

## Minutes of Issues Overview Group (IOG) Meeting

08 December 2015

### Professional Body (PB) Representatives HMRC

Nigel Clarke

Jeremy Nottingham

Alison Ward

Sally Ferguson

Jonathon Stride

Toni Clark (Chair)

Jacqueline Stewart (Minutes)

Madeline McGrillen (part attendance)

Dawn Hewson

Neil Chattell (NC)

Apologies: Andrew Courts, Philippa Stedman

### 1. Welcome and Introductions

1.1 TC welcomed everyone to the meeting and introduced Sally as Philippa's successor for IOG.

1.2 TC acknowledged Philippa's contribution over the years and she requested that SF pass on the acknowledgement together with best wishes. This was echoed by IOG members.

### 2. Minutes and Action Points

2.1 The PBs confirmed their agreement to both the June and September 2015 IOG minutes.

*Post meeting note: The June and September minutes have now been published on GOV.UK*

2.2 The following actions from the September IOG meeting were discussed:

AP1: JS to arrange a follow up visit to the Digital Delivery Centre in Newcastle for November/December 2016.

Cleared: The Professional Bodies visited Dorset House on 22 October 2015

AP2: MM agreed that the current guidance on call backs would be checked and shared with IOG and their feedback passed to Contact Centre colleagues.

Cleared: This is being taken forward via the Service Standards Working Group

AP3: JS to ensure the SW session is added to the December agenda

Cleared: Included at agenda item 6 below

AP4: JS to arrange a teleconference with the IOG to discuss the Once & Done report

Cleared: The telecom was held on 24 November 2015

### 3. WT Issues

3.1 The PBs discussed the issues raised via the Agent Lead in Oxford and the process supporting the escalation and resolution of WT issues. TC confirmed that the issues process would be made easier once the Agent Leads are in place.

3.2 The PBs discussed their concern regarding the updating of their Issues Scoring Spreadsheet together with the Agent Digest and Issues Register (IReg). MM confirmed the process for exporting information from the IReg and she explained that the Agent Digest is a summary of the issues on the IReg. The PBs requested that going forward, the Agent Digest incorporate a date of issue.

3.3 The PBs referred to referral templates posted to the Referral Template Folder in Shared Workspace and the process for adding these to the IReg when they have been scored. MM provided an update on the specifics of the issue discussed at the meeting. TC confirmed that issue referrals made by the Professional Bodies should receive an acknowledgement within 3 days and an update within two weeks of the acknowledgement.

3.4 TC referred to the request for the top 10 forms used by PBs and their members. She confirmed that a tactical solution was being looked at for agents but in the interim HMRC are considering producing guidance setting out everything an agent will require from their client before completing the iForm.

**Action 1:** PBs to provide details of the top 10 iForms used by PBs and their members i.e. in addition to the information provided by SF via email to IOG members on 7 December 2015

3.5 The IReg issues were discussed:

WT050 (Priority 1): Processing P11D and S336 claims: NC provided an update on the new measures being introduced from April 2016 and he confirmed that the processing of P11D/S336 would no longer apply. On this basis, the PBs agreed that this issue be made Dormant with a long review date.

NC confirmed updates will continue to be provided via Employer Bulletin and Agent Update.

AW raised a query around bespoke scale rates and the need to make a new application. NC agreed to let AW have a response

**Action 2:** NC to provide response to question regarding bespoke scale rates

WT054 (Priority 1): Delay in issuing correspondence: JS confirmed that this issue was discussed during the 24 November teleconference and that she had updated the IReg to reflect the decision made.

WT218 (Priority 1): Intelligent Telephony Automation (ITA) system: JS referred to the guide shared with the PBs ahead of the meeting. The PBs confirmed that agents needed a more bespoke guide. JS agreed to note the IReg entry accordingly.

WT226 (Priority 1): PAYE coding (P2) not showing wk1/mth 1 indicator: JS suggested that the issue be made dormant with a longer review date as the future solution would be a digital one. The PBs referred to a new version of the paper notice of coding and AW agreed to provide JS with details.

*Post meeting note: AW provided details of the contact in the Underpayments Assurance Group which JS is pursuing.*

WT234 (Priority 1): SA Reminders: JS referred to the recent communications being included in December edition of Agent Update.

WT237 (Priority 1): Postal delays

WT238 (Priority 1): Telephone Delays on non-Agent Dedicated Lines,

WT239 (Priority 1): Repayment delays due to incorrect signal

These issues are being taken forward via the Service standards working group.

WT187 (Priority 2): CT helpline: PBs agreed that this issue be made dormant and linked to WT238 above.

WT235 (Priority 2): Statement of income for mortgages (SA302): PBs agreed to make this issue Dormant with a long review date. PBs will continue to provide feedback where there is evidence that the new process is not being followed.

The PBs discussed with TC and NC the long term position to remove the provision of this information. TC confirmed that there were no immediate plans to do this. PBs were also interested in whether HMRC could share statistics on the impacts to see what they are contributing.

**Action 3:** JS to contact the business specialist for statistics on the impacts as a result of the contribution made by the Professional Bodies

WT228 (Priority 3): Appointment of an agent by a Liquidator: The PBs have confirmed that they have no further evidence to report and have suggested going back to the original posting to establish if this is still a current issue.

WT229 (Priority 3): VAT OAA (64-8) confusing scope: The PBs confirmed that this issue could be closed. IOG agreed to reopen this issue if further evidence is provided.

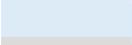
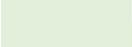
WT241 (Priority 3): VAT Flat Rate Scheme: The PBs requested this Priority rating be changed from a 3 to a 2. They discussed issues around SIC codes which DH will feedback to the Specialist Agent Managers (SAMs)

WT242 (Priority 3): Completing and saving HMRC online forms: The PBs requested the Priority rating be changed from a 3 to a 1 which JS will update on the IReg.

#### **4. Service Standards working group update**

4.1 TC referred to the service standards action log issued ahead of the meeting. She referred to her earlier request for the top 10 reason for contacting HMRC and acknowledged the feedback to date. PBs confirmed that the feedback provided to date captured the key areas so this action could be closed.

*Post meeting note: The key to the colour code on the actions log:*

	Phonelines/waiting times
	Gov.uk
	HMRC Process
	Comms/Engagement

4.2 The PBs discussed repayment delays (IReg issue WT239) with NC and they provided examples where delays are being experienced. They said there was a need for HMRC to communicate when there are known delays. TC confirmed that this issue would be escalated to the Joint Initiative Steering Group (JISG) meeting in January.

#### **5. IOG and Online WT Meetings**

5.1 TC confirmed that the joint PB and HMRC article on how to raise an issue was being published in the December edition of Agent Update (AU). The list of representative body contacts published in AU has been extended to include additional professional bodies involved in WT.

5.2 IOG members discussed the monthly Talking Points and the three WT Digital meetings to date. It was felt that the Talking Points were working well and that there was room for enhancement to the WT Digital meetings e.g. to make more interactive. The need for a re-engagement programme for agents into WT was also discussed.

5.3 IOG discussed Agent Leads and possible alternatives to having an Agent Lead in every Region.

5.4 The PBs confirmed that IOG would host the March WT meeting and that Martyn Warren from ICAEW would be undertaking the Agent Host role for the February meeting. TC referred to a suggestion made by ICAEW for the PBs of IOG to host the WT Digital meetings until the Agent Leads are appointed. The PBs discussed this

proposal and agreed to consult their respective organisations. They will confirm the position following the discussion with their respective organisations.

**Action 4:** PBs to contact TC to confirm their position on the proposal to host WT Digital meetings, preferably before Christmas.

5.5 JN raised a technical point in respect of invitations to Talking Points when registered as a delegate. DH agreed to check the position.

## **6. Shared Workspace (SW)**

6.1 JS referred to the paper sent to IOG ahead of the meeting setting out proposals for how we use SW going forward, including the data cleanse and need to ensure there are two Customer Nominated Contacts for each of the PBs. The PBs discussed their experience of using SW and JS suggested we review SW again once the proposed improvements had been carried out in SW.

## **7. Review Terms of Reference (ToR)**

7.1 TC confirmed that as part of the governance for IOG there was a requirement for IOG to review their ToR. IOG agreed the ToR represented the remit of IOG and no further action was necessary. AW requested that the PB pre-meet be held more than a week ahead of IOG meetings as per the ToR.

## **8. AOB**

8.1 HMRC secondee: PBs to discuss with their organisations whether they can fund a secondee from HMRC.

8.2 Talking Points – The script needs to be amended following feedback from SF that attendees were invited to send any issues to the SAMs.

8.3 Schedule of proposed dates for Digital WT meetings – JN requested a schedule of dates. DH confirmed the details of the Agent Lead/host were required in order to firm up future WT Digital meeting dates.

8.4 TC confirmed that the schedule of IOG dates for 2016 were in the process of being drawn up and will be shared with IOG soon. The next provisional date of 8 March coincides with PB commitment so an alternative date to be organised.

**Action 5:** JS to share dates for 2016 with IOG

*Post meeting note: A revised IOG teleconference date of 10 March is now being proposed – IOG to please confirm whether this proposed date is suitable*