



...EVERYDAY ADVENTURE

# Claiming Gift Aid For Scout Groups

Clive R Fenn  
Greater Manchester North

With acknowledgement to  
Norma Brandon



[scouts.org.uk](http://scouts.org.uk)



...EVERYDAY ADVENTURE

## Gift Aid

This is the **second** of three presentations

The presentations guide you through the general process of the Gift Aid application

Presentation 1 – [Register with HMRC for Gift Aid](#)

Presentation 2 – [The parents Gift Aid form and Register for an online account with HMRC](#)

Presentation 3 – [Submitting your Gift Aid Claim](#)





# **Gift Aid Facts**

# Gift Aid Maths

Charities have special status in tax law. Charities can claim back the tax paid by a taxpayer on all donations.

1

## Every Scout Group is a Charity.

+

All subs are treated as donations.

All Scout Groups can claim 25% (tax paid by parents) on all Subs paid for their members.





...EVERYDAY ADVENTURE

## Help with Gift Aid

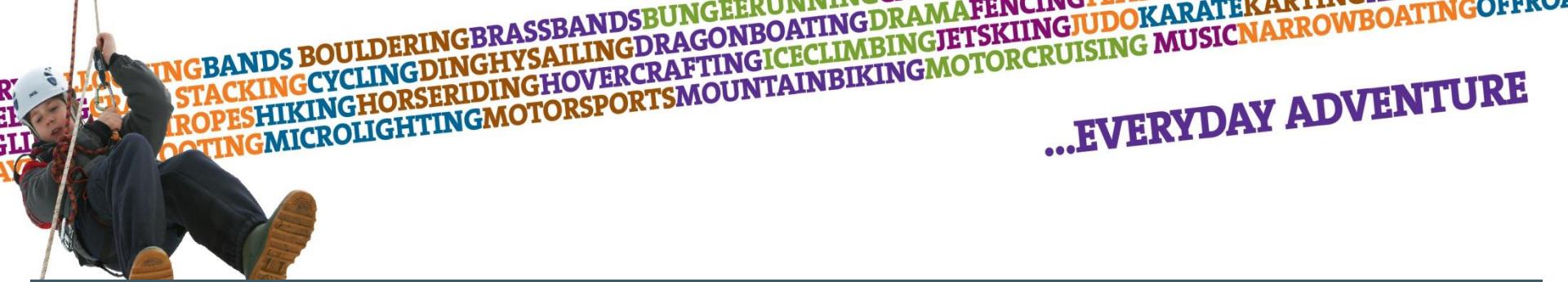
- Here is the link to the Scout UK website where there is more explanation  
[Scouting UK Gift Aid help](#)
- For further support or information about Gift Aid, please contact the HMRC Charities Helpline on 0300 123 1073 (open from 8.30am to 5pm, Monday to Friday).



[scouts.org.uk](http://scouts.org.uk)



# Step 2 Ask all parents to sign the Gift Aid Form



...EVERYDAY ADVENTURE

## Step 2 Ask all parents to sign the Gift Aid Form



Enter your Scout Group details onto the Gift Aid Declaration Form

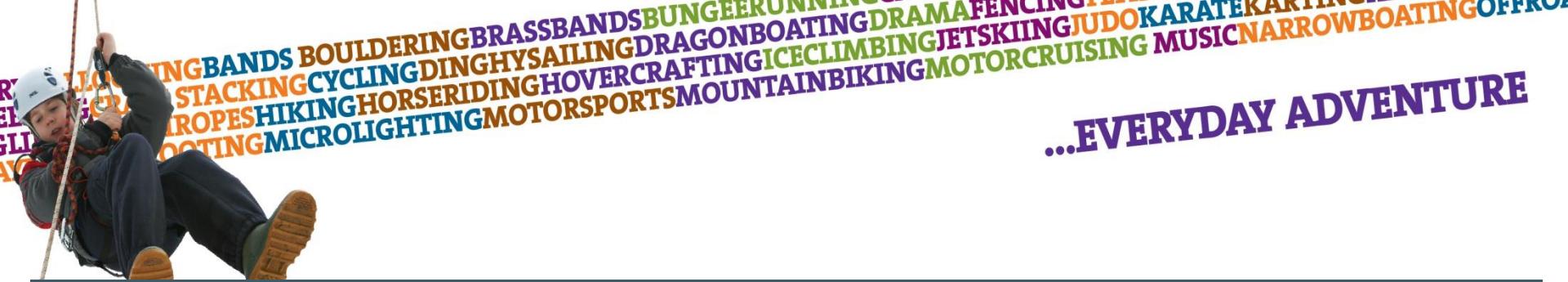
Type in your Scout Group name where it says "Your Scout Group name"

Print out the form – sufficient copies to have all the parents complete it

- Open this form (Gift Aid Declaration Form on the right) in Microsoft Word (or a programme that can open Word documents)
- Don't forget to save the form onto your computer hard disk so that you can access it when you need more copies
- Explain that when signed by taxpaying parents this form is worth an extra 25p for every £1 paid by them to the group
- Ask your parents to sign and return the form to you.



Gift Aid Declaration form



...EVERYDAY ADVENTURE

## Step 2 Ask all parents to sign the Gift Aid Form

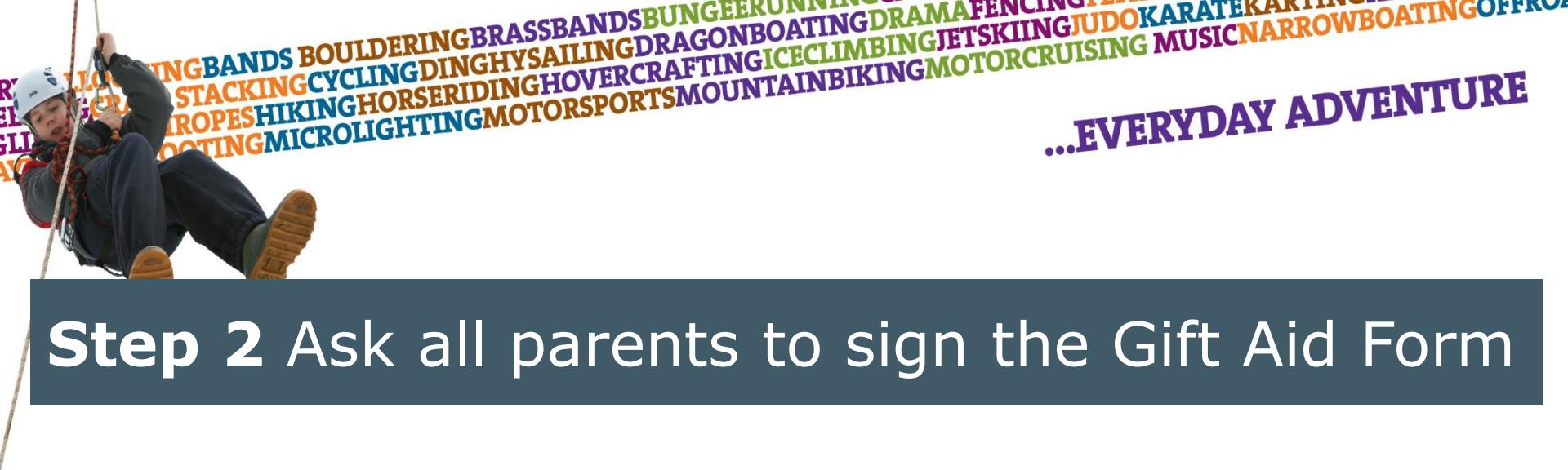


Advertise on your website or Social media page that you are going to ask parents to sign the form and how much it is worth to the group.

Consider what the best way is to obtain a completed form.

Ensure that section leaders have a supply of forms to give to the parents of new members

- If you don't have a website or social media page how about sending an email to parents' email addresses telling them about the value of claiming Gift Aid?
- Visit Section meetings and speak directly to the parents before the meeting, explain you need a form completing and the purpose of the form. Give it to them to bring back at the end of the meeting or ask them to complete it before they leave.
- If you use the [Young Person Information Form](#) then the Gift Aid declaration is contained within that form



## Step 2 Ask all parents to sign the Gift Aid Form

- Congratulations you have initiated Step 2
- Don't wait to fully complete Step 2 to start Step 3 as there is a wait of up to 10 days to receive your Activation Code for the online account

Step 2 Ask all parents to sign the Gift Aid Form

Step 3 Register for an online account with HMRC



scouts.org.uk



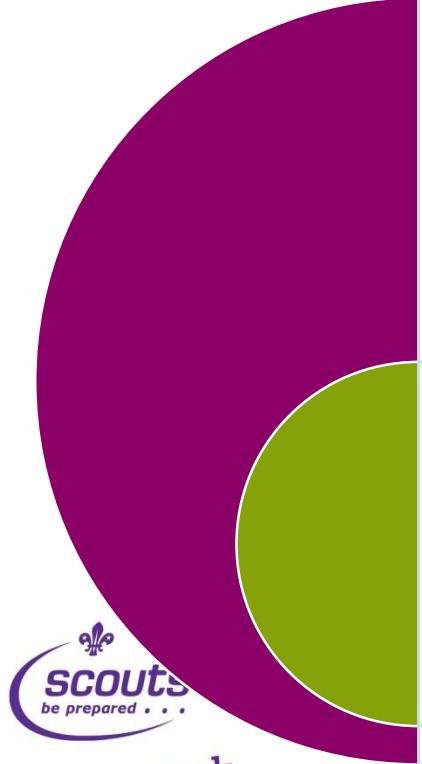
Step 3

# Register for an online account with HMRC



# Step 3 Register for an online account with HMRC

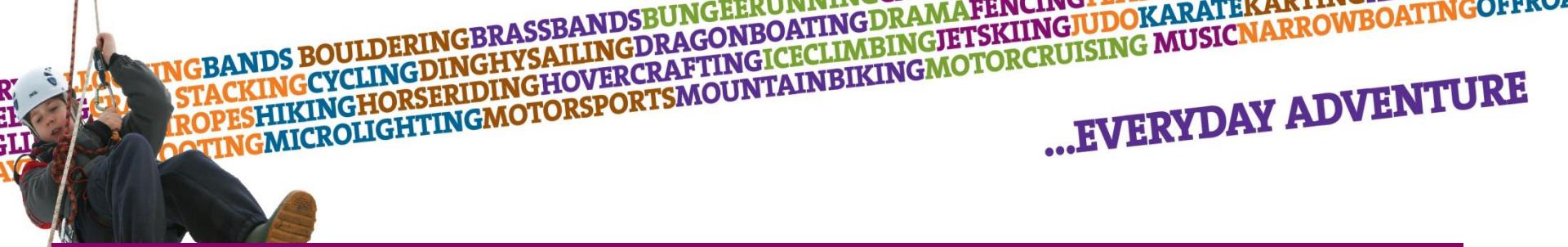
## Summary



# Go to the HM Revenue & Customer Online System

# What you will need?

- Visit
- <https://online.hmrc.gov.uk/registration/organisation>
- You will need your:
  - **HMRC Charities Reference** (this was the result of Step 1)
  - **Postcode (for your group as stated on form CHA1)**
  - **The last 4 digits of your organisation's bank account number**

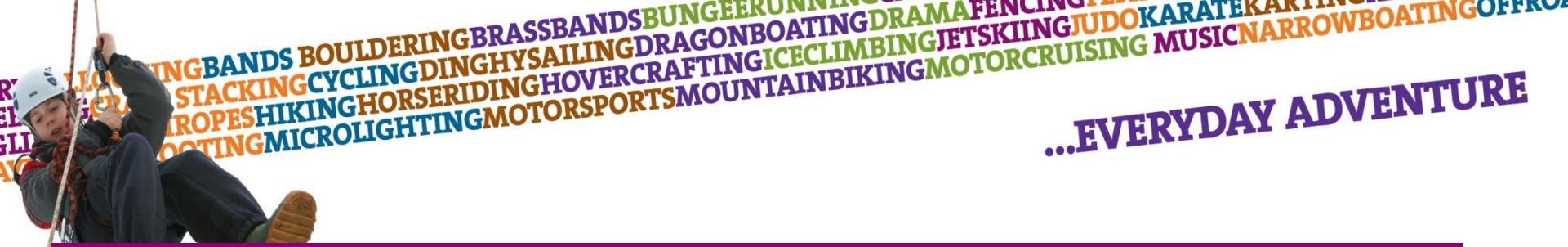


# Step 3 Register for an online account with HMRC Summary

## Brief Overview of information to enter



[scouts.org.uk](http://scouts.org.uk)



...EVERYDAY ADVENTURE

## Step 3 Register for an online account with HMRC

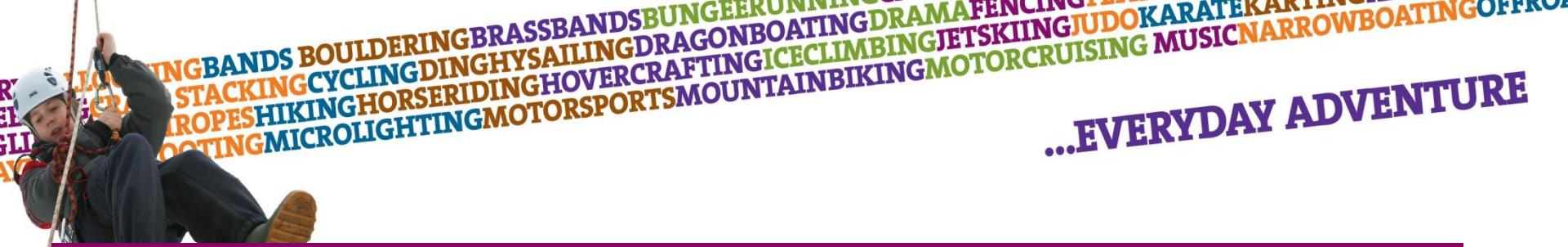
### Screen by screen online application

Visit

<https://online.hmrc.gov.uk/registration/organisation>



scouts.org.uk



...EVERYDAY ADVENTURE

## Step 3 Register for an online account with HMRC

### Screen by screen online application

HM Revenue & Customs

Home Contact

#### New user

Please **select the services** you wish to use.

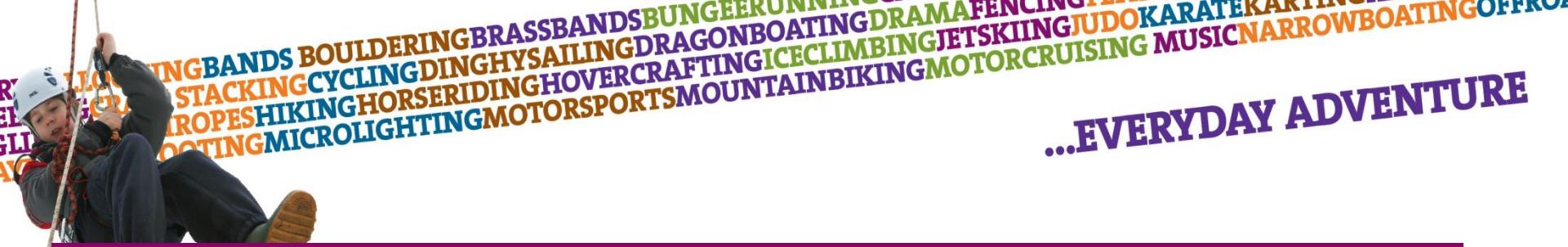
Organisation ?

Charities

- Construction Industry Scheme (CIS)
- Corporation Tax (CT)
- Duty Deferment Electronic Statements (DDES)
- electronic Binding Tariff Information (eBTI)

- Notification of Vehicle Arrivals
- PAYE for Employers
- VAT Mini One Stop Shop (Union)
- VAT Mini One Stop Shop (non-Union)
- Qualifying Recognised Overseas Pensions (QROPS)
- Rebated Oils Enquiry Service
- Self Assessment (SA)
- Self Assessment (SA) for Partners
- Self Assessment (SA) for Trusts

Check the 'Charities' box and then click the 'Next' box (you will have to scroll down the page to find the 'Next' box)



...EVERYDAY ADVENTURE

# Step 3 Register for an online account with HMRC

## Screen by screen online application

 HM Revenue & Customs

[Home](#) [Contact HMRC](#) [Help](#)

### What you will need to enrol

You can only register and enrol for an online service **once** with this information.

**Please note:** If you have previously received an Activation Code from the Government Gateway for any service listed below then you are already enrolled for it.

If you haven't activated the service yet please log in with your User ID and password and activate it now.

If you have lost your Activation Code or it has expired you can request a new one once you have logged in.

To add or delete services, please click the 'Back' button.

#### Organisation

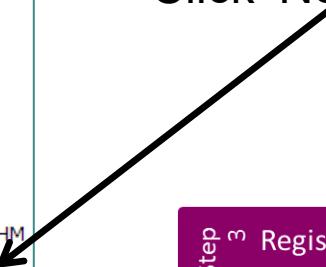
#### Charities

You will need your:

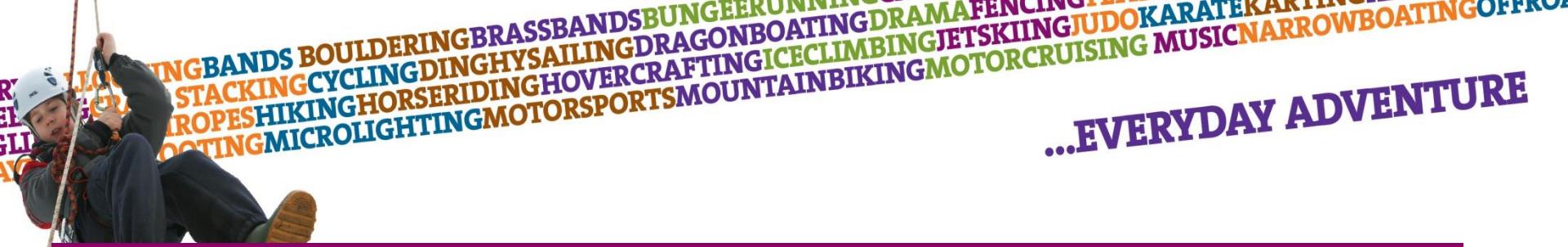
- HMRC Charities Reference 
- Postcode
- plus either:
- The last 4 digits of your organisation's bank account number 
- or
- Your customer account number 

If you have entered the details and are experiencing difficulties, please contact the HM Revenue & Customs [Online Services Helpdesk](#).

Make sure you have the information required then Click 'Next'



Step 3 Register for an online account with HMRC



...EVERYDAY ADVENTURE

# Step 3 Register for an online account with HMRC

## Screen by screen online application

### Registration and Enrolment

Below are the 6 steps you will need to follow to register and enrol. They will only take a few minutes.

- 1 Terms & Conditions
- 2 About you
- 3 Create password
- 4 Note User ID
- 5 Enter details
- 6 Receive Activation Code

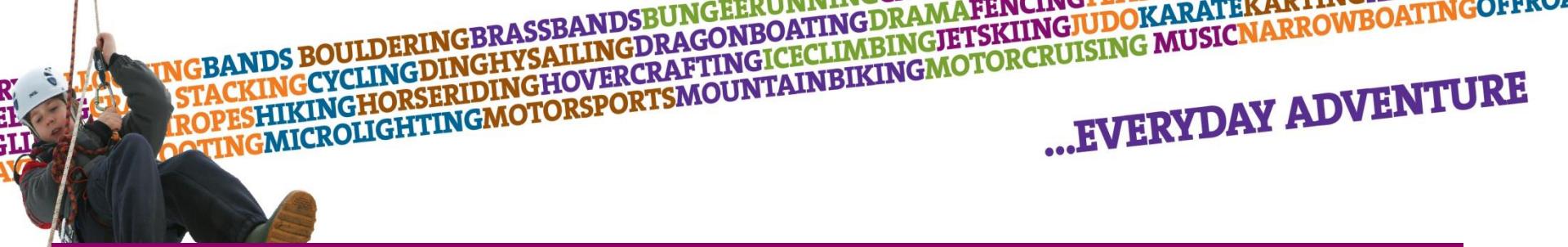
When you reach step 4 HM Revenue and Customs (HMRC) will display your User ID. **You must make a note of this** and keep it safe, as you will need it every time you log in to use HMRC Online Services. **It will not be displayed again.**

- One Activation Code per service, if applicable, will be sent to you by post. Your Activation Code can take up to a week to arrive and if you are overseas it may take a little longer. The envelope will be marked 'Government Gateway'.
- You'll need the Activation Code to use some - but not all - HMRC Online Services. The QROPS, change VAT registration details, submit a VAT return, Reverse Charge Sales List, VAT Mini One Stop Shop and Employment Intermediaries online services are automatically activated.

You must activate your service(s) within 28 days of the date shown on the letter or the code will expire and you'll have to request a new one.

[Back](#) [Next](#)

Follow the 6 steps by clicking 'Next' and entering the required information.



...EVERYDAY ADVENTURE

# Step 3 Register for an online account with HMRC

## Screen by screen online application

HM Revenue & Customs

Home Contact HMRC Help

1 Terms & Conditions → 2 About you → 3 Create password → 4 Note User ID → 5 Enter details → 6 Receive Activation Code

### Step 1 - Terms & Conditions

#### Registration for Organisation

Please view the terms and conditions by following the link below. You must then tick the checkbox to confirm you have read them before clicking the 'Next' button to continue. If you do not confirm that you have read the terms and conditions, you will be unable to use HM Revenue & Customs (HMRC) online services.

- Charities

► [View Terms & Conditions \(opens new window\)](#)

Please confirm that you have read the terms and conditions

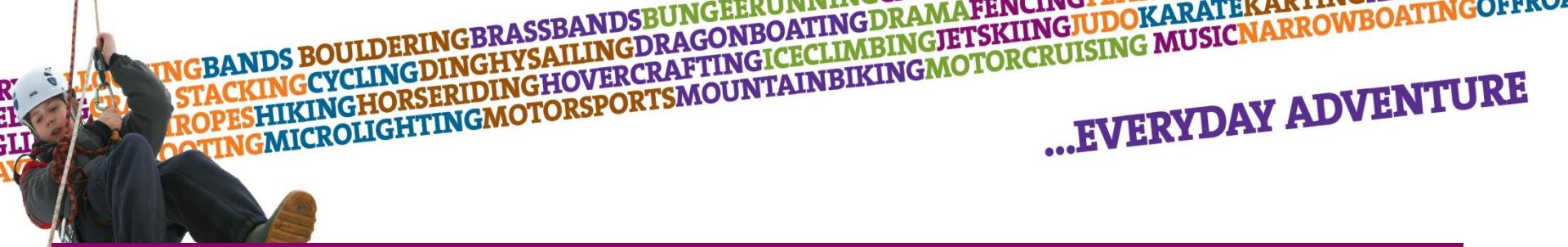
- View the Terms & Conditions
- Check the box
- Click 'Next'

Back

Next



scouts.org.uk



# Step 3 Register for an online account with HMRC

## Screen by screen online application

HM Revenue & Customs

Home Contact HMRC Help

1 Terms & Conditions → 2 About you → 3 Create password → 4 Note User ID → 5 Enter details → 6 Receive Activation Code

### Step 2 - About you

#### Registration for Organisation

\* indicates required information

**Please note:** Fields are not case sensitive.

Full name: *	<input type="text"/>	?
Email address:	<input type="text"/>	?
Confirm email address:	<input type="text"/>	

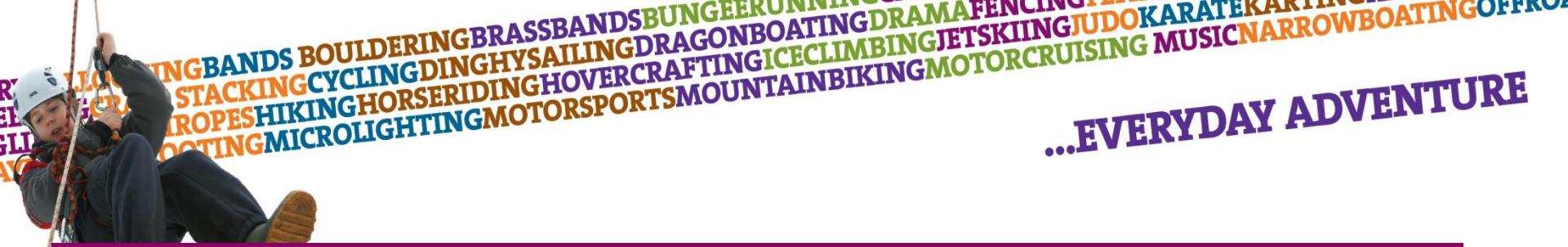
Back

Next

- Complete your details
- Click 'Next'



scouts.org.uk



# Step 3 Register for an online account with HMRC

## Screen by screen online application

HM Revenue & Customs

Home Contact HMRC Help

- 1 Terms & Conditions
- 2 About you
- 3 Create password
- 4 Note User ID
- 5 Enter details
- 6 Receive Activation Code

### Step 3 - Create password

#### Registration for Organisation

\* indicates required information

Please choose a password you can **remember** as you will need it every time you log in to online services.

Your password must:

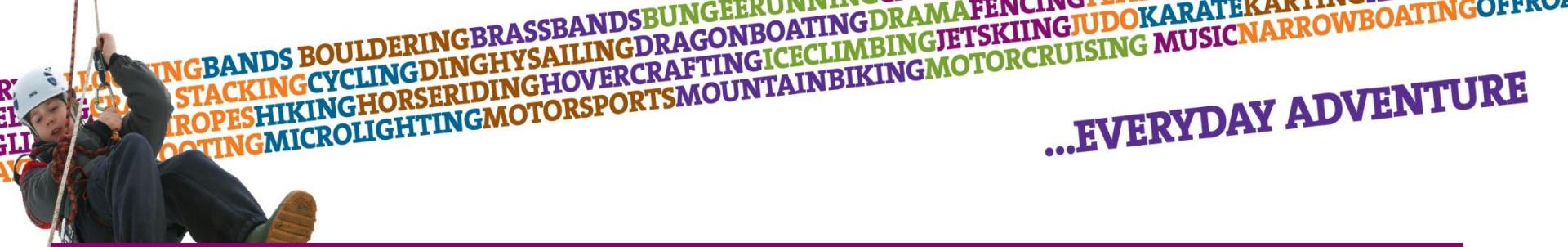
- be between 8 and 12 characters (letters and numbers)
- contain at least 1 number (0-9)
- contain at least 1 letter (a-z)
- not contain the word 'password'.

**Please note:** Fields are not case sensitive.

Password: \*

Confirm password: \*

- Create Password and repeat
- Keep a note of your password ☺
- Click 'Next'



...EVERYDAY ADVENTURE

# Step 3 Register for an online account with HMRC

## Screen by screen online application

HM Revenue & Customs

Home Cymraeg Contact HMRC Help Sign out

1 Terms & Conditions → 2 About you → 3 Create password → 4 Note User ID → 5 Enter details → 6 Receive Activation Code

### Step 4 - Note User ID

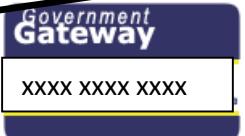
Registration for Organisation

Your Online Government Account has been created.

Your User ID is: XXXX XXXX XXXX

- you must make a note of this User ID - it will not be displayed again and you will not receive written confirmation of the ID.
- please keep it safe as you will need it every time you log in to use HM Revenue & Customs (HMRC) online services, along with your password.
- if the service you are enrolling for needs to be activated an Activation Code will be sent to you by the Government Gateway - to use the Activation Code, log in at HMRC Online services with the above User ID and your password, then follow the instructions to activate the service
- HMRC recommend you print a copy of this page using the print facility on your browser.

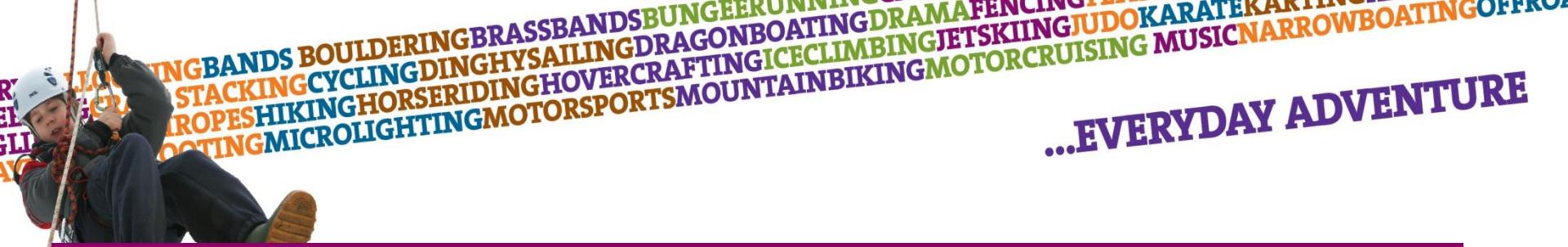
Click 'Next' to enrol for the service.



- Make a note of your User ID
- Click 'Next'

Next

Step 3 Register for an online account with HMRC



# Step 3 Register for an online account with HMRC

## Screen by screen online application

HM Revenue & Customs [Home](#) [Cymraeg](#) [Contact HMRC](#) [Help](#) [Sign out](#)

- 1 Terms & Conditions
- 2 About you
- 3 Create password
- 4 Note User ID
- 5 Enter details
- 6 Receive Activation PIN

### Step 5 - Enter details

[Enrol for the charities service](#)

To enrol for Charities, please enter the details below.

\* indicates required information

**Please note:** Fields are not case sensitive.

HMRC charities reference: \*  [?](#)

Please enter a postcode or indicate if your address is not in the UK.\*

Postcode: \*  [?](#)

eg AB12 3YZ

Please select if your address is not in the UK

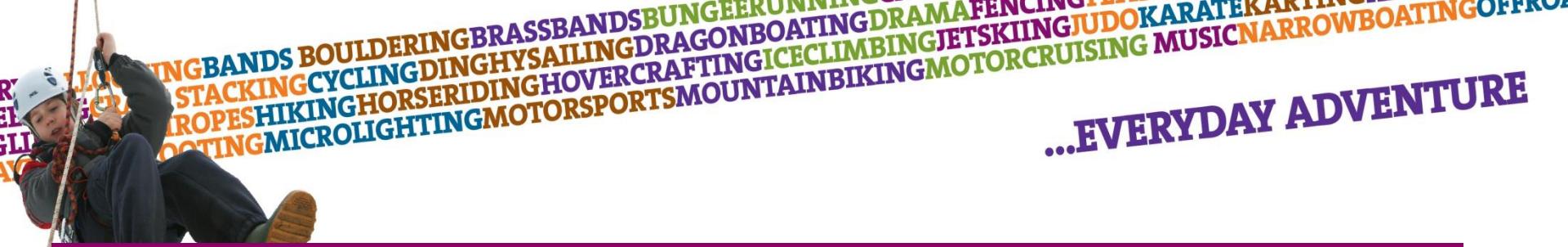
*And*

Last four digits of your organisation's bank account number:  [?](#)

*Or*

Your customer account number:  [?](#)

- Enter the required information from the letter sent to you by the HMRC
- Click 'Next'



...EVERYDAY ADVENTURE

# Step 3 Register for an online account with HMRC

## Screen by screen online application

HM Revenue & Customs [Home](#) [Cymraeg](#) [Contact HMRC](#) [Help](#) [Sign out](#)

1 Terms & Conditions → 2 About you → 3 Create password → 4 Note User ID → 5 Enter details → 6 Receive Activation PIN

### Registration and Enrolment summary

[Receive Activation Code](#)

#### Enrolments

You have successfully enrolled for:

**Charities**

Please read this information before you click the 'Next' button:

- the Government Gateway will issue an Activation Code for each service that requires one
- the Activation Code letter will be posted **within 7 days** to the address you have given for that specific service
- it may take up to 10 days for you to receive this letter or up to 21 days if you live abroad
- when you receive your letter you must activate the service **within 28 days of the date shown on the letter** or the code will expire and you will have to request a new one

**Please note:** You don't need an Activation Code to submit VAT Returns, Notification of Vehicle Arrivals, Reverse Charge Sales List declarations, Employment Intermediaries or Mini One Stop Shop. These services are automatically activated

#### Reminder

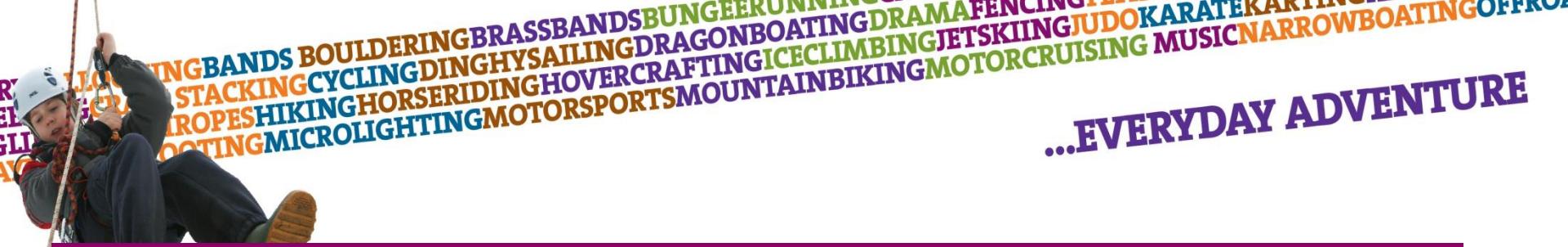
You must activate your service(s) within 28 days of the date shown on the letter or the code will expire and you'll have to request a new one.

[Next](#)

• Nearly there – read the on screen notes – you should receive a letter within about 7 days.

• Click 'Next'  
• and then 'Sign Out' on the next page

Step 3 Register for an online account with HMRC



...EVERYDAY ADVENTURE

# Step 3 Register for an online account with HMRC

## Screen by screen online application



Home Cymraeg Contact HMRC Help

Logout

Thank you for using HM Revenue & Customs (HMRC) online services. You have now successfully logged out of HMRC's secure site.

To use HMRC online services again, please [login](#).

Alternatively you may want to visit the [HMRC Home Page](#).

You may also go to [GOV.UK](#). This website replaces Business Link and Directgov.

[Close this window](#)

© Crown Copyright | [Terms & Conditions](#) | [Privacy policy](#) | [Accessibility](#) | [Feedback](#) | [Complaints](#)



[scouts.org.uk](http://scouts.org.uk)

**Wait for the Activation Code letter.**

This will probably be sent to your meeting headquarters or the address held by TSA. So keep a look out – you only have 28 days to activate the service, otherwise you have to go through the whole process again. 😊



## Step 3 Register for an online account with HMRC

- When you receive the Activation code you MUST activate your account within 28 days
- Congratulations you have completed Step 3

Step 3 Register for an online account with HMRC



[scouts.org.uk](http://scouts.org.uk)



## Remember Step 2?

Ask all parents to sign the Gift Aid Form

- At this point you will need to have received all the signed Gift Aid Declaration forms back from parents who are tax-payers.
- Summarise details of the parents names and addresses into an Excel Spreadsheet (or use the one you set up to upload the COMPASS data). Here is a sample spreadsheet to use



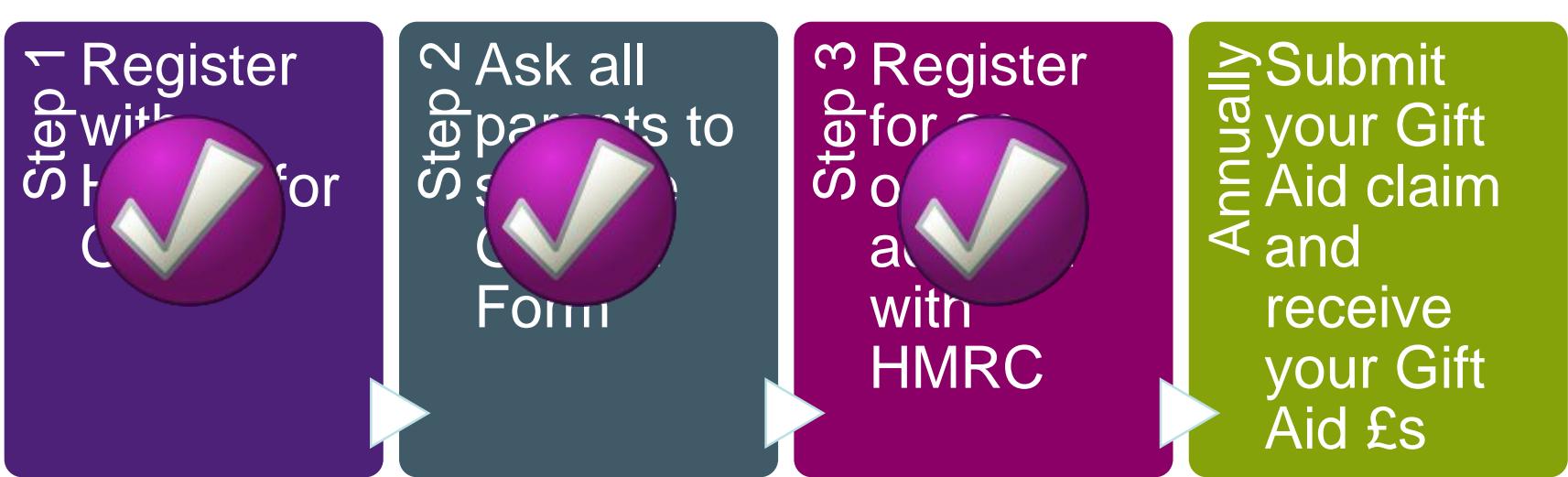
HMRC  
Spreadsheet





...EVERYDAY ADVENTURE

## Setting up your Group to Claim Gift Aid





...EVERYDAY ADVENTURE

# Gift Aid

This is the end of the second presentation  
The parents Gift Aid form and Register for an  
online account with HMRC

The following presentation will help in your application

# Presentation 3 – Submitting your Gift Aid Claim