HMRC Transformation Roadmap

General Features



19 August 2025

HMRC published their long-awaited Transformation Roadmap, which sets out a bold programme of change which aims to transform HMRC customer service, improve existing digital services, introduce new digital services and help HMRC to close the tax gap.

ATT, CIOT and LITRG welcomed the publication of HMRC's Transformation Roadmap on 21 July, large parts of which reflect things which we have been calling for, particularly in terms of improving customer service, improving existing digital services and the development of new digital services.

The joint CIOT ICAEW project 'Tackling HMRC's customer service challenge', published in December 2024, set out recommendations on the introduction of some form of progress tracking for legacy systems, where cost effective, and the need for the development of secure digital communications. Both feature within the roadmap. Our project also highlighted a desire to digitally self-serve, but there remain significant gaps in digital services, and pain points with existing digital services (perhaps due to features being scoped out of design). HMRC have

committed to continue to work with professional bodies in developing new digital services.

Annex B of the roadmap contains a list of digital projects that HMRC plan to work through. ATT and CIOT welcome the inclusion of the following priorities which we have been working on with HMRC:

- Enable agents to withdraw their clients from self-assessment digitally when they no longer need to complete a tax return. Currently, agents need to call or write to HMRC to do this.
- Enhance the Income Record Viewer to share more of the information HMRC already holds about taxpayers with their agents. Expanding this service should allow agents to file returns faster, and identify and resolve any differences between HMRC's data and the taxpayer's records more quickly.
- Launch a new service to allow agents to digitally submit information which may impact their client's tax code. Currently, agents need to call and wait on the phone to resolve issues with clients' tax codes.
- Provide the ability for agents to track the progress of their client's submissions and repayments. This should help to save time spent by agents following up on refunds, which due to increased security measures are often delayed by weeks or months.

ATT, CIOT and LITRG also welcome the roadmap's focus on protecting customers who are vulnerable or digitally excluded. We also welcome the statement that Making Tax Digital (MTD) for Corporation Tax will not go ahead, something we have called for clarity on as time has moved on and projects such as e-invoicing have emerged.

Despite the commitments in the roadmap being welcome, there is further to go. There are a lot of proposals in this package which are aspirational but lacking clear timelines; significant investment and work is required to update HMRC IT infrastructure; significant gaps in digital services remain (particularly for agents); and there is a need for clear standards for the development and delivery of all new digital services, including ensuring that key functionality such as progress chasing is built into every new digital system.

As always, we welcome all future engagement with HMRC to help to move these, and the plans in the roadmap, forward.

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