

# **Minutes of the Self Assessment Developer Forum**

**Friday 28 February 2014**

**Euston Tower – 1<sup>st</sup> Floor Conference Room, London**

## **Attendees:**

Bharat Vithlani (BV) – Andica  
Andrew Bolton (AB) – QMS  
Sean Deverell (SD) – IRIS  
John Knowles (JK) - IRIS  
Helen Page (HP) – CCH (Wolters Kluwer)  
James Reeves (JR) – Taxfiler Ltd  
Paresh Patel (PP) – Taxfiler Ltd  
Marc Fraser (MF) - KPMG  
Ali Abbas (AA) – Sage  
Karen Leedham (KL) - Sage  
Ben Handley (BH) – ASP (TaxCalc)  
Li Reynolds (LR) – Ftax  
Richard Reynolds (RR) - Ftax  
Stuart Moffatt (SM) – Thomson Reuters  
Mark Purdue (MP) – Thomson Reuters (Digita)  
Paul Vickery (PV) – Thomson Reuters (Digita)  
Nick Povey (NP) – Povey Little  
Des Desai (DDe) – MrTaxSoftware  
Richard Strong (RS) – Oyez  
Faye Churchill (FC) - HMRC  
Uhmer Ehsan (UE) – HMRC  
Lorraine Delanoy (LD) – HMRC  
Gary Falconer (GF) – HMRC  
Shehzad Chaudhary (SC) - HMRC  
Dennis Dawkins (DD) – HMRC  
Amanda Gray (AG) - HMRC  
Tim Minshull (TM) – HMRC (Chair)  
Tony Musk (TMu) – HMRC (Minutes)

## **1. Welcome and Introductions**

TM welcomed everyone to the meeting.

## **2. Digital SA**

FC gave an update on progress since the meeting last September. The slides are attached for information.

It is hoped that in December 14 we will be in a position to run a Private beta service for Agents via 3<sup>rd</sup> party software. Initially this would be limited to one large agent (10k clients) and one smaller agent with less than 2k clients and the associated software developer(s).

If anyone is interested in taking part please contact FC via the SDSTeam by 1 April 2014.

***Post meeting note:*** *There is a possibility that the beta test service may not be available until after December. Can you please advise how this would impact on you (and your release cycles) if it was delivered sometime between Dec 14 – Apr 15 and which would be your preferred month, so that we can endeavour to try and meet the needs of the majority?*

### **3. Identity Assurance (IDA)**

UE gave an update on progress. The slides attached for information.

### **4. Agent Toolkits**

GF from the HMRC Agent Strategy and Engagement Team gave a presentation on Agent Toolkits. A summary is provided in the attached 'Agent Toolkits' document. Please contact GF via the SDS Team or directly using the contacts given in the 'Agent Toolkits' document.

### **5. Record Keeping**

SC from the HMRC Business Tax Digital Services Team discussed that they we're looking to work with interested developers in discussing ideas for Apps that help simplify filing for Small to Medium Enterprises (SMEs). Research states that SMEs are looking for a structure that helps them file their taxes more easily. He wanted too take forward with the developer community how we could collaborate to bring that about. In addition also helping the smallest 'micro' employers register there first employee. At this stage it is really to discuss the 'art of the possible' with anyone interested. If anyone has any comments please send them via the SDS Team.

### **6. Matters Arising from SA Forum of 26 June 2013**

#### **6.1 Was the FHL page looked at for 2013/14? (From Item 2.1 in previous minutes)**

TM advised apologised that this had been overlooked but that the form would remain in its current format for 2013/14.

#### **6.2 Digital SA (From Item 3 in previous minutes)**

A meeting was held with developers last September and FC has also given an update earlier in this meeting.

#### **6.3 Agent Only Filing (From Item 6 in previous minutes)**

The issue of whether or not agent only filing will be allowable is still under discussion. The position will be come clearer once the strategy for IDA has been agreed.

#### **6.4 Forms (From Item 8.1 in previous minutes)**

TM has contacted internal stakeholders asking that any re-numbering was kept to a minimum for 2014/15.

#### **6.5 Forms Changes (From Item 8.3 in previous minutes)**

For 2013//14 a changes log was maintained on the draft pages for the main tax returns. Also, as requested by developers, we had made available the draft notes and Helpsheets with changes highlighted to make the year on year changes easier to manage.

## **7. Review of SA Peak**

TM gave an update on what was a very successful SA January peak. Slides are attached for information.

## **8. Scottish Rate of Income Tax**

TM gave an update on the current position. This is expected to be introduced for the 2016/17 Tax Year with more details to be issued nearer the time. Slides are attached for information.

## **9. Coding Out**

A consultation document was issued last year which proposed to introduce a graduated limit for the coding out of debt, PAYE underpayments and SA balancing payments in relation to earnings. Following this consultation a decision has been taken to keep their coding out limits at the current level of £3,000 per annum.

However, to ensure a consistent approach, HMRC now proposes to extend the legislative 50 per cent overriding limit to all tax codes (not just 'K' codes), so that employers and pension providers do not make deductions in excess of 50 per cent of an individual's relevant pay.

## **10. Any Other business**

### **10.1 Feedback for SDS Team**

DD asked that if developers had any feedback on the how we are performing then that would be appreciated. We need this to be able to improve our service so any comments, either positive or negative, are welcome.

AB advised that after documentation has been emailed to developers there is a period when the technical pack is out of date. TMu accepted this but advised that there was a lag between documents being made available and being able to publish these on the website. He would ensure that the lag was kept to a minimum in future.

Documentation is emailed prior to publication because from previous feedback developers had asked that the information is made available to them as soon as possible.

### **10.2 Move to [www.GOV.uk](http://www.GOV.uk)**

The HMRC website will eventually be decommissioned and all the content moved to [www.gov.uk](http://www.gov.uk). There were no definite details on timescales but more information will be sent to developers once it is available.

The meeting closed at 14:45

Minutes by Tony Musk – SDS Team