Technical newsdesk: April 2025

Welcomes



24 March 2025

At the joint CIOT-ICAEW conference to mark HMRC's 20th 'birthday', the Exchequer Secretary to the Treasury James Murray announced that, from the end of March, HMRC will launch a new service to provide a dedicated escalation route for agents with Self Assessment and PAYE queries that are over four weeks old. The following day, HMRC emailed further explanation to agents on HMRC's Agent Update distribution list.

More information can be found on the CIOT (tinyurl.com/5b59f6su) and ATT (tinyurl.com/mpaa29v3) websites, but broadly speaking it will address PAYE and Self-Assessment queries (but not the chasing of repayments or postal delays, or queries relating to Making Tax Digital) that HMRC's Agent Dedicated Line (ADL), or Agent Webchat (AW) have not resolved, if:

- at least 20 working days having passed from the reply date given by the 'where's my reply' tool (tinyurl.com/2azws7h3); and
- the agent has tried at least twice to resolve the query by contacting the ADL or AW.

HMRC will publish the email address for the service on 31 March, and aim to provide a prompt acknowledgement, updates and a speedy resolution within 20 working days.

We have welcomed this new service. An escalation service for complex cases was one of the ten recommendations from our joint CIOT-ICAEW report ‘Tackling HMRC's customer service challenge’ (tinyurl.com/2rznsn3k), which we published in December 2024.

In addition, collaborative discussions with HMRC continue around our service level project, as well as exploring further potential areas of customer service reform. While we would like to think that our report acted as a catalyst for these, I suspect several of them were well underway already.

For example, we recommended that HMRC increase the use of secure email for agent communication. We know that HMRC are exploring how to better use electronic communications, mindful of the desire to use email but also of security concerns. We also recommended that HMRC co-create and continually improve their digital services, and highlighted the minimum standards we think should be set for new digital systems (tinyurl.com/ymck9j62) and new digital forms (tinyurl.com/ye22zhtj). We understand that HMRC are considering including digital minimum standards in their digitalisation roadmap (which will form part of a wider HMRC transformation roadmap) to be published in the summer.

It is reassuring that we are largely ‘on the same page’ regarding what is needed to deliver improvements to customer service. The creation of a new engagement group between HMRC and professional bodies – the Customer Services for Tax Agents & Representative Bodies Working Group (CSTARB) – is further encouragement that HMRC remain keen to engage, listen and respond to the needs of agents.

Representatives from the CIOT and ICAEW also met with James Murray and senior leadership from HMRC to discuss our project and shared desire to work collaboratively going forward to improve HMRC customer services.

Of course, improvement does not happen overnight, and it can be a learning process before the right approach is found. In this regard, we would welcome your feedback on the new escalation route for our ongoing discussions with HMRC. Please send any comments to technical@ciot.org.uk or atttechnical@att.org.uk.