

Minutes of Issues Overview Group (IOG) Teleconference

18 August 2016

Professional Body (PB)

Susan Cattell ICAS (part meeting)

Andrew Courts (ACCA)

Nigel Clarke (CIOT)

Caroline Miskin (ICAEW)

Jeremy Nottingham (AAT)

Jonathan Stride (ATT)

Representatives HMRC

Toni Clark (Chair)

Dawn Hewson (part Chair)

Richard Garth

Jeff Jones

Madeline McGrillen (part attendance)

Jill Poole

Diane Ross (Observer)

Jacqueline Stewart

Brian Ainslie (Minutes)

Apologies: Leontia Doran, Philip McNeill, Brian Palmer, Richard Wild

1 Welcome and Introductions

1.1 TC welcomed all to the meeting and introduced Richard Garth, Neil Chattell's successor and confirmed that Madeline McGrillen would be joining later. Madeline/Richard will represent Customer Services on both IOG and Virtual Communications Group (VCG) going forward.

1.2 TC confirmed apologies (as above)

1.3 TC explained that she would have to leave meeting at 2.30pm but that Dawn Hewson would continue as chair.

2 Minutes and Action Points

2.1 The June minutes were agreed.

2.2 Action Points from March meeting

Action Point 1: Cleared: Copy of letters being issued to Employers attached to Agenda

Action Point 7: Open: RG provided an update on closure of queries in Contact Centres. Following the Customer Service Standards Working Group workshop in June we are awaiting sign off regarding the verification process for call backs and this will be communicated in due course.

PB's requested that further information be sought of different verification rules for different Heads of Duty

Action 1: Open: RG to confirm list of information to be disclosed to each Head of Duty to pass verification

Action Point 11: Cleared: RG confirmed that this information is not available and it may be difficult to distinguish between different types of payment to different types of tax.

2.3 Action Points from June meeting

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

DH advised that HMRC has recordings of Digital WT meetings since 9th February. It was agreed that the recordings of DWT meetings should be issued to all agents registered to receive DWT invitations, rather than make generally available on gov.uk. DWT recordings will only be available until the date of the next meeting to ensure agents have access to the most up to date DWT information, however HMRC will retain copies for audit purposes.

This will start with the recording of 7 September meeting which will be issued after the session has ended. This recording will be available to access up until the next meeting (9 November).

Action Point 2: Cleared: PBs requested clarity on how responses to questions raised during the digital WT meetings are dealt with. SC agreed to review and provide a response.

JP advised that any unanswered questions are taken away and answers sought from the Business Area concerned, to report back at the next WT meeting.

Action 2: JP to provide Q & A based on 7 July WT meeting prior to September WT meeting

BA advised that he would be issuing 3 documents to the IOG at the conclusion of the meeting relating to Class 1, 2, 3 and 4 National Insurance and related issues. This would then be issued to all those who registered for original Class 2 NIC on 15 June 2016.

Post meeting note - BA issued the information to all IOG members immediately following the meeting.

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

TC advised article should be available for Sept and the best means of communicating this is currently being considered.

Action Point 7: Cleared: SA302 - List of Lenders:

TC advised this now available on GOV.UK

<https://www.gov.uk/government/publications/mortgage-providers-and-lenders-who-accept-a-sa302-tax-calculation-or-tax-year-overview/mortgage-providers-and-lenders-who-accept-a-sa302-tax-calculation-or-tax-year-overview>

Action Point 11: PB's to provide feedback by end of July about continued hosting of WT for 2017.

IOG advised they are happy to continue hosting through to June 2017, with the caveat that we explore how the Agent Forum is working.

TC thanked the IOG for continued support for DWT and confirmed that the planned review in December will go ahead.

3. WT Digital Meetings

3.1 TC acknowledged the continual success of the IOG chairing the digital WT meetings, and thanked them for all their work and commitment especially following their agreement to continue through to June 2017.

3.2 DH advised IOG of the statistics relating to DWT

Invites issued September 2015 663 Registered 144, Attended, 117 Satisfaction 89%

Invites issued May 771, Registered 82, Attended, 58 Satisfaction 86%

Invites issued July 761, Registered 113, Attended, 83 Satisfaction 89%

3.3 TC discussed the need to expand DWT and explained that unlike Talking Points, agents wanting to join DWT have to come through their Professional Body and reiterated the need for their help in driving up engagement in DWT. TC confirmed that the PBs can publicise DWT and seek to encourage their members to join. ICAS and ICAEW have both published articles encouraging sign up.

3.4 PBs discussed the process for joining new members and it was confirmed 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 DWT distribution list.

Action 3: JP to discuss joint welcome letter from IOG for those Agents joining

3.5 Online Agent Forum: TC thanked IOG for their input at the recent workshop and advised that they have taken on board their comments. HMRC are looking to run an overview session for the WT Steering Group and possibly JISG. There is no go-live date for the pilot but HMRC plan to request volunteer agents to take part at the September DWT.

3.6 Service Standards Working Group: RG confirmed, as per action point 7 above, HMRC are currently looking at a process where an Agent would provide HMRC with a validation code for HMRC to use when calling an agent back.

3.7 DAEM & SAM teams' digital award nomination: TC thanked everyone for their input and comments. The nomination has been submitted and she will advise of the outcome in due course.

4. Planning WT Digital Meeting

4.1 IOG would like the DWT to concentrate on those issues where progress has been made, more good news stories rather than issues where there appears to be no movement. IOG recognise that the priority one issues can take a long time to resolve and we need to make it clear on the Agent Digest those issues which won't be updated for a number of months.

4.2 IOG asked if an update could be given at the DWT of Making Tax Digital

Action 4: JP to provide this

4.2 JS discussed a proposed visit to Longbenton for both members of IOG and the Customer Service Standards Working Group to see how Digital Mail Service (DMS) works. This visit would also include a session on understanding HMRC internal network for issuing bulk mail and post handling generally following the request from PBs at the June IOG meeting to better understand HMRC's internal post process.

IOG welcomed this offer

4.3 IOG advised that the Next Generation Performance Measures Working Group is looking at post categories and that this work should take into consideration the Customer Service Standards Working Group/IOG issues.

Action 5: JS to look at reviewing this alongside the Customer Service Standard Working Group and how this may impact on potential visit to Longbenton.

4.4 IOG discussed evidence gathering for widespread issues, that sometimes HMRC should have the evidence in the number of calls received to the contact centres. IReg issue WT243, Online Notices of Coding was discussed and IOG stressed the need for an update on this issue as they are still receiving numerous queries about failures in the systems.

Agent Digest

4.5 IOG discussed the widespread issues from the September version of the Agent Digest:

WT054 – Delays in issuing correspondence: IOG agreed to reprioritise from Priority 1 to a Priority 2. AC had an example of a letter dated as issued on 3 August but not received in his office until 12 August. **Action 6:** AC to send to TC to review

Post Meeting Note – the business have explained that at the beginning of August HMRC introduced changes to allow customers entitled to a refund to have it paid directly into their bank account using their online Personal Tax Account. HMRC temporarily slowed down the release of P800's in this week as we tested the new process, but have resumed at normal volumes

WT218 – Intelligent Telephony Automation system (ITA) – IOG agreed to reduce to a Priority 2.

Action 7: JS to go back to Contact Centre to put forward IOG's recommendation of reducing the recorded message on the ADL.

WT226 – PAYE coding (P2) not showing wk1/mth 1 indicator: JS provided an update

WT234 – SA reminders: Closed: IOG agreed to close: this item based on the update provided at the June meeting of VCG and confirmation at July DWT.

WT235 - SA302: Closed: IOG agreed to close based on discussion at Action Point 7 from June Meeting

WT237 Postal delays: IOG agreed to reprioritise this issue from a Priority 1 to a Priority 2

WT238 Telephone delays: Discussed at March Action Point 7 above

WT239 – Repayment delays:

Action 8: RG / MM to obtain lines to take re communications for the PB's to share with members on how best to deal with PAYE repayments by self-serve and new resources being recruited.

WT242 – Completing and saving HMRC forms: IOG confirmed that there was lots of frustrations with iForms but appreciated that some new forms are now saveable. 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 are delivered via Agent Services

Action 9: JS to obtain and update from the Agent Onboarding Team in Agent Services regarding latest position of forms within the projects.

WT243 – Online notices of coding: IOG asked for this issue to be split into the individual items and discussed at DWT.

WT244 – Class 2 NICs & SA: IOG agreed to reprioritise this issue from a Priority 3 to a Priority 1: discussed at Action Point 2 from June Meeting. Documents issued post meeting relating to Class 2 June Talking Points would hopefully resolve most issues. Likely to be a future TP, scheduled for December, based on this information. BA as liaison with Class 2 Team to provide email address for feedback for this meeting.

Action 10: BA to provide email address – brian.p.ainslie@hmrc.gsi.gov.uk

The following potential widespread issues were discussed

Annual Tax Summary

DH advised this is with HMRC business area technical team but no update had been received as yet.

Married Couple's Allowance

JJ asked for IOG agreement to move this across to current widespread issues and allocate a WT reference and allocate as a Priority 2 initially.

IOG agreed

Agent Update

4.6 IOG feel that the Working Together pages of Agent Update needs a refresh as they are a bit tired and it is not obvious what has changed in each edition. MM provided the historical context for Agent Update and the WT pages. TC asked IOG to advise what they like, don't like or would like to see in a refreshed publication

DH chaired remainder of meeting

5. Shared Workspace (SW): Review of Membership

5.1 JS acknowledged the current issues around membership for IOG and discussed whether there was still a need for them to have access to SW now that we have the Agent Digest. JS suggested issuing the Agent Digest monthly. IOG agreed that it appeared to have merit but only if there had been updates to previous issue. A full discussion took place regarding usage of SW and that a number of IOG members do not currently have access. IOG agreed that no more resource should be deployed into administering access. Those IOG members who currently have access will still have that option to receive SW alerts. If anyone doesn't want to receive SW alerts going forward then let JS know and she will update SW

It was agreed a further review will take place at the December IOG meeting

Action 11: Martin Langston to review issue of Agent Digest monthly if there have been any updates.

6. AOB

6.1. AC is gathering info on a review of CIS which would save HMRC and customers money. Will submit to HMRC for review. Wish to discuss in the pre meeting for DWT how best to take this forward.

6.2 JS explained that TC had received a request from CIMA to join IOG.

Action 12: Please email TC with your thoughts.

Meeting closed.