

Disabled Customers Consultation Group
11th April 2013
100 Parliament Street, LONDON SW1A 2BQ.

Attendees

Barbara Abraham (BA)	Low Incomes Tax Reform Group.
Liz Hughes (LizH)	Low Incomes Tax Reform Group.
Charles Clement (CC)	Employers Forum on Disability.
Jane Shillaker (JS)	TaxAid.
Jane Hunt (JaneH)	Association of Disabled Professionals.
Lidia Best (LB)	UK Council on Deafness.
David Sloane (DS)	Action on Hearing Loss.
Jan Hutchinson (JanH)	Centre for Mental Health.
Sally Paull (SallyP)	Positive Signs London.
Steve Lismore (SL)	Dept for Work and Pensions.
Lin Homer (LinH)	HMRC Chief Executive.
Anthea Watson (AW)	HMRC, Central Customer & Strategy Unit.
Tony Verran (TV)	HMRC, Central Customer & Strategy Unit.
Janet Wilcock (JW)	HMRC, Central Customer & Strategy Unit.
Janet Davison (JD)	HMRC, Central Customer & Strategy Unit.
Chris Irwin (CI)	HMRC, RTI Programme.
Dympna Kelly (DK)	HMRC, RTI Programme.
Martin Sellar (MS)	HMRC, PT Change Demand Management.
Emily Gravestock (EG)	HMRC, PT Change Demand Management
Pat Sunderland (PS)	HMRC, PT Ops Current Business Support.
Chris Sexton (CS)	HMRC Digital Services.

Audrey Simmons	BSL Interpreter.
Jean Gough	Palantypist.

Apologies

Joanna Wootton	Employers Forum on Disability.
Penny Melville-Brown, OBE	Disability Dynamics Ltd.
Jane Altimes	Mencap.
Ben Forsyth	Scottish Accessible Information Forum.
Sharon Palmer	Royal National Institute for the Blind.
Lucy Makinson	HMRC, Central Customer & Strategy Unit.
Judy Greevy	HMRC, Disability Champion (temporary).
Kathleen Rawlinson	HMRC, Communications and Marketing.
Ben Good	HMRC, Personal Tax (PT) Customer & Strategy Unit.
Julie Mortimer	HMRC, Diversity and Engagement.
Tyrone McAteer	HMRC, Diversity and Engagement.

1) Introductions and action point updates – Tony Verran.

TV welcomed everyone to the meeting, covered the domestics, and asked each attendee to introduce themselves – slide 2.

The minutes of the last meeting had been issued previously and were agreed.

Action Points from October 2012 meeting – slide 3.

	Action Point	Responsibility	Status
1	Circulate the updated roadmap to DCCG.	TV.	Cleared.
2	Circulate a report of actions under each Roadmap objective for comment a month	TV.	Cleared.

	before the next DCCG.		
3	Circulate a copy of the research into access to HMRC by deaf customers.	TV.	Cleared.
4	Advise DCCG on timescales for improving access for intermediaries.	SG.	Cleared.
5	Send a test copy of the iForm to attendees for further testing.	Ben Arkley.	Cleared.
6	Carry out user testing on the iForm and provide feedback.	All.	Cleared.
7	Correspond with attendees via e-mail regarding the HMRC strapline.	TV.	Ongoing.
8	Provide ideas on service improvements for customers with mental health problems and the role of external organisations.	All.	Cleared.
9	Provide information on the difficulties faced by disabled housebound customers in contacting/dealing with HMRC.	All.	Cleared.
10	Consider the use of the term 'housebound'.	JD.	Cleared.
11	Provide information about the precise issue in relation to blue badge holders.	Barbara Abraham.	Cleared.
12	Circulate equality information published in 2012 and proposed 2013 content for comment.	TV.	Cleared.

2) Real Time Information (RTI) Update – Dympna Kelly - Slides 4 to 13.

DK opened the session by saying that this was a very valuable opportunity for the RTI team to talk to stakeholders and to gather feedback.

DK explained the two main aims of RTI:

- To improve the operation of PAYE – the system needs to be updated to reflect changing patterns of work. RTI will improve PAYE making it quicker, easier and more accurate. Once the new system is bedded-in, it will benefit employers, employees and the Exchequer.
- To support delivery of Universal Credit (UC) – the claimant will receive a credit under UC based on RTI information.

DK talked through the slides, raising the following main points:

- RTI will provide a reduction in burdens for employers in respect of End Of Year activity and will make PAYE simpler and more efficient.
- PAYE itself will not change, but the way that it is reported will.
- A free basic PAYE tool is provided by HMRC which small employers can use to submit information to HMRC on-line.
- HMRC recognises that some employers will have difficulty using an on-line channel and so is developing an alternative paper channel.
- HMRC recognises that 'on or before' may be a challenge for small businesses and so has recently announced a relaxation of reporting arrangements.

DK asked for feedback in relation to disabled customers, and a number of points were raised:

LB raised a query regarding small businesses of two to three people. **DK** confirmed that if these businesses have difficulty using the on-line facility they should contact HMRC. HMRC will provide support of various kinds, including training. If the customer is genuinely digitally excluded they will be the option of paper-filing, but they will be encouraged to continue trying to use the on-line channel, via ongoing dialogue. The option to use paper will be available for a maximum of three years. The alternative option of using an agent to file on-line should also be considered.

CC asked how the on-line process has been made accessible and **DK** responded by assuring attendees that on-line testing has been extensive. **CS** confirmed that HMRC follows a vigorous set of standards for accessibility.

BA asked whether care and support employers are included in the pilot. **DK** undertook to find out and report back.

AP1 – DK to find out whether care and support employers are included in the RTI pilot

JaneH raised a number of points:

- There is a concern about the paper copy of RTI which is more complex than the on-line version and could therefore cause problems for some customers. **DK** confirmed that the form is constantly being improved, and asked all attendees for feedback.

AP2 – DK to circulate RTI forms for comment

- **JaneH** asked whether there would be an option in future to use mobile phones or smart phones to submit information. **DK** confirmed that these options would be considered.
- **JaneH** raised another concern about the fear of HMRC and suggested that, in order to give employers a chance to adjust and learn, the filing penalties for 2013/14 should be relaxed. She also suggested that, as the paper products will not be available until April 2014, there should be a transition period for penalties to make the conditions equal for both on-line and paper filing.
- **JaneH** also pointed out that, as there are no in-year late filing penalties for online filers of real time information during 2013/14, employers filing on paper from April 2014 should be given the same exemption during 2014/15.

LB asked how easy it would be to rectify a mistake made on-line. **DK** confirmed that there is a correction process. Mistakes cannot be rectified by telephone but need to be corrected by sending in additional information on-line.

Finally **DK** reiterated that the RTI team welcome any feedback.

3) Introduction by Lin Homer – HMRC Chief Executive.

LinH introduced herself and outlined her reasons for wanting to come to DCCG. As Chief Executive she has been trying to attend as many forums as possible relating to HMRC's customers. She saw this meeting as an opportunity to introduce herself and but also as an opportunity for attendees to think about how she can help them and endorse activity for disabled customers. **LinH** also explained to the group that she has a cross-Government

role on disability – a championing role to try to make sure that the Civil Service is learning about disability and is open to challenge. She confirmed that although there are great pressures on her time she would like to attend future meetings at least in part.

LinH told the group that she has been impressed by the commitment and the approach towards disability by HMRC, as demonstrated by the fact that as far as she is aware HMRC is the only Government department to have a dedicated Equality team. She explained that HMRC does recognise the seriousness of disability as an issue, which means that HMRC has to administer a tax system that is capable of adjusting to our changing, and more diverse, world. Inevitably this means that more activity takes place on-line, and that needs to be designed well with the disabled customer in mind. HMRC is still going through a period of change, and it is therefore important that we listen and we remain as flexible as possible. HMRC has to carry out mass service delivery and so has to have mass customer services, but that should not mean that personalisation is lost. There is great opportunity in the disability field as we work out our new digital offerings and we need to ensure that we include disability from the beginning.

LinH advised the group that, with help from the Low Incomes Tax Reform Group, HMRC will be launching a new staff award in relation to disability. There are also two new sign language videos available on YouTube, and a disability audit will shortly be undertaken across HMRC.

Finally **LinH** reiterated that we welcome interaction and challenge from attendees, and that we need to try to dispense the fear of HMRC.

JS welcomed the work being carried out by HMRC but raised an ongoing concern that mental health is not always considered under the general 'disability' heading. She urged HMRC to remember that mental health is often a fluctuating condition. **LinH** responded by agreeing that the confidence of HMRC in dealing with mental health is lower than general, but that the Needs Enhanced Support model is helping to address this.

LB welcomed the new sign language videos, but raised a concern regarding inaccessibility for deaf customers on the telephone, stating that many would prefer to use textphones. She also raised a concern about the closure of HMRC Enquiry Centres and what would replace them. **LinH** stated that moving to digital can potentially be very useful for deaf customers, and she hoped that DCCG would help with testing and pilot activity. On the closure of Enquiry Centres **LinH** confirmed that a pilot has been announced whereby some face to face services will still be provided via a different kind of service for those that need it.

JaneH was concerned that different HMRC staff members may answer queries in different ways and that it does not help the customer who has to deal with a different member of staff each time they contact HMRC. **LinH** responded by saying that skills and experiences are paramount but there is more that HMRC can do. We can never guarantee that we won't make mistakes, but we should be able to handle our mistakes correctly.

15 minute comfort break.

4) Intelligent Telephony Automation (ITA) – Martin Sellar and Emily Gravestock – no slides.

MS gave the background to the ITA project, explaining that the current HMRC call centre telephony system handled fifteen million calls last year. However, the system uses push button technology and could be improved via voice recognition. The main advantage of voice recognition is that the customer is put straight through to the correct line of business, by ringing any of the HMRC helpline telephone numbers.

EG gave more detail of the new system via a mixture of visual and speaking presentation. She explained that the HMRC will now move from a touch tone interactive system to a more modern voice response system, providing a system which is easier to use and which will route customers to the right place first time. ITA will be launched in two tranches. The first tranche for PAYE, Self Assessment, VAT and Tax Credits will go live in May. The second tranche for the remaining four lines of business will go live during summer 2013.

EG went on to explain that the main advantage to the customer is that they will get through to the correct line of business straight away, even if they dial the wrong number. This is facilitated via voice recognition where the customer is asked to say the reason for their call. They may be asked supplementary questions, and they will then be taken through security (if necessary) in an automated way. Once through security they will be placed in a queue to speak to an adviser. The adviser who handles the call will already be aware of the reason for the call.

LB asked how text relay operators can overcome voice recognition, and how the system copes with foreign dialects. **EG** explained that the customer is given two attempts at speech following which the system will revert to the push button system. If the customer cannot use the push button system they will automatically be put into a queue to speak to an advisor. HMRC will be sending out an explanatory note to customers to explain the process. **EG** asked attendees to suggest what should be included in this note.

AP3 – All - To provide suggestions on what should be included in an explanatory note to customers on the ITA process

JaneH asked how the system would cope with speech impairments. **EG** explained that system testing has included those with speech impairments, and reiterated that there is the touch-tone system in place for those who cannot engage via speech recognition

In light of the issues raised by **LB** and **JaneH**, **EG** invited them to work with her to produce a communication specifically designed for disabled customers.

LinH asked whether it was possible to offer the touch button system instead of voice recognition at the beginning of the call. **EG** explained that this may not be technically possible because of the way the system has been built. **EG** mentioned that they are investigating the possibility of creating a 'disability passport' which would employ a code to direct customers without speech straight to a specialised team.

DS asked whether HMRC advisors would receive a prompt telling them if a customer has previously bypassed voice recognition, and why. **EG** agreed to look at this possibility for future enhancements.

AP4 – EG to consider the possibility of providing a prompt for advisors when a customer has previously bypassed voice recognition

CS added that HMRC is conscious that telephony does not suit everybody. Digital services are being increased so that those that choose to do so can engage digitally.

JS suggested that it would be valuable if the system could identify emotional terms as well as business terms, for example, 'I'm really worried', as this may help to identify customers who need enhanced support.

5) AOB and Q&A.

LizH asked how the success of the YouTube videos will be measured. **TV** confirmed that measurement will be via number of hits and feedback from attendees.

AP5 – All – To provide feedback on the YouTube videos

TV confirmed that subtitles will be added to the YouTube videos.

AP6 – TV to progress the addition of subtitles to the YouTube videos

TV advised that the next meeting will be held on 17th October 2013. He thanked everyone for attending and closed the meeting.