

EPG Meeting – 9 March 2016

100 Parliament Street – Room 2/39

Elaine Gibson	Co-Chair	CIPP
Maggie Anderson	Co-Chair	HMRC
Carole Carter	Secretary	HMRC

External Stakeholders

Colin Ben-Nathan	Chartered Institute of Taxation
Colin Broad	British Computer Society
Richard Britten	Institute of Chartered Accountants of Scotland
Glenn Collins	Association of Chartered and Certified Accountants
Helen Harvey	Small Payroll Bureau
Ian Whyteside	Association of Accounting Technicians
Hayley Perkin	Association of Taxation Technicians
Alex Rowson	Business Application Software Developers Association
David Heaton	Institute of Chartered Accountants England & Wales
Sarah Eason	Hydrock
Jackie Petherbridge	Federation of Small Business
Huw Johns	Universal Credits
Alison McCrave	Voluntary Action Sheffield
Alison Paling	Community Accounting Plus
Simon Ross	Confederation of British Industry
Sue Renaut	International Association of Book-Keepers

HMRC

Nahid Khan
Richard Garth
Penny Earle
Joanne Collings
Simon Manclark
Paul Dinsley
Madeline McGrillen
Alison Robinson
Martin Delnon
Grace Massey
Martin Butcher

Apologies

Karen Thomson	Armstrong and Watson
David Whitaker	AECOM
Simon Parsons	Large Payroll Bureau
Michael Parker	National Farmers Union
Linda Pullan	Payroll Alliance
Tracey Crank	The Compliance Group
Shawn Healey	Confederation of British Industry

Agenda Item	Main Points, Conclusions/Discussions, Decisions, Next Steps
1	<p>Welcome / Agree Previous minutes Elaine Gibson welcomed members and agreed previous minutes</p>
2	<p>Digital Developments - Penny Earle (PE) Following on from December's 2015 meeting, PE gave an overview of the components integrated into the Personal Tax Account (PTA) and new services to be integrated into the PTA shortly, including</p> <ul style="list-style-type: none"> • Check your State Pension (March) • Webchat (March) • Scottish Rate of Income Tax (SRIT) (March) • Marriage Allowance: Change of circumstances <p>Stats show that over one million users have accessed their account, a total of 2,014,755 times - this includes repeat users. The Income Tax estimate has been viewed 106,362 times and approximately 9,533 addresses updated. The satisfaction rate is 72%.</p> <p>To make access to the PTA easier, the Government Gateway allows all individual customers gain government gateway credentials (to access HMRC online services) and then add the 'two factor authentication' and identify verification to access their PTA.</p> <p>AP: DH said access on mobile phone didn't work. PE to look into this and feedback.</p> <p>AP: The group felt at the next meeting they would like an overview of 'Your Tax Account'. Business Customer and Strategy have confirmed they will be attending the next meeting.</p>
3	<p>RTI Post Implementation Review- Alison Robinson / Martin Delnon The PIR is formal piece of governance that takes place 6-12 months after programme closure and it is intended to be completed by the end of May. David Gauke agreed and Programme board endorsed the approach to meet with external representatives when PIR takes place.</p> <p>The lessons learned document last year was really useful and they will be considered as future programmes are set up to ensure best practice is incorporated from the start. The PIR will not be a repetition of that.</p> <p>"On or before" reporting: the easement end was announced in the Autumn statement and the research we undertook last year was published. We recognise that you still have concerns about the removal of the easement. We will monitor the situation from April and make sure we continue to support any micro employers who appear to be struggling to comply.</p> <p>Now that RTI has become business as usual. We want to capture your views on operational improvements you would like us to consider. We want you to tell us the most important concerns for our customers with a measure of the impact it is having and what benefits you anticipate if we work with our</p>

	<p>customers to deliver a solution.</p> <p>AP: Separate workshop to be held in April with a number of EPG and TDSF members.</p>
4	<p>HMRC 2nd Incomes Campaign - Martin Butcher (MB)</p> <p>MB attended the meeting to highlight HMRC's 2nd Incomes Campaign. His presentation set out the campaigns key objectives and messages. More information can be found at;</p> <p>www.gov.uk/secondincomes</p> <p>EG said CIPP would be more than happy to highlight the campaign. A key consideration for employers being the possible contractual need to declare a second job to main employer due to possible conflicts of interest etc.</p>
5	<p>Apprenticeship Levy - Joanne Collings (JC) / Simon Manclark (SM)</p> <p>JC and SM gave an overview of the Apprenticeship Levy Policy and an outline of the rules for levy liability. The Apprenticeship Levy will support Business, Innovation & Skills (BIS) and employers to create 3 million new apprenticeships by 2020. This was announced at the Summer Budget, consultation and design held over the autumn. The rate and scope was confirmed at Autumn Statement.</p> <p>The levy is expected to raise 3 billion a year. HMRC will collect the levy from employers across the UK from April 2017 onwards. SM and JC outlined the rules for the levy and also how the levy allowance will be allocated. They also covered the role of the Skills Funding Agency. HMRC published draft FB clauses on Feb 4 for comment</p> <p>https://www.gov.uk/government/publications/apprenticeship-levy</p> <p>During February HMRC discussed implementation with software developers, employers and employer representatives. Also held a workshop to work through some of the issues relating to the calculation and payment of the levy to HMRC. This discussion involved HMT, BIS and CBI members. The group highlighted their concern about the practical application of the £15,000 allowance and how it will impact payroll operation.</p>
6	<p>EPG Survey - Maggie Anderson (MA)</p> <p>MA spoke briefly about the EPG survey results, it came across as fairly positive with room for improvement, and it highlighted all the good work and also showed it was worth continuing to work together to maintain/build on the stakeholder engagement.</p> <p>Working together was supported by the recent HMRC review of current forums and EPG was recognised as the key employer group.</p> <p>MA also explained the impact of purdah as a result of the recent budget and also to note that there will be another period of purdah due to the referendum in June.</p>
7	<p>AOB – Richard Garth (RG)</p> <p>RG updated the group on the current position on disputed charges cases.</p> <p>At the last EPG Denise Beat (DB) talked about the commitment to provide</p>

	<p>some educational packages on issues identified by employers: HMRC continue to roll out a series of packages that are being well received. Those that are live are;</p> <ul style="list-style-type: none"> • YouTube video regarding Payments After Leaving • YouTube video regarding the use of Payroll IDs • Webinar designed for employers experiencing problems with Disputed Charges - 'Getting Payroll Information Right' had its first live broadcast aired on 25th February - 1,000 employers attended. Positive feedback received from employers stating that the webinar was both helpful and very useful. <p>(This webinar is also available as a recorded webinar and can be viewed now. A further 5 live webinars which are scheduled within March and April registration for these events is available now. Currently analysing themes from the questions asked at the live webinar to identify further common concerns that are impacting employers.)</p> <p>In preparation;</p> <ul style="list-style-type: none"> • Webinar on repayment claims for employers who want to claim statutory repayments not recovered in year • YouTube video for Employer End of Year, however a Webinar Employer End of Year and Basic PAYE Tools is scheduled to be aired on 10th March. • A webinar regarding 'How to avoid In-Year Penalties' is also being aired on 10th & 22nd March and 13th & 21st April. • A further webinar regarding Merged Employments which hopefully should be available in around May. <p>Details of all products that are available are advertised in the Employers Bulletin.</p> <p>New Guidance on gov.uk regarding 'Fixed Problems with Running Payroll' will assist employers to correct payroll errors - went live on 22th February.</p> <p>DB will be in attendance at the EPG in June and will provide a more comprehensive update of the Disputed Charges work. If there are any specific issues or cases that need resolution in the meantime please pass these through NK and DB will investigate.</p>
	<p>EPG dates for 2016 Wed 8 June 2016: 13:00 - 16:00 (London) Wed 7 Sept 2016: 13:00 - 16:00 (London) Wed 7 Dec 2016: 13:00 - 16:00 (London)</p>