RELEASE NOTES
for Personal Tax

Version 13 Build 4

relate software

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INTRODUCTION

As per Revenue guidelines and due to the implementation of the Finance Act 2021 and amendment in the taxonomy, we have made 4 changes in **Relate Personal Tax Version 13.0 Build 4** for the Tax Year 2021. The major changes have been made to **Relate Personal Tax** to comply with Revenue.

MAJOR CHANGES IN TAX YEAR 2021

Major changes include new tax fields and subsections to be filled in where applicable under

- Self-Employed Income
    - Tax field under **Capital Allowances for the year 2021** – If any amount entered above refers to 'farm safety equipment' under S285D enter the amount and provide the details required.
    - New link to add the **Details of additional certificate**- Tax field for the qualifying certificate number issued by the Department of Agriculture, Food, and the Marine.
    - New link to add the **Details of additional certificate**- Tax field for the amount claimed from this certificate.
    - New Tax field under **Farm Partnership Details (Add Details link)** – Your share of Succession Tax Credit due under Sr.667D in prior years.

- Personal Tax Credits
    - Calculation Changes- The Dependent relative tax credit has been changed to £245.

SELF-EMPLOYED INCOME

CAPITAL ALLOWANCES FOR THE YEAR 2021

The Self-Employed Income section has new details added under **Capital Allowances for the year 2021**. The changes have been categorised into two sections. First off, a new tax field has been added that allows the user to add any amount mentioned earlier that fall under **farm safety equipment under S285D** as highlighted in **Figure 1**. Secondly, the user can add their details of additional certification by clicking on the hyperlink **Details of the additional certificate** as highlighted in **Figure 2.** To navigate to the page as shown in Figure 2, kindly follow the path Self Employed Income → Capital Allowances for the year 2021 → Hyperlink for details of additional certificates. The new dialog box that opens up lets the user add/edit/delete the certificate number alongside the amount claimed for the certificate. This is shown in detail in **Figure 3**. The three Tax Fields added are listed below:

- If any amount entered above refers to 'farm safety equipment' under S285D enter that amount here and provide the following
- The qualifying certificate number was issued by the Department of Agriculture, Food, and the Marine
- Amount claimed from this certificate

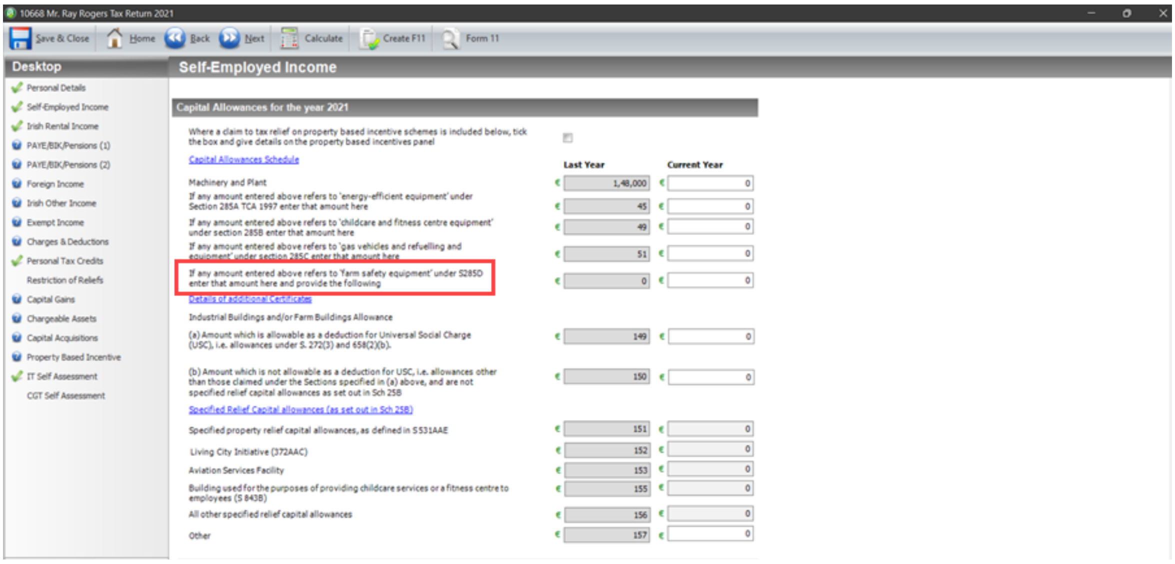

Figure 1: New Section under Capital Allowances for the year 2021

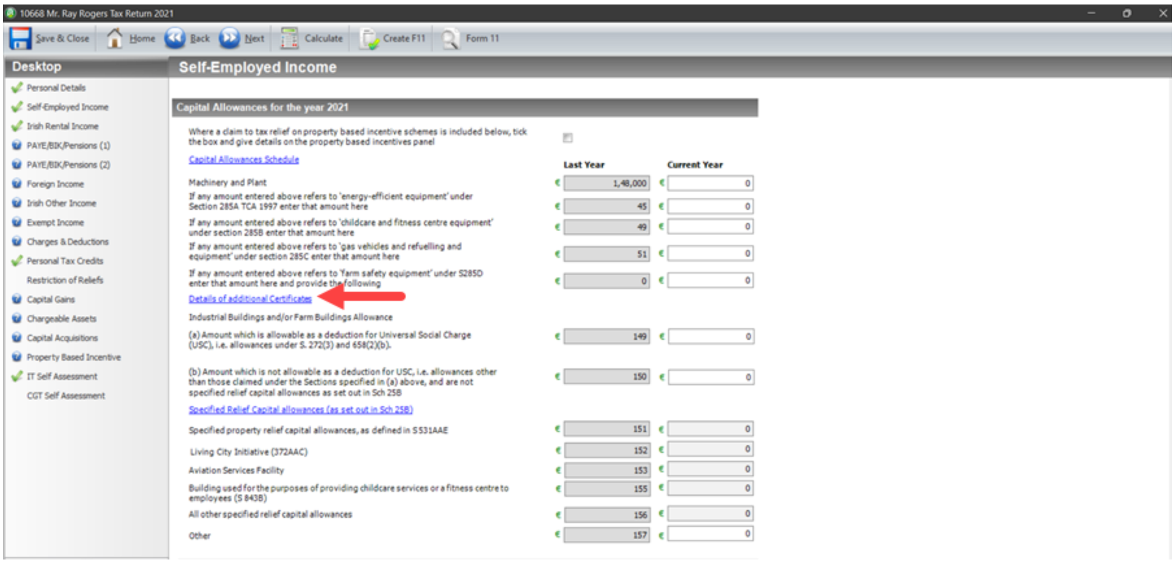

Figure 2: Click on the "Details of additional Certificates" hyperlink under Capital Allowances Details

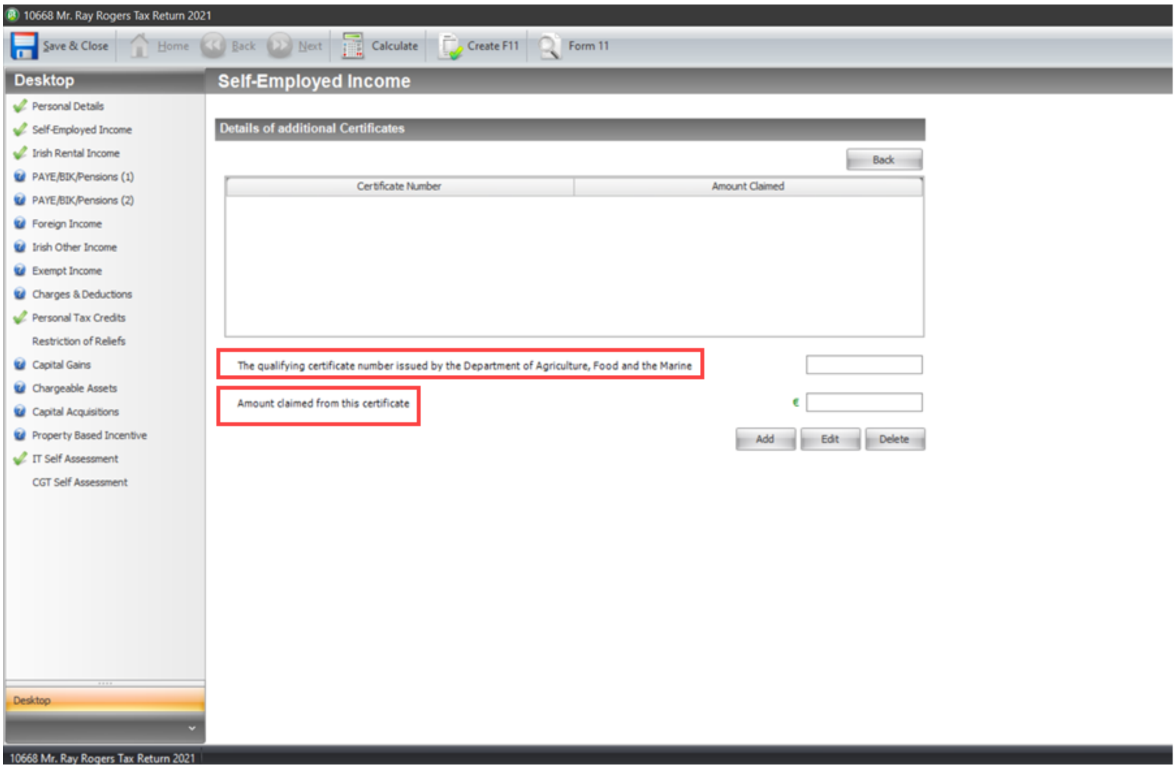

Figure 3: New Section under Capital Allowances for the year 2021

FARM PARTNERSHIP DETAILS

The Self-Employed Income section has new details added under **Farm Partnership Details**. The changes have been added under the **Add Details** hyperlink. The filer needs to click on the **Add Details** hyperlink under the **Farm Partnership Details** to fill in the details. The process of navigation can be identified below. The user of the same needs to click on the highlighted section of **Figure 4** to reach **Figure 5.** Following this, the user can go ahead and add the new information that takes into consideration the share of Succession Tax Credit due under S.667D in prior years. This can be found under **Succession Farm Partnership**. The Tax Field added is listed below:

- Your share of Succession Tax Credit due under S.667D in prior years

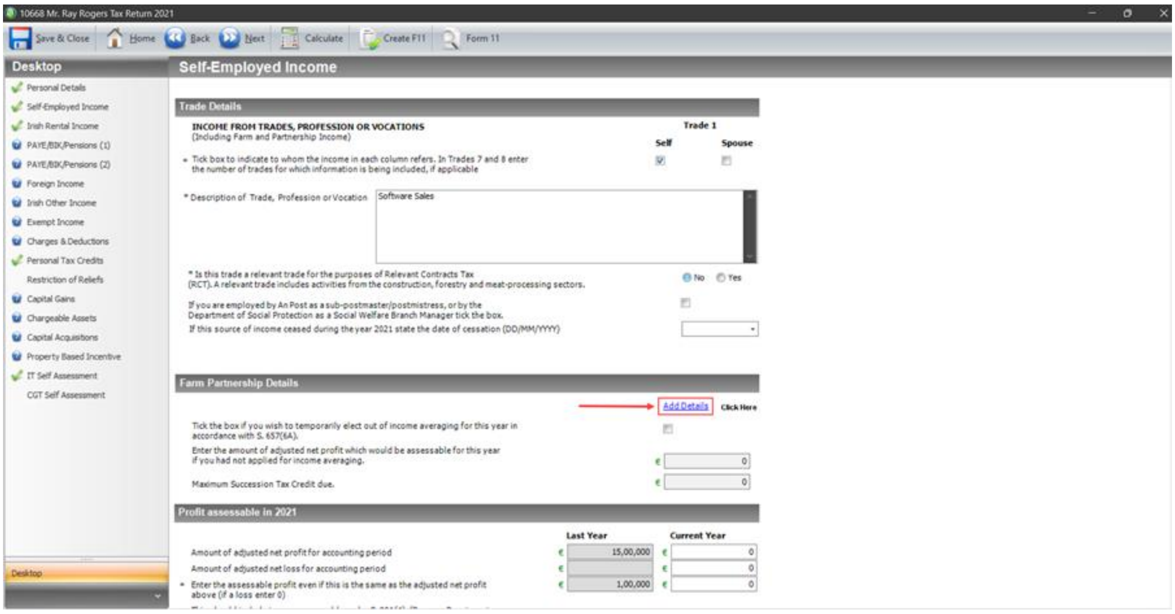

Figure 4: Click on the “Add Details” hyperlink under farm Partnership Details

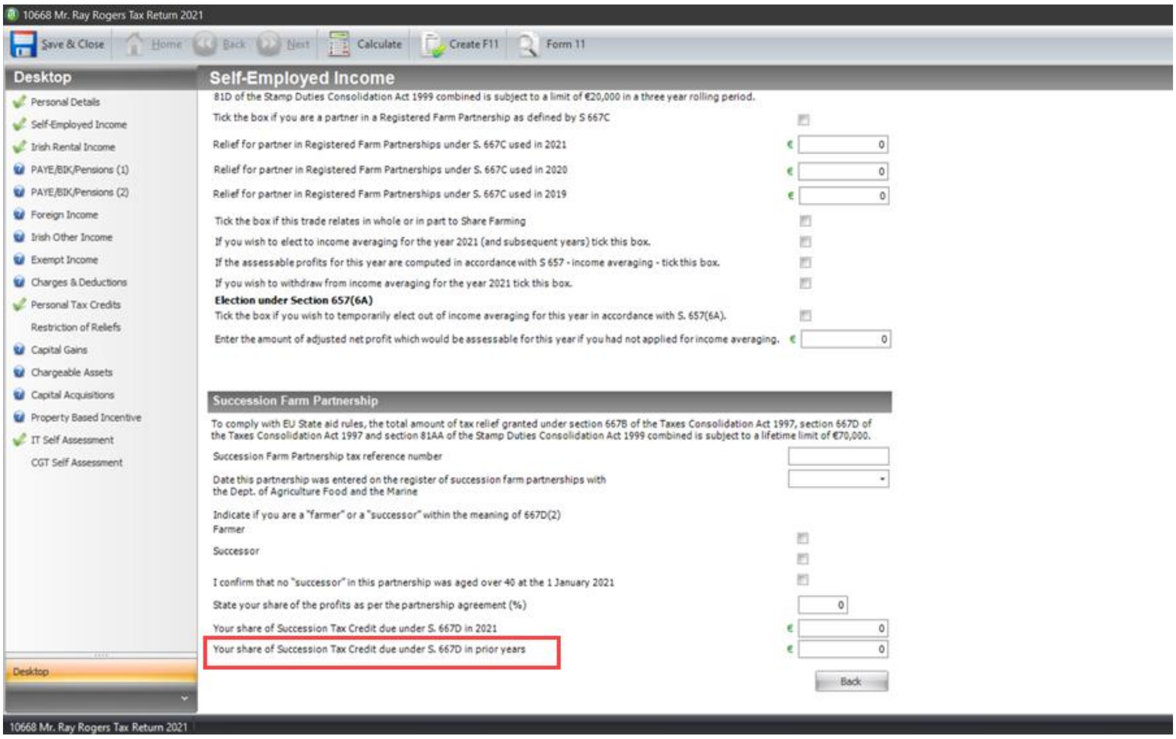

Figure 5: New section under Succession Farm Partnership

PERSONAL TAX CREDITS

DEPENDENT RELATIVE TAX CREDIT

The change under the format for **Personal Tax Credits**, is mainly in regard to the Calculation logic. As per the new tax schema the **Dependent Relative Tax Credit** has been automatically changed to £245. This has been displayed under **Figure 6.**

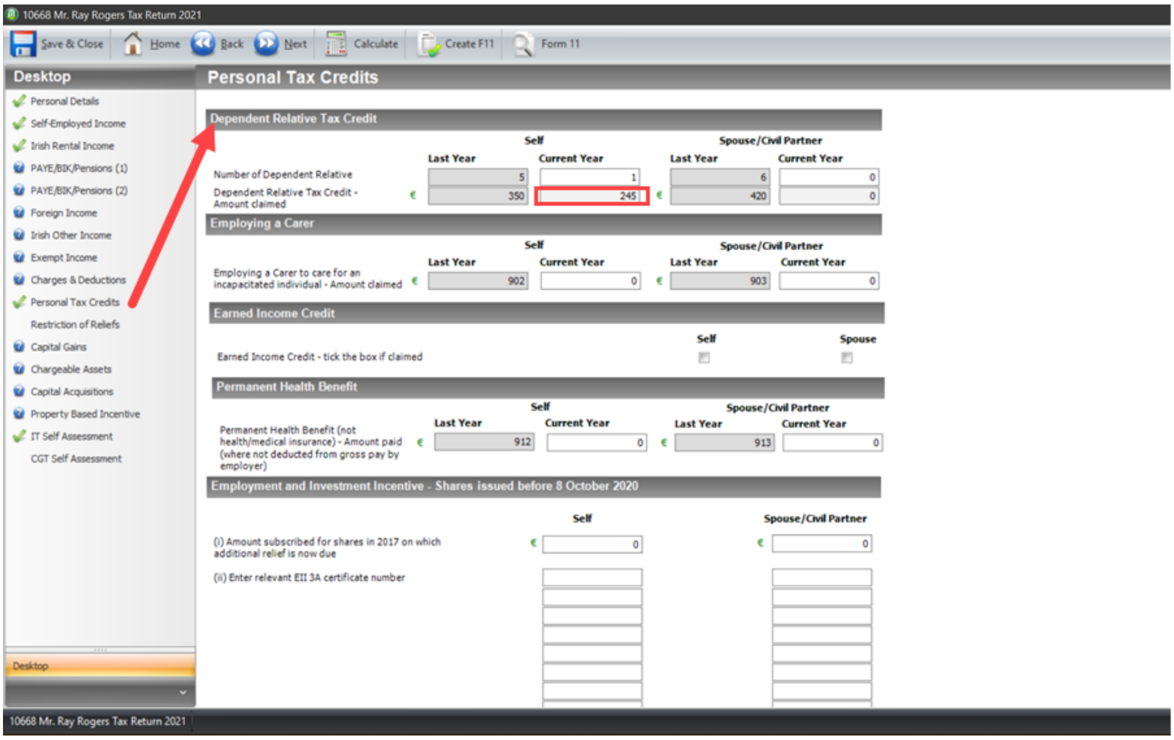

Figure 6: Calculation change under Dependent Relative Tax Credit