

Guidance Strategy Forum notes

Date: 13 October 2021

Time: 11.00am to 12.45pm

Agenda item	Main points/discussion
1	<p>Introductions & previous action points - Kevin Newton (HMRC) & Sue Cummings (HMRC)</p> <p>Kevin welcomed forum members and recapped on meeting domestics.</p> <p>Kevin provided an update on the latest news in the guidance space, stating we have officially launched the HMRC Interactive Guidance team and have a number of products already published.</p> <p>Kevin reflected on the forum which has been in place for over 12 months and the improvements we have been able to make as a result.</p> <p>Sue summarised the written updates on previous meetings' action points:</p> <ul style="list-style-type: none">• GDS have asked for examples where users were struggling with the printed layout.• Reliance on guidance and Uncertain Tax Treatment (UTT) – HMRC are reviewing areas of guidance that forum members have identified as being problematic when UTT begins. Sue added we will provide an update on a future forum. HMRC are having ongoing conversations regarding reliance on guidance with policy stakeholders and Solicitors Office about making the statement more visible. <p>Action points:</p> <ol style="list-style-type: none">1. HMRC will ensure agent feedback is factored into future iterations of the Check when you can expect a reply from HMRC tool2. HMRC to check why Knowledge Base articles are still present within the search results on the HMRC Community Forums.3. HMRC request that forum members email examples of issues with print outputs on GOV.UK to hmrccguidanceteam@hmrc.gov.uk.
2	<p>Guidance Model on GOV.UK – Mike Reed (HMRC)</p> <p>Mike Reed presented a session to build on previous forums discussions regarding the guidance model on GOV.UK. This focussed on a high-level overview of the process we follow when creating guidance, inviting discussion on how we can improve the process.</p> <p>Discussion points from the forum included:</p> <ul style="list-style-type: none">• who recognises the need for guidance in the first place• forum members recognised this happening on large scale projects but reflected that may not always be the case for updates to existing guidance• how we communicate the guidance changes to users

	<ul style="list-style-type: none"> • who decides what's included in guidance pages. <p>Action points:</p> <ol style="list-style-type: none"> 4. HMRC request that forum members let us know if this experience is not reflected in guidance projects they are a part of 5. HMRC to review examples from the forum about how we decide what is included in guidance pages and replay at a future forum 6. HMRC will review guidance process flowchart, incorporating triggers for new and updated guidance, and consider best way to share 7. HMRC to review the way we communicate with external stakeholders during the drafting and user testing of guidance
3	<p>Internal operational guidance in manuals – David O'Connor (HMRC)</p> <p>David O'Connor presented a session about HMRC's internal guidance and to gather views on our approach to moving operational guidance from manuals.</p> <p>Key points from the presentation included:</p> <ul style="list-style-type: none"> • HMRC manuals being the home for technical content and our internal Guidance Hub housing task-based procedural guidance • feedback on HMRC's approach to include checks to ensure information needed externally is held on GOV.UK or within a manual • using existing feedback routes to raise content issues. <p>The discussion points covered:</p> <ul style="list-style-type: none"> • why two platforms existed, adviser remit and internal feedback routes • examples and comments on archiving and change notes • a poll indicating members agreed with the approach or were unsure. <p>Action points:</p> <ol style="list-style-type: none"> 8. HMRC to continue to share more detail on our approach to migrating internal operational guidance from manuals to allow forum to reflect, feed back further and share any examples to address.
4	<p>Manuals linking to GOV.UK - Mike Reed</p> <p>In response to a member enquiry relating to links in manuals to other GOV.UK pages, Mike Reed reiterated the purpose of each layer of guidance on GOV.UK, what it is designed to do and why. He clarified the decision over when to link from a page in our manuals to GOV.UK depends on the specific topic. Mike mentioned work on a manuals style guide which will help manual owners on what to consider when linking to legislation and GOV.UK.</p> <p>Action points:</p> <ol style="list-style-type: none"> 9. HMRC to share an update on its approach to linking within the work being done on the manuals style guide at a future forum.
5	<p>Manuals update index known issue – David O'Connor</p>

	<p>David O'Connor explained the detail behind a known issue with HMRC manuals on GOV.UK. The issue is preventing the updates index for each manual being updated correctly with the dates and change notes for each individual change made to the manual.</p> <p>David clarified the page content itself is still being updated and the issue is solely with the updates index and 'date updated' field in the header. HMRC are working with our IT suppliers to test potential fixes and finally resolve the issue. In the meantime, the Latest updates from HMRC index on GOV.UK will indicate what pages of HMRC manuals are updated every day.</p> <p>Action points</p> <ol style="list-style-type: none"> 10. HMRC to provide an update on the manuals updates index known issue once resolved or at the next forum.
6	<p>Any other business – Sue Cummings (HMRC)</p> <p>Sue Cummings advised the forum members that HMRC will be sending out a survey to gather their views on the Guidance Strategy Forum itself now that it has been running for one year.</p> <p>Action points</p> <ol style="list-style-type: none"> 11. HMRC to send out an evaluation survey for the Guidance Strategy Forum to its members.
7	<p>Next meeting scheduled for 18 January 2022</p> <p>Action point</p> <ol style="list-style-type: none"> 12. Group members to send questions and suggested agenda items to hmrcguidanceteam@hmrc.gov.uk by 3 December 2021.