

Minutes of Issues Overview Group (IOG) Teleconference

21 June 2016

Professional Body (PB)

Brian Palmer (AAT)

Richard Wild (CIOT)

Andrew Courts (ACCA)

Caroline Miskin (ICAEW)

Jonathan Stride (ATT)

Representatives HMRC

Madeline McGrillen (Chair)

Toni Clark

Jacqueline Stewart (JMS) (Minutes)

Jill Poole

Shehzad Chaudhary (part attendance)

Apologies: Nigel Clarke, Jeremy Nottingham, Philip McNeill, Leontia Doran, Susan Cattell, Dawn Hewson, Richard Garth

1 Welcome and Introductions

1.1 MM welcomed all to the meeting and explained this meeting was in the new format.

1.2 MM confirmed apologies (as above)

1.3 MM explained the change to the running order of the agenda, to ensure we cover the relevant items during SCs attendance on the call

2 March Minutes and Action Points

2.1 The March minutes were agreed.

2.2 MM confirmed that Neil Chattell had moved on and that his successor Richard Garth was on leave. She confirmed that an update to the actions for NC at the last meeting were being co-ordinated and a response would be given soon.

Action 1: Cleared: NC to feedback agents comments to the project team
There is no penalty regime in these circumstances as the abolition of £8.5k only went live in April 2016, this means employers have until July 2017 to report these (previously unreportable) expenses. It will mean their employee(s) will have an underpayment in their tax code if the employer does not report the expense before the July (normal P11D process/penalties will apply if they fail to submit P11D by the July deadline).

The Comms/letters issued to employers encouraging they contact with the information was to limit the impact/amount of underpayments occurring in the current tax year 2016/17, by HMRC capturing the Bik into the codes before the start of the tax year.

Action 2: Cleared: NC to provide copies of communications issued by w/e 18/03/16
Post meeting note: A copy of the letters were issued with the minutes

Action 3: Cleared: PBs to publicise message to members, through their respective communication

Action 4: Cleared: NC to feedback to policy team re Stamp Duty and spike in SA302 requests.

Action 5: Cleared: Update on Citrix given at para 3.8 below

Action 6: DH to check whether we would need to extend the Citrix slot beyond the scheduled hour to cover this eventuality.

Cleared: JP confirmed that Citrix session doesn't need to be extended as it won't throw you out of a session

Action 7: Open: NC will look at the process for closure of queries in contact centres- when they happen and if recorded

Action 8: Cleared: TC to feed in suggestion for workaround for having to provide vouchers would be to include CIS information in the digital accounts when the move is made to MTD

Action 9: Cleared: IOG agreed the issue was client specific and therefore passed to the Agent Account Managers (AAMs)

Action 10: Cleared: JMS has actioned referral templates

Action 11: Open: PBs asked for stats on the numbers of cheques received in January, this will be explored but it may not be possible to distinguish SA cheques payment?

Action 12: Cleared: IOG are hosting the digital WT meetings during 2016

3. Extending WT Digital Meetings

3.1 MM acknowledged the team's appreciation and thanks to the PBs for all their support in hosting the digital Working Together (WT) meetings. TC confirmed that the satisfaction rates from the previous two digital WT meetings were excellent.

3.2 TC discussed the need to expand WT and explained that unlike TPs, WT has to come through the PBs so their help in driving up engagement in WT is needed. She referred to the recent article published by ICAS and PBs agreed to use this as their template.

3.3 PBs discussed the process for joining new members and it was agreed that the PB should send details of the name and email address of their member(s) wanting to join to their appointed SAM. The member will then receive an acknowledgment email once their details have been added to the WT distribution list.

3.4 PBs confirmed that they were happy to promote the extension of WT. TC confirmed that Agent Update (AU), issue 51 contains an article on how to raise an issue which is still current. As this edition is soon to be archived, a further article will be published in a future edition of AU which should also help support and drive take-up of WT.

3.5 A discussion on agent distribution lists ensued and SC confirmed that undeliverable emails were reviewed and there were very few that couldn't be processed.

3.6 PBs discussed issues submitted by agent members. JP confirmed that there are still members submitting issues directly to the SAMs. The SAMs are actively encouraging agents to take the issue via their representative body.

3.7 TC invited PBs to nominate the work we have achieved over the last year in establishing Digital Working Together meetings and Talking Points, for a Civil Service award. As part of

the application testimonies are required to support the application. TC said it would be appreciated if PBs were able to send us a few words of support for the work the teams have done together in this area.

Post meeting note: As requested at the meeting, TC followed this request up by email immediately following the meeting. A response by 28 June has been requested.

3.8 SC provided an update on a new webinar platform being tested in July with a view to transitioning this with some business customers in Oct. He confirmed that the new webinar platform could be transitioned for WT meetings in the future. He explained that the webinar would have an enhanced functionality and tailored to customer needs but would have a similar look and feel to the current webinar.

3.9 CM said that it would be helpful for the whole meeting to be recorded. SC confirmed that this functionality was currently available and he agreed to review and report back.

Action 1: SC to review policy on recording meetings and provide a response

4. Planning WT Digital Meeting

4.1 PBs requested clarity on how responses to questions raised during the digital WT meetings are dealt with.

Action 2: SC agreed to review and provide a response.

PBs discussed evidence gathering for widespread issues. IReg issue WT243, Online Notices of Coding was discussed and PBs stressed the need for an update on this issue as there are lots of problems around P2s and HMRC needs to do more. PBs suggested a deep dive of the P2 issue.

PBs also discussed the possibility of including a polling question and JP agreed to look into this.

Action 3: JP to review possibility of a polling question for notices of coding (P2)

Post meeting note: The polling question to run a TP meeting on codlings or not was run at the July digital WT meeting – the result was yes to run a TP meeting.

4.2 IOG discussed the widespread issues from the July version of Agent Digest:

WT054 – Delays in issuing correspondence: MM confirmed that this is a historic issue. She confirmed that it is planned to request further evidence at the July digital WT meeting to determine how widespread an issue this is currently. TC confirmed that specific examples are needed. PBs said it would be useful to explain to agents what the process is, explaining the length of time i.e. for agents to understand the internal network.

WT218 – Intelligent Telephony Automation system (ITA) - MM asked if this was still a problem for agents. TC referred to the guide produced for individuals and that the feedback from IOG was for a more bespoke guide for agents. PBs were asked to provide current evidence that this is priority.

Action 4: JMS to share a copy of Your guide to calling HMRC

Post meeting note: Your guide to calling HMRC was issued with the minutes

WT226 – PAYE coding (P2) not showing wk1/mth 1 indicator: The business specialists have confirmed that they are giving consideration for the emergency indicator W1/M1 to be included within PTA as part of the changes to the P2.

WT234 – SA reminders: An update has been requested for the Virtual Communications Group. JMS confirmed that she has a business specialist lined up to join the July meeting. PBs discussed the importance of knowing what reminders will be issued in view of the approaching July payment deadline.

Post meeting note: An update was provided at the June VCG meeting confirming that there were currently no plans to make changes to reminders/payslips this year.

WT237 Postal delays: MM requested specific examples where delays are being experienced. She also reminded IOG of [Where's My Reply](#) tool on GOV.UK.

WT238 Telephone delays: TC provided an update following the June Customer Service Standards workshop regarding security questions and providing references for call backs.

PBs asked when agents would be in a position to self-serve changes to coding notices. TC agreed to obtain an update for the next meeting.

Action 5: TC to provide update on self-serve for coding notices

WT239 – Repayment delays: PBs confirmed that it was too early in the tax cycle to know if repayment delays was still a problem. It was agreed that the Agent Digest be updated to this effect and IOG will continue to monitor.

WT242 – Completing and Saving HMRC forms: PBs confirmed that there was lots of frustrations with iForms. TC confirmed that the 2016/17 priorities for Agent Services had been shared with VCG. TC reminded PBs of her request for details of the top 10 forms that cause agents the most frustration so we could look to implement an interim tactical solution to help until solutions delivered via AS.

WT243 – Online notices of coding: This was discussed at para 4.1 above.

WT244 – Class 2 NICs & SA: PBs said that not all the questions were addressed at the recent Talking Points session and they feel there are problems between the two IT systems. JP agreed to take an action to request more evidence at the next WT digital in order to take this back to the business.

Action 6: JP to ensure that this issue is discussed at the July digital WT meeting

Post meeting note: The issue was discussed and an update provided at the July digital WT meeting

WT245 – C79 for NETPs: PBs didn't think this issue was widespread and they agreed that it be closed on the basis that it should be taken forward elsewhere e.g. via JVCC

WT235 - SA302: PBs reported that they are still receiving lots of issues around the process not working. AC highlighted a problem where other organisation request SA302s and requests to HMRC for SA302s can take up to three weeks to process.

Action 7: JMS to pass PB feedback to the business together with the request to have published the list of members who have signed up to the new process

Post Meeting Note: An update was provided at the June VCG meeting to confirm that the list of organisations signed up to the process will soon be published on GOV.UK. HMRC are receiving significantly fewer requests for SA302 compared to this time last year indicating the process is working but to expect some issues as the process embeds.

The following potential widespread issues were discussed

Gift Aid suggestion: PBs suggested this might be included in a TP Polling Question JP to review possibility of a polling question for Gift Aid notices of coding

State retirement pension-SA online: PBs reported that the state retirement figure isn't always accurate on SA online. JP agreed to feedback to the SAM to provide an update.

Action 8: The SAM to provide an update on this issue for the July digital WT meeting
Post meeting note: An update was provided at the July digital WT meeting.

Class 2 NIC online link: The PBs highlighted that the issue summary doesn't accurately reflect the issue. JP agreed to feedback the SAM working the issue.

Action 9: JP to feedback to the SAM to update the issue summary to better reflect the nature of the issue.

4.3 MM discussed the retention policy of the closed issues tab on the Agent Digest in view of the fact that this is going to grow quite considerably over the coming months. TC suggested retaining closed issues for 6 months before archiving.

4.4 MM invited general comments around the Agent Digest. PBs would like to see track changes and discussed the possibility of using a separate font colour (not red) or italics to show the changes made from the previous version. JP agreed to feed this back to the SAM responsible for coordinating the Agent Digest.

Action 10: Consideration to be given on how best to show track changes in the Agent Digest when sharing with the PBs

4.5 Agent Update – MM explained that JMS wants to take a fresh look at the way widespread issues are reported in AU. Currently only Priority 1 and closed widespread issues are reported. Now that we have Agent Digest, is there still a need to report issues in AU - PBs would prefer to still report P1 issues and felt that it could send out the wrong message to members. JMS will make further recommendations for IOG consideration.

4.6 Hosting WT meetings 2017 onwards - TC confirmed that she wanted to start planning for 2017 to allow sufficient time to make the necessary arrangements. TC requested that PBs consider how they envisage WT working in 2016/2017 and the involvement of other rep bodies being invited into the host role. PBs discussed further streamlining of the joint WT/IOG meeting and TC said consideration would need to be given to the current IOG ToR but she was happy to review any considerations made and would inform the WT Strategic Group accordingly.

Action 11: PBs to provide feedback by the end of July

5. Shared Workspace (SW): Review of Membership

5.1 JMS acknowledged the current issues around membership for customer organisations and discussed with PBs whether there was still a need for PBs to have access to SW now that we have the Agent Digest. She invited feedback from CM. JMS agreed to follow up on the discussion post meeting in order to reach a consensus from IOG on the need for PB access to SW.

6. AOB

6.1. JS referred to a question from one of his members which was raised at the April digital WT meeting. MM confirmed this was working with the AAM manager and she agreed to discuss with JS following the meeting.

6.2 MM said she was intending carrying out an after action review of the new meeting format and agreed that this would carry this forward to the next meeting.

Meeting closed.