

The link below is the page in the Girlguiding website which gives information about the process and is where you can download the registration certificate to complete.

[Gift Aid | Girlguiding](#)

## Step 1. Complete registration certificate

The form needs details of three responsible persons (your bank account signatories would be ideal). It then needs to be sent to Girlguiding to be signed. Because the form contains personal data, you need to be aware of GDPR when you send it. If you email it, it should be password protected – as it is a PDF, you are unlikely to be able to do this unless you have a paid for version of the software. An alternative is to ask for consent of those people whose details are included and email it without a password if they are comfortable with that. If you post it, it should be sent special delivery – this currently costs £6.85 (which is a legitimate unit expense).

## Step 2. HMRC application form

Girlguiding will send the partly completed form to you with your signed registration certificate. The form needs to be signed by all three responsible persons and then posted to HMRC with copies of your last 3 months bank statements and your last unit accounts.

You will then receive a letter from HMRC confirming that you are a charitable company for tax purposes and confirming who has been registered as the authorised officials.

## Step 3. Enrolling for HMRC Online services

Go to the website below.

[Sign in using Government Gateway - GOV.UK \(access.service.gov.uk\)](#)

Select **“create an account”**.

You are then asked to give an email address to get a code.

Enter your full name as on the authorised officials list.

Create a password.

This generates a government gateway user ID.

Choose type of account: **“Organisation”**

Set up additional security: choose from text message, voice call or authenticator.

Select **“add a tax – other tax”** then **“Charities for gift aid repayment claims”**

You’ll then be asked for your HMRC charities reference provided in the letter from HMRC and your customer account reference (also on the letter).

This requests access and means an activation code will be sent in the post.

## **Step 4. Activating your Gift Aid account**

The guidance on how to do this is included in the letter you are sent with your activation code. The activation code has to be used within a month of requesting it.

You will need your government gateway ID (issued in Step 3 above), the password you created and access to your phone / authenticator for the additional security set up in Step 3.

Logging in will take you to the Business tax account page.

Scroll down the page and select **“Access Charities”** from the Charities section then enter the activation code received through the post.

Once entered, this gives you immediate access to be able to claim so now under charities, you have the option to claim tax back.

## **Step 5. Claiming Gift Aid**

Tick the box at the top to confirm you will provide honest and accurate information.

Select **“Yes”** to claiming Gift Aid and **“No”** to claiming UK tax deducted from other income and **“No”** to claiming top up payments for small cash donations.

Enter a claim reference if you want one to appear on your bank statement. (The statement will show that the payment has come from HMRC Charities.)

On the next screen, select **“Organisation Details”**.

- Under name of charity regulator: select **“None”** and then select **“Your charity is excepted”**
- Select **“No”** to claim being made by a corporate trustee
- Enter your name and postcode as given when registering as a responsible person
- Enter a daytime telephone number

On the next page, select to download a **“Gift Aid Schedule”**. This will take you to a webpage where you can find the document to download. Scroll down the page and click on **“download a Gift Aid schedule”** which will take you to the page where you can actually download it.

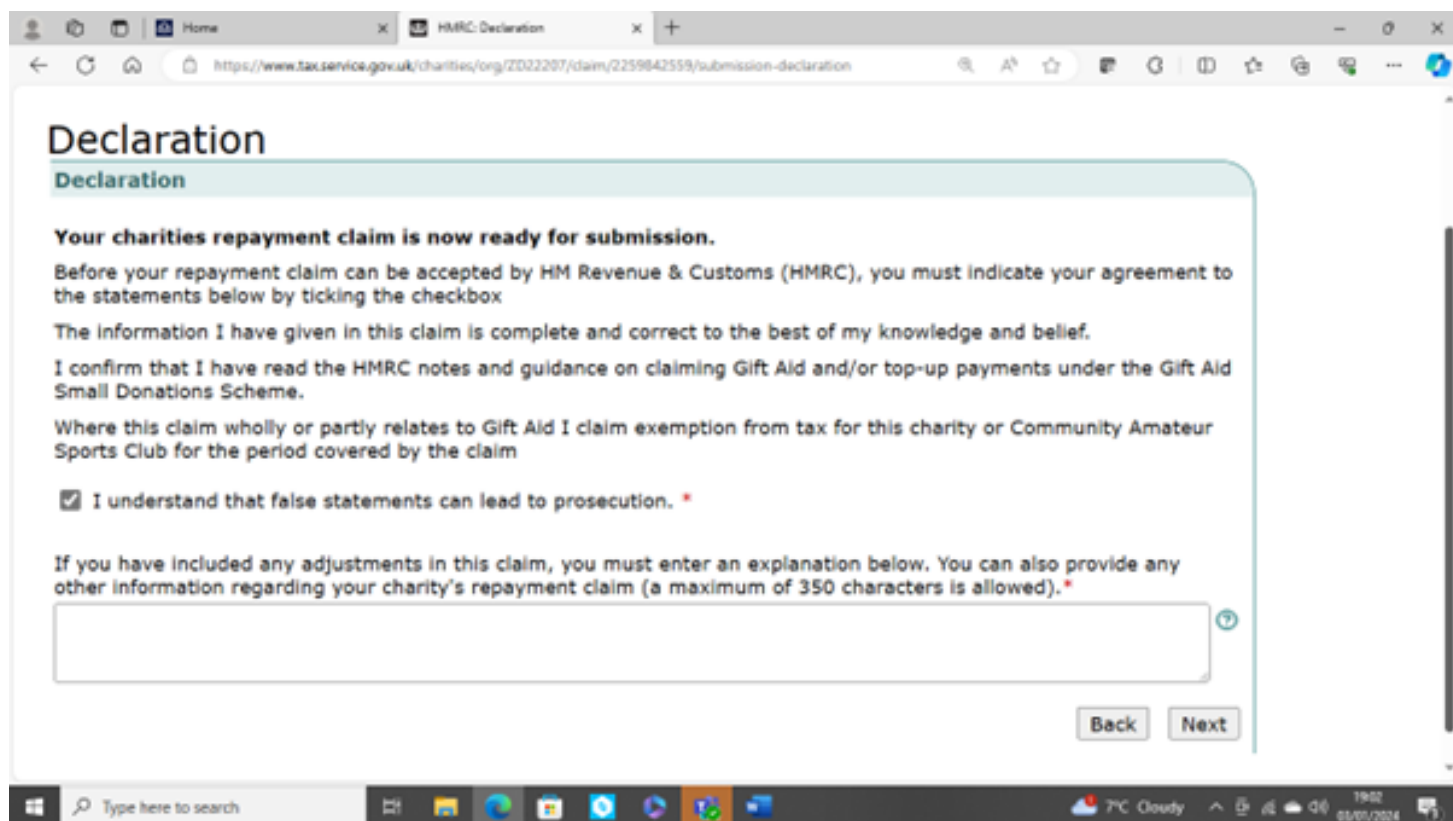
On the form you will need to complete:

- Box 1: the date of the earliest payment of subs for which you are claiming Gift Aid
- The donation schedules table with the information from the Gift Aid declarations of anyone who has paid subs for which you are claiming gift aid. If someone has paid more than one lot of subs then the date you put on their row should be the date of the first lot they paid within the period you are claiming for. The amount you put in should be the total of all the subs paid within the period you are claiming for.

You will then need to save the document.

Once it is saved, you can upload it then click **“Next”**.

This will take you through to the following declaration which you must complete.



The screenshot shows a web browser window displaying the HMRC Declaration form. The browser's address bar shows the URL: <https://www.tax.service.gov.uk/charities/org/Z022207/claim/2259842559/submission-declaration>. The form title is "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 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).\*

At the bottom of the form, there are two buttons: "Back" and "Next".

When you click **“Next”** again, you will be asked to re-enter your Government Gateway user ID and password and will then get an acknowledgement that the claim has been submitted with a submission receipt reference number. You can then view your **“repayment claim summary”** which you can then screenshot or print so that you have it for your account's records.