



HM Revenue  
& Customs

# Your Charter Annual Report

April 2014 - March 2015





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# Your Charter

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## Our role

- We make sure that the money is available to fund the UK's public services by collecting taxes and duties as laid down by Parliament. We help families and individuals with targeted financial support.
- We want to give our customers a service that is even-handed, accurate and based on mutual trust and respect. We also want to make it as easy as we can for customers to get things right.

## Your rights – what you can expect from us:

- Respect you
- Help and support you to get things right
- Treat you as honest
- Treat you even-handedly
- Be professional and act with integrity
- Tackle people who deliberately break the rules and challenge those who bend the rules
- Protect your information and respect your privacy
- Accept that someone else can represent you
- Do all we can to keep the cost of dealing with us as low as possible.

## Your obligations – what we expect from you:

- Be honest
- Respect our staff
- Take care to get things right.



Lin Homer  
Chief Executive and HMRC Charter Champion

## Foreword by Lin Homer

Good customer service is an absolute priority for HMRC – whether that's helping customers to pay the right amount of tax or ensuring that they receive the payments to which they're entitled.

Your Charter is central to the way we deal with customers, because it explains very simply what they can expect from us, and what we expect from them in return. We've continued to work hard to help and support customers to get things right, with some notable successes and some instances where our performance has not been up to scratch.

Earlier this year we struggled to deliver the consistent level of service that customers expect from us. From a low point of 54% of call attempts being answered in the first quarter of the financial year, we improved our performance significantly in quarter two, achieving 76% of call attempts handled.

We responded quickly to improve the situation and that's why, in June 2015, we announced an extra £45 million to pay for 3,000 additional staff in customer service teams – and we've seen a steady improvement in call answering rates as a result. We've also invested in new telephone equipment, which allows more of our staff to answer calls and to help customers at the busiest times.

We answered 99.9% of calls about Self Assessment tax returns on the 31 January 2015 deadline day. We also answered more than 89% of calls from people contacting us about their tax credits renewals at the end of July 2014.

Our customers are also seeing the benefit as we move from telephone and paper to more digital services. Our services are becoming increasingly accessible via laptops, smartphones and tablets. For example, people went online to submit 85.5% of the 10.2 million Self Assessment returns we received.

Making it easier for people to meet their tax and payments responsibilities resulted in another record-breaking year for us, in terms of the tax revenue we brought in.

We increased our total revenue by £11.9 billion to £517.7 billion in 2014-15, while reducing our costs by £210 million during the same period. You can find further information about our progress since the last report on page 9.

By continuing to help compliant customers to get their tax and payments affairs right, we've been able to focus more closely on those who deliberately cheat the system through fraud, avoidance and evasion and by refusing to pay what they owe.

We do this by tailoring our approach according to the levels of risk involved and customer behaviours, making the most of new technology and various sources of data.

We know it's crucial for us to listen to, and to act on, what our customers tell us they expect from HMRC. Our customer survey measures how we delivered the objectives listed under Your Charter rights. Each year we ask a series of set questions to individuals, small and medium-sized businesses and agents. We measure their responses in percentage terms to see how we are doing and add these up to get the overall score for customers giving positive answers to the questions.

This overall score for how we delivered Your Charter rights for the 12 months to March 2015 remained at 68%, unchanged over the previous year. Our performance results for 'Helps you to get things right' for individuals, decreased slightly from 77% to 75%, which reinforces the need for us to improve customer service. You can find the full survey results on page 17 of this report.

I mentioned in last year's report that we planned to refresh Your Charter and I'm pleased to say that we've made very good progress – taking comments and suggestions from customers.

The enhanced Charter links rights and obligations to specific areas of our work, so customers can see more clearly how we are delivering on our promises and commitments. We will be able to show how HMRC's transformation and new digital ways of working will play a major role in how we deliver our commitments.

We've also created a new HMRC Board sub-committee. This will enable us to show customers and stakeholders how we are an accountable and transparent organisation.

Edwina Dunn, who is one of our highly-experienced Non-Executive Directors, will be Chair of the new Charter Committee.

This will replace the Charter Advisory Committee, which has served HMRC faithfully since its creation in 2009 – and my thanks go to members present and past for their constructive contributions.

I am very pleased to share Your Charter Annual Report with you.



Lin Homer  
Chief Executive and Permanent Secretary



Ian Young  
Chair, Charter Advisory Committee

## Charter governance by Ian Young

After the launch of Your Charter in 2009, the Charter Advisory Committee (CAC) was set up to honour a commitment made by ministers. They said that a body containing a majority of members – who were completely independent of HMRC – should review the Charter rights and obligations regularly. I have been the Chair of CAC since March 2012.

During the past year, I have worked with John Whiting, who is a Non-Executive Board member of HMRC as well as a member of CAC, on a review of the arrangements for Your Charter. We presented our findings and recommendations to the HMRC Board at their meeting in July 2015. One of our key recommendations was to enhance the status of the advisory committee within HMRC.

We felt this was necessary to ensure that Your Charter rights and obligations could have greater prominence and recognition within HMRC. Specifically, we recommended that the committee should become a direct sub-committee of the Board of HMRC. The Board accepted all of our recommendations, including enhancing the status of CAC. Because of this, the advisory committee held its last meeting in September 2015. The new Charter Committee, which is a direct sub-committee of the HMRC Board, will hold its first meeting in February 2016.

I am delighted that Your Charter will have a much-enhanced focus within HMRC following the review, in which the other CAC members participated very fully. Crucially, this will mean that Your Charter will have the 'ear' of the Board when the Charter Committee considers this is appropriate.

Edwina Dunn, who is an external member of the HMRC Board, and Chair of the new Charter Committee has set out her initial thoughts on the new committee's role, on page 15 of this report.

During the course of the review, I was absolutely clear that the reassurances about Your Charter needed to be respected. The government had given these reassurances in Parliament in 2009, when the initial arrangements were put in place. There were two key issues for me. Firstly, the new Charter Committee must continue to have a majority of members who are independent of HMRC. Secondly, we also reviewed the details in Your Charter, and said that the format should be similar to the existing version – articulating clearly the rights and obligations of HMRC’s customers.

Our report to the Board also recommended that the publication of the Charter Annual Report should coincide with the publication of HMRC’s Annual Report, from 2016 onwards. HMRC publishes the Annual Report in July along with the Tax Assurance Commissioner’s Annual Report. Publishing the three reports together will be a further step to ensure that Your Charter has increased prominence and plays a key role in enhancing the customer experience of HMRC. It will also be in keeping with another commitment, which the government made to Parliament in 2009 – that Your Charter Annual Report would be part of the HMRC departmental report. This will ensure that the Charter report will be open to the same scrutiny by the Public Accounts and Treasury Select Committees.

The changes to the governance arrangements for Your Charter within HMRC come at a time when service standards for HMRC customers have been under severe strain. The statistics published in July 2015, in respect of the final six months of 2014-15, make for uncomfortable reading.

HMRC published the customer survey results for 2014-15 in September 2015. I remain concerned that agents, who have more contact with HMRC as part of their job, rate HMRC consistently lower than the ratings that individuals and small and medium-sized businesses give the department. I also spoke about the results from agents in last year’s report. The new committee needs to keep agents’ views on HMRC under active review.

This is going to be an extremely challenging period for HMRC in upholding the commitments it has made in Your Charter. I wish Edwina Dunn every success in the new role that she will be taking on as Chair of the new Charter Committee.

**Ian Young**

Chair, Charter Advisory Committee



# Progress for 2014-15

During the past 12 months we have made significant progress in making the tax and payments system modern, efficient and user-friendly, but we know we have more to do to make sure that we can respond quickly to customer needs.

The following table summarises some of the key activities we have delivered against our commitments in Your Charter this year:

Charter rights	How we have delivered
<b>A more personalised service</b>	
<p>1, 2, 3 and 4: Respect you, help and support you, treat you as honest and treat you even-handedly</p>	<p><b>Business customers</b></p> <p>We increased the number of subscribers to Your Tax Account to more than 2.5 million customers and we continue to refine the service based on customer feedback. Once we roll it out fully, the online tax account, called the Business Tax Account, will help 5.2 million businesses to manage their tax affairs in a single place and have the ability for businesses to use their own software to send data to us. This will include showing their liabilities and payments for:</p> <ul style="list-style-type: none"> <li>• Self Assessment (SA)</li> <li>• Corporation Tax (CT)</li> <li>• VAT</li> <li>• PAYE.</li> </ul>
	<p><b>Individual customers</b></p> <p>We continued planning the introduction of online tax accounts for all 45 million individual taxpayers, which will bring together all of their information and services in one place. Customers will be able to use their account to tell HMRC about changes to their circumstances – helping to ensure that they pay the right amount of tax in-year, and removing the need for many to complete tax returns. We will provide high-quality online guidance, with personal support when customers need it. We are putting the taxpayer in control and making it much easier for them to deal with us.</p> <p>We improved the tax credits renewals process by adopting a more flexible approach. This led to more than 2,000 people joining their colleagues on the helplines and the introduction of new digital channels to make it easier to renew online. We launched a campaign with national and regional press releases, campaign tweets and national radio adverts to encourage customers to renew before the deadline, and we sent out 3.6 million text messages. We also began a trial using text messaging to let our customers know we had received their claim form. By the end of July 2014, we had received more than three million renewals, 2.85% ahead of last year. On the deadline day itself – 31 July – we handled 89% of calls compared to 16% the previous year.</p> <p>In December 2014, we ran an online payment system pilot for customers to make credit or debit card payments for Self Assessment and VAT. The feedback showed that 90% of pilot customers were satisfied with this service, and we are now extending it to include other taxes.</p>
	<p><b>Agents:</b></p> <p>More than 43,000 agents provide support for about eight million of our customers. We are gradually rolling out our new Agent Online Self Serve (AOSS) service, which received very positive feedback from agents when we piloted it earlier in the year. AOSS reduces the need for agents to contact us as they are able to:</p> <ul style="list-style-type: none"> <li>• confirm and update client lists</li> <li>• view clients' records in one place</li> <li>• keep clients' tax affairs up to date</li> <li>• carry out the same online tasks as clients.</li> </ul>

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## All customers

Getting more of our people to answer telephone calls and process post is not a long-term answer to improving customer service. We need to transform how we serve customers, making it easier for them to get things right and to serve themselves through online accounts so they don't need to speak or write to us in the first place.

At the heart of our new approach, we recognise that customer service and compliance are two sides of the same coin, and that improving services upfront helps improve compliance. This is what we call our 'Promote, Prevent, Respond' approach.

Using new ways of working, alongside automation and cutting-edge digital technology, we want to make it easier for customers to get their tax affairs right first time. As a result, we'll spend less time correcting avoidable errors and will be able to target our resources on tackling complex cases and those who deliberately set out to cheat the system.

#### **Promote: getting tax and payments right**

We know that the overwhelming majority of businesses and individuals are honest and want to meet their obligations. So we want to make it as easy as possible for them to file and pay their taxes, or claim tax credits, on time. We are improving our processes and changing legislation, where necessary, to help our customers to get things right from the very beginning.

A great example is Self Assessment, where we are proactive in removing people who no longer need to fill in an annual tax return. Last year we removed 225,000 people from Self Assessment, while improving our processes to tackle problem areas. Many employers are now able to report benefits in kind, such as company cars and private medical insurance, in the same way as PAYE – as and when they receive the benefit throughout the year. This enables us to adjust tax codes as soon as we are notified. It means that customers will be less likely to be on the wrong tax code and face a bill to repay tax at the end of the year.

#### **Prevent: stopping things from going wrong**

We aim to get customers to self-serve wherever possible, correcting errors themselves when they file, pay or claim and so avoiding a lot of back-and-forth communication with HMRC.

Using data that we have already for individuals and companies to identify and predict risks, we gave people an opportunity to check information and put things right before they submitted returns. We are joining up our internal systems, and will populate digital tax accounts with the information we hold. This work is already underway – for instance, until now, taxpayers completing a tax return had to include details of their earnings, paid from their employment, even though HMRC already receives this information from their employer. From next year, most taxpayers completing their return online will find this information already filled in. The same principle applies to information from other government departments, such as the state retirement pension. We receive information from other third parties too – for example, banks and building societies reporting the interest they pay on their customers' savings. From 2016, information on bank and building society interest will start to be included in tax codes, removing the need for many taxpayers to report this income separately in a tax return.

Of course, customers will still need to contact us, and we are giving them new ways to do so. Early in 2015, we started a series of trials to test new tools such as webchats, social media and secure messaging. We also introduced a new telephone and mobile adviser service for people who need extra help with their tax and entitlements. We also put in place arrangements for customers to pre-register for the new Marriage Allowance, ahead of it going live in 2015.

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**Respond: tackling complex cases and deliberate cheats**

Some people will always push the boundaries or break the rules – and HMRC will always be ready with a strong response where needed. From 2010 to the end of March 2015, our criminal investigations work has led to 2,556 convictions and prison sentences totalling more than 3,000 years.

By designing out error from our systems and making it harder for the dishonest minority to cheat, our specialist compliance teams can target wrongdoing more efficiently in the future. They'll be able to focus on tax avoiders, evaders and organised criminal gangs, where there is a high level of money at risk. They will be working on complex and challenging cases that will require enhanced legal, digital and analytical skills.

We are collecting and protecting more compliance revenue than ever before, bearing down on those who try to cheat the system. Last year, we protected more than £9 billion in tax revenues through legal action in the courts. We also secured important new compliance powers, such as Accelerated Payments to collect disputed tax upfront from users of tax avoidance schemes and a Diverted Profits Tax for multinationals that try to move their UK profits to other countries, in order to reduce their tax liability here.

We are now looking to increase the capability of intelligent telephony with a new speech recognition application for self-service payments. This will allow customers to make debit and credit card payments to HMRC without having to speak to an adviser. Call handling staff will then be able to focus on more complex customer enquiries, which will make better use of their time and expertise.

We are providing our customers with new and improved digital support products, such as online calculators, online courses, webinars and business support emails, and making greater use of social media. Customers can use our services on a variety of digital devices, such as PCs, tablets and smartphones.

We have delivered a wide range of live and recorded HMRC webinars for our business customers on areas where they wanted further help. These included:

- what it means to be self-employed
- what self-employed people need to do
- understanding VAT
- understanding international trade
- benefits and expenses – so popular that two webinars on this attracted 2,000 attendees
- employer e-learning – where 51,120 customers took part in live seminars during the year.

We delivered support tools for agents, such as an online course to resolve disputes through appeals and reviews, and an HMRC toolkit to help agents reduce errors in their clients' forms.

In September 2014, we held a workshop with representatives from the voluntary sector and debt professionals to understand how HMRC can deliver a better service for vulnerable customers with debt problems. As a result, we set up a dedicated team to provide support for our most vulnerable customers, debt professionals and their voluntary sector representatives.

We have developed software applications, launching products designed to help our customers in areas where they have told us they need additional support. For example, we have developed smartphone applications that help customers keep an accurate record of their business income and expenditure. This is proving popular and central to effective record keeping.

When customers have temporary financial difficulties and cannot pay their tax in full before the deadline, our Business Payment Support Service can help by offering them time to pay. By the end of March this year, 800,000 customers had Time to Pay arrangements with a value of £2.7 billion. We are also developing a digital Time to Pay service, aiming for customers to be able to pay online by the end of 2015-16.

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Charter rights

How we have delivered

**5: Be professional and act with integrity**

We used our email service more frequently, to tell businesses about the latest initiatives available across government. For example, we sent small business customers an email from the Department for Business, Innovation and Skills to promote a voucher scheme to get advice worth £2,000. They could use the vouchers to find strategic advice from private sector suppliers on how to help their business grow. More than 356,000 customers accessed guidance about business growth, following our email.

We built and delivered an IT system that stops tax credits when customers move onto Universal Credit. This means that staff have more time to spend on supporting customers with queries, rather than with routine tasks, such as inputting data.

For our staff, the Tax Academy brings together everything we need to recruit and develop tax professionals at all levels, providing a tax learning service throughout their careers.

We defined tax competency and qualification requirements and carried out research to benchmark external and international standards and capability. By identifying and applying best practice techniques we are able to ensure that HMRC people are seen as leaders in our field.

More than 40,000 of our people involved in supporting customers directly are included in the Operational Delivery Profession, covering up to 70% of the Civil Service. We ensure that everyone in these important roles understands the skills that are required and can access relevant learning, qualifications and other opportunities.

**6: Tackle people who deliberately break the rules and challenge those who bend the rules**

We created a new Counter-Avoidance Directorate bringing together all aspects of marketed avoidance into a single line of business with a clear focus on reducing the avoidance tax gap and discouraging avoidance activity. The tax gap is the difference between the amount of tax that should be collected by HMRC in theory, against what is actually collected.

We collected £786 million in tax payments for 2014-15, from users of tax avoidance schemes under the government's new rules to collect disputed tax upfront. The government introduced Accelerated Payments last year to change radically the economics of avoidance. Avoidance scheme users pay disputed tax upfront, so the money is not available for them to invest and make a profit. We have issued more than 25,000 notices to pay disputed tax since August 2014.

We increased our efforts to detect the illegal use of rebated fuels that should be for use only by agricultural and construction vehicles. We reduced and disrupted the ability of criminal gangs and fraudsters to sell this fuel on the mass market. This provides a level playing field for legitimate UK businesses to trade and protects the flow of oil duty to the Treasury.

**7: Protect your information and respect your privacy**

We take the confidentiality of our customers very seriously and have strict procedures for the release of information.

For example, as part of our strategy to tackle VAT fraud, we required additional layers of security in order to verify a caller's identity before being able to reset their 'shared secret'. We developed a new approach, which allows advisers to carry out this process more quickly. Advisers can now fill in drop down boxes on our forms, with information we have already from other sources, so the customer does not have to do it themselves. The advisers can also remove areas of guidance irrelevant to specific callers. This has reduced call handling time, minimising the potential for error and increased our capacity to handle more calls.

We also take particular care with conversations under our 'Deemed Consent' arrangements, which make it easier for those who need enhanced support to seek help through intermediaries. These can be unpaid agents, such as friends and family.

**8: Accept that someone else can represent you**

We realise that some of our vulnerable customers are unable to go online, and for them we provide our Needs Extra Support (NES) service, over the telephone and during mobile, face-to-face visits.

HMRC's NES service won the engagement category of the 2014 Compact Awards. This is the agreement between the voluntary sector and the government to ensure that we are better at working together.

We launched the service in May 2014. By the end of March this year, the service had received 71,727 calls from vulnerable customers. We served 54,356 (75%) successfully via telephone assistance only, with 17,371 (25%) customers needing a face-to-face appointment.

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## Charter rights

## How we have delivered

9: Do all we can to keep the cost of dealing with you as low as possible

## Resolving queries more quickly

We invested in improving the delivery of our core services of call handling, post and face-to-face contact by building the capability of our people and introducing new technology.

We introduced Real Time Information (RTI) reporting of PAYE details, as promised in last year's report. In 2013-14 we reported that more than 95% of PAYE schemes with employees or pensioners were reporting through RTI. Last year, this figure rose to more than 99%.

RTI improves PAYE administration for employers by integrating PAYE reporting with the normal payroll process, so employers no longer need to complete a separate return at the end of the tax year. By reporting in real time, employees are reassured their tax and benefits position is up-to-date. This reduces the number of under or overpayments.

We continued to streamline processes, such as the way we introduced our 'Once and Done' initiative. This reduces the need for customers to contact the department more than once to resolve a query. We trained our people in a wider range of skills and knowledge so they can deal with more of our customers' questions in a 'Once and Done' way – at the first point of contact, without having to pass customers from one part of HMRC to another.

We also introduced a number of simplifications for small businesses including:

- allowing most unincorporated businesses to pay their tax on a 'cash basis' (receipts minus payments) rather than calculating taxable income on what they expect to spend and receive in payments
- introducing a flat rate for common business expenses, for example, business use of a home and collection of Class 2 National Insurance Contributions through Self Assessment, from 2015-16.

We introduced these changes following consultation with our small business customers on how we could make their interactions with HMRC simpler. As a result, we will reduce burdens and give greater certainty that their tax affairs are correct.

Small businesses play an important role in boosting growth and creating jobs, because they are responsible for nearly half of all jobs created in the UK. We have continued to work with other government departments to help businesses to expand and to simplify what they need to do. For example, we are:

- working with the Department for Business, Innovation and Skills (BIS) and the Department for Work and Pensions (DWP) to produce a guide for those employing staff for the first time
- continuing to administer allowances that contribute to growth, for example, the Employment Allowance, Research and Development Relief and Annual Investment Allowance.

We cut delays by more than 50%, by streamlining how we manage employer registrations coming through our online channels from eight days down to three. The World Bank validated this improvement in November 2014.

We also continued to streamline the business registration processes with Companies House through a new online service. By May 2017, new companies won't have to enter core data more than once when they set up a private limited company, which is known as incorporation, and then register for Corporation Tax, PAYE and VAT – whether they do this all at the same time or in stages.

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**Building new services**

We introduced 22 new digital products and services over the last 12 months. They covered important services that helped us to transform our relationship with our customers including:

- PAYE for employees
- Digital Self Assessment
- Your Tax Account
- Agent Online Self Serve.

We also introduced a service for those individual (PAYE) customers who receive a car and or fuel as a benefit in kind. They can now go online to check and update these so they pay the right amount of tax at the right time and avoid underpayments of tax at the end of the year.

We have more than 400 volunteers to trial new digital services for agents. In April, we provided a small number of agents with a pre-release version of one of our latest projects, where they use a live service to validate their client list and provide a limited view of PAYE liabilities and payments. This is going well, so we have launched an expanded PAYE view, including a monthly breakdown of employer's PAYE liabilities and how we have allocated the payments received to each period.

In addition to our main corporate Twitter account (@HMRCgovuk) which has around 255,000 followers, we set up a Twitter pilot for customers (@HMRCcustomers). We launched it in the period leading up to the Self Assessment peak as part of our plans to make it easier for customers to get help and advice without having to write to us or call. More than 75% of customers who used it rated this service highly (eight or more out of ten) and more than 70% stated they would have telephoned us without this service.

We continue to explore new social media channels and have run ten Self Assessment online chat sessions answering 11,000 questions. Customers rated this service highly with four out of five saying they would use it again.

We are developing new, more straightforward digital services more quickly – improving the service by using customer feedback to ensure the final product is what customers need. For example, we developed and implemented the widely-praised tax credits online renewal process in eight weeks in 2014. More than 400,000 customers used the service, giving it a satisfaction level higher than 90%.

## Acting on feedback from customers

Your Charter was introduced in 2009 and as we move forward we felt it was now time to refresh it, taking on board feedback from customers. We are launching the updated Charter in January 2016, and we are currently recruiting members for the new Charter Committee who will be representative of all customer groups.

We have made considerable progress towards achieving our vision for improved customer experience, as Lin highlights in this report. We know that we have more to do to meet the expectations of our customers, and the newly refreshed Your Charter sets out clearly how we will do that.

I am delighted to have the opportunity to lead the new Charter Committee, which will be a sub-committee of the Board. We will use the rich customer performance data that is available in HMRC to inform the new committee. The committee will take regular opportunities to hear directly from customers. We will ensure that the committee represents the voice of all customers at the highest level of decision-making. We will appoint external representatives of the new committee via an open recruitment process.

I am looking forward to this exciting opportunity and to reporting on progress in next year's Charter Annual Report.

**Edwina Dunn**  
Chair, new Charter Committee



# Priorities for 2015-16

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This report includes many examples of the ways we have introduced new products and services during the past year. We have based them on what our customers told us they wanted.

We remain committed to driving up levels of customer service. We will continue to invest in a highly-skilled workforce and cutting-edge IT, focusing on personalising online accounts to give us and our customers a single view of their dealings with HMRC.

We will continue the roll out of our new Business Tax Accounts, known to our customers as Your Tax Account (YTA), for UK businesses and the Personal Digital Account for individuals, building on the services that more than two million small businesses are using already. Eventually, 5.2 million businesses will be able to manage their tax affairs in a single place online – the features of the digital account include showing their liabilities and payments across Self-Assessment, Corporation Tax, VAT and PAYE. Businesses will also be able to use their own software to submit data to HMRC.

We will continue to make it harder for the dishonest minority to cheat, and we will target wrongdoing more efficiently. Our specialist compliance teams will improve further their legal, digital and analytical skills as they work on more complex and challenging cases, concentrating their efforts on high-value tax avoiders, evaders and criminal gangs.

Getting online services right means we can automate simple tasks. We will make it easier for the honest majority of customers to get their taxes right and harder for them to make mistakes. We can do this by designing online forms so they automatically add up figures that a customer enters, or building in prompts for customers to check that what they're telling us is correct. This will make routine compliance an integral part of customer service.

We will still offer services through other channels for those who need them, including over the telephone and through face-to-face visits. We also know that some customers cannot use computers, so we are working with charities and the voluntary sector to make sure that they can do things on their behalf, along with their families and friends.

By making better use of our customers' tax and payments data and other information we hold, we will be able to deliver a service more tailored to their needs. Customers will feel that we have a good understanding of what's going on in their lives. When they deal with us, it will be as though they're picking up a conversation where they left off – rather than starting all over again.

As we move through the year, the new Charter and governance arrangements will ensure that our performance is scrutinised effectively.

HMRC is well-placed to achieve our objectives for all of our customers. Our new governance arrangements will help to ensure that we stay on track.



# Appendix: Charter and customer survey questions

Right	Survey question	Customer group	Mar 14 per cent	Mar 15 per cent	Margin of error	Significant change	Base size
Respect you	How well or poorly did staff treat you?	Individuals	84	83	±1	↔	4005
		SME	83	85	±2	↔	1871
		Agents	80	81	±2	↔	1759
		<b>Overall</b>	<b>83</b>	<b>83</b>	<b>±2</b>		
Help and support you to get things right	Ease of getting all the information needed	Individuals	77	75	±1	↓	5324
		SME	78	80	±2	↔	2844
		Agents	64	66	±2	↔	2023
		<b>Overall</b>	<b>73</b>	<b>73</b>	<b>±2</b>		
Treat you as honest	HMRC treats individuals as honest	Individuals	61	61	±2	↔	2645
		SME	68	68	±2	↔	3581
		Agents	48	49	±2	↔	2258
		<b>Overall</b>	<b>59</b>	<b>59</b>	<b>±2</b>		
Treat you even-handedly	Rate HMRC in terms of how much you trust them to be fair	Individuals	59	61	±2	↔	2645
		SME	69	69	±2	↔	3581
		Agents	59	59	±2	↔	2258
		<b>Overall</b>	<b>63</b>	<b>63</b>	<b>±2</b>		
Be professional and act with integrity	HMRC can be relied upon to act with honesty and integrity	Individuals	73	72	±3	↔	1308
		SME	80	79	±2	↔	1811
		Agents	74	73	±3	↔	1145
		<b>Overall</b>	<b>76</b>	<b>74</b>	<b>±3</b>		
Tackle people who deliberately break the rules and challenge those who bend the rules	HMRC can be relied upon to carry out its duties properly and professionally	Individuals	73	72	±2	↔	2645
		SME	77	76	±2	↔	3581
		Agents	61	60	±2	↔	2258
		<b>Overall</b>	<b>70</b>	<b>69</b>	<b>±2</b>		
Protect your information and respect your privacy	HMRC protects my information	Individuals	68	67	±3	↔	1308
		SME	69	71	±3	↔	1811
		Agents	72	72	±3	↔	1145
		<b>Overall</b>	<b>70</b>	<b>70</b>	<b>±3</b>		
Accept that someone else can represent you	How easy or difficult was it to get us to recognise their authorisation	Agents	78	80	±2	↔	2145
Do all we can to keep the cost of dealing with us as low as possible	HMRC can be relied upon to look after customers' interests	Individuals	62	61	±2	↔	2645
		SME	62	63	±2	↔	3581
		Agents	41	41	±2	↔	2258
		<b>Overall</b>	<b>55</b>	<b>55</b>	<b>±2</b>		

Continued

Right	Survey question	Customer group	Mar 14 per cent	Mar 15 per cent	Margin of error	Significant change	Base size
All rights	Overall score – Individuals	Total Individuals	70	69	±3		
	Overall score – SME	Total SME	73	74	±3		
	Overall score – Agents	Total Agents	62	62	±3		
	<b>Overall HMRC score</b>	<b>Total HMRC</b>	<b>68</b>	<b>68</b>	<b>±3</b>		

Notes:

Small and medium-sized business customers are referred to in the table as SME. SME stands for small and medium enterprises.

All scores are based on rolling annual data from the HMRC customer survey. Scores represent positive responses such as strongly agree or agree to each survey question.

For each right in the Charter the closest question from the HMRC customer survey has been identified.

The survey was not designed specifically to measure the rights in the Charter and therefore some questions have closer matches to the rights than others.

Overall measures for each right are calculated using a simple average of the three customer groups.

The following rights are only asked of customers who have had recent dealings with HMRC: 'Respect you', 'Help and support you to get things right', and 'Accept that someone else can represent you'.

The remaining rights are asked of a representative sample of each customer group.

Read [www.gov.uk/government/publications/hm-revenue-and-customs-customer-survey-2008-to-2015](http://www.gov.uk/government/publications/hm-revenue-and-customs-customer-survey-2008-to-2015) further information about the customer survey.





# HM Revenue & Customs

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