

1 2eFile.com

User Manual

(How does E-filing Work?)

PAYE and CIS Returns



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Table of Contents

| | |
|--|-----------|
| Key Summary of the E-Filing Process..... | 3 |
| 1 Step 1. Sign Up / Sign In..... | 5 |
| 1.1 Sign Up : | 5 |
| 1.2 How to Appoint Additional Users : | 7 |
| 1.3 Sign In : | 8 |
| 2 Step 2. Download Spreadsheet | 9 |
| 3 Step 3. Populate your data into the spreadsheet | 13 |
| 4 Step 4. Assign a file name to the spreadsheet | 14 |
| 5 Step 5. Upload your data to eFileReady | 15 |
| 6 Step 6. E-Filing your data | 20 |
| 7 Step 7. Check your E-filing Status..... | 27 |
| 8 E-Filing as an Agent / Company / Employer – HMRC Credentials Set up | 29 |
| 8.1 P14, P35, P38A, P45, P46, WNU E-Filing Setup..... | 30 |
| 8.2 CIS 300 E-Filing Setup..... | 31 |
| 8.3 CIS Verification Request E-Filing Setup..... | 33 |
| 9 Appointing Additional Users | 34 |

Key Summary of the E-Filing Process

This summary shows you the steps involved to e-file your data.
Whatever you are e-filing, the steps involved are the same.

- CIS300, CIS Subcontractor verifications
- PAYE P14, P35, P45 etc data,

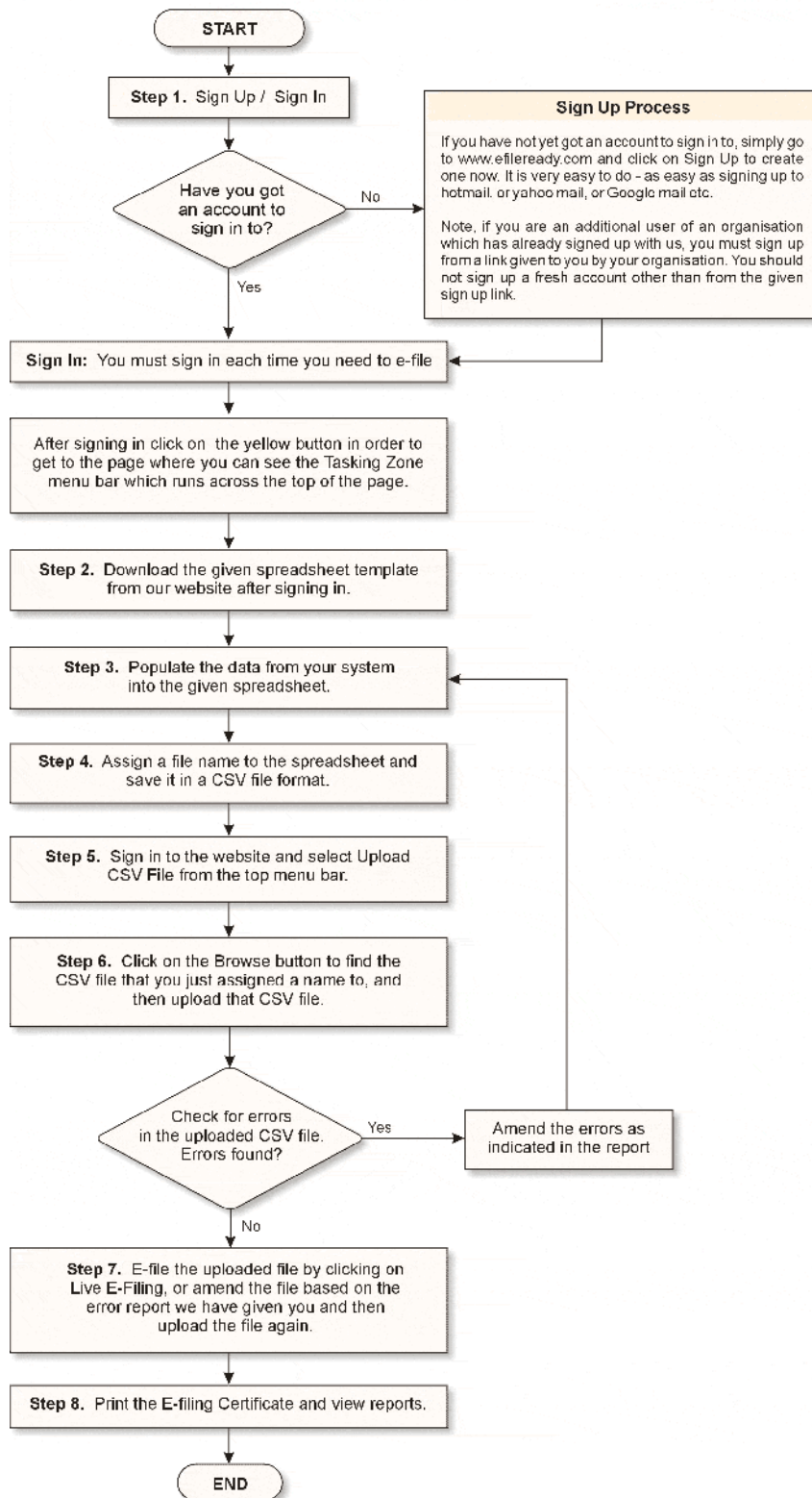
- Step 1** Sign Up / Sign In.
- Step 2** Download the given spreadsheet template from our website
- Step 3** Populate the data from your system into the given spreadsheet.
- Step 4** Assign a file name to the spreadsheet and save it in a CSV file format.
- Step 5** Sign in to the website and select Upload CSV File from the top menu bar.
- Step 6** Click on the Browse button to find the CSV file that you just assigned a name to, and then upload that CSV file.
- Step 7** E-file the uploaded file by clicking on E-File Now!, or amend the file based on the error report we have given you and then upload the file again.
- Step 8** Print the E-filing Certificate and view reports.

(More information about each of the steps is detailed below.)

Support Email: Kevin.Munn@efileready.com

Tel: 020 8452 9516

How Does www.EfileReady.com E-filing Work?



The following steps explain how you can use www.efileready.com to e-file your returns.

1 Step 1. Sign Up / Sign In

1.1 Sign Up :

If you have not yet got an account to sign in to, simply go to www.efileready.com and click on 'Sign Up' to create one now. It is very easy to do - as easy as signing up to an email account such as hotmail, yahoo mail, or Google mail etc.

Before you start the sign up process, please ensure you have the following details to hand. They will need to be entered to complete the sign up:-

Accounts Office Reference and PAYE Reference Number (optional)

All employers who register with the HMRC are issued with an Accounts Office Reference and a PAYE Reference Number. They can be found on any documents or correspondence received from your tax office. For example, on your yellow paying-in book and your P35 form.

This sign up process is carried out only once.



www.eFileReady.com Home | How it Works? | Contact Us | About Us | Feedback

Tested for e-filing to Companies House & gained HMRC recognition

HMRC & Companies House E-filing Specialists + Data Services

eFileReady is an e-filing specialist providing an exceptionally user friendly e-filing system allowing you to e-file almost every document you need to the HMRC and Companies House (CH) with ease. The system saves you from complicated XML e-filing processes because eFileReady is equipped with data conversion intelligence that can automatically convert your data to the HMRC and CH required XML or iXBRL formats for any return. Any responses or electronic acknowledgments due to you from HMRC and CH can also be downloaded from our system to your system for viewing purposes and/or to update your data.

E-File your RTI with Ease **E-File your iXBRL CT with Ease**

Innovative and Compatible with all payroll, accounts & ERP systems

IBM. SAP. ORACLE. JDEdwards. Windows. solaris.

Sign Up (To Create New account)

Sign In (To your account)

Features and How it Works

Listed below are the range of e-filing services we provide, You can find out more details by clicking on the list.

How PAYE, VAT and CIS E-FILING to HMRC works?
Please click on the links for demo

1. CT and iXBRL Accounts to HMRC
2. P45, P46, P14, P35, P11D, WNU

Fig 1.1 Home Page – Sign Up

Important Note to Additional Users: if you are an additional user of an organization which has already signed up with us, you must sign up via a link emailed to you by your organization's system administrator. You should not sign up for a fresh account from our home page.

1.2 How to Appoint Additional Users :

If you are a system administrator and wish to allow other people in your organization to have access to the e-filing service, please follow the steps detailed below.

In the Tasking Zone menu click on Employer/Contractor, then further select the sub-menu Employer/Contractor Details. Click on the 'View/Edit' button for Additional User Details, then click on the 'Add New User' button.

For more details please refer to the eFileReady Sign Up / Sign In manual.

| System User Name | System User Sign In ID | Sign In Log Book | Internet A/c Status | | | Forget Sign In Details | System User Personal Details |
|---------------------|------------------------|----------------------|----------------------------------|-----------------------|--|--------------------------------|------------------------------|
| | | | Enable | Disable | Confirm | | |
| Testing, AddInAdmin | ETEST7056796 | View | <input checked="" type="radio"/> | <input type="radio"/> | <input type="button" value="Confirm"/> | Resend Details | View / Edit |
| Testing, Ketan | ETEST7098073 | View | <input checked="" type="radio"/> | <input type="radio"/> | <input type="button" value="Confirm"/> | Resend Details | View / Edit |

< Previous Page 1 of 1 Next > | Go to

 < Back

Fig 1.2 Add Additional Users

1.3 Sign In :

You must sign in each time you need to e-file.

For more details please refer to our separate eFileReady Sign Up / Sign In manual.

The screenshot shows the eFileReady.com homepage. At the top, the website URL and navigation links (Home, How it Works?, Contact Us, About Us, Feedback) are visible. The main header states 'Tested for e-filing to Companies House & gained HMRC recognition' and 'HMRC & Companies House E-filing Specialists + Data Services'. A man in a suit stands next to a globe. Text describes the e-filing system's ease of use and data conversion capabilities. Two callouts highlight 'E-File your RTI with Ease' and 'E-File your iXBRL CT with Ease'. A section lists compatibility with various software systems (IBM, SAP, ORACLE, JDEdwards, Windows, solaris, and a penguin icon). On the left, a sidebar contains links for 'Sign Up', 'Sign In' (highlighted with a blue border), 'Features and How it Works', and 'Price'. The main content area lists e-filing services and provides a list of links for more information.

www.eFileReady.com Home | How it Works? | Contact Us | About Us | Feedback

Tested for e-filing to Companies House & gained HMRC recognition

HMRC & Companies House **E-filing Specialists** + Data Services

eFileReady is an e-filing specialist providing an exceptionally user friendly e-filing system allowing you to e-file almost every document you need to the HMRC and Companies House (CH) with ease. The system saves you from complicated XML e-filing processes because eFileReady is equipped with data conversion intelligence that can automatically convert your data to the HMRC and CH required XML or iXBRL formats for any return. Any responses or electronic acknowledgments due to you from HMRC and CH can also be downloaded from our system to your system for viewing purposes and/or to update your data.

E-File your RTI with Ease

E-File your iXBRL CT with Ease

Innovative and Compatible with all payroll, accounts & ERP systems

IBM. SAP. ORACLE. JDEdwards Enterprise Software. Windows. solaris. penguin

Sign Up (To Create New account)

Sign In (To your account)

Features and How it Works

Price

Listed below are the range of e-filing services we provide, You can find out more details by clicking on the list.

How PAYE, VAT and CIS E-FILING to HMRC works?

Please click on the links for demo

1. [CT and iXBRL Accounts to HMRC](#)
2. [P45, P46, P14, P35, P11D, WNU](#)
3. [P6, P9 & SL1 etc. downloads for auto-updates](#)
4. [CIS 300 Monthly Returns & Verifications](#)

Fig 1.3 Home Page – Sign In

2 Step 2. Download Spreadsheet

Download the CIS300 spreadsheet, or any other document spreadsheet as required, to your local system.

The screenshot shows the 1 2eFile web interface. At the top, there is a navigation bar with buttons: Employer/Contractor, Download Spreadsheet, Upload Data, E-Filing, DPS, Reports, and Others. The 'Download Spreadsheet' button is selected, and a dropdown menu is displayed. The menu items are: Important Notice, PAYE P14, P45, P46, P11D etc Template Download, CIS 300 & CIS Verification Template Download (highlighted), Pension Scheme & Others Template Download, ePayslip Template Download, VAT 100 & VAT 101 Template Download, HMRC CT & iXBRL Accounts Template Download, Co. House iXBRL Accounts Template Download, and Co. House Secretarial Service(Web based). Below the menu, the 'Employer Details' section is visible. It includes a text input field for '777 Lucky Street', a section for 'Employer's PAYE Ref.' with a dropdown set to '999' and a text input for 'P999', and a section for 'Accounts Office Ref.' with the value '999PC999'. There is also an advertisement for HSBC. At the bottom, there is a table with four rows: 'Employer Contact Details' (View / Edit), 'System Administrator Details' (View / Edit), 'Support Request' (Enable), and 'Client Internet A/c' (Manage). A footer note says: 'If you wish to switch to any other function please click on the above Tasking Zone button. Click for a DEMO'.

Fig 2.1 Go to Download Spreadsheet in the Tasking Zone, then click on the appropriate sub-menu

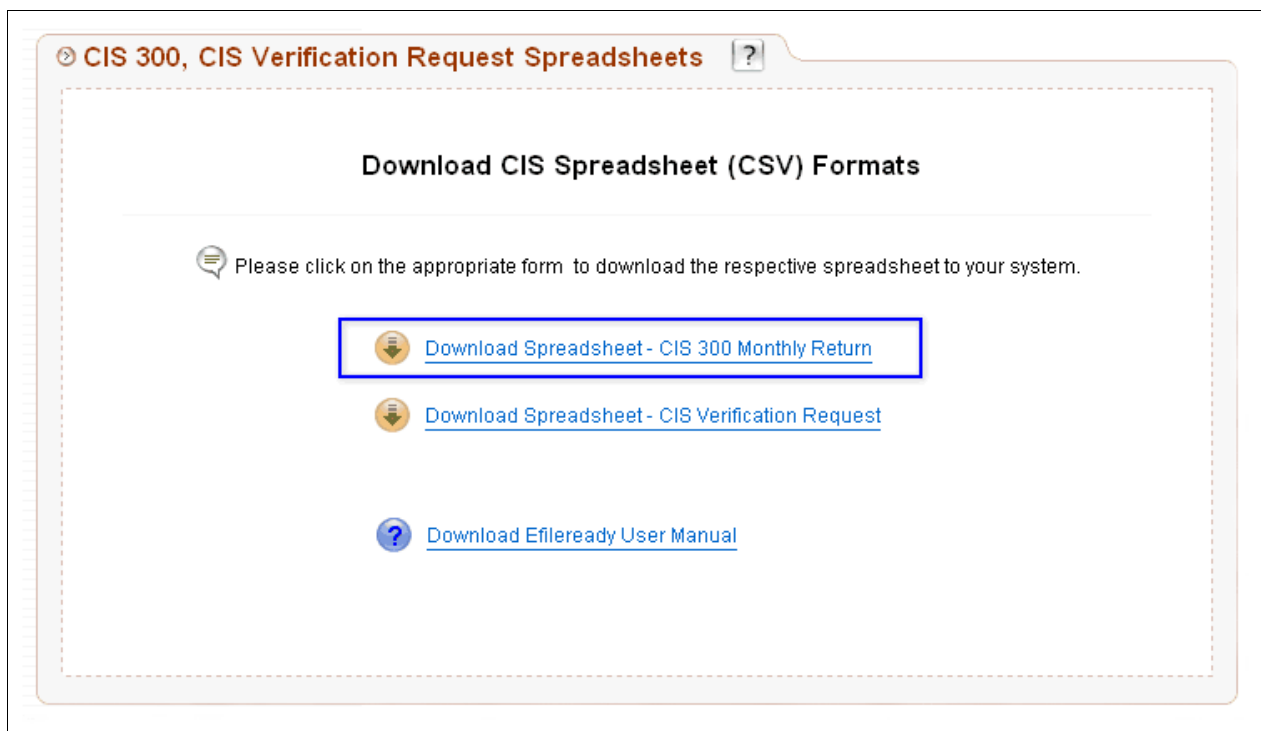


Fig 2.2 Click on the required spreadsheet

Download CIS 300 Monthly Return Spreadsheet

Read Me First
Back

Download CIS 300 Spreadsheet (without eStatement - 2 Files)

We have introduced a **FREE eStatement** service in the system. If you wish to use the eStatement function you need to download the new spreadsheet files, which can be found in our spreadsheet download section (option 2 or 3). If you do not wish to use the eStatement function you can continue to download the current spreadsheets files. Option 1 is for current users without the eStatement function.

Always download and read the instructions before you populate your data into the spreadsheet.

Download

[Instruction for CIS 300 Monthly Return Spreadsheet \(Contractor \)](#)

Download

[CIS 300 Monthly Return Spreadsheet document \(Contractor \)](#)

Download

[Instruction for CIS 300 Monthly Return Spreadsheet \(Subcontractor \)](#)

Download

[CIS 300 Monthly Return Spreadsheet document \(Subcontractor \)](#)

Once downloaded, you should enter your data into the Spreadsheet and **save it in a CSV format**. Then select Upload CSV Data from the Tasking Zone to save the spreadsheet back to our server in a CSV format ready for E-Filing

Back

Fig 2.3 Click to download the required spreadsheet

Note: The instructions for entering your data in the spreadsheet are provided and can be downloaded. We recommend you read these instructions before filling in the actual spreadsheet.

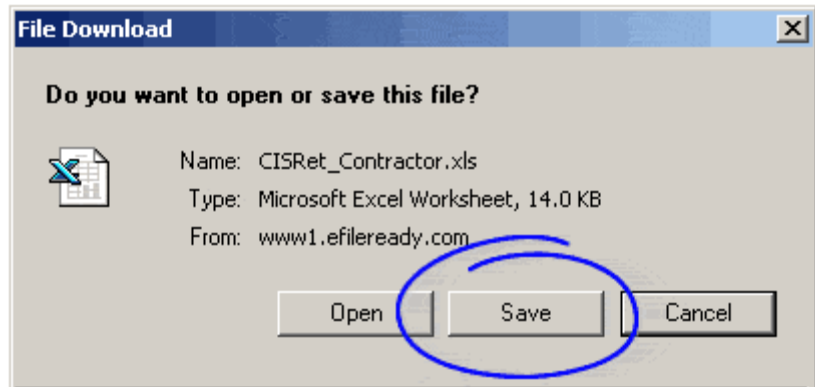


Fig 2.4 Download and Save the spreadsheet to your local system

3 Step 3. Populate your data into the spreadsheet

Populate the CIS300 data from your system into the downloaded spreadsheet. Refer to the instructions provided if you are unsure of any field.

This can be done off-line, so after downloading the spreadsheets and instructions, you can log out from eFileReady. You do not need to be logged in to eFileReady to enter data into the spreadsheets.

| | A | B | C | D | E | F | G |
|----|---------------------------------|--------|---------------------------------|---------------------------|----------------------|-------------------------------|--------------------------|
| 1 | M1 | M2 | M3 | M4 | M5 | M6 | M7 |
| | Tax Month End Date (YYYY-MM-DD) | Sender | UTR (Unique Taxpayer Reference) | Accounts Office Reference | Nil Return Indicator | Employment Status Declaration | Verification Declaration |
| 3 | 2008-05-05 | Agent | 7325648155 | 123PP87654321 | | Yes | Yes |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |
| 8 | | | | | | | |
| 9 | | | | | | | |
| 10 | | | | | | | |
| 11 | | | | | | | |
| 12 | | | | | | | |
| 13 | | | | | | | |
| 14 | | | | | | | |
| 15 | | | | | | | |
| 16 | | | | | | | |
| 17 | | | | | | | |
| 18 | | | | | | | |
| 19 | | | | | | | |

Fig 3.1 Populate your data into the downloaded spreadsheet

4 Step 4. Assign a file name to the spreadsheet and save it in a CSV file format.

Now save your data in the spreadsheet in a CSV format.

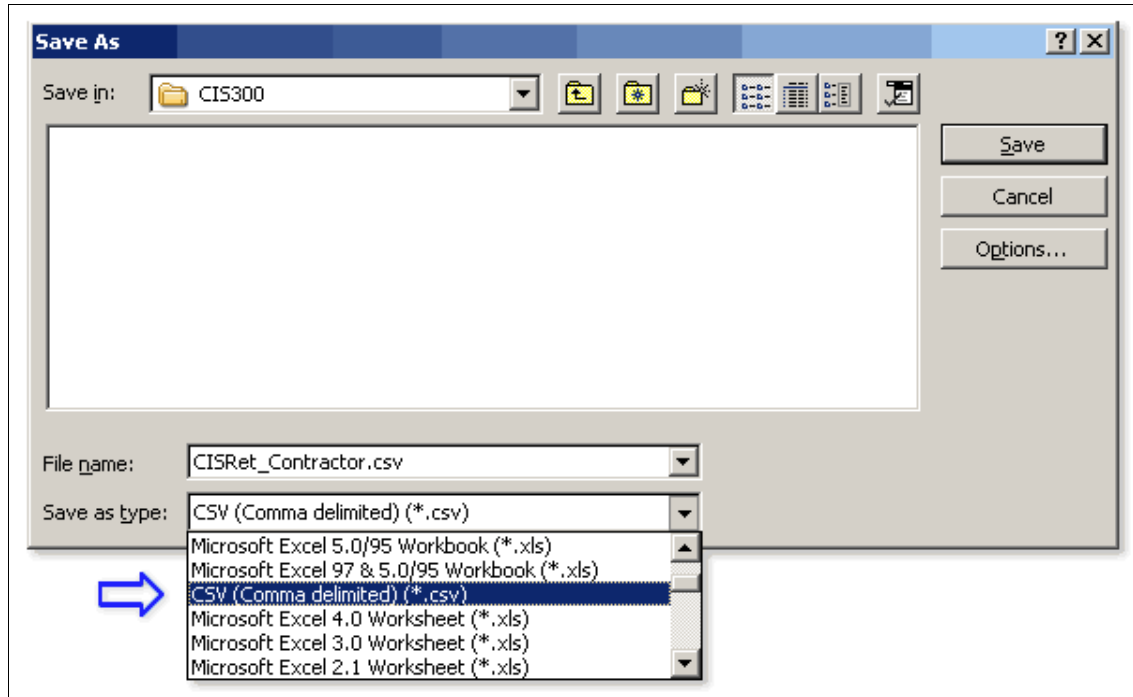


Fig 4.1 Save the spreadsheet as a CSV file

5 Step 5. Upload your data to eFileReady

Sign in to WWW.EFILEREADY.COM

Select Upload CSV File from the Tasking Zone menu and then further select Upload CIS CSV Files, or any other document CSV file as required.

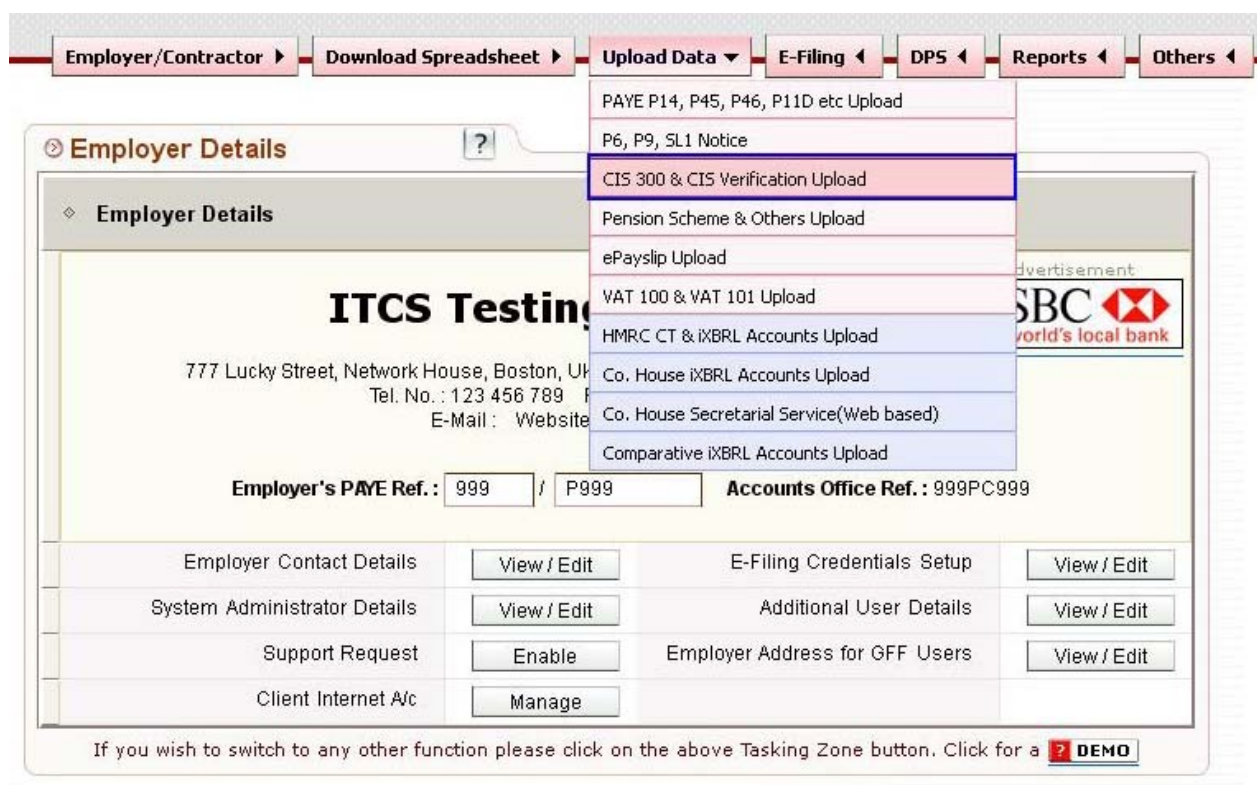


Fig 5.1 Click on the Upload Data File sub-menu

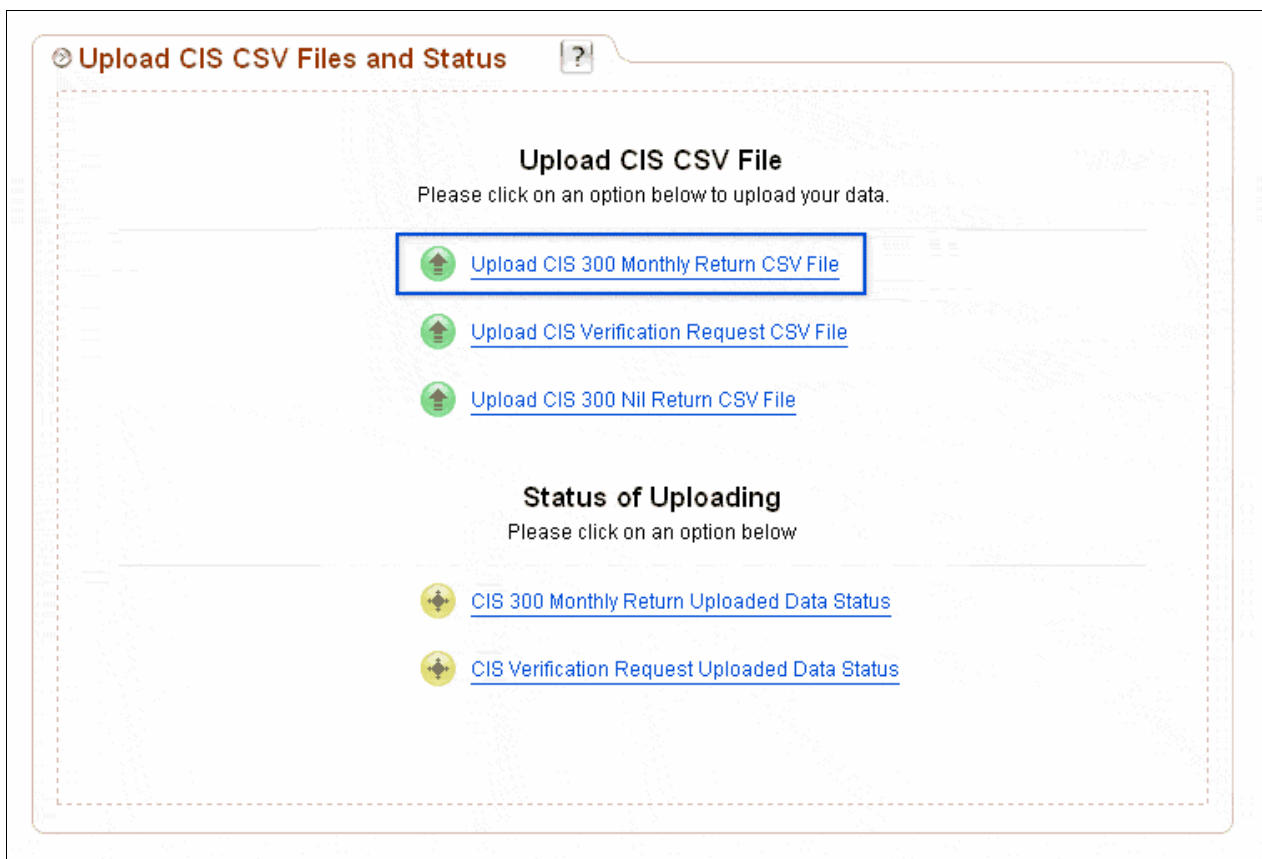


Fig 5.2 Click on the appropriate Upload CSV File link

Pick up the CIS spreadsheet file you just saved in your local system by clicking on the 'Browse' button (in just the same way as you sign in to an e-mail account and then go to your local system to pick up a file you prepared previously to attach to an e-mail).

"Your own CSV File Reference" is where you can enter a short description of the upload. This can also include the date of submission.

Click on the 'Click to Upload CSV File' button to upload the file to the www.efileready.com server.

Upload CIS 300 Monthly Return CSV File
?
< Back
Click to Upload CSV File ^

Upload CIS 300 CSV File(without eStatement - 2 Files)

This upload is for existing eFileReady CIS users to upload their CIS300 monthly returns data using their existing spreadsheets / CSV file for e-filing to the HMRC. If you do not wish to have the eStatement function you can continue to use your current spreadsheet / CSV file as it is. HMRC has not changed any of the CIS300 e-filing standards.

However, we do encourage you to switch to the new spreadsheets / CSV files with eStatement functions. The eStatement function is FREE and has a lot of advantages. [Please click here to find out more.](#)

Step 1 - Please ensure that your CIS 300 data for your monthly return e-filing is in a CSV file format.

Step 2 - Select Tax Year 2010-11

Step 3 - Tax Month End Date * 05 JUN 2010 (06-05-10 to 05-06-10) Click for Info
(Reset if to select other tax month)

Step 4 - **CONTRACTOR (CIS 300) ***
Click Browse to Upload Contractor CSV file. Browse...

Step 5 - **SUBBIES (CIS 300) ***
Click Browse to Upload Subcontractor CSV file. Browse...

Step 6 - Your own CSV File Reference (optional)

Warning : Please note - it will take **about 3 minutes**, depending on the quantity of data, to complete the uploading and validating process. Please do not click on any Tasking Zone button during this time. If you do the file upload will be aborted.

[Click here to Upload CSV File](#)

Fig 5.3 Browse to find the files in your local system and then upload

As you upload your CSV files, our service instantly converts the files into XML and validates them against the HMRC provided SCHEMA and BUSINESS RULES, ready for e-filing.

If no errors are found in the uploaded data, select E-filing/Status in the Tasking Zone to proceed on to e-file the uploaded file.

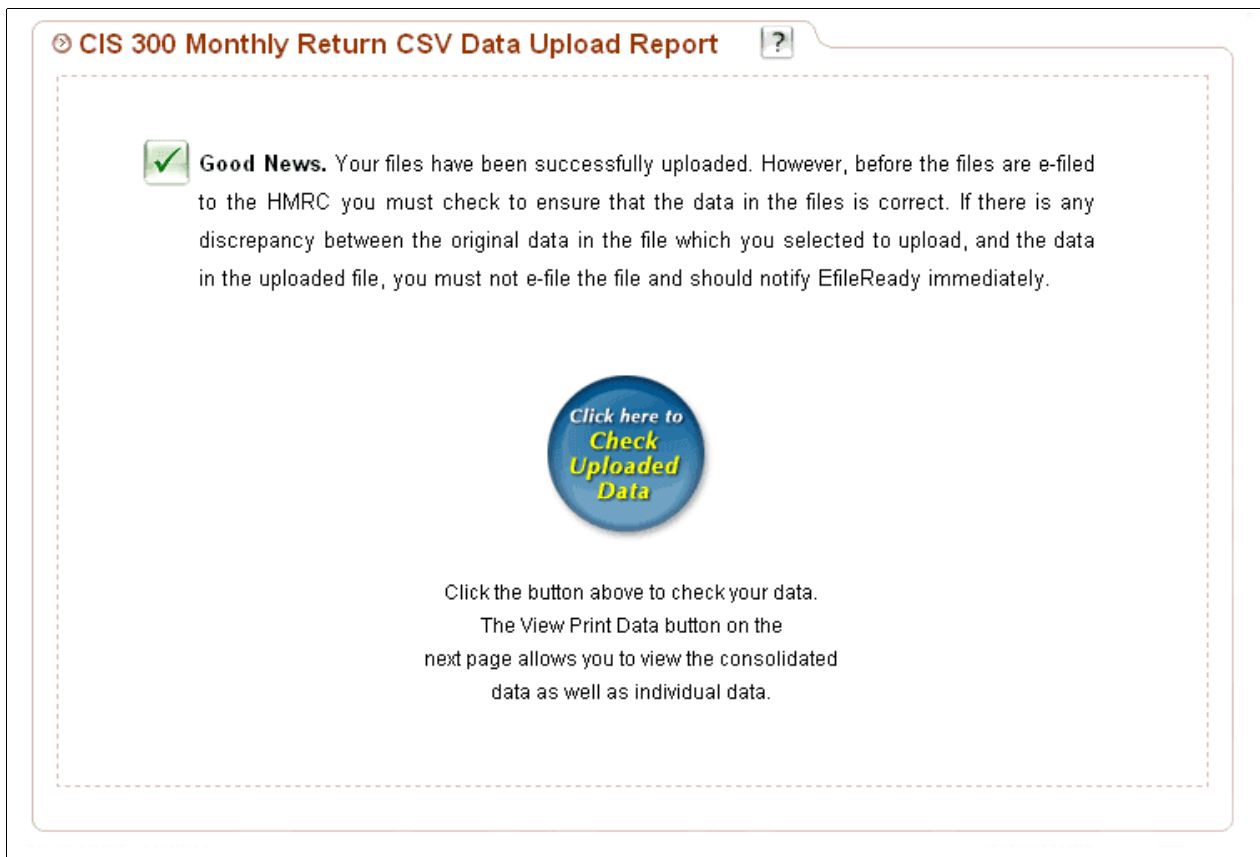



Fig 5.4 CSV Data Upload Report

If errors are found, an Error Report will be displayed on screen. You should amend the errors as indicated and then start the process again from Step 3.

CIS300 Monthly Return Details?

Print Report< Back

User CSV File Ref. **CIS3000002**Batch Ref. **AAA000006**

 **CSV Data Validation Error Report:**

Please fix the errors on your CIS300 Monthly Return spreadsheet and upload again.

Error found in Contractor CIS300 CSV file

1

Line 3 Column M1>> 2007/13/05 : Invalid Date field/format.

2

Line 3 Column M3 >> 727325648155 : Invalid mandatory field value.

3

Line 3 Column M4 >> 90123PP87654320001 : Invalid mandatory field value.

4

Line 3 Column M7 : Invalid mandatory field value.

Error found in Subcontractor CIS300 CSV file

1

Line 3 Column N2>> 9876543212334234324 : Maximum length exceeded.

2

Line 3 Column N11>> YHJ89753000J : Maximum length exceeded.

3

Line 4 Column N7>> ## : Either Individual or Trading Name should be present.

Print Report< Back

Fig 5.5 CSV Data Validation Error Report

6 Step 6. E-Filing your data

To e-file the uploaded data directly to HMRC, select E-filing/Status from the Tasking Zone, then select the appropriate sub-menu.

The screenshot displays the 2eFile web interface. At the top, a navigation bar contains buttons: **Employer/Contractor**, **Download Spreadsheet**, **Upload Data**, **E-Filing** (selected), **DPS**, **Reports**, and **Others**. A dropdown menu is open under **E-Filing**, listing the following options: E-File PAYE P14, P45, P46, P11D etc; **E-File CIS 300 & CIS Verification Request** (highlighted with a purple border); E-File Pension Scheme & Others; E-File VAT 100 & VAT 101; E-File HMRC CT & iXBRL Accounts; E-File Co. House iXBRL Accounts; and E-File Co. House Secretarial Forms.

The main content area is titled **Employer Details** and features the **ITCS** logo. Below the logo, the address is listed: 777 Lucky Street, Network House, Boston, UK, BR5 6BP, United Kingdom. Contact information includes Tel. No. : 123 456 789, Fax No. : , and E-Mail : Website : .

Below the address, there are input fields for **Employer's PAYE Ref. :** (containing '999') and **Accounts Office Ref. :** (containing '999PC999').

A table of links is provided at the bottom of the main content area:

| | | | |
|------------------------------|-----------------------------|--------------------------------|-----------------------------|
| Employer Contact Details | View / Edit | E-Filing Credentials Setup | View / Edit |
| System Administrator Details | View / Edit | Additional User Details | View / Edit |
| Support Request | Enable | Employer Address for GFF Users | View / Edit |
| Client Internet A/c | Manage | | |

At the bottom of the page, a note states: "If you wish to switch to any other function please click on the above Tasking Zone button. Click for a [DEMO](#)".

Fig 6.1 Click on the E-Filing sub-menu



Fig 6.2 Click on the appropriate E-File Document link

E-File CIS 300 Monthly Return Uploaded Data

Back E-File Now!

| Tax Month End date | Contractor Name | UTR | Contractor PAYE Ref. | User CSV File Ref. | Total Subbies | Upload Status | Action | Select to E-File |
|-----------------------|---------------------------|------------|-------------------------|-----------------------|------------------|------------------|-------------|------------------------|
| 05/05/2008 | Demo Contractor Limited | 4325648151 | 067 / V30456 | CIS300005 | 86 | Successful | View Remove | <input type="radio"/> |
| 05/05/2008 | Demo Contractor Limited 2 | 2325648152 | 067 / V30456 | CIS300004 | 0 | Successful | View Remove | <input type="radio"/> |
| 05/05/2008 | Demo Contractor Limited 3 | 4325648151 | 067 / V30456 | CIS300003 | 50 | Successful | View Remove | <input type="radio"/> |
| | | | | CIS300002 | 50 | Failed | View Remove | <input type="radio"/> |
| 05/05/2008 | Contractor Name X | 9625648152 | 067 / V30456 | CIS300001 | 12 | Successful | View Remove | <input type="radio"/> |

Previous Page 1 of 1 Next
Go to Page
Back E-File Now!

Fig 6.3 View the data to be E-filed

Before e-filing your data to the HMRC you should double check to ensure that the data you have uploaded is correct. If it is correct, select those details you wish to e-file by ticking the appropriate tick boxes, then click on the 'E-file Now!' button.

Contractor's Declaration

Cancel
Continue >

Contractor's Declaration

Tax Month End Date

05 MAY 2009 (05-04-2009 to 05-05-2009)

NOTE:

Please check that you have entered your E-Filing Setup details correctly. i.e. ensure that you have selected either Contractor or Agent as appropriate, and that your E-Filing User ID and Password are both entered and up to date.

DECLARATION :

I hereby confirm that I have checked through all the HMRC documents and records, consisting of CIS 300 Monthly Return CSV Data for my contractor, and to the best of my knowledge and belief these records are fully and truly stated.

Your Personal Name *

Robert Redford

Your Acting Capacity

Contractor

Enter User Sign In Password *

(eFileready Sign In Password)

Date and Time

14/05/2010 11:54:58

Continue to E-File

Fig 6.4 Enter your details on the Declaration page

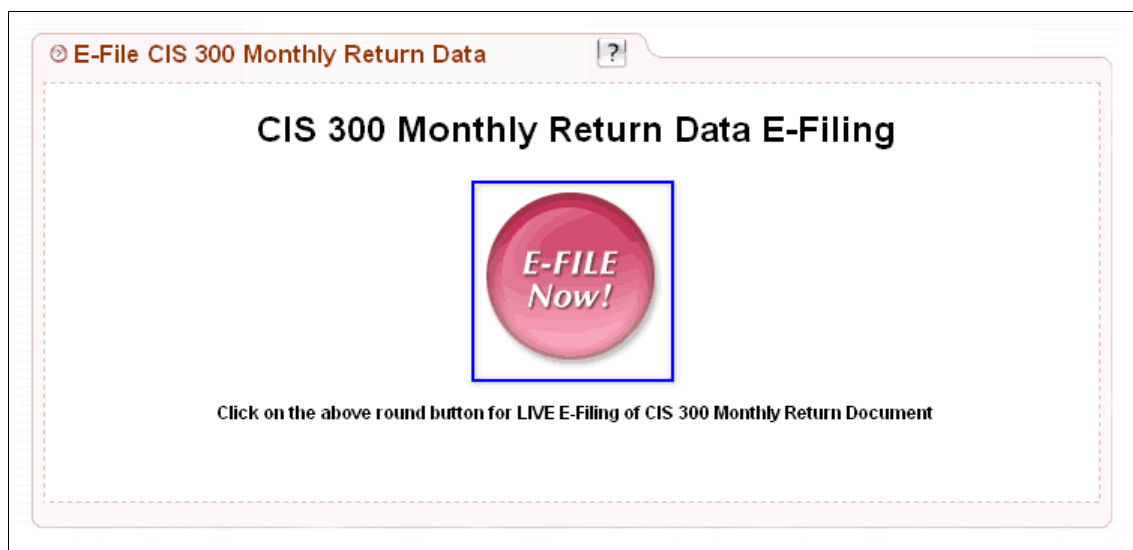


Fig 6.5 Click on the 'E-file Now!' button to e-file your data to the HMRC

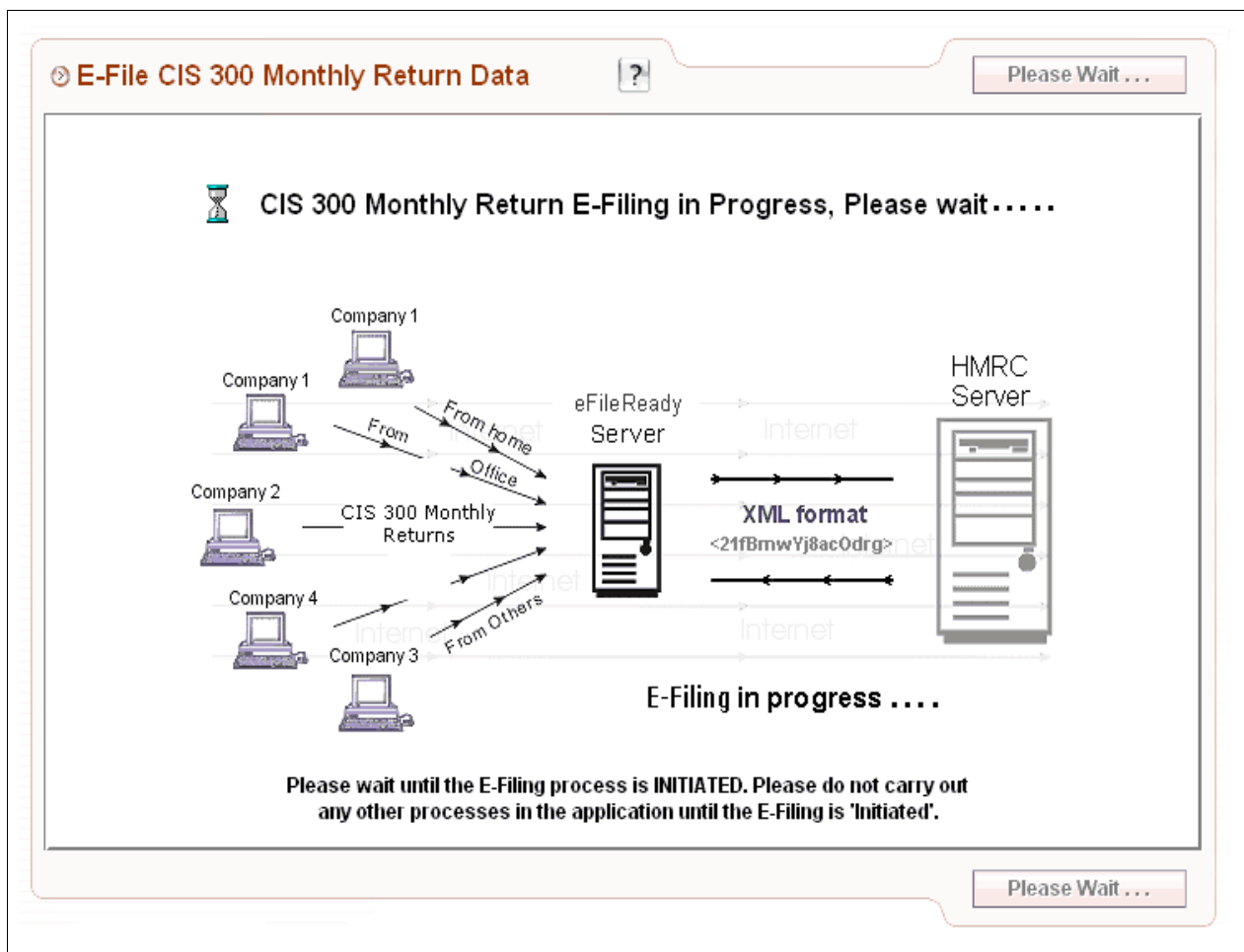


Fig 6.6 E-Filing in progress

The above diagram will be displayed as you data is being sent to the HMRC. There may be a time delay before you receive a response from the HMRC, especially at peak times.

During this time you can either carry out other processes in the system, or sign out and sign back in later to check on the status of your e-filing.

CIS 300 Monthly Return E-Filing Status

CIS 300 Monthly Return E-Filing

INITIATED

for

Demo Company Limited

(UTR No.: 1234567890, PAYE Ref.: 067/ V30456)

Tax Month End Date: 05 MAY 2009 (05-04-08 to 05-05-08)

No. of Subcontractor: **86 Subcontractors**

HMRC Reference (Correlation ID) : **0FF3EA4E1DE2425CAF1C86B6844C5982**

E-Filing of CIS 300 Monthly Return is INITIATED

The Internet E-Filing of your CIS 300 Monthly Return Data to HMRC is INITIATED.
Please come back again later and click on the "E-Filing / Status" button in the Tasking Zone to check the status of your E-Filing submission.

Click here to view the E-Filing Submission Details

Click on the button above to view the status of your E-Filed documents.

Follow the instructions below to check the latest E-Filed Status of this E-Filed document.

- Click on E-Filing / Status on the Tasking Zone
- Click on the appropriate E-File Document and Status menu item
- Click on CIS 300 Monthly Return E-Filed Status under Status of E-Filing section

To continue with other tasks please click on appropriate button at the above Tasking zone buttons

DEMO

Fig 6.7 E-Filing process initiated

7 Step 7. Check your E-filing Status.

Click on E-filing/Status in the Tasking Zone to check the status of your e-filing. If the status is shown as 'Completed', this means the HMRC have received and accepted your e-filed submission. You can then print your e-filing Certificate as proof of your e-filing for your records.

| CIS 300 Monthly Return E-Filed Status | | | | | | | | | | |
|---------------------------------------|---------------------------|----------|----------------------|--------------------|---------------|-------------------------|------------------------|---------------------------------------|------------------------------|------------------------|
| Tax Month End date | Contractor Name | UTR | Contractor PAYE Ref. | User CSV File Ref. | Total Subbies | HMRC e Timestamp | E-Filed Status | E-Filed Certificate & Digital Receipt | E-Filed Details | Action |
| 05/05/2008 | Demo Contractor Limited | 12367890 | 067 / V30456 | CIS3005 | 86 | 2008-05-15T03:30:66.056 | COMPLETED | View / Print | View / Print | |
| 05/05/2008 | Demo Contractor Limited 2 | 23248152 | 067 / V30456 | CIS3004 | 0 | 2008-05-15T07:18:53.276 | COMPLETED | View / Print | View / Print | |
| 05/05/2008 | Demo Contractor Limited 3 | 43248151 | 067 / V30456 | CIS3003 | 50 | 2008-05-15T12:25:13.456 | COMPLETED | View / Print | View / Print | |
| 05/05/2008 | Demo Contractor Limited 3 | 43248151 | 067 / V30456 | CIS3002 | 50 | 2008-05-15T12:25:16.321 | AUTHENTICATION FAILURE | View Error | View / Print | Remove |
| 05/05/2008 | Demo Contractor X | 45648146 | 067 / V30456 | CIS3001 | 12 | 2008-05-15T12:25:17.235 | COMPLETED | View / Print | View / Print | |

< Previous Page 1 of 1 Next > | Go to Page < Back

Fig 7.1 E-Filing / Status

CIS 300 Monthly Return E-Filed Status ? **Print Certificate** < Back

CIS 300 Monthly Return E-Filed

Certificate

for

Demo Contractor Limited

(UTR No.: 1234567890, PAYE Ref.: 067/ V30456)

Tax Month End Date: 05 MAY 2009 (05-04-08 to 05-05-08)

HMRC eTimestamp: 2008-05-15T10:34:31.111554 (YYYY-MM-DDTHH:MM:SS.SSS)

CIS 300 Monthly Return E-Filed : **86 Subcontractors**

Congratulations: Your CIS 300 Monthly Return document has been successfully E-Filed by Internet to the HM Revenue & Customs.

| | |
|---------------------------------|----------------------------------|
| CIS 300 Monthly Return E-Filed | 86 Subcontractors |
| Submitter Name | Demo Contractor Limited |
| HMRC Accounts Office Ref. | 123PP87654321 |
| Inhouse Tracking Reference | AAA0198367 |
| HMRC Reference (Correlation ID) | 0FF3EA4E1DE2425CAF1C86B6844C5982 |
| Submission Status Report | SUBMITTED SUCCESSFULLY |

HMRC Digital Receipt (IRmark)

The Inland Revenue has received the IR-CIS-CIS300MR document ref: 067 V30456 at 2009-02-13T10:33:50.840. The associated IRmark was:

5X4MUOG4PIDXKKJGXXKMF8X2UBMDSLGPR We advise you to keep this receipt in both electronic and hardcopy versions for your records. You may wish to use them to identify your submission in the future.

Print Certificate < Back

Fig 7.2 E-Filing Acceptance Certificate

8 E-Filing as an Agent / Company / Employer – HMRC Credentials Set up

If you are an agent / pension scheme administrator / company using our service, you have to enter your Agent / company details to file the returns online to HMRC. To do this select Employer / Contractor from the Tasking Zone menu, further select the HMRC E-File Credentials Setup, then click on the appropriate link for E-filing Setup.

HMRC E-File Credentials Setup

Please select one of the following to setup HMRC e-filing credentials.

| | |
|---|---|
| P14, P35, P38A, P45, P46, WNU + | Accounts, CT600 & Computation |
| P11D(b), P11D, P9D, P46(Car) + | VAT 100 & VAT 101 |
| CIS 300 + | Pension Scheme |
| CIS Verification Request | DPS - P6, P9, SL1, SL2 etc. |

+ By default, E-Fileready sets up E-Fileready's Agent ID and Password for you to E-File your returns.

If you wish to switch to any other function please click on the above Tasking Zone button. Click for a **DEMO**

Fig 8.1.1 E-Filing Setup

8.1 P14, P35, P38A, P45, P46, WNU E-Filing Setup

P14, P35, P38A, P45, P46, WNU E-Filing Setup ? < Back

Employer / Contractor E-Filing Details Edit

| | |
|---------------|--------------|
| HMRC User ID | GGGGGGGGGG ? |
| HMRC Password | ***** |

☐ **I would like to use eFileReady's Agent credentials for my E-Filing**

By default E-FileReady has entered E-FileReady's own Agent ID and Password ready for you to use to E-File your P14, P35, P38A, P45, P46, WNU (PAYE) returns.

☒ **I am an EMPLOYER**

If you are an employer and have a HMRC User ID and Password you can use these to E-File your P14, P35, P38A, P45, P46 and WNU (PAYE) returns to HMRC.

To set up your E-Filing details click on the Edit button, then enter your HMRC ID and Password and click on Save. You can then easily E-File your returns to HMRC.

To apply for an employer HMRC E-Filing User ID and Password, please [click here](#).

☐ **I am an AGENT / BUREAU**

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client you can use your HMRC Agent User ID and Password for CIS and PAYE E-Filing.

To set up your E-Filing details click on the Edit button, then enter your Agent HMRC ID and Password and click on Save. You can then easily E-File your client's returns to HMRC.

To find out how to set yourself up as an Agent, please [click here](#).

< Back

Fig 8.1.2 Select and enter your Employer / Agent HMRC User ID & Password

If you are an Employer and have a HMRC User ID and Password, select I am an Employer option and enter the details to E-file your Inyear and EOY PAYE returns.

Please note, If you have not got your own HMRC E-Filing User ID and Password or if they are not working, you can use this default setting temporarily to e-file your documents. You do not need to enter any details if you choose to use our E-Filing credentials for your E-Filing as the details are already embedded in the system. You may change the default setting to your own at anytime.

If you are an Agent filing your client's returns, select "I am an Agent / Bureau" option and enter the Agent details.

8.2 CIS 300 E-Filing Setup

CIS 300 E-Filing Setup ? < Back

Employer's / Contractor's E-Filing Details Edit

| | | |
|---------------|---------------|---|
| HMRC User ID | 611J5Q12ABVBC | ? |
| HMRC Password | ***** | |

☐ **I would like to use eFileReady's Agent credentials for my E-Filing**

By default E-FileReady has set up E-FileReady's Agent ID and Password ready for you to use to E-File your CIS300 monthly returns.

Please note, this default setting DOES NOT allow you to E-File your CIS Verifications. If you wish to conduct CIS Verifications you need to apply to the HMRC for your own User ID and Password.

To apply for your own HMRC E-Filing User ID and Password, please [click here](#).

☒ **I am an EMPLOYER / CONTRACTOR**

If you are an employer / Contractor and have your own HMRC User ID and Password, you can use these to E-File your CIS returns to HMRC.

To set up your E-Filing details click on the Edit button, then enter your HMRC ID and Password and click on Save. You can then easily E-File your CIS300 monthly returns to HMRC.

To apply for your own HMRC E-Filing User ID and Password, please [click here](#).

☐ **I am an AGENT / BUREAU**

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client you can use your HMRC Agent User ID and Password for CIS E-Filing.

To set up your E-Filing details click on the Edit button, then enter your Agent HMRC ID and Password and click on Save. You can then easily E-File your client's CIS300 monthly returns to HMRC.

To register as an CIS Agent, please [click here](#).

< Back

Fig 8.1.3 Select and enter your Employer / Agent HMRC User ID & Password

If you are an employer / Contractor and have your own HMRC User ID and Password, select I am an Employer / Contractor option. Please enter your HMRC User ID and Password to efile your CIS 300 returns to HMRC

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client, select I am an Agent / Bureau option and enter your HMRC Agent User ID and Password for CIS E-Filing.

Please note, to efile the CIS 300 returns as an Agent, you should have registered as an CIS Agent

with HMRC.

If you do not have the HMRC User ID and Password, you can use the E-FileReady's Agent ID and Password to E-File your CIS300 monthly returns. To use this option, please select I would like to use eFileReady's Agent credentials for my E-Filing option.

Please note, this default setting DOES NOT allow you to E-File your CIS Verifications. If you wish to conduct CIS Verifications you need to apply to the HMRC for your own User ID and Password.

8.3 CIS Verification Request E-Filing Setup

CIS Verification Request E-Filing Setup ? < Back

◆ **Employer's / Contractor's E-Filing Details** Edit

| | | |
|---------------|---------------|---|
| HMRC User ID | 611J5Q12ABVBC | ? |
| HMRC Password | ***** | |

☒ **I am an EMPLOYER / CONTRACTOR**

If you are an employer / Contractor and have your own HMRC User ID and Password, you can use these to E-File your Verification Requests to HMRC.

To set up your E-Filing details click on the Edit button, then enter your HMRC ID and Password and click on Save. You can then easily E-File your CIS verification requests to HMRC.

To apply for a HMRC E-Filing User ID and Password, please [click here](#).

☐ **I am an AGENT / BUREAU**

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client you can use your HMRC Agent User ID and Password for your client's CIS Verification Requests.

To set up your E-Filing details click on the Edit button, then enter your Agent HMRC ID and Password and click on Save. You can then easily E-File your client's Verification Requests to HMRC.

To register as an CIS Agent, please [click here](#).

< Back

Fig 8.1.4 Select and enter your Employer / Agent HMRC User ID & Password

If you are an employer / Contractor and have your own HMRC User ID and Password, select I am an Employer / Contractor option. Please enter your HMRC User ID and Password to efile your Verification Requests to HMRC.

If you are an Agent / Bureau acting on behalf of a CIS Contractor / Employer client, select I am an Agent / Bureau option and enter your HMRC Agent User ID and Password for your client's CIS Verification Requests.

9 Appointing Additional Users

If you wish to allow additional users to access your eFileReady account, in the Tasking Zone menu click on Employer/Contractor, further select the sub-menu Employer/Contractor Details. Click on the 'View/Edit' button for Additional User Details, then click on the 'Add New User' button and enter the requested details.

Employer Details

Employer Details

ITCS Testing Co.

777 Lucky Street, Network House, Boston, UK, BR5 6BP, United Kingdom.
Tel. No. : 123 456 789 Fax No. :
E-Mail : Website :

Advertisement
HSBC
The world's local bank

Employer's PAYE Ref. : 999 / 999 Accounts Office Ref. : 999PC999

| | | | |
|------------------------------|-----------------------------|--------------------------------|-----------------------------|
| Employer Contact Details | View / Edit | HMRC E-File Credentials Setup | View / Edit |
| System Administrator Details | View / Edit | Additional User Details | View / Edit |
| Support Request | Enable | Employer Address for GFF Users | View / Edit |

If you wish to switch to any other function please click on the above Tasking Zone button. Click for a [? DEMO](#)

Fig 9.1 Click on the Additional User Details button

| System User Name | System User Sign In ID | Sign In Log Book | Internet A/c Status ? | | | Forget Sign In Details ? | System User Personal Details |
|---------------------|------------------------|----------------------|----------------------------------|-----------------------|--|--------------------------------|------------------------------|
| | | | Enable | Disable | Confirm | | |
| Testing, AddInAdmin | EEST7056796 | View | <input checked="" type="radio"/> | <input type="radio"/> | <input type="button" value="Confirm"/> | Resend Details | View / Edit |
| Testing, Ketan | EEST7098073 | View | <input checked="" type="radio"/> | <input type="radio"/> | <input type="button" value="Confirm"/> | Resend Details | View / Edit |

Fig 9.2 Click on Add New User

On this screen, as well as adding new users, you can also control the access rights of your existing additional users, send them reminders of their sign in details should they ever forget them, and even view a log of their previous signins.

Add New System User ?

(*) = required fields.

System User's Email to be used for this service *

Retype System User's Email *

System User's Title ▼

System User's Surname *

System User's Forename *

System User's Second Forename

System User's Address

Town / City

County

Post Code

Country ▼

System User's Tel. No.

System User's Mobile No.

Fig 9.3 Enter the details of your Additional User

1 2eFile.com

E-Filing Specialists

(Automated E-filing to the HMRC at anytime over the Internet)

- 1. E-filing of CIS 300 Monthly Returns**
- 2. Verification of Sub-Contractors' Tax Status**
- 3. E-filing of EOY P14,P35,P45,P46,WNW,P160**
- 4. E-filing of Pension, VAT and other returns**
- 5. Data Provisioning Services (DPS) Downloading**
- 6. E-filing of P11D,P11D(B),P46(CAR)**
- 7. E-Filing of CT and iXBRL Accounts to HMRC**
- 8. E-Filing of Companies House iXBRL Accounts**
- 9. E-Filing of Companies House Secretarial forms**
- 10. E-Filing of Companies House Incorporation forms**
- 11. E-Filing RTI Returns (EAS, FFPS, FPS, EPS, NVR)**

[Click here to log on to www.EFileReady.com](http://www.EFileReady.com)

For more information about our products and services, please contact our Support Team.)

Support Email: Kevin.Munn@efileready.com

Tel: [020 8452 9516](tel:02084529516)