Piloting a new course

General Features



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Jon Stride explains the changes to the Working Together initiative, and looks at the new forum being piloted

Key Points

What is the issue?

Working Together is changing. The local face to face meetings are gone, and we move towards greater digital interaction with HMRC.

What does it mean to me in practice?

There are still ways to report problems with HMRC's systems and processes, and personnel within HMRC to try and resolve them.

What can I take away?

Your voice can be heard, and the CIOT and ATT continue to work with HMRC to iron-out the operational problems encountered by agents.

Readers of this magazine will be familiar with the Working Together initiative, but many will not be aware of recent developments, and how it will work in future.

As with many things involving HMRC, Working Together is in a state of flux following the closure of local HMRC offices and the increased reliance on technology and digitalisation of the former Inland Revenue.

This is certainly the case for Working Together. The many local groups that were in place around the country were linked to local tax offices, and so their closure, along with the change in the landscape of tax administration, has meant that the local Working Together groups also ceased to exist.

History of Working Together

The roots of Working Together go back to the early 1990s when Andrew McPherson, Deputy Regional Controller for the South West at the Inland Revenue, asked the Bristol Branch of CIOT to take part in a series of Customer Liaison meetings. Former CIOT president Richard Mannion was involved, and he felt that the meetings worked well in increasing the level of understanding on both sides.

The local nature of the meetings meant that there were inevitably some shortcomings as the meetings were only able to resolve problems that were within the remit of the local districts, and there was no mechanism in place for the local district to report issues that arose to a central, national point. It was also noted that it was not easy to get messages to lots of local agents quickly.

Following the advent of Self Assessment, the CIOT Technical Committee commissioned Anne Hansford to carry out a research study into Self Assessment in

March 1998. The need for this arose following cases of incorrect processing, poor communication and complex situations that did not fit neatly in to the new system.

The study identified two important changes that it was felt would help the Self Assessment system to operate more efficiently –

1. ‘Real liaison and consultation to avoid badly thought out procedures’; and
2. ‘Open up communication links with the Revenue … pathways of communication must be developed more than at present’

In autumn 1998, Richard Mannion approached Geoffrey Bush, Deputy Chairman of the Board of Inland Revenue, with the proposal that customer service meetings that had been taking place in Bristol should be replicated on a national basis. This was encouraged by Mr Bush, and it was asked that a formal proposal for Working Together should be prepared by CIOT and ICAEW. The formal proposal was signed on 30 November 1999, and Working Together was born.

In November 1999 ATT, ACCA, ICAS and the CCAB in Northern Ireland also signed up to the agreement. Working Together was formally announced in the Budget 2000 Press Releases by Gordon Brown.

By 2002, approximately 60 Working Together groups had been set up around the UK, with meetings taking place involving Inland Revenue officers and local practitioners. Meetings were intended to be open and informal, two-way, and friendly. Minutes of the meetings were routed through a national Working Together Team, with a register of issues established and, if necessary, allocated to a Senior Inspector for attention.

In order for Working Together matters to be reported to the wider agent community, a bulletin was produced by the Inland Revenue. The publication evolved to include messages from the ‘Revenue specialists’ to communicate information to agents (now Agent Update).

For many years Working Together continued largely unchanged. It provided agents with a means of working with the Inland Revenue (and latterly HMRC) to resolve problems in the tax system that arose on a day to day basis – with the aim of ‘removing grit from the system’ as it was referred. Many agents had become involved, and membership has grown to 19 agent and other representative bodies, who found this to be a helpful way to communicate the problems that arose at the

coal face.

Recent changes

The widespread closure of HMRC offices in 2013 and 2014 meant that many of the local tax offices to which Working Together groups had been connected no longer existed. Also, a growing number of functions were being centralised within HMRC, meaning that local HMRC offices had less influence over operational matters. The local Working Together groups had reducing impact, and fewer places to meet, and ceased to exist.

In 2014 HMRC began to consider an alternative. Digital Working Together was created. This involved webinars hosted by HMRC, in which Working Together matters were highlighted. The webinars also included new matters and initiatives that HMRC wished to air. The professional bodies continued to have input through the Issues Overview Group (IOG), who monitor Working Together issues reported to HMRC.

The approach of using webinars, in conjunction with Agent Update, had limited success. At their face to face meeting with HMRC in December 2015, the members of IOG commented that the webinars were deviating from Working Together matters, with greater emphasis on HMRC highlighting matters that they wished to gain exposure for. The members of IOG were asked if they were prepared to be involved with hosting and presenting the webinars.

This took place throughout 2016, with HMRC and IOG members jointly hosting a Digital Working Together meeting every two months, with IOG members from the professional bodies providing commentary throughout the webinar and enabling participants to submit questions in real time which HMRC or the IOG would seek to address.

One of the wishes of IOG was that matters outside of Working Together should not be included within the Digital Working Together meetings and should be dealt with separately. These are now addressed in HMRC’s own ‘Talking Points’ webinars.

Unfortunately, the Digital Working Together meetings have not been as successful as had been hoped and attendance has been disappointingly low. The use of digital communication for Working Together matters has meant that many of those agents that enjoyed being part of the original face to face meetings are still not able to

engage and be involved in the same way that they would have been in years gone by.

Working Together Forum

The members of IOG were invited to 100 Parliament Street in August 2016 for a meeting and demonstration of a new facility that HMRC had developed for Working Together – a digital forum ('the forum').

The Forum had been developed by HMRC as a tool for reporting and gathering evidence on Working Together issues. The system was well received by members of IOG and, following some minor amendments, a pilot commenced in September 2016. Initially the forum was restricted to members of IOG and those closely connected with Working Together. Since then, the pilot is being extended more widely, and currently has over 100 members.

The Forum is quite different from any existing HMRC solutions. It enables those who have access to post fresh items for discussion, search for issues raised and identify progress, to see conversation threads regarding existing posts, and to sort in various different ways.

Items posted to the Forum are monitored by HMRC's Special Agent Managers (SAM's). They are therefore able to identify widespread issues as they arise, as more agents report problems, and to act swiftly to try and identify a resolution.

Those that are registered with the Forum receive a helpful weekly update by e-mail, providing details of issues posted in the previous week.

The future for Working Together

As noted above, the Forum is currently a pilot, and it is hoped it will be formally approved by HMRC, giving it the green light to be transferred to the regular HMRC IT platform, and for it to go live.

The Forum will then be opened up to a much wider audience. In particular, it is hoped that many of those agents that were involved with the face to face Working Together meetings, as well as agents new to Working Together, will welcome the chance to use the new facility. Of course, it will be different to the face to face

meetings of old, but in the digital age it will provide an avenue for those interested in Working Together to become involved, and to help iron out some of the day to day problems that are encountered by tax agents – and to ensure that the aims set out in the early days of Working Together can be achieved.

If the pilot of the Forum is successful and is formally approved by HMRC, IOG members will be able to step down from their current role with the Digital Working Together meetings, and place greater emphasis on monitoring the problems being reported by agents – and to ensure that wherever possible, those matters are resolved.

If you would like to be involved with the Forum, please contact ATT at wt@att.org.uk or CIOT at wt@tax.org.uk to register your interest.

Thanks to Richard Mannion for his help in providing background details for this article.