

# Dr. Tony Goldstone's HMRC McCloud Triage-on-a-Page Helper



Summary page - the table below is a representation of the last page of the RPSS sent to you

We've added your 1995/2008 Scheme and 2015 Scheme pension input amounts and scheme pays together to make it easier for you to input these into the calculator section of HMRC's Digital Service.

Please note information in **GREEN** is obtained from your **prior submitted TAX RETURNS**

Pension input period start	Pension input period end	Combined 1995/2008 Scheme and 2015 Scheme		
		Old pension input amount	New pension input amount	Existing scheme pays
06/04/2022	05/04/2023	NA	£ >£40,000	NA
06/04/2021	05/04/2022	£ Any year < New	£ Any year > Old	£ >1
06/04/2020	05/04/2021	£ Any year < New	£ Any year > Old	£ >1
06/04/2019	05/04/2020	£ Any year < New	£ Any year > Old	£ >1
06/04/2018	05/04/2019	£ Any year < New	£ Any year > Old	£ >1
06/04/2017	05/04/2018	£ Any year < New	£ Any year > Old	£ >1
06/04/2016	05/04/2017	£ Any year < New	£ Any year > Old	£ >1
09/07/2015	05/04/2016	£ Any year < New	£ Any year > Old	£ >1
01/04/2015	08/07/2015	£ Any year < New	£ Any year > Old	
01/04/2014	31/03/2015	£		£
01/04/2013	31/03/2014	£		
01/04/2012	31/03/2013	£		
01/04/2011	31/03/2012	£		
01/04/2010	31/03/2011	£		

- 1) Have you paid AA 15/16-21/22 via **Scheme Pays (see above)** or **Self Assessment**? Yes > **Full Submission**
- 2) Have your contributions changed – NHS are you a locum GP subject to annualization - if YES ...
  - a. Was your **NET INCOME > £100k 15/16-19/20** Yes > **Full Submission**
  - b. Was your **NET INCOME > £190k 20/21-21/22** Yes > **Full Submission**
- 3) Are **ANY** of your contributions **HIGHER** in **ANY YEAR** 15/16 – 21/22 Yes > **Full Submission**
- 4) **Is your 22/23 growth >£40k** > **Full Submission**
- 5) **Is your 22/23 NET INCOME > £190k** > **Full Submission**
- 6) Did you flexibly access any “DC” or private pension schemes [not your NHS pension] on or after 6 April 2015? If yes >
  - a. Did you and / or your employer contribute over £4000 to any **defined contribution (DC)** [not your **NHS pension**] scheme from 6 April 2022 to 5 April 2023? > £40k > **Full Submission**

Answer **YES** to **ANY** of the above, **you need to use the FULL HMRC SERVICE** – you can claim the cost of an Accountant completing (200 page HMRC) form for you to £1000 inc. VAT

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