

Self-Assessment Tax Checklist for UK Employees (2025-26)

Important Deadlines

- 5 October 2025 - Register for Self Assessment if required
- 31 October 2025 - Deadline for paper returns
- 31 January 2026 - Online filing and payment deadline

Documentation to Prepare

- P60/P45 forms from employers
- Records of additional untaxed income (dividends, rent, freelance work)
- Savings and investment income documentation
- Details of any pension contributions outside PAYE

Self-Assessment Checklist

- Check if you need to file a Self Assessment return (e.g. you earned over £100,000 or had untaxed income)
- Register for Self Assessment by 5 October 2025 if required
- Collect your P60 and/or P45 from your employer(s)
- Gather records of any untaxed income (e.g. dividends, rental income, side gigs)
- Include details of any income from savings or investments (e.g. interest, ISAs)
- Record any pension contributions made outside of PAYE
- Check if you claimed any work-related expenses or benefits (e.g. mileage, uniforms)
- Calculate your total taxable income for 2025-26
- File your Self Assessment tax return online by 31 January 2026
- Pay any tax due by 31 January 2026

Need Help?

Contact My Tax Accountant for expert Self Assessment assistance:

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