

# Minutes

Date	06/12/13
Group	Joint Tax Agent Strategy Steering Group
Location	Room GE/01, 100 Parliament Street, London
Timing	Agent representatives' pre-meeting 10:30 to 11:30 <b>Main meeting 11:30 to 13:30</b>
Agent Representatives	Frank Haskew (ICAEW), Brian Palmer (AAT), Aleem Islan (AAT), Tina Riches (CIOT), Simon Braidley (ATT) (on behalf of Stuart McKinnon), Mukesh Gunamal (ACCA) (on behalf of Chas Roy-Chowdhury), Charlotte Barbour (ICAS), Patrick Stevens (CIOT)
HMRC attendees	Theresa Middletin (chair), Jenny Cowles, Ian Heron, Justin Savage, Martin Stevens (via T.C.), Janet Abeysondera, Richard Quarshie-Awuah, Elaine O'Donnell, Sam Shaikh, Connie Kirk (secretariat)
Apologies	Chas Roy-Chowdhury (ACCA), Adam Harper (AAT), Stuart McKinnon (ATT), Rebecca Benneyworth (ICAEW), Lin Homer, Jim Harra, Andrew Gordon, Jo Penny

## 1. Introductions

Theresa Middleton (TM) welcomed everyone to the meeting and asked everyone to introduce themselves around the table. TM reminded everyone that this was Tina Riches last meeting as she was moving on and wanted to thank her for all her help and support.

## 2. Open actions

Connie Kirk (CK) advised the group that all actions were closed and the relevant papers/information had been sent out to the group as agreed. The group had no further comments or feedback.

## 3. Agent & Client Statistic update on the pilot

Justin Savage (JS) updated the group on the pilot which started in November and was still ongoing. Agents wanted to know more about the selection process for those in the pilot and some feedback on the pilot. JS confirmed that the qualitative evaluation will begin around March/April 2014 and an interim report will be made available but the date is yet to be confirmed.

The agents requested HMRC to engage with them a lot sooner in order to pre-empt any obvious issues which will save time for agents as well as HMRC.

## 4 & 5 Programme update and Transition to Agent Online Self Serve

Ian Heron provided the group with a brief update on the programme focusing on the Agent Online Self Serve (AOSS) project. He reminded the group that Agent Online Self Serve delivery of digital registration and authorisation services for agents was now linked to the delivery of new, secure, cross-government Identity Assurance and Authority Management (IDA/AM) services.

The Identity Assurance and Authority Management project has now begun its 'discovery' phase, talking to users from within and outside government about their needs of the new service. This phase should be completed by end of January 2014 and will inform the project's delivery plans. The Agent Online Self Serve planning assumption is that an initial 'private' beta service will be launched in late summer 2014 to test the new services before they are expanded and made available to all agents by the end of 2014/15.

Janet Abeysondera is now working on the Identity Assurance and Authority Management with the Cabinet Office to ensure that HMRC and agent user needs are taken into account. She provided an overview of the project and will feed back any updates to this group.

Work is currently being carried out to ensure the Identity Assurance and Authority Management is a secure system before this is made available. The current Government Gateway will not close until a suitable process is available in its place and Agents will be provided with regular updates on the progress of this work.

## **6. Future research**

Richard Quarshie-Awuah gave an overview of the research HMRC is about to commission into the agents' community around their attitudes, needs and behaviours to a Digital service. He shared a draft list of questions which will be used to identify the key areas where HMRC needs more information. In particular, HMRC need to understand the sort of support agents may need for transferring over to Digital.

At this stage, HMRC want to know if the key areas are being covered for this research. The paper is for the agents to provide feedback and not to share out amongst the wider agent population.

**AP 1:** CK to send out an electronic version of the paper for agents to feed back to her by 23 December.

## **7. Core Script**

The Core Script is still in the process of being signed off and has been circulated for feedback. Any comments should be sent to Val Barton by close of play 9 December.

If the agents have any feedback on any of the information they have been provided during this meeting, they can send in their comments to Connie Kirk.

ATT were not included on the Comms Group and asked if they could be included in future.

**AP 2:** CK to check that ATT have been included on the Comms Group.

## **8. Blog update**

Jenny Cowles advised the group of the work underway to start the Blog which will provide agents with messages and updates and upto date information.

Agents have asked if a glossary of the acronyms could be provided as they are not sure of some of these used.

**AP 3:** CK to pull together a list of the acronyms and circulate to the agents.

## **9. AOB**

HMRC have a new publication that explains how we are making tax quicker, easier and simpler for Small and Medium Employers. The link to this publication was published as a part of the Autumn Statement.

**AP 4:** CK to email the link for the agents to provide feedback to her by 23 December 2013.

With there being no further points to discuss, TM thanked everyone for their time.