HMRC Customer Service Levels: an update on CIOT-ICAEW joint project

General Features | Management of taxes



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One year on from the publication of the joint CIOT-ICAEW report ‘Tackling HMRC’s customer service challenge’, we take this opportunity to provide an update on the progress made, ongoing projects and our engagement with HMRC and ministers over the last year.

On 11 December 2024, CIOT and ICAEW published a joint report ‘Tackling HMRC’s customer service challenge’, following a six week study which involved our members recording their attempts to contact HMRC by phone or webchat. These findings informed our ten recommendations that could make meaningful improvements to HMRC’s customer service, and would have mutual benefit for HMRC, taxpayers and agents.

Our ten recommendations can be largely divided into three main groups:

- those that aim to reduce volume pressure on HMRC phonelines and webchat;

- those aimed at improving the quality of advice provided by HMRC; and
- those aimed at improving the digital services offering, whether through improvements to existing digital services or the roll out of new digital services.

Changes to HMRC services

On 11 March, at our joint CIOT-ICAEW conference to mark 20 years of HMRC, James Murray (the then Exchequer Secretary to the Treasury (XST)) announced the introduction of the Personal Tax Query Resolution Service, which was one of our ten recommendations for improvement.

We have continued to discuss iterative changes to this service with HMRC throughout the year. Overall, member feedback received to date has been positive, with HMRC also pleased with the resolution rate the team has achieved since introduction. However, initial uptake to use the service has been slower than expected. HMRC are encouraging agents to use the Personal Tax Query Resolution Service for Agents (tinyurl.com/2vymtaj8), where appropriate and within the criteria, before moving to a complaint. We are hoping to explore with HMRC in 2026 the possibility of easing the criteria for this service or perhaps expanding it across other taxes.

The HMRC Transformation Roadmap, published in July 2025, included a commitment to provide the ability to track the progress of client submissions and repayments and secure three-way communication, as well as more generally expanding the use of progress updates and reassurance messages for taxpayers and agents. Within our report, we also emphasised the importance of tackling existing pain points with HMRC agent services, and the roadmap included a commitment to look at some of these pain points including enhancements to the Income Record Viewer and a new service to enable agents to digitally submit information which may impact their client's tax code. We remain in discussion with HMRC in relation to these projects, and several other areas, and will update our members where possible.

On 1 October, HMRC launched a new service for agents to enable them to re-activate Self-Assessment accounts for their clients by calling the Agent Dedicated Line, aimed at providing a quicker route than other options.

Engagement with HMRC and ministers in 2025

Over the last year, CIOT and ICAEW have continued our efforts to engage with HMRC and ministers, to open and continue discussions on improving customer service.

In late December 2024, HMRC created a new HMRC working group ‘Customer Services for Tax Agents and Representative Bodies’, comprising HMRC, CIOT, other professional bodies and agents in practice. The focus of the initial meetings in 2025 has been to progress the introduction of the Personal Tax Query Resolution Service.

Following a significant level of member feedback on the suspension of agent HMRC online accounts which we had raised with HMRC, a new HMRC working group called the ‘Digital Security Working Group’ was established. Through this group, we have provided feedback to HMRC on the process and communications for reinstating agent accounts and helping an agent deal with fraudulent activity that they have identified. This work is ongoing.

In February 2025, we met with then XST, James Murray, and senior leadership from HMRC to discuss our report. This meeting was followed up with a second meeting in August 2025. We have been pleased by the consideration that has been given to the report’s findings and desire to work collaboratively with us. As an outcome of this engagement, a visit to HMRC Portsmouth office was organised and at the time of writing this article, we are scheduled to meet with HMRC to share thoughts on minimum functionality and minimum standards for new digital services.

In July 2025, we met with key representatives from HM Treasury to discuss our report. We provided insight on the importance of minimum standards and functionality to improve future digital services; of earlier involvement of tax professionals and professional bodies in the design process; of the need for agent access; and the importance of high-quality advice being provided by customer service advisers, to help inform the Treasury’s understanding of key customer service issues when considering spending priorities.

In September 2025, during the visit to HMRC’s Portsmouth Office, we had the opportunity to meet with customer service advisers from the Agent Dedicated Line team, advisers from the Personal Tax Query Resolution Service team and tax technicians. We had an open discussion on what it feels like to be an HMRC adviser and a tax agent when interacting with HMRC customer services, standing in each

other’s shoes. We gained insight on the processes and complexities around training and escalation processes. Following the meeting, we are currently agreeing a list of shared action points, which we hope to take forward with HMRC. One such area is exploring ways to improve agent webchat.

Whilst there has been progress over 2025, we continue to receive regular feedback from our members around customer service standards which continue to fall short and there is much to do. CIOT and ICAEW remain committed to pursuing improvements to HMRC customer service standards, but continued feedback from members is vital for us to do so. If members do have feedback on HMRC customer service levels, or ideas for improvements, please do get in touch via technical@ciot.org.uk.

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