

# TAX Agents User Guide For Filing Tax Returns Online

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## General

The Taxes Office Online Services (TOOS) provides the ability for approved agents and company officers to submit company (zero/ten) Company returns and will only be accepted electronically from January 2015 onwards unless an exemption has been approved by the Comptroller of Taxes in writing beforehand and

**Personal Returns** from 2014 onwards can only be submitted using the online XML upload method. At present, only a registered agent may complete online returns for individual taxpayers. If you do not have this capability, we are accepting paper returns which you should have received in January.

### What tax return types can I submit online?

You can submit tax returns online for companies and Jersey resident individuals. You cannot yet complete a return online for partnerships, pension schemes, charities, non-residents, estates or trusts.

The Year of Assessment being filed is on a previous year basis. If you need to make a return for earlier years or for the current year, please contact the Taxes Office for the appropriate form.

The return can either be entered on screen or a separate return file can be uploaded to our website.

### Visit the website

To visit the TOOS website, type <https://empret.jsytax.je/TOOS> in your browser address bar or alternatively Go [to www.gov.je](http://www.gov.je) and follow the links through to Taxes and your Money and the Income Tax section.

## Register

It is necessary to register to use the Taxes Office Online Services website.

*Please note:- Once you have registered you will be sent 'activation PIN' in the post – you cannot log in to your account until you have received this.*

You can currently register into 2 possible roles as follows:

**Agent Role** - If you are registering to complete tax returns on behalf of one or many clients in the capacity of an agent or tax advisor, please use the Agent Registration. Once your registration has been approved, each client that has confirmed your authority to the Taxes Office will appear in your client list. You will also have the ability to create further users but you have full responsibility to maintain the access of those users

thereafter, bearing in mind this is an internet-based system and users can access the system from any internet enabled location or device.

**Company Role** - If you are registering to complete the tax return of a company in the capacity of an authorised officer of that company, please use the Company Registration. Once your registration has been approved you will have the ability to register further companies that you may also be authorised to file tax returns for. Other authorised officers will also need to register. Should you no longer be entitled to return on behalf of the company you must immediately remove the company from your online profile. Alternatively, you can apply to the Taxes Office if you have reason to remove an existing registered user. .

### To register:

1. Go to the TOOS home/login page <https://empret.jsytax.je/TOOS>

The screenshot shows the TOOS website interface. At the top, there is a red header with the States of Jersey logo and the text "Online information and public services for the island of Jersey". Below this is a "Help" link. A prominent red banner reads "Complete your tax returns online". The main content area is divided into two columns. The left column has a "Login and registration" section with a welcome message and a "Login" section containing a form with fields for "User ID" (filled with 45677838990) and "Password" (masked with dots), and a "Log In" button. Below the login form is a "Forgotten your password?" section with a button to start the password reset process. The right column has a "News" section with an update about Section 7 of the 2013 personal income tax returns, and a "New user?" section with a "Begin Registration >" button. At the bottom right, there is a "Forgotten your User ID?" section with a link to contact the Taxes Office Helpline.

2. Click on the 'Begin registration' button
3. Click on radio button for the appropriate role as defined above.
4. Click on the 'Next' button
5. You need to read the 'Terms and Conditions'. If you are happy to continue, confirm that you have read the conditions.

## 1. Company Registration: Terms & Conditions

View the terms and conditions below. You must confirm that you have read them before clicking the 'Next' button to proceed. If you do not confirm that you have read the terms and conditions, you will not be able to use the States of Jersey Tax Office online services.

### Terms and Conditions

Welcome to **Taxes Office Online Services, part of gov.je, the States of Jersey website.**

Taxes Office Online Services are delivered to you subject to the conditions set out on this page.

### Important note

Please read these conditions carefully before using Taxes Office Online Services.  
By using Taxes Office Online Services, you signify your agreement to be bound by these conditions.

### Conditions relating to your use of Taxes Office Online Services

All Taxes Office Online Services services are delivered subject to the standard [terms and conditions](#) of use for gov.je.

The following terms and conditions are specific to the use of Taxes Office Online Services.

#### 1. Your account

If you register to use Taxes Office Online Services, you are responsible for maintaining the confidentiality of your email address and password and for restricting access to your computer to prevent unauthorised access to your account. You agree to accept responsibility for all activities that occur under your account or password. You should take all necessary steps to ensure that the password is kept confidential and secure and should inform us immediately if you have any reason to believe that your password has become known to anyone else, or if the password is being, or is likely to be, used in an unauthorised manner.

Ensure that the details you provide us with are correct and complete and inform us of any changes to the information that you provided when registering.

The States of Jersey Taxes office reserve the right to refuse access to Taxes Office Online Services, terminate accounts, remove or edit content at our discretion.

#### 2. Privacy

Please review our [privacy statement](#), which also governs your visit to Taxes Office Online Services, to understand our practices.

#### 3. Access to Taxes Office Online Services

We will do our utmost to ensure that availability of Taxes Office Online Services will be uninterrupted and that content and services will be error-free. However, due to the nature of the Internet, this cannot be guaranteed. Also, your access to Taxes Office Online Services may be occasionally suspended or restricted to allow for repairs, maintenance, or the introduction of new facilities or services. We will attempt to limit the frequency and duration of any such suspension or restriction.

#### 4. Reporting a problem with Taxes Office Online Services

If you have a problem with your use of Taxes Office Online Services, you may phone the Taxes Office on normal working days, between the hours of 9:00 am and 5:00 pm on 440300. You may also [email the Taxes Office](#).

#### 5. Changes to terms and conditions of use

The States of Jersey reserve the right to change these terms and conditions of use at any time.

#### 6. Submission of Returns

The date and time recorded against any submitted return shall be the server date, time and time zone (this may not be the same as the time on the machine used to connect to the service).

The server date and time when this page was last refreshed was **2015/01/02 10:38:06** Greenwich Mean Time Zone (UTC+00:00).  
Refresh the page to see the current server time.

Confirm that you have read the terms and conditions.

6. Click on the 'Next' button.

7. Complete the information requested. The email address will be used to email the User Id to you.

### Notes on Passwords:

- When choosing your password make sure it contains between 8 and 12 elements. The password must contain characters from three of the following elements – uppercase letters (A-Z), lower case letters (a-z), a number (0-9), a symbol from ! # % & ( ) \* + , - / ~ : ; < = > ? @ [ \ ] ^ \_ ` { | }.
- Make sure you can remember this password, particularly if you are making returns infrequently (e.g. annually), as you will need it every time you log in to the secure website. Keep it safe.
- Logging in with an activated user Id and password authenticates you and the information you send to us through this system. If you believe your user ID and

password has been compromised please advise us immediately by emailing [jerseytax@gov.je](mailto:jerseytax@gov.je)

- Each time you log in you will see a message displaying the last time you logged in and a link to your account settings where there is a list of all account activity.

8. Below the password there is an image containing some random letters. Please retype these characters into the box below.

9. Click on the 'Next' button.

10. You are now presented with your User ID and advised that your Activation PIN will be posted to you if your registration is successful. You can print these details.

### **Activate your account**

When you have received your activation PIN you can log in to use the Taxes Office Online Services.

Please note that you only need to enter this activation PIN at first log in.

To activate your account:

1. Go to the TOOS home/login page <https://empret.jsytax.je/TOOS>
2. Enter your User ID (advised on last page of registration and emailed to you) and password (set during the registration request process) then click 'Log in'.
3. You are now presented with the activation page. Enter the activation pin you were sent in the post & click 'Activate'.
4. You are now logged in to the website securely.

Your Service page:

If one user wishes to have a number of companies associated with their user account they can do it via the 'Add new company service' button on the service page, or if the company has been auto registered you can click the 'Add Auto –Registered company button' you will need the user ID and password supplied by post for this.

## Services available to you

You last logged in on 16/01/2015 at 14:57 Click [here](#) to see all event history for your account

Below is a list of services that are available to you on this website. To access the service, click on the appropriate button below.

Online Company Tax Return for ASSOCIATED TRUST LIMITED (

▶ Access Service >

Remove Service

Add New Company Service >

Use this to initiate a completely new Company Registration.

Add Auto-Registered Company >

Use this to add a Company that has been automatically registered. You will need the User ID and Password as supplied by post for this.

## Accessing, removing and adding Services

Most users will only have one service and the system will take you directly to that service after logging in. Where you have registered successfully for more than one service, for example if you are filing returns for more than one company (see Company Role in the Register section above) you can see what services are available to you:

1. Follow instructions to 'Log in'

2. If you have multiple services, the first screen after logging in will be the 'Your Services'

selection screen. If you need to get to here from another page, click on 'Your Services' in the menu bar.

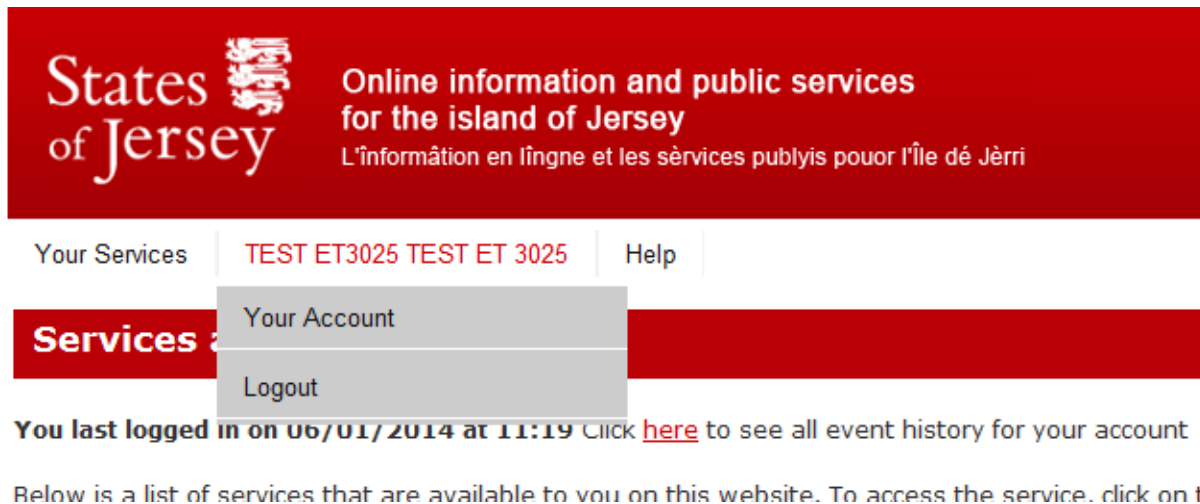
3. From the Services screen you will see buttons next to each available service allowing you to access the service or remove the service.

4. If the service is not active you will only have the option to return to the home page. This will apply to services where the activation pin has not yet been sent or where the application for the service has been rejected.

5. At the bottom of the page there is a button to add further services. This will take you through the same company registration process. An activation pin will be sent for each service on approval of the application.

## Manage my users

Registered Agents and Tax Advisors have the ability to create other 'users' to log in with their own user ID and passwords. Users can be added, edited and deleted via the 'Manage users' page accessed from the drop-down menu.



The screenshot shows the top navigation bar of the States of Jersey website. The header is red with the text "States of Jersey" and "Online information and public services for the island of Jersey" in white. Below the header, there is a navigation bar with "Your Services", "TEST ET3025 TEST ET 3025", and "Help". A dropdown menu is open under "Your Services", showing "Your Account" and "Logout". Below the menu, there is a message: "You last logged in on 06/01/2014 at 11:19 Click [here](#) to see all event history for your account". Below this, there is a line of text: "Below is a list of services that are available to you on this website. To access the service, click on t".

Only an Administrator level user can see the Manage User options.

- By default, the first registered user is the Administration user but this can be changed. There must always be at least one administration level user.
- An administration level user can create, delete and change details of themselves and other users.
- A standard user can only see and change their own user details.
- Apart from managing users, Standard users can access all other online return services.
- An Upload user account is for use with third party software packages to connect and upload returns automatically. These 'users' can only log in to maintain the account details (such as changing the password).

1. Follow instructions to 'Log in' ensuring you are an Administrator.
2. Click on 'Your Services' in the menu bar.
3. Click on 'Manage Users' in the menu drop down.

## Change User Account Details

To change the name, email address or password of your user account and to view a list of all recent activity:

1. Follow instructions to 'Log in'

2. Click on your user account name in the menu bar and then click on 'Your Account'
3. Or, if on the opening page after logging in, wherever you see the statement 'You last logged in on ...' you can click on the underlined 'here' link.

Always keep your account details up to date and private. We consider an online submitted return to be electronically signed in compliance with the Electronic Communications (Jersey) Law 2000 and that you are signing either as the tax payer, an authorised signatory of the tax payer or as an agent with the full knowledge and consent of the tax payer.

### Navigate Agent's list of Taxpayer clients

To view and navigate the list of taxpayers associated with you as an Agent: 4. Follow instructions to 'Log in'

5. You should be taken straight to the client list. If you are on another screen, click 'Your Services' on the menu bar and select 'View Client List' from the drop down.








6. You will now be on the 'Agent Return: Taxpayer Selection' list. The default setting for this page is to list all clients in pages of 10 at a time. This can be changed in the Show ... Entries dropdown on the heading of the client grid.

7. You can change the selection criteria options and select 'Refresh' to make the list more specific.

8. Use the Search box to type any characters that you wish to filter the displayed client list to.

The rows shown will automatically filter to those where the entered search text appears in any part of any of the columns, so the text entered could be part of the tax reference, the client name, your agent's reference, the date the return was completed or a lodgement reference.

9. The header of the client grid allows the list to be sorted in any order. Click in a column heading to sort by that column in ascending order. Click again to reverse the order. The arrow denotes which column is currently being sorted and how (up or down).

Show 10 entries		Search: <input type="text"/>					
Action	Tax Ref 	Agents Code 	Name 	Type 	Status 	Date Complete 	Lodge. Ref 

10. The footer of the client grid shows the total number of clients, the number currently filtered and which page you are on with navigation buttons to move between pages.



## Client Grid:

- Action Button:
    - View enabled for submitted returns (completed or received).
    - Submit enabled for Not Started or In Progress returns.
    - Button will be disabled (greyed out) when the client has a return type that cannot be accepted at the time.
  - Tax Ref: The unique identifier assigned to the tax payer by the Taxes Office.
  - Agent's Code: A reference that you may have assigned to the client. Note: This is maintained by us at our discretion based on information supplied to us by you and we are under no obligation to do so.
  - Name: The tax payer name as they are known to the Taxes Office.
  - Type: Is the Return Type. Online returns are currently restricted to Company (zero ten) and Personal only.
  - Status: Of the return
    - 'Not started' returns have not been started.
    - 'In progress' returns have been opened but are either only partially completed or not yet submitted.
    - 'Completed' returns have been submitted to us but not yet processed by our systems. Completed returns cannot be changed.
    - 'Received' returns have been submitted and received.
- 
- Date Complete: Shows the date and time the return was submitted.
  - Lodge. Ref: This is a Lodgement Reference and should be used in any correspondence with the Taxes Office regarding this online submission. If there is no lodgement reference there is no record of the return submission on TOOS.

## **Change taxpayer details**

To change a taxpayer's details please contact the Taxes Office.

## **Create a tax return**


To create and submit a tax return online you need to:

- Complete – complete all the return pages with your company or clients' information
- Submit – review the return to make sure it is correct, read and complete the declaration and then submit the return to our online servers

See the sections below for more information

To start a return:

1. Login in and access the required service.
2. From your company services list or your Agents Client list, navigate to find the required taxpayer on the list then select the 'Submit' action button.
3. You are now on the 'Build your return' page. You need to answer 'yes' or 'no' as applicable to each question for the taxpayer, then click on 'Save and Continue'.
4. You will now be presented with the first page of the tax return in accordance with your answers to the build questions, along with any mandatory sections.

Most sections of the return have  icons that contain help information. Alternatively a link to a copy of the full Guidance notes for completing your income tax return can be found on the 'Build your return' page as well as the printable version from our main information website

[www.gov.je/taxesmoney](http://www.gov.je/taxesmoney)


### **Complete a tax return**

When you have built your tax return (see 'Build a return') you will have all the return sections available for completion as web pages. Links to each page/section are shown in the left hand menu.

For Personal Returns, pages with a red circle next to them are 'not started'. Pages with an orange circle next to them are 'incomplete'. Pages with a green tick next to them are 'complete'.

You can return to 'Build your return' (via the menu on the left) at any point to add or remove a return section. If you still cannot find an appropriate area to enter your return information, use the

'Other information' section as appropriate.

Each return page has an  icon – click this to open a pop-up containing help text.

To complete a tax return:

1. Follow the instructions under 'Build a return' above to reach the first page of the tax return
2. Enter your return information.
3. For Personal Returns, select a radio button for this page. If you are still working on this page select 'In progress'. If you have completed this page and are happy that it is correct select

4. Click on 'Save' to save the information and remain on this page. Click on 'Save and continue' to save this information and go to the next page.

### **Submit a tax return**

When you have successfully completed and saved all required return pages you can submit the return. It is very important that the tax return is correct, therefore you are advised to review the return and read the declaration carefully.

Please note, an online submitted return is considered to be electronically signed in compliance with the Electronic Communications (Jersey) Law 2000 and that you are signing either as the tax payer, an authorised signatory of the tax payer or as an agent with the full knowledge and consent of the tax payer. You may wish to print the completed return for a physical signature before or after submission to satisfy your own record management processes.

1. Follow the 'Complete a tax return' instructions above to complete the tax return
2. Click the 'view Return Details' button to see a printable report of the completed return.
3. A printable 'report' containing the tax return details will now open. Check this report to make sure the information is correct. If you need to change anything you can still go back and amend your tax return. We recommend that you save &/or print a copy of this return for your own records (select the Export option then save as a pdf and print. You may need to allow pop-ups to be displayed via your browser settings for this page).
4. When you have checked the report and you are happy that the return is ready for submission click on 'Back to Return Submit Page'
5. Make sure you have read, understood and can comply with the declaration. Tick the box to confirm this.
6. Click on 'Submit Return'
7. You will now be given a lodgement reference number. This Lodgement Reference and confirmation of return submission is also emailed to the email address of the user account you are logged in with.
8. The 'Agent Return: Taxpayer Selection' page will now show this lodgement reference, and the 'Return status' for this taxpayer will be 'Completed'. Once in the submitted state it is only possible to view the return, you cannot submit another or an online amendment to this return.

## **Change a tax return**

If the tax return status is 'Completed' or 'Received' changes can only be made in writing to the Taxes Office.

## **View a tax return**

To view a copy of a submitted tax return:

1. Follow instructions above to 'Navigate agent list of personal taxpayers'
2. Use the page navigation or the filters (remember to use the refresh button after changing the filters) and/or the text search box to find the taxpayer then click on 'View' on the action button.

## **Save/print a copy of a tax return**

To save/print a copy of a submitted tax return:

1. Follow instructions above to 'View a Tax Return'
2. The report will now open. Select the Export option then save as a pdf and print. (You may need to allow pop-ups to be displayed via your browser settings for this page.

## **View help files**

Each section of the return has its own  icon which contains help information specific to the section in which it is located.

## **Find out lodgement reference**

When a return has been submitted you are given a lodgement reference. This is displayed on the submission confirmation page, it is also emailed to the email address set up for the user account that made the submission and it is also displayed in the Client List for Agents (Follow instructions above to 'Navigate agent list of personal taxpayers').

## **Upload an xml file for one or more returns**

Personal tax returns submitted by agents to our secure website can be uploaded as a separate return file (xml) to the website. The xml schema and an example are available on request from the Taxes Office. Only a registered agent may complete online returns for individual tax payers, and only by uploading an XML file. If you do not have this capability, we are accepting paper returns which you should have received in January.

Note that there is commercially available software that will prepare and upload tax returns in xml format. Contact the Taxes for a list of vendors or if you wish to be considered as a vendor.

There are two methods to upload XML Return files:

### **‘Unattended’ upload method**

This requires third party software. You will need to create an ‘Upload’ User account (see Manage My Users section above). With this method, the third-party software is entirely responsible for building, completing and submitting the return.

A return successfully submitted through this route will still be viewable through the website (see section on View a Tax Return above).

### **‘Attended’ upload method**

This method uses a third-party software program or tool to create the required XML return. An online user must then log in to the TOOS website and upload the XML file.

To upload an xml:

1. Follow the instructions above to ‘Log in’ and Accessing services that are available to you.
2. Click on the Upload a Return menu item from the Service menu drop down 3. Click on ‘Browse’ to locate the xml file on your PC or network.
4. Click on ‘Validate’ or ‘Upload’
5. You will be advised if there are any errors in the file, or if the upload is successful, a lodgement reference will be returned.
6. To view or print the return as we will see it, see the sections above on View a Tax Return and Save/print a copy of a Tax Return.

### **Contact tax office**

For Tax Return completion questions:

Telephone : +44 (0)1534 440300 option 4

Email : [jerseytax@gov.je](mailto:jerseytax@gov.je)

For technical questions regarding the website:

Telephone : +44 (0)1534 440300 option 7

Email : [jerseytax@gov.je](mailto:jerseytax@gov.je)