



**Redbrick**  
Solutions

# Stamp Duty - SDLT



**Redbrick**  
Practice Management

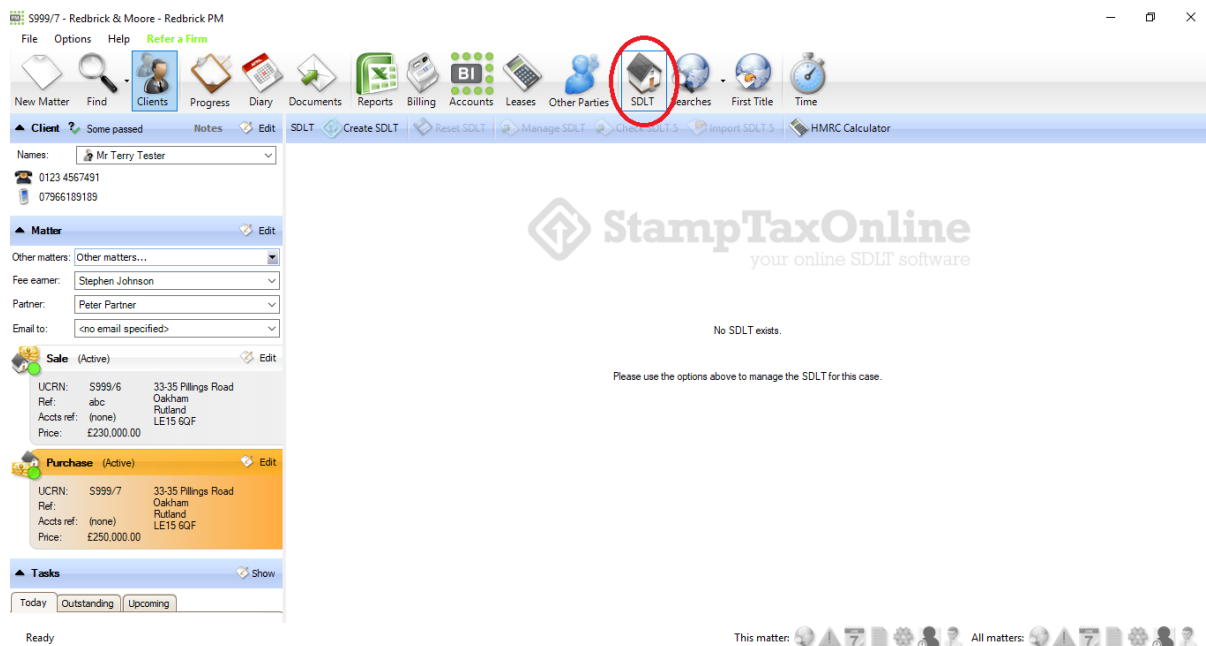
Legal Case Management

## SDLT

SDLT forms can be created through Redbrick PM.

Go to the SDLT button.

Please note SDLT will only be visible for relevant matter types, e.g. it won't be shown if you are in a Sale matter.



The screenshot shows the Redbrick PM software interface. The top navigation bar includes buttons for New Matter, Find, Clients, Progress, Diary, Documents, Reports, Billing, Accounts, Leases, Other Parties, **SDLT** (circled in red), Searches, First Title, and Time. Below the navigation bar is a toolbar with buttons for Create SDLT, Reset SDLT, Manage SDLT, Check SDLT 5, Import SDLT 5, and HMRC Calculator. The main window displays the StampTaxOnline logo and the text "No SDLT exists. Please use the options above to manage the SDLT for this case." The left sidebar shows client details for Mr Terry Tester and two active matters: a Sale and a Purchase.

If this is the first time you have opened the SDLT then your only option (button) is to Create SDLT



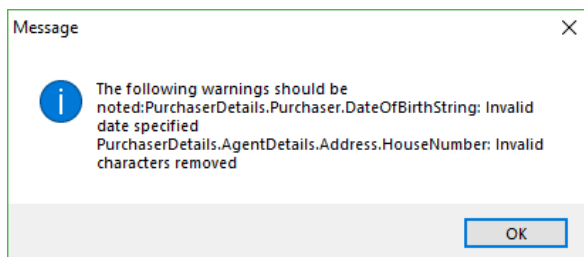
The screenshot shows a close-up of the software toolbar. The buttons are: SDLT, **Create SDLT** (highlighted), Reset SDLT, Manage SDLT, Check SDLT 5, Import SDLT 5, and HMRC Calculator.

Once you have created one, you have the ability to close the form and re-open it at any point to add additional information until you are ready to submit.

- **Create SDLT** – This is visible if you haven't run the SDLT form for this matter.
- **Reset SDLT** – This enables you to clear any data and start your SDLT form again.
- **Manage SDLT** – Allows you to edit a previously created SDLT form and continue working on it.
- **Check SDLT 5** – From here you can search for previously submitted SDLT forms within a date range or by a matter reference. You can also view the form, print the form, print the SDLT 5 and print a receipt.
- **Import SDLT 5** - You can import the SDLT 5 submission directly back into the document history in Redbrick.

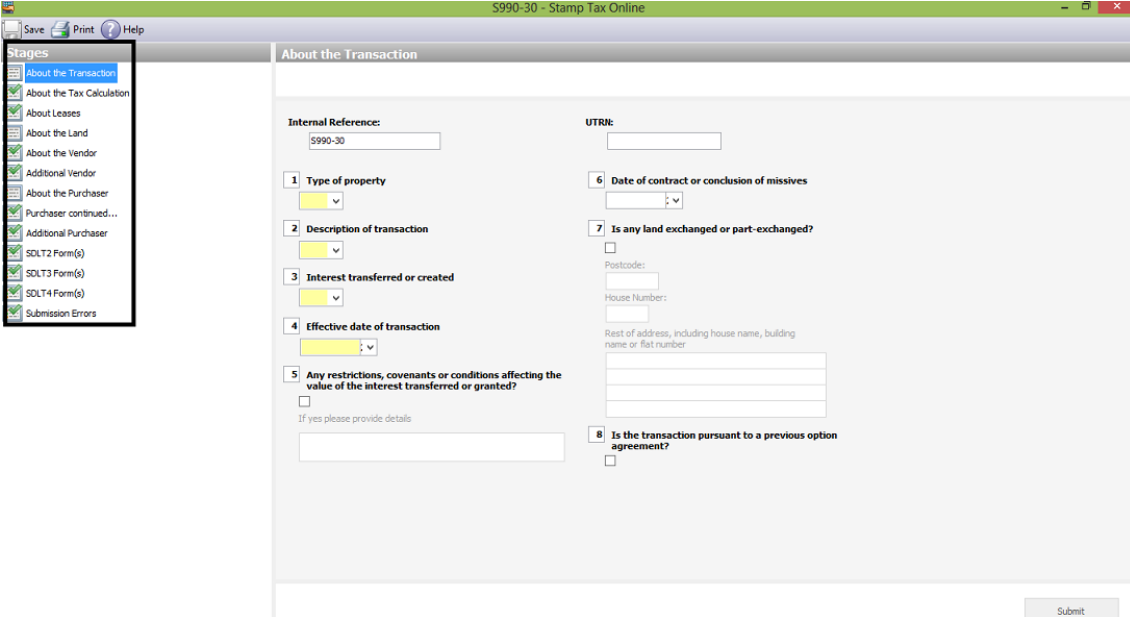
To create a new SDLT form, click on Create SDLT button.

You may get some warnings of missing data, you should rectify the data i.e. add Date of Birth to the Client record.



You can then fill in the missing information in Redbrick PM, then come back into SDLT and select the Reset SDLT button to reset and Create the SDLT again.

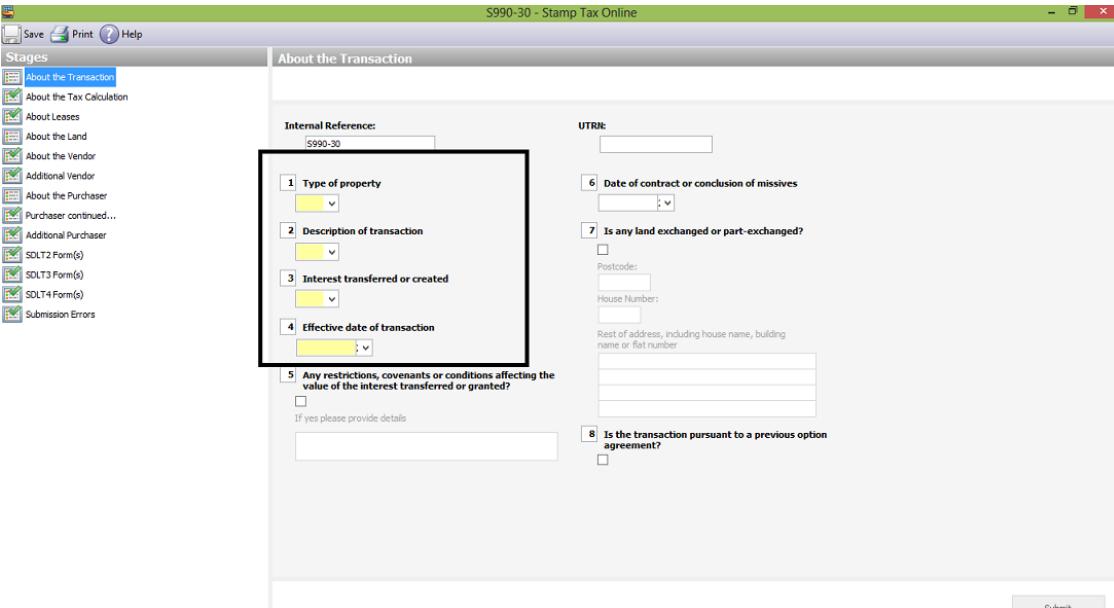
Or, you can continue with the SDLT with the missing information by clicking on the OK button against the warning message.



The stages on the left-hand side are different pages where information needs to be filled in for submission. Redbrick PM will automatically fill in some of that information, if it has previously been entered against that matter.

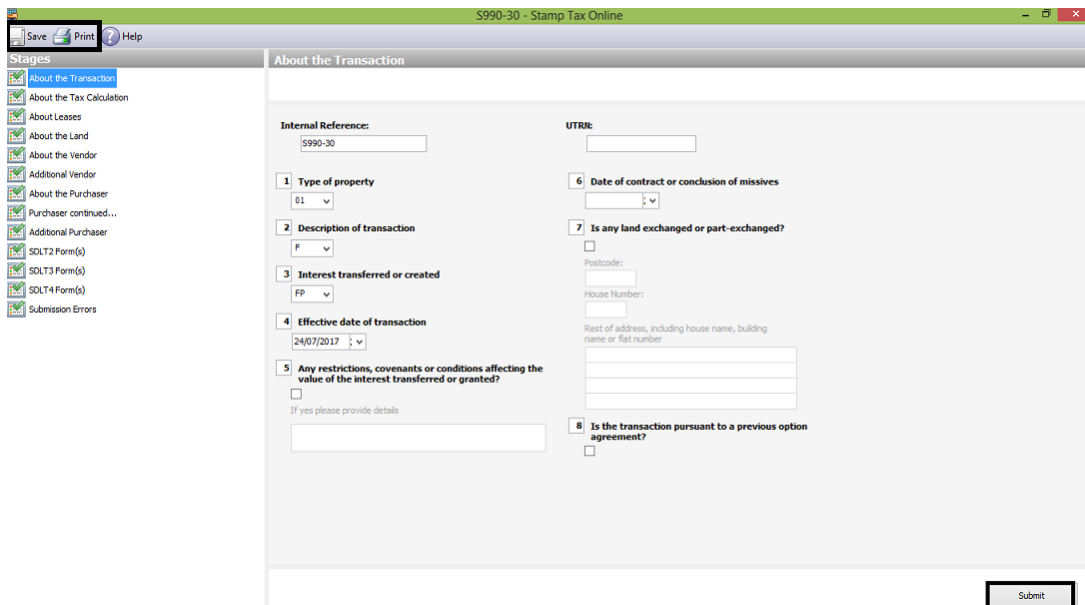
You need to click on each stage to fill in that particular page. The stage highlighted in blue is the page that you are on.

The stages that have a green tick next to them mean the minimum amount of information for submission has already been filled in. You can of course enter any additional information on that page.



On a stage that doesn't have a green tick next to it there will be fields that are yellow in colour. These are the fields that still need to be filled in before you can submit your SDLT form.

Fill these in until you have green ticks against each stage. If you can't fill all the information in at that time, select the Save button, then at a later stage you can come back to it from the SDLT page and click on the Manage SDLT button. Then add the missing information.



You can then save the SDLT form information by clicking on the Save button. This saves it forever in Redbrick PM, unless you select the Reset SDLT button as mentioned previously.

You could also print it off – if you need to send it to your client to sign before submitting. Just click on the Print button and send it to your printer.

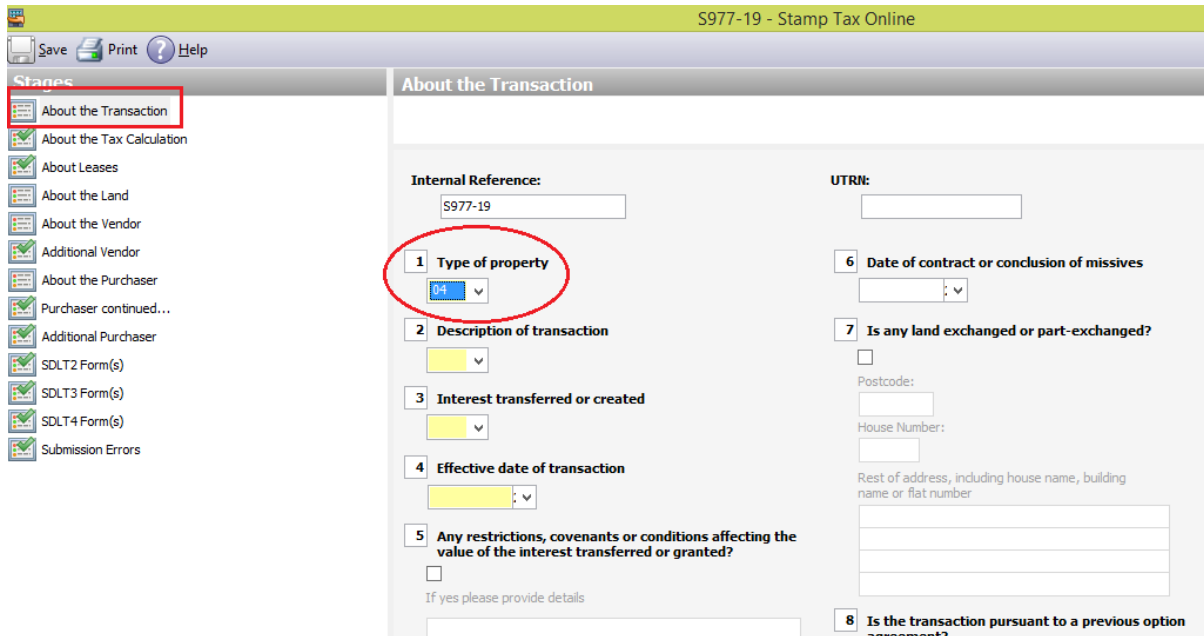
If you're happy with everything and want to submit the form to HMRC click on the Submit button.

*The submit button will be greyed out until all the required information has been completed.*

*Please see next sheet for how to change the SDLT payable and select the correct fields:*

## SDLT – using the calculator

The correct Type of Property selected will ensure the calculator displays the correct figure (calculator needs to be clicked AFTER correct selections have been made).



S977-19 - Stamp Tax Online

Save Print Help

**Stages**

- About the Transaction
- About the Tax Calculation
- About Leases
- About the Land
- About the Vendor
- Additional Vendor
- About the Purchaser
- Purchaser continued...
- Additional Purchaser
- SDLT2 Form(s)
- SDLT3 Form(s)
- SDLT4 Form(s)
- Submission Errors

**About the Transaction**

Internal Reference: S977-19

UTRN:

**1 Type of property** (04)

**2 Description of transaction**

**3 Interest transferred or created**

**4 Effective date of transaction**

**5 Any restrictions, covenants or conditions affecting the value of the interest transferred or granted?**

**6 Date of contract or conclusion of missives**

**7 Is any land exchanged or part-exchanged?**

Postcode:

House Number:

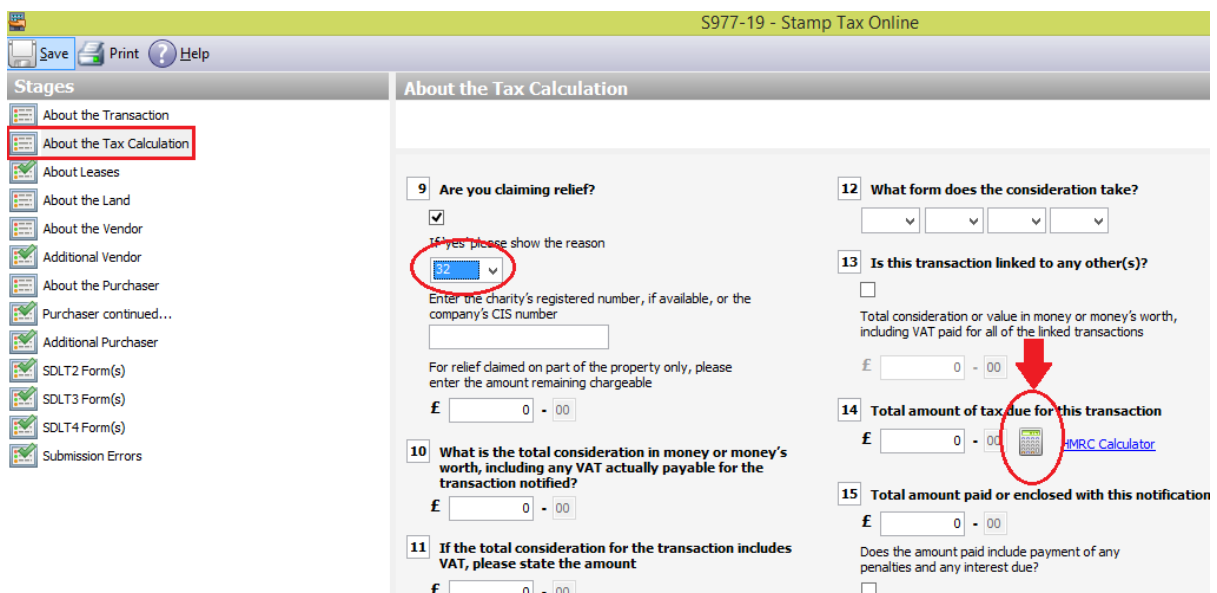
Rest of address, including house name, building name or flat number

**8 Is the transaction pursuant to a previous option agreement?**

Normal SDLT rate and First Time Buyer rate need to have 01 selected in the Type of Property.

Higher rate of SDLT needs 04 selected as per the above screenshot.

Tick box 9 if client is claiming First Time Buyer relief and select option 32.



S977-19 - Stamp Tax Online

Save Print Help

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**About the Tax Calculation**

**9 Are you claiming relief?**

If yes, please show the reason

(32)

Enter the charity's registered number, if available, or the company's CIS number

For relief claimed on part of the property only, please enter the amount remaining chargeable

£ 0 - 00

**10 What is the total consideration in money or money's worth, including any VAT actually payable for the transaction notified?**

£ 0 - 00

**11 If the total consideration for the transaction includes VAT, please state the amount**

£ 0 - 00

**12 What form does the consideration take?**

**13 Is this transaction linked to any other(s)?**

Total consideration or value in money or money's worth, including VAT paid for all of the linked transactions

£ 0 - 00

**14 Total amount of tax due for this transaction**

£ 0 - 00

**15 Total amount paid or enclosed with this notification**

£ 0 - 00

Does the amount paid include payment of any penalties and any interest due?

If you have any queries on Redbrick or BI please either contact your dedicated Business Consultant or our Support team.



## Support

**Tel : 01572 770088**

**Email : [Support@RedbrickSolutions.co.uk](mailto:Support@RedbrickSolutions.co.uk)**

**Website : [www.redbricksolutions.co.uk](http://www.redbricksolutions.co.uk)**

**Address :  
Top Floor  
33-35 Pillings Road  
Oakham  
Rutland  
LE15 6QF**

**Or Access your client portal for support and additional resources:  
<https://www.redbricksolutions.co.uk/clientarea/login>**

