Minutes

Date of Meeting	26th March 2011	
Group Name	Luton & Stevenage	
Chair: HMRC Lead	Helen Cook	
Agent Lead		
Agent Representatives attending	Sally Ferguson	Representing ICAEW
	Patricia Caputo	Representing ATT
	Nigel Clarke	Representing CIOT
	Seymour Griffiths	Representing ACCA
	Ben Saunders	Representing CIOT
HMRC attendees	Tuyi Akinnubi	WT coordinator & Agent Account Manager
	Madeline McGrillen	NWTT Team leader
	Julie Clarke	SCP presenter
Apologies	Julie Dingwall	Representing ICAEW
	Neil Griffiths	Representing AAT

1. **Welcome and introductions**

Helen Cook as chair opened the meeting by welcoming the attendees. An update on all Action Points from previous meeting held on 24/10/11 was delivered by Tuyi, brief details below:-

AP1: Authorization codes (re 64-8) not received by clients

Given the time frame issue was first raised, may I suggest we close this unless Reps can provide examples before next meeting

AP2: Form 64-8 issue – agents not showing on clients details

The whole 64-8 process is under review – ongoing

AP3: Online VAT Registration, email confirmation reference with no name

Referral made; can Rep please provide some examples?

AP5: Compile list of sub-committees, groups and meetings attended by group members

Update: Awaiting response from Reps

2. **Update on Group's existing unresolved issues**

2.1: **WT 54 Post Delays (outbound)** -

Update: 05-03-12: The Post Working group met again on the 05 March to review improvements to the post process. An update on the Post Working group is given in WTP47, published on the 28 March.

2.2 WT29 - Agents are reporting that since the PAYE upgrade they are not receiving copies of any tax calculations issued following processing of non SA forms, for example R40 and R27

Update: 05-03-12: A presentation was given to the Voluntary Community Sector on the 29th February; an event is being planned for agents. On going

2.3 State Pension in Code - State Pension included in 2012/13 Code appears to include pension on basis of 1 week at old rate and 51 weeks at new rate (from April 2012). Why? Letters from Pension Service indicate the date from which the new rate is to apply e.g. from 10 April 2012. On this basis and by reference to notes in SA105 for ITRI 2011 (latest one available on website) we would assume that the code should include 52 weeks at the new rate.

Update: NWTT response emailed to Reps 21/03/12, further queries raised by reps, state pensions currently under review

2.4: P2 Coding – Delay in posting out significant numbers of 2012/13 coding notices. Codes dated 1-5 February only appear to have been received by taxpayers very recently (since 5.3.12).

Update: NWTT response emailed to Reps on 21/03/12.

2.5: Annual coding notices – Reps have raised the issue of annual coding notices not being available for agents to view online. Agents were advised by online help desk that codes should become visible within 72 hours. Supplementary referral submitted to NWTT on 25/04/12

3 **Update on all issues resolved since last meeting**

3.1 please refer to the closed issues digest (attached)

4 **Key Messages from HMRC**

- SCP (Single Compliance Process) presentation by Julie Clarke (power point presentation emailed)
- Update on NWTT – Madeline McGrillen

With the agreement of the group Madeline provided:

- an overview of how NWTT fits with Agent & Employer's team - bringing together the AAMs, Agent Toolkit Team & NWTT
- HMRC strategy - which aims to improve customer/agent satisfaction, close the tax gap currently £35 billion while reducing HMRC costs
- the Joint Understanding Agent Project (JUAP) - Working Together 46, page 4 contains an update of this joint initiative (link below)
- http://www.hmrc.gov.uk/agents/working-together-46.pdf
- A summary of the discussions that is on-going with the WTSG Reps about possible changes for NWTT in 2012/13.

HMRC are focusing on how we can improve our services, an email pilot was also recently launched and a survey will soon be issued to examine agent's frustration with HMRC telephony service.

- HMRC news updates & Agent/Employer/WT publications – further details in links below
- http://rss.openobjects.com/hmrc/hmrc-agents.rss
- http://www.hmrc.gov.uk/agents/publications.htm

5 **New Issues Referred to National WT Team**

5.1: P35 Notices – Agents are unhappy with these notices, agents will discuss amongst themselves and complete a referral if appropriate (TBC)

5.2: HMRC threatens the Agent client relationship – Reps have complained that HMRC actions re bulk default surcharge notices issue to clients (Nov 2010) and subsequently withdrawn & conflicting messages received threaten the relationship between them and their clients. NWTT will review and respond in due course

5.3: CAP1 application forms – HMRC is not meeting its service level agreements to respond to CAP1 forms submitted within 30 days. Reps have been asked to clarify numbers involved and consider the AAM route option if appropriate. A referral will be made if numbers affected meet WT guidelines.

5.4: Debt collection agency used by HMRC (CCS) – Reps have requested that HMRC pass agents details to CCS so agents will be in a position to deal with CCS on behalf of their clients, currently CCS will not talk to agents when pursuing debts owed by clients. (WTC to consider a referral)

5.5: CG34s submitted – Reps has raised the issue in delays relating to CG34s submitted to the specialist CGT team in Bristol and reported in some instances it has taken more than 8 weeks for an acknowledgement letter to arrive. Reps have been advised to confirm numbers involved and where appropriate a referral will be submitted.

5.6: ADL lines for online filing help desk – Reps are receiving comments from many agents that it's taking ages to get through on the normal online filing helpdesk number if indeed its not engaged. A dedicated phone number for this service (and the Collector) would be great. Referral template submitted 19/04/12.

6 New Issues resolved at the meeting

6.1**: Clients not appearing on agent clients' online list** – Reps have raised another issue about not being able to view certain clients on their client's online list when logged unto HMRC systems. Madeline explained in details reasons for this being a problem with the Government gate way and not HMRC systems. A Microsoft engineer has been arranged to implement a fix to the problem.

7 Unresolved local issues

None

8 AOB

1. Real time information re payroll – RTI presentation have now been rolled out, new WTC (Sharon Mortimer) to arrange a presentation for next meeting.
2. Madeline also talked about the issue of publishing local WT minutes; currently some professional bodies published LWT minutes on their website. Madeline has advised that provided there is an agreement with Reps at the specific groups this is okay, however Reps should bear in mind that discussions made and included in minutes could potentially be available to the public as well
3. Current WTC (Tuyi) is moving on and starts a new role in local compliance next month.
4. The new issues listed under item 5 above were not discussed by the group due to time constraints given two presentations were delivered on the day.
   - http://www.hmrc.gov.uk/agents/working-together-47.pdf

Date of Next Meeting

31st July 2012

Summary of Action Points

AP1: CAP1 application forms issue (TBC)

AP2: Debt collection agency (CCS) issue (WTC)

AP2: Delays with acknowledging CG34s form submitted (WTC)

AP3: ADL lines for online filing help desk (Sally Ferguson)

Summary of hyperlinks:

- Agent update & working together publications http://rss.openobjects.com/hmrc/hmrc-agents.rss
- http://www.hmrc.gov.uk/agents/publications.htm
- WT Publications 46 & 47
- http://www.hmrc.gov.uk/agents/working-together-47.pdf
- http://www.hmrc.gov.uk/agents/working-together-46.pdf

Appendix

Issue number	Summary of issue	Latest update
WT 40	VAT helpline. “Callers to VAT helpline, having navigated the menu system are then advised by the automated voice that “All our advisors are helping other people – you may want to call back later” and then cut off.	**Closed**
Returned Issues Template	Pensioners Tax codes – sent to National WT on 12 April as a potential issue.	On Going – No further updates since last meeting 19/04/11.
CT 204	CT204 used to notify HMRC that company is dormant but no acknowledgement is received so agents have to ring HMRC to find out if CT204 has been received and the dormancy period.	On Going – Agents cannot provide specific examples as requested by NWTT. Group felt the NWTT should provide an answer. Does HMRC send acknowledgements to CT204 or not.
ADL for Claims Office	R40s are completed for many clients who do not have a PAYE or SA source as such they are dealt with by Claims Office. Any follow up calls by agent have to be made to HMRC Contact centre as they are not covered by ADL. Why don’t these taxpayers agents receive the same level of service as SA, PAYE & CT clients	**Closed**
Requirement to notify chargeability on non SA cases	Recent HMRC announcements have indicated that they will not	**Closed**

	pursue underpayments identified under the NPS review if the underpayment is less than £300 for any tax year. Where does this leave the requirement for an agent to notify small tax underpayments when approched by a taxpayer to carry out a review of their affairs and when they do not meet the SA criteria. At present agents feel obliged to notify HMRC of the liability however small. Is there therefore to be a recognised de minimis limit of £300 for non SA cases?	
National Advise Service (NAS) renamed – now referred to as the VAT, Excise & Customs helpline	Agents have not been able to get through to NAS – VAT adviser section, phone seems to ring through	**Closed**