

# **A guide to Revenue.ie**

## **2. Claiming Tax relief on a lump sum AVC**

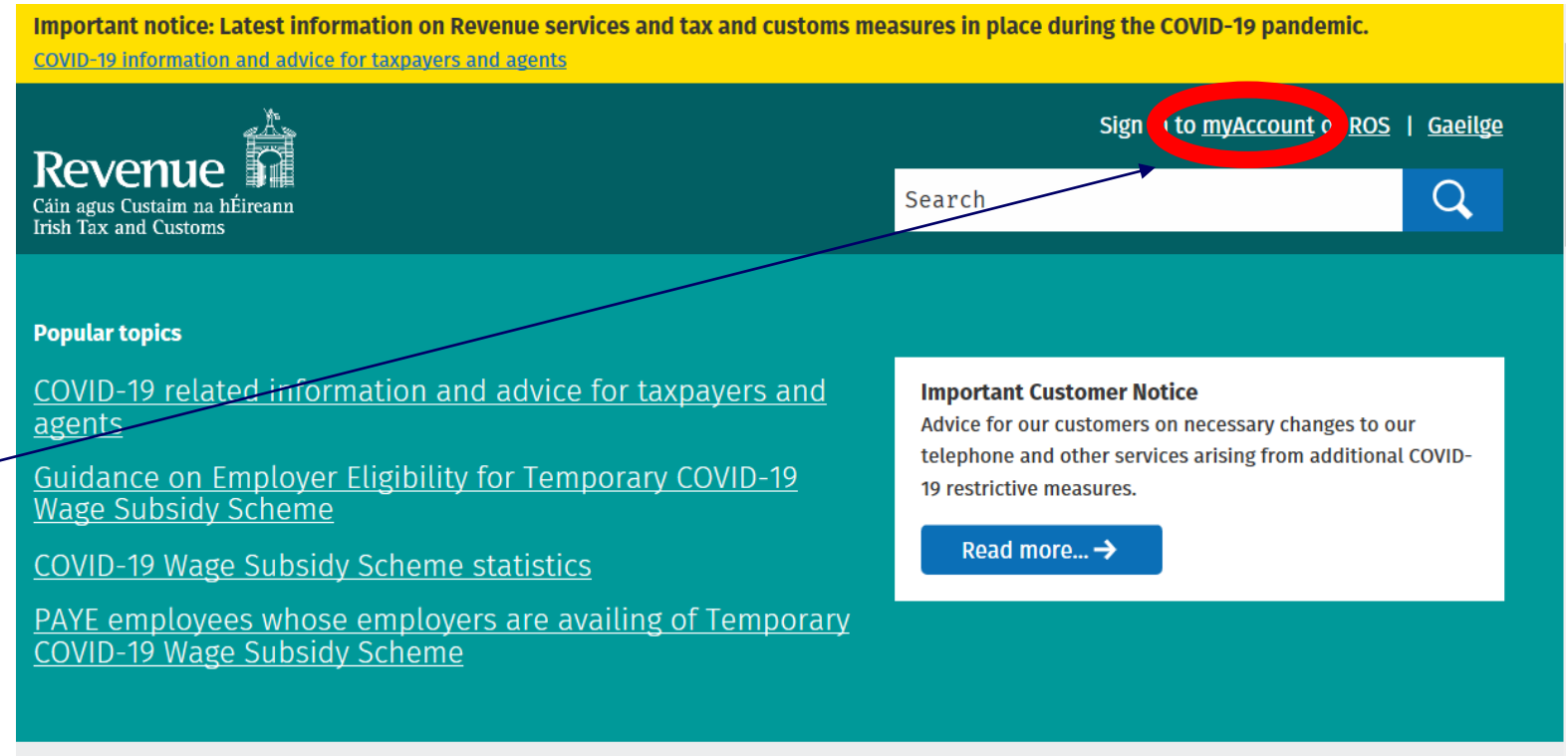


# Step 1

Revenue homepage

## Revenue Website: *Revenue.ie*

To start, click “myAccount”  
at the top right hand  
corner of the page



## Step 2

### Sign In

This will bring you to the Sign In page.

If you have not yet registered on 'myAccount', select "Register Now" and follow the instructions.

Once registered, submit your PPS Number, Date of Birth and Password to sign in.

#### Sign In

PPS Number

Date of Birth

DD

MM

YYYY

Password

Temporary passwords can also be used

If you have a verified MyGovID account, you can use your MyGovID details to sign in

[Continue with MyGovID](#) 

[What is MyGovID?](#)

Or

[Register Now](#) →

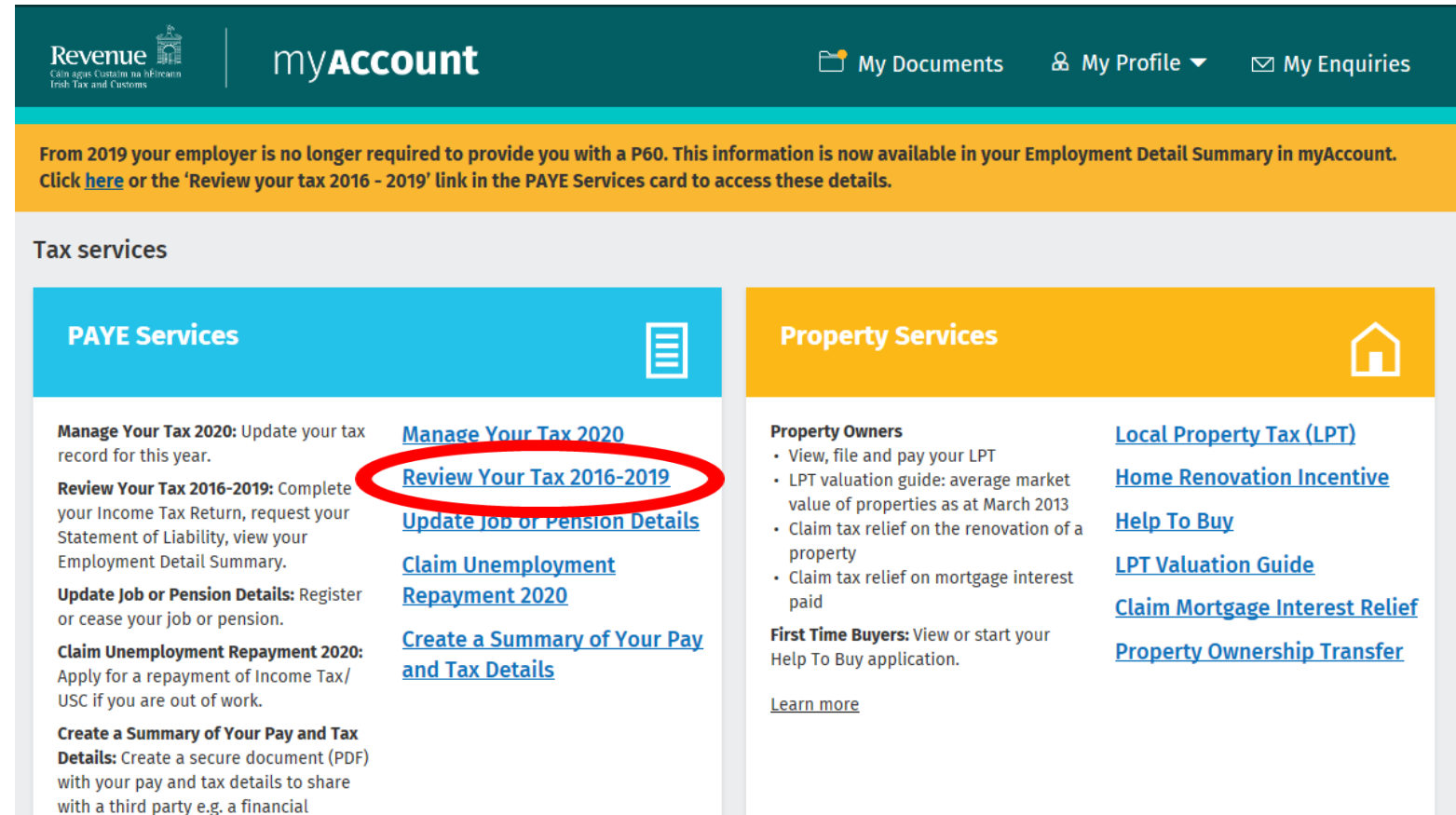
If you already have a temporary password, use this to sign in. You do not need to register again.

# Step 3

## Home Screen

Once you have signed in, you will be brought to the Home Screen.

Select “Review Your Tax 2016-2019” link under PAYE Services.



The screenshot shows the 'myAccount' interface. At the top, there's a header with the Revenue logo, the 'myAccount' title, and navigation links for 'My Documents', 'My Profile', and 'My Enquiries'. Below the header, a yellow banner contains a message about P60 availability. The main content area is divided into two columns: 'Tax services' and 'Property Services'. Under 'Tax services', the 'PAYE Services' section is highlighted in blue. It lists several services: 'Manage Your Tax 2020', 'Review Your Tax 2016-2019' (which is circled in red), 'Update Job or Pension Details', 'Claim Unemployment Repayment 2020', and 'Create a Summary of Your Pay and Tax Details'. Under 'Property Services', the 'Property Owners' section is highlighted in orange. It lists services like 'Local Property Tax (LPT)', 'Home Renovation Incentive', 'Help To Buy', 'LPT Valuation Guide', 'Claim Mortgage Interest Relief', and 'Property Ownership Transfer'.

Revenue  
Cuid agas Custaim na n-Éireann  
Irish Tax and Customs

myAccount

My Documents My Profile My Enquiries

From 2019 your employer is no longer required to provide you with a P60. This information is now available in your Employment Detail Summary in myAccount. Click [here](#) or the 'Review your tax 2016 - 2019' link in the PAYE Services card to access these details.

Tax services

**PAYE Services**

**Manage Your Tax 2020:** Update your tax record for this year. [Manage Your Tax 2020](#)

**Review Your Tax 2016-2019:** Complete your Income Tax Return, request your Statement of Liability, view your Employment Detail Summary. [Review Your Tax 2016-2019](#)

**Update Job or Pension Details:** Register or cease your job or pension. [Update Job or Pension Details](#)

**Claim Unemployment Repayment 2020:** Apply for a repayment of Income Tax/ USC if you are out of work. [Claim Unemployment Repayment 2020](#)

**Create a Summary of Your Pay and Tax Details:** Create a secure document (PDF) with your pay and tax details to share with a third party e.g. a financial [Create a Summary of Your Pay and Tax Details](#)

**Property Services**

**Property Owners**

- View, file and pay your LPT
- LPT valuation guide: average market value of properties as at March 2013
- Claim tax relief on the renovation of a property
- Claim tax relief on mortgage interest paid

**First Time Buyers:** View or start your Help To Buy application. [Learn more](#)

[Local Property Tax \(LPT\)](#)

[Home Renovation Incentive](#)

[Help To Buy](#)

[LPT Valuation Guide](#)

[Claim Mortgage Interest Relief](#)

[Property Ownership Transfer](#)

# Step 4

## Statement of Liability

From here, you can choose your tax year for which you wish to generate the Statement of Liability, using the dropdown.

Review your tax 2016 - 2019

My Documents

Tax year

2019

Select

2019

Review type	Description	Status	Action
Statement of Liability	<ul style="list-style-type: none"><li>View your Preliminary End of Year Statement for 2019 based on Revenue's records.</li><li>Complete your Income Tax return to:<ul style="list-style-type: none"><li>- Change existing credits/declared income;</li><li>- Declare additional Income e.g. rental income, income from casual work;</li><li>- Claim additional credits/reliefs e.g. health expenses;</li><li>- Request your Statement of Liability from Revenue.</li></ul></li></ul>	Available	<a href="#">Request</a>

In the section titled "Statement of Liability", click 'Request'.

# Step 5

## Preliminary End of Year Statement

From here, you will see a page with a breakdown of your tax payments for your chosen year.

It is recommended that your tax calculation has gone through before you proceed so that you can see whether there is an overpayment or underpayment of tax.

In this instance, the employee overpaid on their tax by “€0.03”.

Preliminary End of Year Statement 2019

My Documents

### Preliminary End of Year Statement

This is a preliminary calculation for 2019 based on the information held on Revenue's records at this time.

If you have any additional income to declare e.g. rental income, income from casual work, you should declare this income by completing your Income Tax Return. To go directly to your Income Tax Return, click 'Complete your Income Tax Return' at the bottom of this page.

Preliminary result	Overpayment	€0.03
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### What your preliminary result means

#### Overpayment

Based on Revenue's records for 2019, you paid more Income Tax or USC than you were due to pay. To receive any refund due, you should complete your Income Tax Return for 2019.

### Preliminary Income Tax result

To view a breakdown of your taxable income, credits/reliefs and Income Tax due, click 'View Income Tax details'.

[View Income Tax details](#)

# Step 6

## Tax Return

Scroll down to the bottom of that same page and click “Complete your Income Tax Return” to proceed.

### How would you like to proceed?

You should complete your Income Tax Return to:

- Receive any refund of tax due;
- Change existing credits/declared income;
- Declare additional income e.g. rental income, income from casual work;
- Claim additional credits e.g. health expenses;
- Receive your Statement of Liability.


**Complete your Income Tax Return →**

If you do not need a Statement of Liability and have no additional income to declare or credits/reliefs to claim you can return to 'Review your tax' by clicking the 'Back' button below.

# Step 7

## What do I need to do?

### Income Tax Return

 My Documents

## Completing your Income Tax Return

### What do I need to do?

To complete your Income Tax return and request your Statement of Liability, you need to complete the five sections below.

- 1 Personal details  
Check that your details are correct. Add details for you and your spouse or civil partner, if relevant.
- 2 PAYE income  
Check that the pay and tax details for 2019 for each of your jobs/pensions are correct. This is based on information provided by your employer/pension provider to Revenue. A breakdown of this information is available under 'Employment Detail Summary' in the [Review your tax](#) screen. If your pay and tax details are incorrect, you must contact your employer to correct these details.
- 3 Non-PAYE income  
Confirm, edit or delete non-PAYE income already on record. Add any additional non-PAYE income not already declared e.g. rental income, nixers.
- 4 Tax credits and reliefs  
Confirm, edit or delete tax credits and reliefs already on record. Add new tax credits or reliefs not already on record.
- 5 Declaration  
Confirm that all the information provided is correct before requesting your Statement of Liability

You will then be brought to a page detailing the 5 steps needed to complete in order to complete your Income Tax return.

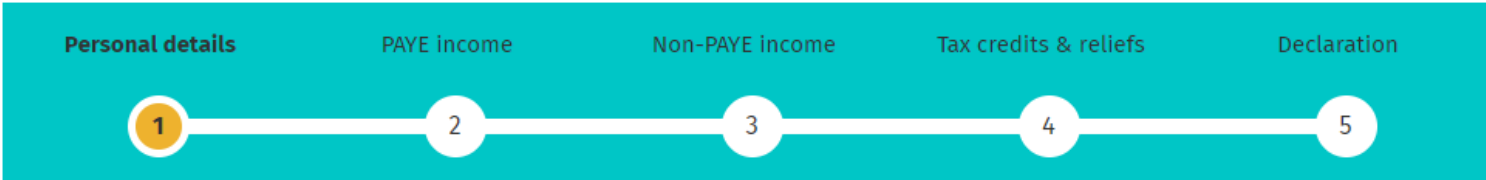


# Step 8

## Personal details



### Personal details



\* Denotes a required field

To start, enter your personal details and click 'Next'.

### Gary's personal details



PPS number

*i* Date of birth (dd/mm/yyyy)

# Step 9

## PAYE & Non-PAYE Income



You can choose to add income, tax and USC details for PAYE and non-PAYE income which are not already recorded by Revenue.

Once you have checked that your PAYE income and any non-PAYE income is recorded, click 'Next'.

Income Tax Return

My Documents

### PAYE income

Personal details

PAYE income

Non-PAYE income

Tax credits & reliefs

Declaration

1

2

3

4

5

Click **Edit** to **add** income, tax and USC details where these are not displayed or if you have paid non-refundable foreign tax on any of the PAYE incomes shown.

If any source of PAYE income is not included, you can use the Jobs and Pensions service to update your records.

If any of the below information is incorrect, please contact us via MyEnquiries.

### Non-PAYE income

Personal details

PAYE income

Non-PAYE income

Tax credits & reliefs

Declaration

1

2

3

4

5

Please **confirm**, **edit** or **delete** income already on record. **Add** new income not already on record.

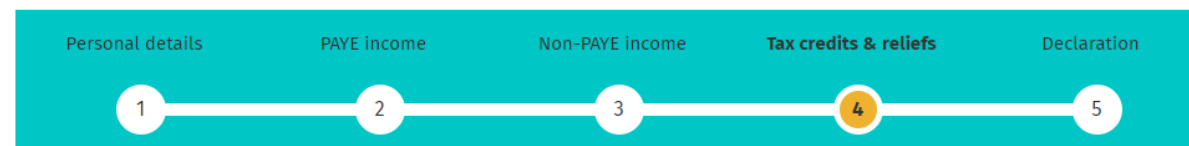
Add income:

Expand All

# Step 10

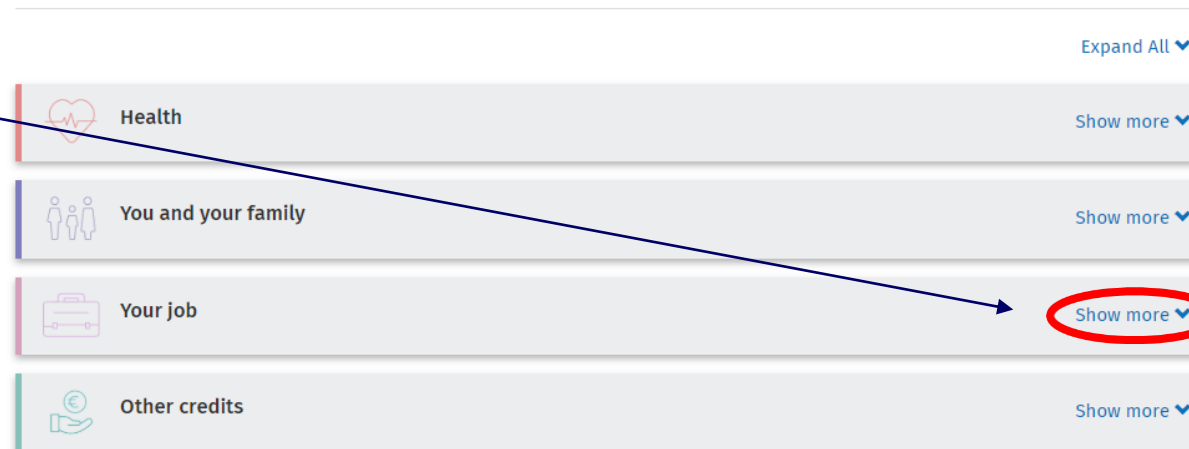
## Tax credits & reliefs

### Tax credits & reliefs







Please **confirm**, **edit** or **delete** tax credits and reliefs already on record. **Add** new tax credits or reliefs not already on record.

#### Add tax credits:



The 'Add tax credits' section contains a list of categories with 'Show more' dropdowns. The 'Your job' category's 'Show more' dropdown is circled in red. An arrow points from the text 'Select the "Show more" dropdown in the "Your job" section' to this dropdown.

Expand All ▼	
 Health	Show more ▼
 You and your family	Show more ▼
 Your job	Show more ▼
 Other credits	Show more ▼

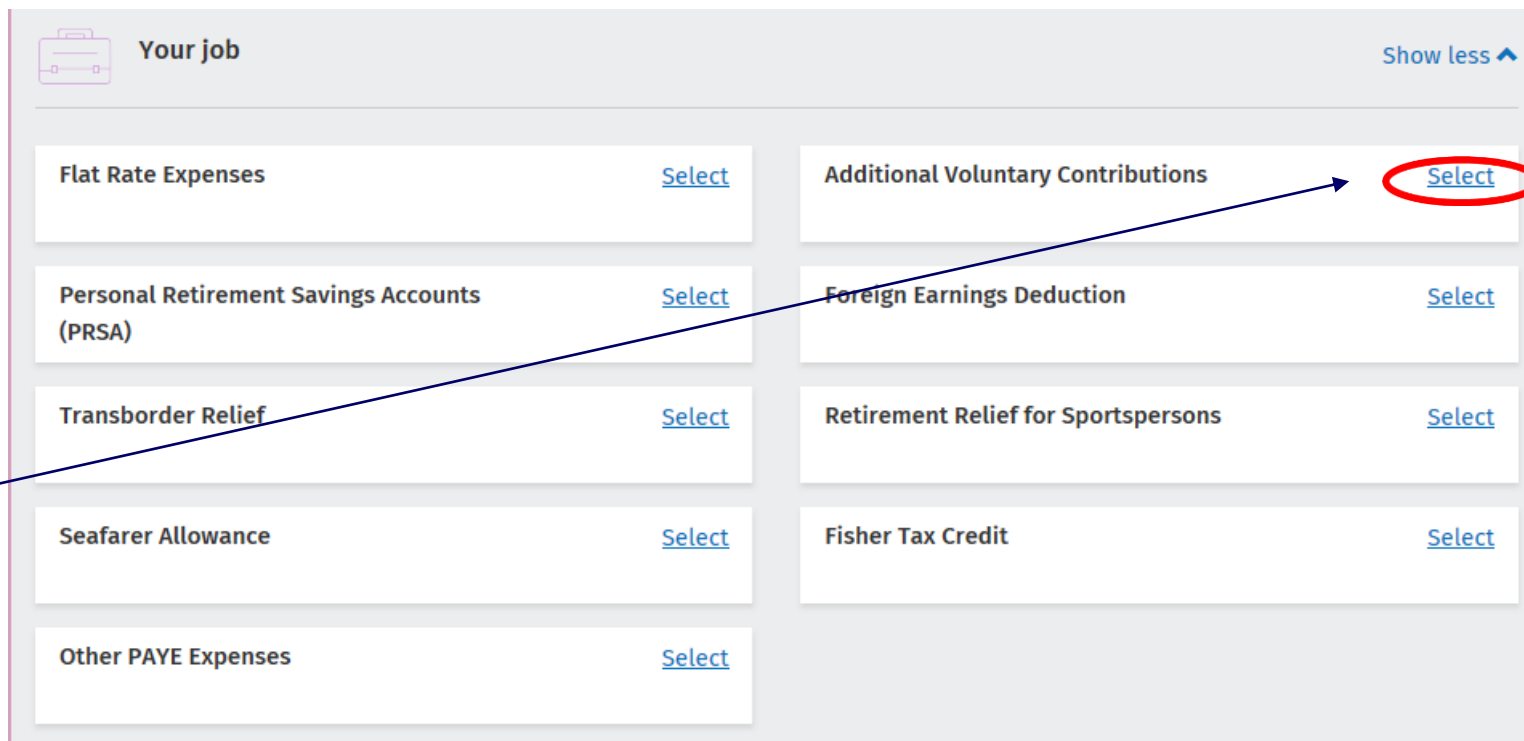
Select the "Show more" dropdown in the 'Your job' section


# Step 11

## Your job

Once clicked, a list of the difference tax options will appear.

Click "Select" in 'Added Voluntary Contributions' to proceed.



 **Your job** Show less ^

Flat Rate Expenses <a href="#">Select</a>	Additional Voluntary Contributions <a href="#">Select</a>
Personal Retirement Savings Accounts (PRSA) <a href="#">Select</a>	Foreign Earnings Deduction <a href="#">Select</a>
Transborder Relief <a href="#">Select</a>	Retirement Relief for Sportspersons <a href="#">Select</a>
Seafarer Allowance <a href="#">Select</a>	Fisher Tax Credit <a href="#">Select</a>
Other PAYE Expenses <a href="#">Select</a>	

# Step 12

## AVC Contribution

Select the type of AVC Contribution you are looking for and enter your gross income and net relevant earnings.

### Additional Voluntary Contributions

Additional Voluntary Contributions are additional superannuation payments made to an occupational pension scheme . AVC relief can only be claimed if AVC contributions have been paid for you by you or your employer.

\* Denotes a required field

### Type of AVC Contribution \*

☒ PRSA

☐ Other

### Employment where your Superannuation Fund is held \*

Please select an option



### Employment gross income

### Net relevant earnings \*

## Step 12 continued...

Input the amount of AVC you are going to pay, for this example we will be inputting €5000.

Fill in the remaining sections, which includes any additional AVC's or tax reliefs you may claim through the main scheme.

This ensures that you do not go over the age related tax limits.


 Amount of AVC paid by you in 2019 on which relief has not already been granted \*

Amount of AVC contributions relieved under the net pay arrangement in 2019

Amount of ordinary contributions relieved under the net pay arrangement in 2019

Amount carried forward from a prior year, from which relief has not been obtained

Amount paid between 1/1/2020 and 31/10/2020 for which relief has not already been granted and for which relief is being claimed for 2019

 Are you a specified sportsperson?(S.23A)

☐ Yes

☒ No


# Step 13

## Tax credits

Once completed, your tax credits will be updated to include your lump sum Additional Voluntary Contribution.

This is the amount of AVC paid by you in 2019 on which relief has not already been granted.

### RICHARD's Tax credits

Confirm	Description	Gross amount	Action
<input type="checkbox"/>	 Personal Tax Credit	€3,300.00	
<input type="checkbox"/>	Interest Relief on Certain Home Loans	€0.00	
<input type="checkbox"/>	Employee Tax Credit	€1,650.00	<a href="#">Edit</a> <a href="#">Delete</a>
	Additional Voluntary Contributions	€5,000.00	<a href="#">Edit</a> <a href="#">Delete</a>

# Step 14

## Declaration

Continue by reading and confirming the declaration, and selecting 'Next'.

### Declaration

I declare that, to the best of my knowledge and belief, this form contains a correct return in accordance with the provisions of the Taxes Consolidation Act 1997 of all sources of my income and the amount of income derived from each source in the year 2019.  
I declare that to the best of my knowledge and belief, all particulars given as regards tax credits, allowances and reliefs claimed and as regards outgoings and charges are stated correctly.

Civil Penalties/Criminal Prosecution - Tax law provides for both civil penalties and criminal sanctions for the failure to make a return, the making of a false return, facilitating the making of a false return, or claiming tax credits, allowances or reliefs which are not due. In the event of a criminal prosecution, a person convicted on indictment of an offence may be liable to a fine not exceeding €126,970 and/or to a fine of up to double the difference between the declared tax due and the tax ultimately found to be due and/or to imprisonment.

Check this box to confirm this declaration.\*



[← Back](#)

Print

Next →



# Step 15

Sign in

To proceed, input your myAccount details once again.



## Secure sign and submit

PPS Number

Enter myAccount password

**Sign and Submit →**

# Step 16

You should receive a confirmation along with your reference number.

As stated, you can expect to receive your Tax refund within 5 working days.

Review your tax 2016 - 2019

 My Documents



## Thank you

Your reference number is:

In most circumstances a copy of your Statement of Liability will be available to view or download from My Documents within 5 working days.

However if we need to confirm some details, it may take longer.

OK →

# Thank you

**Zurich Life Assurance plc is regulated by the Central Bank of Ireland.**