

# How to Submit an R&D Tax Credit Claim (Step-by-Step) | ReaDI-Watch

06/05/2026 10:05 am IST

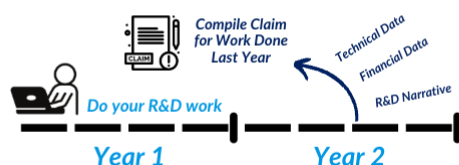
As HMRC scrutiny continues to increase, organisations can no longer rely on retrospective summaries or fragmented project information. Strong claims now depend on clear technical narratives, structured evidence, and accurate alignment between finance and development teams.

Submitting an R&D tax credit claim is a detailed process that requires accurate financial data, clear technical justification, and compliance with HMRC requirements. From identifying qualifying activities to preparing supporting documentation and completing your Company Tax Return, each step must be carefully managed to avoid delays, enquiries, or rejected claims.

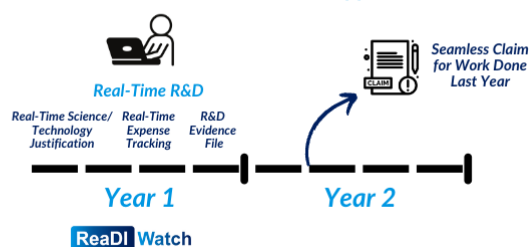
In practice, much of the information required to support a claim is often fragmented across teams and captured retrospectively, making the process more complex and time-consuming. Things such as technical decisions, uncertainties, and development progress, can get lost in the day to day workings of a company.

ReaDI-Watch brings customers from a “retrospective” end of year approach to submitting R&D tax filings by implementing a culture and structure for real-time data capture in the business.

## Typical Timeline to File a Claim - Retrospective



## ReaDI-Watch “Real-Time” Approach



Qualifying R&D activity for R&D tax credits may form a part of the overall R&D accounted for in the company. The qualifying criteria for an R&D tax credit claim is available in other articles such as R&D Tax Credits.

If your company (or client) is submitting an R&D tax claim for the first time, there may be some basic eligibility requirements, before considering qualifying R&D:

- Is the company eligible for R&D tax (SR&ED) purposes in the country in question?
- Is the company part of a group, and does this affect R&D tax eligibility?
- How would R&D tax credits positively impact the business? Will tax credits reduce corporation tax on profits? Will tax credits carry forward to offset future profits? Will tax credits be refunded to the business directly?

Once these basic requirements have been clarified, and the company wants to pursue an R&D tax credit (SR&ED) claim, the below information needs to be captured in the ReaDI-Watch platform:

- What is the financial year of the company (client)?
- What is the deadline for filing an R&D tax (SR&ED) claim?
- What forms / what format need to be submitted with the R&D Tax (SR&ED) claim?
- What will the Finance or Accounts team prepare for the claim?
- How do other non-dilutive supports impact the R&D tax credit (SR&ED) claims?

If these dates and times are clear, the company (or client) can work with ReaDI-Watch to get the right information together for a seamless claim filing.

ReaDI-Watch's "[Claims](#)" Features will be used to manage this entire process. To meet science and technology requirements, the "Qualifying R&D" process will be followed [Complementing your R&D Tax Claim with a Strong R&D Report \(Ireland\)](#).

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