Agent Services

Management of taxes

01 July 2016

During the recent Talking Points webinar HMRC set out what it is doing to enable agent access to information in clients' digital tax accounts and help manage their relationship with agents.

This is a short summary of the HMRC Talking Points webinar on Agent Services (AS), formerly Agent Online Self-Serve or AOSS, on 19 May 2016. A recording of it and other Talking Points webinars can be viewed on GOV.UK.

The webinar provided details of HMRC's Key 2020 Principles. This explains how the Revenue intends for all agents to be able to see what their clients can do and see through third party software (namely the information in the new digital tax accounts (DTAs)) and how digital services will be developed to enable an agent to manage their relationship with HMRC. Below are the proposed 'deliverables' for 2016-17.

Agent access

This applies to paid agents only. HMRC explained that it will not be giving agents access to their clients' DTAs because they may not be authorised to see everything in them. Instead, access will be offered through third party software providers (or in house software). HMRC is to start exposing application program interfaces (APIs), which will enable third party software to 'talk' to HMRC's systems. An API is an open set of standards that describes how information can be exchanged between applications and services. The APIs will start with the four main tax regimes (SA, PAYE, CT and VAT plus services that use a national insurance number as an identifier).

HMRC will check that agent authorisations are in place so that the correct access is granted to the correct agent through the third party (or in-house) software. This is a

cheaper option for HMRC which it says will allow quicker access for agents to the information in their clients' DTAs. Over time, therefore, agents will no longer need to access HMRC's own online pages to see their clients' details.

HMRC says it may provide a solution at a later date for agents who do not use third party software depending on the number, but it is not a priority.

Agent authorisation

HMRC is working on improvements to the online agent authorisation (OAA) process to reduce the number of questions and to get rid of the current 'PIN in the post' which agents tell HMRC they do not like. The improvements to the OAA will still involve a form of verification by the client. This may be through messages to the client's DTA (assisted digital for clients needing help) but the details about how this will work have not yet been decided. The ultimate aim is for agent authorisations to go fully online and to remove the paper form 64-8, but HMRC says it will not do this until it has found an online solution that works for everyone.

We anticipate that the proposed new OAA process will be piloted soon and we would urge you to take part if you can.

Agent subscription

This will replace the current agent registration process and will in effect be a risk assessment check in real time. HMRC says the process will be applied first to agents that are sole proprietors. The details of how this will be done have yet to be disclosed. In the first year (2016/17) HMRC's systems will register basic identifying data about an agent that can easily be verified (name and address and possibly AML registration information). No details were given about the future.
Once an agent passes this check, they will be given access to HMRC's services being exposed by APIs to third party software developers (see above). A number will be assigned to the agent to help HMRC identify all Government Gateway account registrations. It will also help feed into HMRC's work on agent segmentation.

Inbound secure messaging

HMRC is hoping to implement 'web chat' into the current web service to help resolve agent queries. It will consider all forms of inbound secure messaging received from

agents and how it can digitise the process.