

CLAIM FOR ANNUAL SUBSCRIPTION – SECTION 344 ITEPA 2003

Please use this form to claim tax relief on your UNISON Health Care subscriptions

GUIDANCE NOTES FOR COMPLETION OF THE CLAIM FORM

1) Section 1 of the claim form lists the personal details that will enable your tax office to deal with your claim. It is very important that you put your National Insurance Number on the form. It looks something like: AB 12 34 56 C. You can find your National Insurance Number on Form P60, (the form your employer should give you in April/May each year which tells you your total income for the year). It is also on letters you may have received from HM Revenue & Customs and your payslip.

2) Section 2 of the claim form lists the information that HM Revenue & Customs will need to process your claim. Firstly, you need to confirm that you are, or have been at some time since 6 April 2004, a member of one of the named sectors of the UNISON Health Care Service Group by placing a tick in the appropriate box(es). A broad description of the membership of each of the sectors is shown overleaf. **If you are a member of the British Association of Occupational Therapists you should not complete this form as you do not pay a subscription direct to UNISON.**

If you do not complete an tax return, you can claim back the relief for up to six years. If you do complete a tax return you can only claim back four years. Please make sure you do not claim for any years you have already received tax relief.

3) Next you need to enter details of the UNISON subscriptions paid by you in the years during any part of which

SECTION 1 (Please read the guidance notes before completing this form)			
Surname	<input type="text"/>		
Forename(s)	<input type="text"/>		
National Insurance number	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>		
Address and postcode	<input type="text"/>		
Employer's name, address and postcode	<input type="text"/>		
SECTION 2			
I confirm that I am/have been* a member of UNISON's Health Care Service Group *(delete as applicable)			
	Tick to claim		Tick to claim
Nursing sector	<input type="checkbox"/>	Ambulance sector	<input type="checkbox"/>
Voluntary sector	<input type="checkbox"/>	Professional & Technical 'A' sector	<input type="checkbox"/>
Professional & Technical 'B' sector	<input type="checkbox"/>	Senior & General Managers sector	<input type="checkbox"/>
and claim tax relief on the following amounts of subscriptions paid by me:			
	YEAR (From 6 April to 5 April)	Total subscription paid	Relief claimed on 70% of subscription paid
Please amend my code to include relief for my subscriptions payable for 2006-07	£		£
2007-08	£		£
2008-09	£		£
2009-10	£		£
2010-11	£		£
2011-12	£		£
Signature	Date		

you were a member of any of the named sectors. If you were not a member of a named sector for the entire year you should only claim that proportion of your annual subscription that relates to the period of membership of a named sector.

Details of subscriptions (subs) can be found on your payslip and in the table on the right:

4) When you have fully completed and signed the claim form, send it to your tax office. The address will be shown on any letter from them or, for example, on the form that advises you of your PAYE code number. If you cannot find the address of the tax office your employer's payroll department will be able to tell you.

WEEKLY PAY	ANNUAL PAY	MONTHLY UNISON SUB	ANNUAL UNISON SUB	70% OF ANNUAL UNISON SUB	*Annual refund (assuming liable to basic rate tax @ 20%)
Up to £38.47	Up to £2,000	£1.30	£15.60	£10.92	£2.18
£38.48–£96.16	£2,001–£5,000	£3.50	£42.00	£29.40	£5.88
£96.17–£153.84	£5,001–£8,000	£5.30	£63.60	£44.52	£8.90
£153.85–£211.53	£8,001–£11,000	£6.60	£79.20	£55.44	£11.08
£211.54–£269.23	£11,001–£14,000	£7.85	£94.20	£65.94	£13.18
£269.24–£326.92	£14,001–£17,000	£9.70	£116.40	£81.48	£16.29
£326.93–£384.61	£17,001–£20,000	£11.50	£138.00	£96.60	£19.32
£384.62–£480.76	£20,001–£25,000	£14.00	£168.00	£117.60	£23.52
£480.77–£576.92	£25,001–£30,000	£17.25	£207.00	£144.90	£28.98
£576.93–£673.08	£30,001–£35,000	£20.30	£243.60	£170.52	£34.10
£673.08+	over £35,000	£22.50	£270.00	£189.00	£37.80

** Whether you receive a refund or not will depend on your personal circumstances*

QUALIFYING SECTORS

Nursing sector

The Nursing sector covers the whole nursing family including nurses, midwives, health visitors and healthcare assistants working in the community, schools, mental health, dentistry, GP practices, learning disabilities, maternity care, hospitals and the prison service.

Ambulance sector

The Ambulance sector covers all grades of ambulance staff and paramedics serving in every ambulance service in the UK.

Voluntary Sector

The Voluntary sector covers those who work for a non-NHS voluntary sector organisation (such as a charity, community group or social enterprise) providing services such as home, residential or day care, rehabilitation and social work.

Senior Managers' sector

The Senior and General Managers' sector covers heads of services, directors, assistant

directors, professional managers, organisers, co-ordinators and team leaders within the NHS and its support services.

Professional and Technical 'A' sector

The Professional and Technical 'A' sector covers members who, prior to Agenda for Change, came under the PTA section of the Whitley Council pay structure, including those working in areas such as art, music and drama therapy, occupational therapy, speech and language therapy, physiotherapy, psychology, orthoptics, dietetics, chiropody and radiography.

Professional and Technical 'B' sector

The Professional and Technical 'B' sector comprises professional and technical staff working as operating department practitioners and assistants and those working in anaesthetics,

chaplains, counselling, dialysis, estates management, optometry, phlebotomy, podiatry, prosthetics and orthotics, sexual health, healthcare scientists including clinical scientists who work in biochemistry, gastroenterology, haematology, haemostasis and thrombosis, microbiology, immunogenetics and histocompatibility, immunology molecular genetics, medical physics, respiratory physiology and clinical engineering, cytoscreeners, laboratory support staff and perfusionists, technicians or technologists working in anatomical pathology, audiology, dentistry, physiological measurements and cardiology, gastroenterology, hearing, respiratory, medical physics, engineering, renal, physiology, neurophysiology, and medical illustrators and photography, dental auxiliaries, hygienists and therapists, pharmacists, pharmacy technicians and pharmacy assistants.