Technical Newsdesk: April 2024

Welcomes



19 March 2024

This month I am going to reflect on some recent experiences which have made me think about the ‘health’ of the tax system.

Late in February, along with the ICAEW, we spoke to nearly 800 HMRC staff about Professional Conduct in Relation to Taxation (PCRT) (see tinyurl.com/59ja5dr7) and the standards expected of tax agents, and explained how the agent/client relationship typically works and the pressures agents are under.

It was really well received by those attending, and was the second time we have run the session for HMRC, with a third to follow in April. The purpose of these is to demonstrate the similarities between us, while also helping HMRC staff to understand more about the world in which agents operate.

Shortly after that, I joined many other professional and representative bodies, agents and others at HMRC’s annual stakeholder conference, which was again a useful event.

Meeting people and discussing issues in the flesh (as opposed to online) really helps to crystallise working relationships. We also heard from HMRC about some of the pressures they are under, and in break-out sessions we discussed several key topics such as tax simplification and moving people online. The keynote speeches are available on YouTube (see tinyurl.com/cavtdsn7).

As a result, I ended February very much 'glass half full'.

I then had the opportunity in early March to join a large number of our volunteers at our annual branches conference. Unsurprisingly, one of the biggest concerns I heard was around HMRC's customer service – timeliness, accuracy, access to the right people, and so on – to the extent that I am worried about the impact all of this is having on members' physical and mental health.

We have raised these concerns with HMRC before, and I shall be doing so again. Members who might need support through a challenging situation can access our free Members' Support Service (email membership@ciot.org.uk or membership@att.org.uk, stating Member Support Service in the heading).

Just yesterday, we closed the survey which will help us to evaluate HMRC's performance against their charter. We had 1,647 responses, mainly from agents, but also a large number from taxpayers too.

The results will be incorporated into the Charter Stakeholder Group's report to HMRC, which itself will form part of HMRC's charter annual report 2023-24. (The 2022-23 report can be found at tinyurl.com/42ce22wd.) I cannot share the results until they are published in the 2023-24 report, save to say that they reflect many of the concerns we have been hearing from members.

In the light of these experiences, and likely the further challenges to come, it's not easy to remain glass half full. It is clear that we will need to continue to work closely with HMRC and others to improve customer service and ease the pressure on all parties.

Digitalisation is going to be one of the key factors in delivering improvements, but we need to ensure that those systems are working as planned. We remain keen to receive your feedback, particularly where HMRC's digital services need improving.