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## Application stage

You can apply as an individual, or as part of a group if you are buying or building with other people. You must complete a declaration and select the years you want to use for a refund. If you are tax compliant, your application will be approved and you will be provided with an application number and a summary of the maximum amount you can claim. You will also be given an access code separately through [MyEnquiries](#).

Keep a safe note of both of these codes as you will need to provide them to your lender. If you are buying your home you will also need these codes for your qualifying contractor. If you are self-building you will need these codes for your solicitor. Your contractor or solicitor will require this information to verify what you have submitted.

## Claim stage

When you have signed the contract for your home and you are ready to make your claim, complete the following steps online.

### Step 1

Upload the following information about your application through MyEnquiries:

- a copy of the signed contract
- evidence of your mortgage (including loan-to-value ratio)
- proof of drawdown of the first part of the mortgage, if it is a self-build.

You should take note of the MyEnquiries reference number that you are given when you submit the information above.

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### Step 2

Log in to HTB through [myAccount](#) or [Revenue Online Service \(ROS\)](#) and make your claim. You will need to include the MyEnquiries reference number that you were given in step 1. You will be asked to confirm details about the:

- property
- purchase price
- date of completion
- mortgage
- amount of deposit already paid.

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If you are applying with other people you will also need to confirm the portion of the refund to be refunded to each person. If you are self-building, you will need to provide the BIC and IBAN of the loan bank account.

Once you have submitted your claim you will be provided with a claim reference.

Please ensure that you have carefully checked all the information you input before you sign and submit the claim. If any of the information you have provided is incorrect you must cancel your claim and submit a new claim with the correct information before you continue to step 3.

### **Step 3**

Once you have submitted your claim you should advise your developer or contractor (or solicitor if you are self-building).

Provide them with your claim reference (issued to you after step 2) and access code (issued to you when you submitted your application). Before you receive any refund, the information you have provided will need to be verified by the:

- developer or contractor, in the case of a new build
- solicitor acting on your behalf, in the case of a self-build.

The refund that you finally receive is limited to 5% of the purchase price of the house. This may mean that it is different to the maximum relief amount that you were given at application stage.

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