The new ‘Working Together’

Professional standards



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Noel Flanagan explains why agents should get involved with the new Agent Forum

Key Points

What is the issue?

How agents interact with HMRC has changed, with face to face and telephone contact reducing. Therefore, when systemic problems arise, it can be difficult for agents to know who to tell.

What does it mean to me?

The new Agent Forum is precisely that outlet. This gives a direct route into an interactive discussion with other agents and HMRC about potentially widespread problems with HMRC's systems and processes.

What can I take away?

A smooth-running tax system benefits taxpayers, agents and HMRC. Understanding current problem areas and work-arounds also ensures you deliver an improved client service. So what are you waiting for? Get involved.

BX9 1AS, as most tax professionals will know, is HMRC's default address: anonymity personified (if that is not an oxymoron)! In my old Inland Revenue days, any issues would possibly have been dealt with by a letter to the D.I. (District Inspector, for those who do not stretch back that far) at HMIT Barnet, with a possible follow up call to a local 01349 1234 number – no 03000 numbers in those days. While my current correspondence is now sent from the other side of the fence, the primary concern is still the same: the inability to have any direct or continuing contact point of engagement with HMRC (unless you are dealing with those in the upper HMRC echelons on a serious enquiry or very technical case). Even 'routine' enquiry work seems to be handled by a rotation of HMRC personnel.

The clock is unlikely to ever be turned back (nor, perhaps, should it be). The current HMRC migration to 13 Regional 'super' hubs is well under way, but I doubt very much that this will result in better direct communications with them. So, if that is the case, how should and can we interact better with HMRC, either when things do go wrong (as they frequently do) or perhaps if we have that Eureka moment when we come up with an idea or suggestion that will help both sides work better? Maybe even HMRC may want to do the same?

Enter Working Together – or perhaps to give it its current form, the 'Agent Forum'.

The Agent Forum

Jon Stride gave a summary of the history of Working Together (in its old guise) in his article 'Piloting a new course' in the February 2017 edition of *Tax Adviser* so I do not intend to cover the same ground again in this article, which aims to provide more a summary of where we are with the new Agent Forum, in giving feedback on issues to

HMRC. This is now a totally online Forum and, in reality, is now our only direct way to feed back suggestions, comments or reports of issues to HMRC. It also allows the agent community to see if other agents are having the same issues or to see if some resolution has been provided to an ongoing problem (very useful if you are a sole practitioner or part of a smaller firm).

Joining the Agent Forum (if you are not already signed up) is easy and Richard Wild summarised the simple, two stage registration process in his brief article in the October edition of *Tax Adviser*. The forum is currently only open to professional body registered agents but it is hoped that this will be widened once the forum is fully established.

How does it work?

When you initially log in, you are taken to the gov.uk 'Small Business Forum' site. You then proceed to log in to the Agent Forum site via the login header. The site is merely headed up 'Forums' (with a sub title Agent Forum). There are then various sub-headings, the first two being general Announcements and T&Cs, followed by a further specific seven

Subheadings:

- CGT
- CT
- MTD
- NI
- PAYE
- SA
- VAT

There are then three further Subheadings:

- Others
- Cleared issues
- Ideas and suggestions

The forerunner trial of the current Agent Forum had no real defined sub-categories and that made it very difficult to locate or post comments made on a wide variety of issues. To their credit, HMRC took away all the feedback from the trialists and

professional bodies (PBs) and produced the current, revised layout. Even now, this is very much a work in progress but I am sure that with regular feedback and comment, the Forum will continue to be improved.

The Forum aims to be a positive, proactive tool to help the agent community (and HMRC) to address and resolve issues which come up in our daily working lives. There will always be a fine line (after being motivated to make a post on the Forum as a result of some frustrating issue) between posting that comment as a ‘rant’ or a ‘positive suggestion’. HMRC are not asking for all emotion to be totally removed but we do strongly recommend that the language and context is kept totally professional. There are enough other outlets on the internet for the other type of comments, none of which are condoned by the PBs. In fact, due to the potentially sensitive nature of all comments, HMRC do have an initial ‘moderation’ review process before any comments ‘go live’.

Clicking on any of the ten subheadings above will then open up and reveal further subheadings and issues relevant to that Head of Duty where the history of discussions on that topic can be read. The commenting agent’s name appears against the post and any responses from HMRC are also shown (generally as HMRC and then a number). Current topics can either be searched by scrolling down the list or by using the ‘search’ facility under the banner heading ‘Post’ at the top. You can then post a comment regarding that particular topic or you can create a new topic if one is not there already. Remember to try to use a topic heading that will make your post easy for others to find and comment on.

The previous trial of the Forum did also have a facility whereby an email alert was received each time a new post was made to a topic in which you had registered an interest or had made a post but that option is not currently available in this version, although there is the facility to view the last posts added since you last logged in to the Forum. Currently, to review updated posts on any topic, you can use the ‘posts – recent’ drop down tab which will then show later activity. HMRC are keen to receive feedback on the Forum, particularly where additional functionality would be helpful.

We have asked HMRC to run a Talking Points session on the new Agent Forum where all aspects and options of the Forum can be demonstrated in the form of on screen demonstration.

A call to action!

One request which is continually being made by HMRC in connection with any issues/problems is to provide them with EVIDENCE to support the issue and the problems it is creating. This is reasonable in that HMRC need to assess whether the issue is ‘one off’ or widespread in nature. An example of the latter might be the numerous incorrect P800s that are being issued. Please be prepared to provide any evidence requested – anonymised where appropriate.

A call for evidence sounds like a crime has been committed but the only crime will be if we, the agent community, do not rise to the challenge to make this new Agent Forum work. The current version of the Agent Forum is not perfect, but it is continually being reviewed and updated. HMRC have committed both resources and manpower to this project and there is no doubt that they wish to see it work too.

Too much time is lost on both sides of the divide trying to resolve issues and if we are to maintain any semblance of communication lines with each other, then we need to be doing this through Working Together/the Agent Forum and not by letters to BX9 1AS – wherever that is!