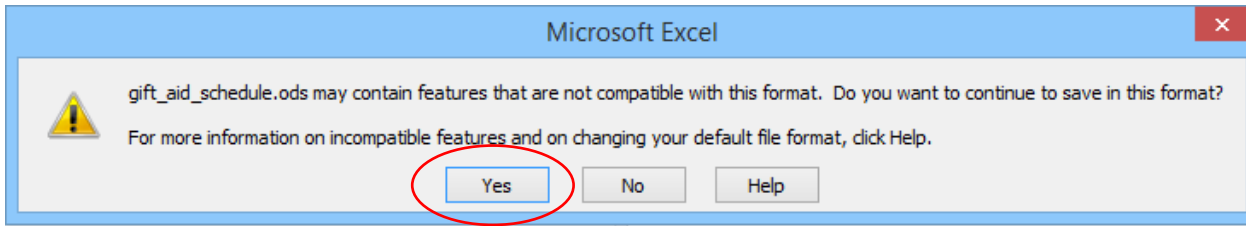
The spreadsheet will calculate the total amount for you.

Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event (Yes/blank)	Donation date (DD/MM/YY)	Amount
1	Mrs	Jane	Doe	123	AB12 3CD			01/09/12	20.00
2	Mr	Joe	Bloggs	456	EF45 6GH			02/10/12	40.00
3	Miss	Ann	Other	789	JK78 9LM		Yes	14/12/12	3.00
4									
5									

Total donations: £63.00

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

11. Remember to save regularly. This message may pop up every time you save (depending on which version of Excel you use). Always click "Yes"



Keep going until all the donations have been recorded. Then save and close the spreadsheet.

Have a cup of tea, glass of wine or some chocolate to reward yourself for finishing the time-consuming bit!



Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

Be prepared for part two... You will need your HMRC/Government Gateway User ID and password. This part of the process is much quicker (as long as you have a reasonable internet connection).

PART TWO - THE ONLINE CLAIM

1. Follow the link below (or copy and paste into your browser):

<https://online.hmrc.gov.uk/login>

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](#)

2. Log in with your User ID and Password from when you first registered.

If you haven't yet verified yourself after receiving your verification code in the post, you will be taken through the steps to do this.

If you haven't yet received your verification code, you can't go any further at the moment.

3. The security message will appear - it will show your unit name in the top right corner and the last day and time you logged in.

Click next to continue.

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

1st Little Paxton Brownies

Security message

For your information: You last logged in at the HM Revenue & Customs (HMRC) portal on *****

Please check the HMRC [Reporting online security issues](#) page if this is not the last time you logged in.

Have you taken steps to protect yourself from online fraud?

Criminals are using increasingly sophisticated ways to commit online fraud and it is important that you do everything you can to protect yourself.

Please take some time to read the security advice on the HMRC [Online security](#) page to find out how you can do this and for details of the steps HMRC is taking to protect your information.

Please click the 'Next' button to continue.

Next

HM Revenue & Customs Home Cymraeg Contact HMRC Help Sign out

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Your HMRC services

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

Customer communications

Please follow the link below to view customer communication messages you have received from HM Revenue & Customs.

You have 0 unread messages

[View all communications](#) ▶

Register for HMRC taxes

To register a business with HMRC for Self Assessment and Class 2 National Insurance, Corporation Tax, PAYE for Employers, VAT, Machine Games Duty, VAT Mini One Stop Shop (VATMOSS), Automatic Exchange of Information (AEOI) or Gambling Tax Service (GTS) follow the link below.

[Register for HMRC taxes](#) ▶

4. Select "Services you can use" from the menu on the left.

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

1st Little Paxton Brownies

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	
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.	

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

5. Select “Charities” from the list. Your HMRC reference will show after the word “reference.”

6. Select “Make a charity repayment claim.”

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

1st LITTLE PAXTON BROWNIES
HMRC charities reference:

At a glance

Make a charity repayment claim

You can make a charity repayment claim using the HMRC online service by following the link below.

Make a charity repayment claim

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

View a list of commercial software

Charity repayment claim

- At a glance**
- Make a charity repayment claim
- FAQs

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

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

1st LITTLE PAXTON BROWNIES
HMRC charities reference:

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? * Yes

Are you claiming UK tax deducted from other income? * No

Are you claiming a top up payment for small cash donations under GASDS? These are not your Gift Aid donations. * No

Your claim reference number: Brownies 2014-15

Back Next

7. Complete the Repayment claim details as follows:

Are you claiming Gift Aid? YES

Answer NO to the next two questions.

(There is a possibility of claiming under GASDS in the future, but there are tax related issues with this at present)

Give your claim a reference number.

Click “Next”.

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

8. Select "Organisation details" from the list.

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

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

Delete

Next

Charity repayment claim	
▶ At a glance	
▶ Repayment claim summary	
▶ About the organisation	
▶ Attach Gift Aid schedule	
▶ FAQs	

About the organisation

Organisation details

You must provide the information below then, click the 'Next' button to continue. The person making this claim must be a recognised authorised official or corporate trustee that has already been notified to HM Revenue & Customs as the authorised official.

* indicates required information

Name of charity regulator: *

None

Charity registration number:

About the person making this claim. Is your authorised official a corporate trustee?

If you selected you are not a corporate trustee you must provide details below about your organisation's authorised official. *

Title:

First name:

Last name:

Please enter a postcode or indicate if your address is not in the UK. *

Postcode:
eg AB12 3YZ

Please select if your address is not in the UK

Your daytime telephone number (including international dialling code if outside the UK):

'Next' automatically saves your data

Back

Next

9. Complete the About the organisation as follows:

Charity regulator:
NONE

Charity Reg. No.:
LEAVE BLANK

About the person...:
NO

Complete the details of your authorised official. Title, first name, surname, postcode and phone number must all be completed.

Click "Next".

10. This is the bit where you upload your spreadsheet.

Click on "browse" and locate your saved spreadsheet.

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](#)

Further information about Gift Aid schedules can be found in the online guidance. HMRC recommend you read this guidance before you complete and save your schedule.

Attach your Gift Aid schedule

When you are ready to attach your Gift Aid schedule to this claim, click on the 'Browse' button below to find and select the completed schedule on your computer.

Gift Aid schedule: No file selected.

If you do not want to attach a Gift Aid schedule now please tick the checkbox below then, click the 'Next' button to continue.

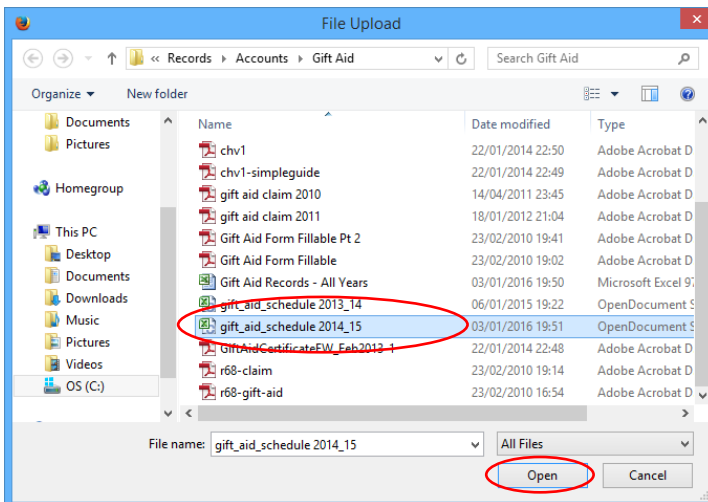
Please note: You must attach a Gift Aid schedule before you can submit your charity repayment claim.

I do not want to attach a Gift Aid schedule at this time.

Repayment claim summary

Next

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16



11. Select your saved spreadsheet and click "Open"

12. You should now see this screen appear. (I've blanked out the personal details from my claim.)

If it does, you've done everything right.

If you get an error message - it will most likely be for one of the 2 following reasons:

1 - You haven't filled in all the boxes on the spreadsheet.

2 - You haven't saved the spreadsheet in the .ods format.

If you have made an error, open Excel, open your spreadsheet and make any alterations needed. Save it as a .ods document. Go back to step 10 and continue from there.

13. Click on "Confirm details".

Attach Gift Aid schedule

Gift Aid schedule - Confirmation

Please confirm that the details shown below match the information in the Gift Aid schedule that you have attached to this claim.

If the information is correct please click the 'Confirm details' button to continue.

If the information is incorrect, you will have to amend the Gift Aid schedule saved on your computer and then follow the 'Attach an updated Gift Aid schedule' link below to continue with your claim.

Gift Aid schedule details

Earliest donation date: 01 August 2014
 Adjustment for Gift Aid previously over-claimed: £0.00
 Total donations: £1739.50

Item	Title	First name	Last name	House name or number	Postcode	Aggregated donations	Sponsored event	Donation date	Amount (£)
1	Ms					Not applicable	Not applicable	01/06/2015	120.00
2	Mrs					Not applicable	Not applicable	04/06/2015	104.00
3	Ms					Not applicable	Not applicable	04/06/2015	84.00
4	Mr					Not applicable	Not applicable	04/06/2015	104.00
5	Mr					Not applicable	Not applicable	13/11/2014	154.00
6	Mr					Not applicable	Not applicable	04/06/2015	140.00
7	Mrs					Not applicable	Not applicable	04/06/2015	120.00
16	Miss					Not applicable	Not applicable	09/07/2015	84.00
17	Mr					Not applicable	Not applicable	18/09/2014	20.00
18	Mrs					Not applicable	Not applicable	16/07/2015	17.50

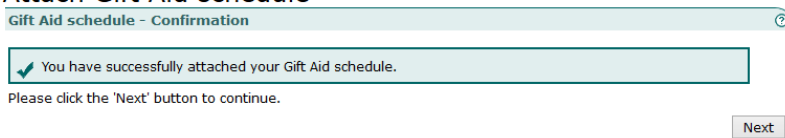
Attach your Gift Aid schedule

If you want to attach an updated Gift Aid schedule please follow the link below.

[Attach an updated Gift Aid schedule](#)

[Confirm details](#)

Attach Gift Aid schedule



14. SMILE!

You have successfully completed the tough bit!

Nearly there...

Jenni's Guide to claiming Gift Aid for Girlguiding units updated 03/01/16

14. If you have followed this guide you should have 3 ticks.

Click "Next" to confirm your claim.

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

Declaration

Declaration

Your charities repayment claim is now ready for submission.

Before your repayment claim can be accepted by HM Revenue & Customs (HMRC), you must indicate your agreement to the statements below by ticking the checkbox

The information I have given in this claim is complete and correct to the best of my knowledge and belief.

I confirm that I have read the HMRC notes and guidance on claiming Gift Aid and/or top-up payments under the Gift Aid Small Donations Scheme.

Where this claim is wholly or partly relates to Gift Aid I claim exemption from tax for this charity or Community Amateur Sports Club for the period covered by the claim

I understand that false statements can lead to prosecution. *

If you have included any adjustments in this claim, you must enter an explanation below. You can also provide any other information regarding your charity's repayment claim (a maximum of 350 characters is allowed).*



15. Tick the box to confirm that you understand the statement.

Back

Next

Click "Next".

16. Re-enter your User ID and Password to pass the security check.
Click "Submit".

Security check

To increase the security of this service and to further protect the information you are providing, HM Revenue & Customs need to re-authenticate your details. Please enter your User ID and password then click the 'Submit' button to continue.

* indicates required information

User ID: *

Password: *

Back

Submit

Acknowledgment

✓ You have successfully submitted your charity repayment claim at 3 Jan 2016 20:16:03

Your **submission receipt reference number** is: *****

Click the 'Next' button to see a printable summary of your claim, including your submission receipt reference number.

To see a summary of your claim click 'Next'.

Next

17. Click "Next" and then print the confirmation page if you are able to. If you can't, make a note of your submission receipt number.

That's it. It's done!

Now just wait for the money to arrive.

As a guide, it took about 1 week from me submitting my last claim until the money was in the Brownies bank account.

Remember, it's up to you how often you claim - every year, every term, every month...

Hope this guide has been useful. If you think of ways that it could be improved, please let me know. Please forgive spelling, punctuation or grammatical mistakes!

Have a another cup of tea, glass of wine or some more chocolate to reward yourself for completing your gift aid claim!

