

# Agents Digital Design and Advisory Group Update

## General Features

08 June 2021

**The Agents Digital Design and Advisory Group continues to meet regularly to discuss practical issues regarding agent online services.**

The Agents Digital Design and Advisory Group (ADDAG) – which is intended as a bridge between tax policy and implementation – has met twice so far in 2021 with a slightly revised operating structure. Going forward, the group will be jointly chaired with a representative from HMRC and the professional bodies. The current representative body co-chair is ATT technical officer Helen Thornley.

A key topic for the group remains agent authorisation – how clients appoint their agent to act and what the agent, once appointed, can see and do for their client. The group is continuing to explore issues around the digital handshake which is being rolled out as the authorisation route for all new services (for example, the Trust Registration Service and UK Property Reporting service) and get to grips with HMRC's concerns around the continuing use of the 64-8. From the agent perspective, the 64-8 is a simple and effective solution to appointment, while the range of digital handshakes is cumbersome, challenging (to impossible!) for some clients and the requirement to gain multiple authorisations for different processes is unwieldy.

We are also looking to get a greater understanding of how agents should be using their (relatively) new Agent Services Account. For example, when should an agent with a number of different staff be creating additional users on this account and what authority will any such additional users have to access client details? Most agents will want to manage what client information their staff can access and it is very important that we can start to get to grips with – and influence – HMRC's thinking in this area.

The group has also started to engage with the Policy Driven Change (PDC) group. This group has responsibility for a rolling portfolio of projects that HMRC need to implement because of fiscal events such as the Budget. Accordingly, PDC can have a large number of projects that are a mix of rate changes, digital projects and changes to policy.

The PDC team are keen to understand how each new project will affect agents, and have asked the group to review the grading of a number of current projects. Each project is graded as having a very low to very high impact on agents. ADDAG is now able to input into this team, which will hopefully help HMRC to better prioritise the communications to and engagement with agents in respect of each of these projects.

The group is also looking at a range of other digital services offered to agents and is keen to get involved at an early stage wherever possible to maximise the benefit of our input.