

# Minutes

Date/Timing	29/07/13, 14.00 – 16.00
Group	Joint Tax Agent Strategy Steering Group
Location	Room G/57, 100 Parliament Street, London
Agent Representatives	Rebecca Bennyworth (ICAEW), Stuart McKinnon (ATT), Brian Palmer (AAT), Andrew Pickering (ATT), Patrick Stevens (CIOT), Charlotte Barbour, (ICAS), Tina Riches (CIOT), Frank Haskew (ICAEW) Anthony Thomas (LITRG)
HMRC attendees	Theresa Middleton, (chair), Lin Homer, Jenny Cowles, Jo Penny, Martin Stevens, Ian Heron, Geoff Allen, Paul Harrison, Wayne Sumner (for Ellie Lusty), Karina Immanuel (Observer), Connie Kirk (Minutes).
Apologies	Jim Harra, Ellie Lusty, Denise Walsh, Chas Roy-Chowdhury (ACCA),

## 1. Introductions

Theresa Middleton (TM) welcomed everyone to the meeting and apologies were noted.

## 2. Open actions from previous meeting

All actions from previous meeting have been closed. Jenny Cowles (JC) confirmed that the Core Script had now been signed off and thanked the professional bodies for their help in achieving this. Extra resources have now been bought into the team to speak at Events and Conferences.

## 3. Consultation document

TM advised professional bodies that HMRC will be looking at the following key themes:

- bringing the relationship with agents into the 21<sup>st</sup> century
- enabling agents to self serve digitally on behalf of their clients
- asking agents to do more to assure their clients' compliance
- how we assure agents and decide 'what good looks like'

HMRC needs to look at how they can work together with agents to enable them to close the tax gap. The consultation document will be available in August. The professional bodies were concerned that if agents start to do more to assure their clients' compliance, clients may stop using agents and instead try and deal with their affairs on their own, which could cause more problems.

LH acknowledged the concerns but noted that technology was changing business models and, while this may not always feel comfortable, agents and HMRC need to keep up with these changes. TM stressed that the customer benefits will be a key piece to the business case for any future change. HMRC and professional bodies could work together to produce some data on how this could save money for both sides.

#### **4. Programme update**

Ian Heron (IH) reported that design work got underway in June on a digital agent registration service and there are plans to do some early user testing in August. The Investment Committee has asked for an updated business case in September but they want the digital development work to continue in the meantime..

The professional bodies asked for clarification over how the reductions in programme benefits affected the business case. JC noted that the business case would be improved if HMRC could work with agents to identify positive customer benefits (cost savings) for agents.

IH reported that HMRC is looking at the scope for linking the delivery of digital services for agents to the delivery of a new Identity Assurance (IDA) credential. This will make the new services more secure and prevent the need for agents to go through two periods of change in short order. .

**AP 1: IH will prepare a note on the programme benefits.**

**AP 2: HMRC to contact agents to discuss cost savings from new digital services.**

#### **5. Digital Service Development work**

Paul Harrison (PH) explained that the Agent Online Self Serve project is now one of four “digital exemplar” projects within HMRC. As a result new digital services for agents are being developed using “agile” methodology. This allows for early and regular user testing to feed back into the development process, enabling changes to be made more quickly and cheaply. User testing plans are being developed now and testing of registration screens will start in August with a small group of invited agents. Examples of the early screen flows were circulated and the professional bodies were invited to provide comments to PH.

PH confirmed that agents would also be involved in user testing of other digital services being developed for individual and business customers. The professional bodies felt it would be helpful to see how the digital development work fitted together across the piece.

**AP 3: CK to issue electronic versions of the screen flows and invite feedback to PH.**

**AP 4: PH to produce a matrix of the digital development work in flight.**

#### **6. Feedback from Agent Engagement Group (AEG) meetings**

Martin Stevens (MS) reported helpful discussions with AEG looking at practical solutions in the following areas:

- Data Protection. Professional bodies have been keen to ensure that any ‘machine to machine’ checking of membership information does not result in the unauthorised disclosure of information about their members.
- IT security. Professional bodies have also been concerned that any IT interactions are designed so that they are secure and safe from attack.

HMRC is also working with professional bodies not represented on AEG to ensure they too are ready for implementation. Further engagement will be needed to cover off issues arising as the development work progresses.

Geoff Allen (GA) reported that HMRC has also shared with AEG (and the relevant sub-group) an initial draft evaluation report of the first Agent & Client Statistics pilot. The small sample size has made it hard to draw firm conclusions but the pilot showed that some agents were doing a lot more than HMRC originally thought to help their clients pay on time.

The details of the proposed next pilot, looking at High Volume Repayment Agents, are still being worked up and particular attention is now being paid to the selection criteria to ensure that only High Volume Agents are being identified.

The professional bodies felt that the comms around this pilot will be very important as 90% of the High Volume Agents are not members of professional bodies.

TM thanked GA for his work on this group and wished him luck in his new role in Local Compliance. The professional bodies added that GA has dealt with them in a very professional and positive way and were very appreciative of this.

#### **7. AOB**

JC noted that a new sub-group of the Agent Engagement Group will be set up to look at the protocols of dealing with clients direct when they have agents acting on their behalf. TM will chair this sub group.

**Next meeting will be on 2 October 2013**