Self Assessment
Checklists

The use of a checklist for Self Assessment clients is a useful way of ensuring that all the data has been collected and collated.

There are two forms of checklist required.

The first is for clients that have just registered for self assessment; the second is for the accountant to ensure good practice.

A self assessment checklist can be found Self Assessment Set Up Checklist

The second checklist is a prompt for the Accountant to ensure that: -

- All clients have been captured on the list.
- All clients have been contacted about their self-assessment.
- All client self-assessment have been received.
- All client data has been collected.
- The client has a unique tax reference UTR.
- All new data for clients has been asked for.
- A 64-8 has been completed where appropriate.
- The tax office details are correct.
- Client contact details are attached to ensure ease of contact when there are queries.

The checklist can be found at Self Assessment Process Checklist Proforma