HMRC’s Agent Account Manager Service

General Features

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A look at how to use HMRC’s agent account manager service

As those involved with Working Together will know, specialist agent managers (SAMs) work with agents to resolve issues that have been identified, through Working Together, as widespread and having a systemic impact on the UK tax system.

However, if agents are identifying client-specific issues we would strongly recommend that they register for the agent account manager (AAM) service. AAMs act as a single point of contact to help agents resolve any ongoing client-specific problems when the usual escalation channels within HMRC have failed.

To use the service, agents must register by completing the registration form on GOV.UK. Only one agent from each business practice or branch needs to register and this will then allow everyone else in the practice or branch to use the service.

How to raise an issue with the AAM service

HMRC must have a current agent authorisation on file, which will enable it to discuss and exchange information with the agent about the client. The agent must be authorised for the head of duty to which the issue relates.

Since the AAM service is available only when the normal ‘business as usual’ channels have broken down, an agent will need to demonstrate that they have tried to resolve the issue already.

The agent will have to complete an online issue resolution form for each issue with which they would like AAM assistance. The agent will receive an automatic email

acknowledgement, including a reference number specific to their query.

A member of the AAM team should then contact the agent within three working days to verify identity and to discuss what will happen next.

Some examples of when the AAMs can help

- You are expecting a call back from HMRC.
- A referral hasn’t been actioned.
- You are waiting for a reply to a letter and the agreed timescale has been missed.

AAM liaison with other areas of HMRC

As mentioned, the AAM service is not the correct route for widespread systemic issues. However, an agent may not be aware that an issue is widespread and think it affects their own client only. Reporting it to an AAM is still useful if all normal channels have been pursued since the AAMs do liaise with the SAMs and will report issues that they are seeing repeatedly so that the SAMs can investigate whether this is the start of a widespread problem.

The AAM service is also the wrong route for dealing with complaints, compliance checks or appeals that are already being dealt with by particular HMRC departments. However, an AAM can assist in progressing such issues if correspondence between the agent and HMRC has come to a halt.

The AAM service is not able to provide advice on technical matters, including the interpretation of tax legislation or guidance.
HMRC is keen for agents to make use of the AAM service and is encouraging as many practices as possible to register in advance for this.

Talking Points webinar and useful links

HMRC is planning to hold a Talking Points webinar on the AAM service this month. For more, check the newsdesk section of the Technical pages on both the CIOT and ATT websites. We will publish the date of the webinar once it is available.

The Registration Form for the AAM service can be accessed here.

The Issues Resolution Form can be accessed here.