

Guidance Strategy Forum notes

Date: 14 July 2021

Time: 11.00am to 12.45pm

Agenda item	Main points/discussion
1	<p>Introductions & previous action points - Kevin Newton & Sue Cummings (HMRC)</p> <p>Kevin welcomed forum members and recapped on Microsoft Teams domestics.</p> <p>Kevin mentioned Uncertain Tax Treatment (link to consultation) and how HMRC recognises this further increases the spotlight on keeping guidance up to date. As the picture develops, we will keep this group informed about the practical steps we are taking to achieve this.</p> <p>Kevin noted HMRC is working on a GOV.UK Guidance Improvement Roadmap covering the areas we want to focus on. This is a living document that is evolving and we will consider doing a session on this in the future.</p> <p>Sue recapped on the written updates to the last forum's action points. She then provided an update following the reliance on guidance workshop, advising next steps are that there may be a full public consultation, but we will agree the main principles and all channels it applies to. The formal call to evidence will be published in Autumn but we will play back what has been captured to workshop attendees in the next few weeks and consider any short-term wins.</p>
2	<p>Guidance Model on GOV.UK – Mike Reed & Suzanne Meek (HMRC)</p> <p>Mike Reed presented a session to provide more detail around the '3 layers' of guidance, acknowledging an additional layer for legislation that can sit beneath it all. The session focussed on:</p> <ul style="list-style-type: none"> • specialist content on GOV.UK and the different types of content available • the differences between policy, guidance and communications and how they should complement each other rather than duplicate or contradict. <p>Suzanne Meek led a case study on the process HMRC have followed to transform VAT notices:</p> <ul style="list-style-type: none"> • highlighting the design principles and methods of mapping out the overall user journey on GOV.UK • providing examples of specific notices, explaining the theory behind the changes and what has improved as a result • Illustrating how user data analytics provides insight to how people use HMRC guidance and helps direct thinking. <p>Forum members discussed and noted comments regarding:</p> <ul style="list-style-type: none"> • linking to legislation from guidance

	<ul style="list-style-type: none"> • communication channels sometimes contain guidance that has not been published • a concern about the focus on task-based guidance. <p>Action points:</p> <ol style="list-style-type: none"> 1. HMRC to consider the forum’s comments about the value of linking to legislation from our guidance. 2. HMRC to reinforce internal messaging about how communication channels should be used compared with published guidance. 3. HMRC to consider comments made about the balance between task-based guidance and guidance that builds an understanding of the rules and address at a future forum. 4. HMRC to use the experience of UK Property Service to review and reflect on how we can improve making sure the right type of guidance is in place at the right time.
3	<p>Making digital content accessible for all – Jamie Kewley (HMRC)</p> <p>Jamie Kewley presented a session to explain why accessibility for all is important, advising we must produce content that will work for everyone as part of the new public sector bodies accessibility regulations, detailing:</p> <ul style="list-style-type: none"> • why and how HMRC are tackling the issue of accessibility across GOV.UK • what HMRC considers as drivers for accessibility and impairments for interacting with GOV.UK • the benefits of using HTML format to design and publish documents, with more users using mobile devices making it difficult for PDFs. <p>Kevin Newton acknowledged our Strategy Forum notes are held on GOV.UK as a PDF document due to software limitations with the page type. We are working on this but do also publish the notes in an accessible open text format.</p> <p>Forum members discussed and noted comments regarding limitations of formatting making it difficult to print out pages in HTML format – Government Digital Services are working on the print output as part of a bigger programme of work and will be in future updates.</p> <p>Action points:</p> <ol style="list-style-type: none"> 5. HMRC to check progress of GDS programme to improve print output.
4	<p>Tax agent and client guidance – Rachel Day & Megan Gardner (HMRC)</p> <p>Rachel Day and Megan Gardner presented a session on GOV.UK tax agent guidance improvement work. The project began following feedback from the agent community that the guidance on GOV.UK needed improving. Since then, the GOV.UK team have been working closely with stakeholders across HMRC and externally to review and improve the agent journey as a whole.</p> <p>They outlined the:</p> <ul style="list-style-type: none"> • process of reviewing existing guidance • changes they have made so far to tax agent guidance

	<ul style="list-style-type: none"> • next steps of the project which involve developing a clear journey for agents through existing and new guidance, including pre-registration, registration, authorisation and transacting. <p>Forum members discussed and noted comments on</p> <ul style="list-style-type: none"> • including agent content from Agent Update 81 on GOV.UK • improvement suggestions to the Tax agent and adviser guidance topic browse page. <p>Action points:</p> <ol style="list-style-type: none"> 6. HMRC to review improvement suggestions from members of the forum about the Tax agent and adviser guidance topic browse page 7. Forum members to send in feedback on the newly published sign-up process improvement work to hmrcteam@hmrc.gov.uk
5	<p>Any other business – Sue Cummings (HMRC)</p> <p>Rachel Dowling providing further updates from the work HMRC is progressing to provide screenshots of their online services. Rachel advised we have a commitment to providing more screenshots and we need the forum members feedback to make sure we are keeping to that.</p> <p>Kevin added that we are working hard to enable our internal advisers to better see what taxpayers using our external services see online. We will revisit on a future forum as this work progresses.</p> <p>HMRC will liaise directly with forum members to clarify comments raised in the meeting.</p>
6	<p>Next meeting scheduled for 13 October 2021</p> <p>Action point</p> <ol style="list-style-type: none"> 8. Group members to send questions and suggested agenda items to hmrcteam@hmrc.gov.uk by 10 September 2021.