

Digital data request for self assessment

Guide to digital data request

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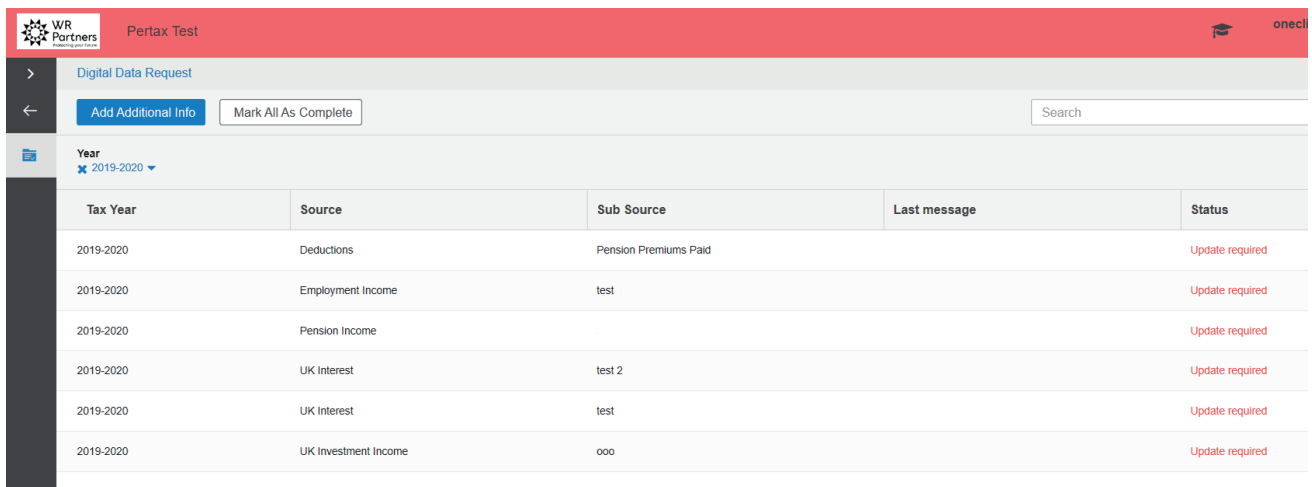
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Digital data request

You will receive an email when we send you the digital data request each year. If your digital data account is not showing on OneClick, please contact your assignment manager to send.

When you select the digital data request, you can add your documents and details onto the form and send directly to us.

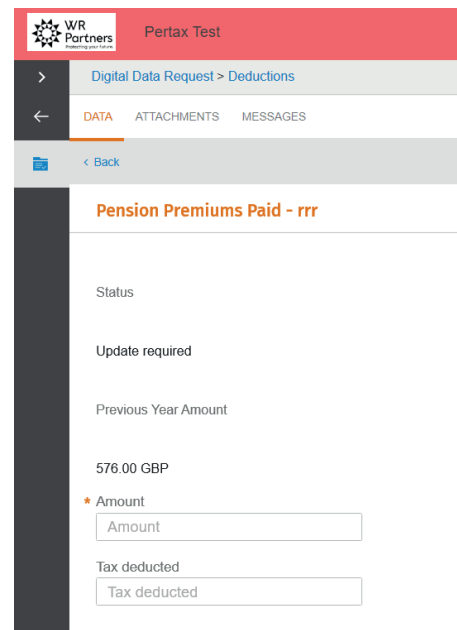
Your digital data screen will look like the image below and will include all known income for you to complete.



The screenshot shows the 'Digital Data Request' screen for 'Pertax Test'. It features a search bar and a table with columns for Tax Year, Source, Sub Source, Last message, and Status. The table lists six entries for the 2019-2020 tax year, all with a status of 'Update required'.

Tax Year	Source	Sub Source	Last message	Status
2019-2020	Deductions	Pension Premiums Paid		Update required
2019-2020	Employment Income	test		Update required
2019-2020	Pension Income			Update required
2019-2020	UK Interest	test 2		Update required
2019-2020	UK Interest	test		Update required
2019-2020	UK Investment Income	ooo		Update required

You can click on each item, doing this will bring up the following screen (**right**): You have the option to type the data figures, add an attachment/photograph of the paperwork to support the figure, and add a message if you need to explain or add any information. Once you are done, press Save in the bottom right corner.



The screenshot shows the 'Digital Data Request > Deductions' screen for 'Pertax Test'. It displays the title 'Pension Premiums Paid - rrr' and a status of 'Update required'. The 'Previous Year Amount' is listed as '576.00 GBP'. There are input fields for 'Amount' and 'Tax deducted'.

Pension Premiums Paid - rrr

Status

Update required

Previous Year Amount

576.00 GBP

* Amount

Amount

Tax deducted

Tax deducted

If you have a new form of income this year, you can select the 'Add Additional Info' from the main digital data request screen. You can also use this screen to filter the tax years.

This screen will then appear, and you can add the extra income. You can do this multiple times if you have numerous new income streams this year.

When you press 'Save' you can add the data, attachments or pictures. Once you are finished adding the income, press the 'Mark as Complete' button. On the main digital request page.

Digital Data Request

[Add Additional Info](#) [Mark All As Complete](#)

Year
x 2020-2021

Tax Year	Source
2020-2021	Employment Income

Add Additional Information

* Tax Year
2020-2021

* Title
Dividend

* Further Information
Standard Life

[Save](#) [Cancel](#)

Digital Data Request

[Add Additional Info](#) [Mark All As Complete](#)

Year
x 2020-2021

Tax Year	Source
2020-2021	Any Other Sources that require you

You will then have a confirmation page appear, press ok to continue or cancel to go back and add more information.

It will then ask you to confirm one final time. Press 'Yes' to continue.

Your assignment manager will then receive an email notifying them that you have completed the data request and will start to prepare your self-assessment return.

If any information is incomplete or the Manager adds any messages, these will be shown in the message tab for each income source.

Mark All As Complete ✕

Please select a year and click 'OK' to mark ...

* Tax Year

2020-2021 ✕ ▾

Are you sure?

