



HM Revenue & Customs



HMRC Documentation

This guide will provide you with information in how to obtain documents typically requested by mortgage lenders from the HMRC website.

How to print a SA302 Tax Calculation (online)

From your HMRC online account

1. Log into the HMRC online account (go to www.online.hmrc.gov.uk)
2. Select 'Self-Assessment' (if you are only registered for Self-Assessment then you will automatically be directed to this screen)
3. Follow the link 'View Your Tax Return'
4. Follow the link 'tax return options'
5. Choose the year from the drop-down menu and click the 'Go' button
6. Click the 'view return' button
7. Follow the link 'view calculation'
8. Follow the link 'view and print your calculation'
9. Follow the link at the bottom of the page to 'print your full calculation'

Tax Year Overviews

An additional HMRC online document called a Tax Year Overview will be required to verify that the SA302 information is correct, whether using online or paper based SA302s.

The Tax Year Overview is produced by HMRC after the customer has submitted their self-assessment tax return. It shows the amount of tax due to be paid direct to HMRC or any available amount for refund for a given tax year.

How to print a Tax Year Overview (online)

From your HMRC online account

1. Log into the HMRC online account (go to www.online.hmrc.gov.uk)
2. Select 'Self-Assessment' (if you are only registered for Self-Assessment then you will automatically be directed to this screen)
3. Follow the link 'Self-Assessment Overview'
4. Follow the link 'view account'
5. Follow the link 'tax years'
6. Choose the year from the drop-down menu and click the 'Go' button
7. Follow the link 'print your Tax Year Overview'.

Please note: You must wait 72 hours after fully submitting your return until you can print your documents.