Agents road test HMRC digital forms

General Features

01 December 2018

In October, a number of ATT members took part in research sessions to help HMRC design digital forms that meet the needs of agents.

In October, a number of ATT members took part in individual research sessions looking at how agents complete and submit digital HMRC forms online. The volunteers were asked about their current use of HMRC forms and then shown a mock form online. The purpose of the session was to give HMRC a better understanding of the needs of agents to help inform their design process.

The testing focused on the design and layout of the form and whether the completion process was clear and easy to follow.

Volunteers commented on a number of aspects including:

- The need to make it clear at the start of the process that an Agent Services Account (ASA) is required for access to these digital forms. It was suggested that users should be advised to establish whether an ASA has already been created by their agency, rather than automatically being invited to set one up.
- The importance of being able to move forwards and backwards through the whole form and return to uncompleted parts of the form at a later stage, rather than being constrained to complete the form in a fixed order.
- Help links within the form should open in a new window so that after they are closed down, the user is returned to the same point on the form.
- The duration of the temporary access code required to return to a partially completed form. The current proposal is that a form must be completed within 28 days of commencement, or it must be restarted from scratch.
- The proposed wording of the declaration on submission. For the purposes of forms submitted by agents, declarations of accurate completion need to be caveated by statements such as ‘to the best of our knowledge and belief’.

If you would be interested in road-testing any future developments in digital forms from the comfort of your own office, please contact atttechincal@att.org.uk.