## STEP-BY-STEP GUIDE:

Mazars Bridging software sign up and HMRC for VAT sign up





## OVERVIEW

The following is a step-by-step guide on how to sign up for the Mazars Bridging software and Making Tax Digital with HMRC:

Confirm first VAT period to sign up for MTD for VAT with HMRC.

If you are a new client to Mazars, confirm our Mazars engagement terms to provide the software – we will issue and engagement letter for use of the software to set you up.

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Set up an account on the Mazars bridging software. You are able to add multiple users each with their own log in and password.

Authorise the Mazars Bridging software to submit VAT returns on your behalf – you will need your HMRC login and be sent a 6 digit text code to the linked mobile account.

Sign up for MTD with HMRC – If you sign up too early your access to the existing HMRC log in will be blocked and you will automatically be part of the VAT pilot. The table in Step 1 is a summary of when to sign up.

STEP 1

### Key dates: when to sign up for MTD with HMRC

The "Stagger" is the end of the VAT period

(e.g. if your VAT period is 1 January to 31 March you will be on "Stagger 1" as below)

	Optional (Pilot)		Compulsory
<b>Stagger 1</b> (Mar, Jun, Sep, Dec)	Dec-18	Mar-19	Jun-19
Sign-up periods	before Tues 5 Feb	Fri 8 Feb - Sat 4 May	Wed 8 May - Sat 3 Aug
Sign-up periods (Direct debit)	before Fri 18 Jan	Fri15 Feb - Wed 17 Apr	Wed 15 May - Wed 17 Jul
<b>Stagger 2</b> (Apr, Jul, Oct, Jan)	Jan-19	Apr-19	Jul-19
Sign-up periods	before Tues 5 Mar	Fri 8 Mar - Fri 14 Jun	Sat 8 Jun - Wed 4 Sep
Sign-up periods (Direct debit)	before Fri 15 Feb	Fri 15 Mar - Thur 16 May	Sat 15 Jun - Thur 15 Aug
<b>Stagger 3</b> (May, Aug, Nov, Feb)	Feb-19	May-19	Aug-19
Sign-up periods	before Fri 5 Apr	Mon 8 Apr - Thur 4 Jul	Mon 8 Jul - Fri 4 Oct
Sign-up periods (Direct debit)	before Mon 18 Mar	Sat 13 Apr - Sun 16 Jun	Sat 13 Jul - Mon 16 Sep
Monthly Returns	Feb-19	Mar-19	Apr-19
Sign-up periods	Fri 8 Mar - Thur 4 Apr	Mon 8 Apr - Sat 4 May	Wed 8 May - Tues 4 Jun
Sign-up periods (Direct debit)	Fri15 - Sun 17 Mar	*	Wed 15 - Thur 16 May

# STEP 2

## If you are not currently an existing Mazars client, confirm your engagement terms with Mazars

Please speak to your Mazars contact to set this up for you.



### Set up an account on the Mazars Bridging software



Please click on the following link and complete the form:

https://www.mazars.abratax.co.uk/mtd/register/business/



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You will see the following form to complete:



Choose a password and agree to the terms and conditions:

Use the "Access code" and 6 digit "client billing code" provided by your Mazars contact.

Password:		
	₿ <sub>t</sub>	
Confirm Password:		
	₿₂	
I have read and I agree to the terms	and conditions.	
Access Code		
Access code		
Client billing code		
Client billing code		
SIGN UP		

	Your account is now created and you will see the
/	following message:





### Authorise the software to submit VAT returns on your behalf with HMRC. This is a security measure to ensure that the account is authorised to submit returns on your behalf.



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Once set up you will be requested to confirm your email address using the link provided:



Add a new VAT registration to the account as per the following:

LUSTINUS FIERE		
Add New VAT Registration +	2	'o start, you can add a VAT registration t

Enter your VAT number in the Box



You will now be redirected to the main page
where you will be requested to "Grant Mazars
Bridging software Access" – click on the blue
text under your VAT number:

MAZARS DASHBOARD	FILE RETURN
E Obligations Liabilities Payments	Name and VAT number Add free VAT Registration +
	Access
Contact us:	Please Grant Mazars Bridging Software Access to view and submit VAT information for Mazars LLP

## STEP 4 CONTINUED

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The following message will appear: Click on the "Go to HMRC" link



You will be redirected to HMRCs website: Click the "Continue" box:

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## Authority to interact with HMRC on your behalf

Mazars needs permission to interact with HMRC on your behalf. To grant this authority, you'll need to:

- 1. Sign in to your Government Gateway account.
- Enter the 6 digit access code we'll send to your mobile phone, landline or other device.
- You might need to confirm who you are by answering some security questions on, for example, your passport, P60 or other documents.
- Grant authority for this software to interact with HMRC on your behalf.

This authority will last for 18 months. You can <u>remove this authority</u> at any time.

#### If you're an agent

To use the Making Tax Digital APIs, sign in with the user ID and password for your agent services account.

To use the APIs that pre-populate a Self Assessment return, sign in with the account that's enrolled for Self Assessment for Agents - it's the same account you use to access the HMRC agent portal.

Continue

## STEP 4 CONTINUED

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Click on "Grant authority" in the box as per example:

8 Enter your Government Gateway ID and password. This will generate an "Access code". HMRC's systems will send you an access code to the linked mobile on the account.

If you do not have your Government Gateway details you will need to phone HMRC on 0300 200 3600 to recover your user ID. If you have forgotten the password only you can reset using your user ID and email address, as per the link on HMRC's website.

Once you have entered your access code click "Continue"

Once authorised you will be redirect back to the Mazars bridging software as per the following example. The message is confirmation that the Mazars Bridging software is now connected.

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## Authority to interact with HMRC on your behalf

The Mazars software application is requesting to do the following:

- Change your VAT information
- View your VAT information

It will be able to do the above for 18 months from when you grant authority.

Grant authority Do not grant authority

Mazars will act in accordance with their <u>privacy policy</u> and their <u>terms</u> and conditions of.

You can remove this authority (opens in a new tab) at any time.

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#### Enter your access code

We just sent a 6 digit access code by text to: **\*\*\*\*\*\*\*\*291** It may take a few minutes to arrive. **Access code** 

Continue

I can't get my access code

Get help with this page.

FILE RETURN			
Name and			
VAT number	Add New VAT Registration +		
Connected Ø			
We cannot access your VAT information right now.			
This might be because the Government Gateway credentials provided are not associated with this VAT number.			
Alternatively, the VAT number used might not be registered for MTD. If not, you can register with HMRC here.			
If you have already registered for the pilot scheme, try editing the VAT registration above and re-connecting the VAT registration to HMRC			

**Note:** Please note as per the statements above that you will not be able to see your VAT information until you sign up for MTD with HMRC (Step 5).



### Sign up to MTD for VAT with HMRC

Note: Please see table (step 1) with instructions on when to sign up for MTD. Please note that there are different dates dependant on whether or not you are on direct debit.

Once you sign up for MTD for VAT with HMRC, your existing portal access will be blocked.

You will need the following to sign up with HMRC:

- Your Government Gateway user ID and password
- The VAT number of the business that's signing up

If you do not have your Government Gateway details you will need to phone HMRC on 0300 200 3600 to recover your user ID. If you have forgotten the password only you can reset using your user ID and email address as per the link on HMRC's website.

Click on the link below to start the sign up process:

https://www.gov.uk/guidance/sign-up-for-making-tax-digital-for-vat

HMRC will send a confirmation of sign up within 72 hours.

3 Once you have signed up to MTD for VAT with HMRC, when you log back into the Mazars Bridging software you will see your VAT return details and other relevant information.



### Contact us

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