ATT Welcome: HMRC service levels

Welcomes



24 April 2024

Hello and welcome to the Deputy President’s page for May. Last month’s welcome page focused on U-turns. Since writing that page, we have had another significant U-turn from HMRC which beats all the others for speed of turnaround!

On 19 March, HMRC announced that the telephone helpline (although not the Agent Dedicated Line) would be closed from 8 April until 30 September. In addition, the VAT helpline would only be available for the five business days ahead of the deadline and the PAYE helpline would no longer deal with queries relating to refunds. This was to be an attempt to persuade the public to use digital methods to obtain information rather than calling.

The next day, however, HMRC announced that ‘following feedback from concerned stakeholders’, the changes would be put on hold to allow further discussions to take place.

There is no doubt that radical change is required to HMRC service levels, with wait times on the telephone helplines continually increasing. I have seen records from

one call showing that 77 minutes were spent on hold. There are numerous reports of callers waiting for over an hour to then be cut off.

The move to digital makes sense but the digital systems have to be fit for purpose. The digital assistant carries the risk that unless the taxpayer knows enough about tax matters, they will not ask the correct questions. And if they cannot find the answer, they may turn to less reliable sources in social media.

If you can get through to an agent via WebChat, this can be very helpful for standard queries. However, if the situation is more complicated, then WebChat struggles. Given this, I think it's good that the system allows you to save a PDF copy of the conversation for your records.

In my experience, delays in mail handling are also still an issue. I am aware of overpayment relief claims which are now over 10 months old and HMRC cannot advise when they will be processed.

I do have sympathy for HMRC. As tax becomes more complicated, there will inevitably be the need for more support. The report published by the Public Accounts Committee on 28 February argued that the Treasury had not given HMRC enough resources 'to meet the service standards that customers expect'. Along with many other professional bodies, we will continue to liaise with HMRC to pass on our members' concerns and also to suggest where improvements could be made in a positive collaborative manner.

As we move into basis period reform, I imagine that HMRC will be fielding even more queries than usual. However, one positive system I must recommend is the online G-form that HMRC has made available to allow agents and taxpayers to request the overlap figures required for the transitional profits/losses calculations. The response time is only a few weeks and is much quicker than enquiring by post (see tinyurl.com/2s429hf6).

Although a Government Gateway account is required to complete and send the forms, agents are able to use their own account to sign in and complete the form for client's overlap figures.

Our Technical Officers are continually updating our basis period reform FAQs and I would suggest that you visit there if you have any queries (see tinyurl.com/4zkebj8y).

If you still have questions or you are looking to top up your CPD, our annual conferences are being held in June. There will be the option between two live online dates and one in-person session in London (see tinyurl.com/u7pzrys3). A Topical Tax Update will be given by Barry Jefferd and the following sessions supported by our Technical Officers include:

- ‘Making Tax Digital: where are we now?’ by Emma Rawson (a HMRC representative will join the face to face session);
- ‘Avoiding Self-Assessment processing problems: help HMRC to help you’ by Helen Thornley and David Wright;
- ‘Capital taxes update’ by Helen Thornley and David Wright; and
- ‘Options for avoiding the tribunal’ by Steven Pinhey.

I hope to ‘see’ some of you at one of these sessions!

And finally, may I wish all our students sitting exams this month all the best. We are getting close to our 10,000th member. Could this be you?!